Strategy Call

CHECKLIST

PLAYBOOK

The Brand Foundation

0 – 10 MINUTES

Purpose: Clarify the brand's mission, values, and identity.
Why this matters: Understanding the brand at its core ensures all content aligns with who they are and communicates the right message online.

☐ What's your brand's purpose or mission?

☐ What values are at the heart of your business?

☐ How do you want your audience to feel when they interact with your brand?

☐ What 3–5 words would you use to describe your brand's personality or tone?

☐ What makes your brand stand out from others in your space?

The Audience

10 – 20 MINUTES

Purpose: Define who the brand is speaking to and what they care about.
Why this matters: Knowing the audience allows you to create content that resonates, converts, and builds genuine connection and trust.

☐ Who is your current audience or typical customer?

☐ Who is your ideal audience or a new audience you'd like to attract?

☐ What are their key interests, challenges, or motivations?

☐ Where do they spend most of their time online?

☐ Are there any audience types you don't want to attract?

Strategy Call

The Goals

Purpose: Identify what the client wants to achieve through social media.
Why this matters: Clear goals shape the strategy, helping you prioritise the right platforms, content types, and metrics to measure success.

☐ What are your short-term social media goals (next 3 months)?

☐ What are your long-term goals (6–12 months)?

☐ What would "success" look like for you on social media?

20–30 MINUTES

Tone, Voice & Content Direction

Purpose: Establish how the brand communicates and shows up online.
Why this matters: Defining tone and messaging ensures consistency across visuals and captions, strengthening brand recognition and personality.

☐ How would you describe your brand's tone or voice? *(e.g., confident, calm, playful, professional)*

☐ Are there any words, topics, or styles you want to avoid?

☐ Which content formats or platforms tend to perform best for you?

30–40 MINUTES

Competitors & Inspiration

Purpose: Analyse competitors and gather creative benchmarks.
Why this matters: Learning what works (and doesn't) in their space helps you find unique opportunities and position the brand strategically.

☐ Who are your main competitors on social media?

☐ What do you like about their content or presence?

☐ What don't you like about their approach?

☐ Are there any brands (inside or outside your industry) whose content or visuals you admire?

40–50 MINUTES

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Workflow & Next Steps

Purpose: Confirm expectations and align on the next phase of collaboration.
Why this matters: Establishing clear processes upfront avoids confusion later and keeps your strategy execution smooth and efficient.

☐ Is there anything else I should know before building your strategy?

☐ Recap and confirm next steps (strategy document, content pillars, posting plan).