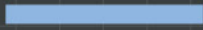


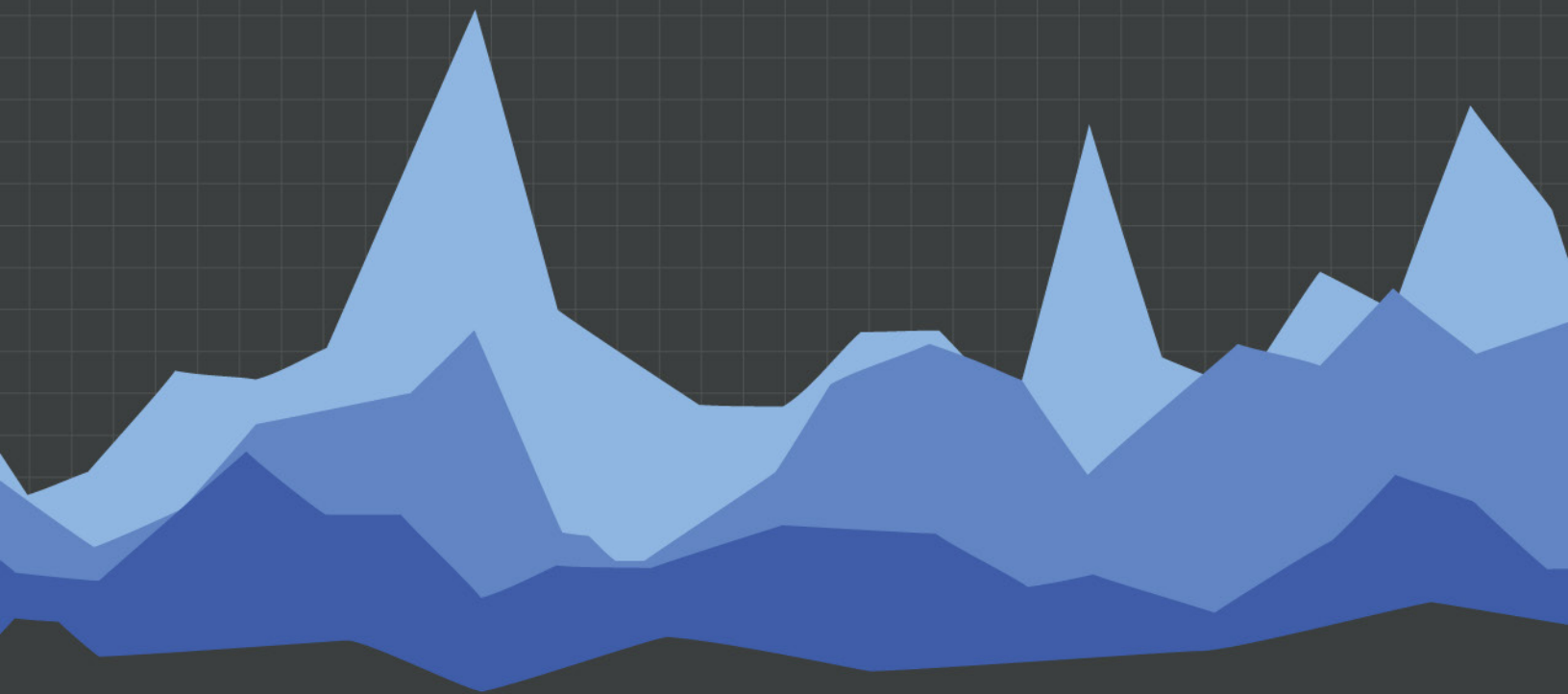
*How to Create a*



**MONTHLY**

**SOCIAL MEDIA**

**REPORT**



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# INTRODUCTION

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Common misconception: social marketers get to play on Twitter all day.

In reality, these socially savvy folks have to focus on a variety of complex tasks:

- Engaging their community
- Building campaigns that drive business value
- Establishing social strategies
- Connecting with influencers
- Educating and entertaining users
- Creating lovable content
- Okay, yes, playing on Twitter

If you work in social marketing, you know that this is actually a conservative list. New asks pop up everyday from other departments and within your own team.

With such a sprawling task list and an even more diverse set of goals, it can be tough to parlay activities into a meaningful and concise summary and lists of results for your team and boss.

How can you summarize what the wins, losses, and lessons of each month were? You may run a lot of reports and analyze a whole slew of metrics for your own programs, but, chances are, company leaders don't need – or want – every detail.

In the following guide, Simply Measured's Social Media Manager Jade Furubayashi shares tips for creating a solid monthly report. We'll walk through specific examples of what that report should include.

Whether you manage the social presence for your entire brand, or specific campaigns and channels, this framework will help you think through the process of creating a monthly report in an organized, results-oriented fashion.

# How to Begin Creating a MONTHLY SOCIAL MEDIA REPORT

## 1 Start with a Snapshot

Your monthly report should operate the same way a piece of content would: like a funnel. **Start large, with a complete snapshot overview of your “social health” and trends from across all your key social channels.**

Owned Channels									
CHANNEL	# OF ACCOUNTS	AUDIENCE	% change	BRAND POSTS	% change	TOTAL ENGAGEMENT	% change	ENGAGEMENT AS A % OF AUDIENCE	% change
Google+	1	2,066,430	-0.1%	0	N/A	0	N/A	0.00%	0.0%
Facebook	1	805,609	4.1%	229	-9.1%	228,660	5.8%	28.95%	2.6%
Twitter	1	799,414	1.3%	1,814	30.1%	121,832	50.5%	15.33%	48.7%
Instagram	1	458,001	5.7%	50	-7.4%	134,632	-11.0%	30.19%	-15.7%
YouTube	1	21,858	1.5%	8	-38.5%	345	-17.7%	1.59%	-19.0%
LinkedIn	1	8,108	3.4%	15	-25.0%	773	-15.1%	9.69%	-19.0%
Tumblr	1			42	N/A	169	-71.0%	0.00%	0.0%
TOTAL	7	4,159,420	1.6%	2,158	24.5%	486,411	8.1%	11.78%	6.6%
Earned Media									
CHANNEL	# OF MENTIONS	% change	POTENTIAL REACH	% change	POTENTIAL IMPRESSIONS	% change			
Twitter	68,859	11.2%	85,539,380	-26.4%	648,129,999	-11.2%			
Instagram	5,636	14.6%	11,939,326	-62.2%	48,905,474	-37.6%			
Google+	114	-14.3%	N/A	N/A	N/A	N/A			
Other	10	-23.1%	N/A	N/A	N/A	N/A			
TOTAL	74,619	11.4%	97,478,706	N/A	697,035,473	-13.7%			

[Click here to see a larger version of a snapshot](#)



*I usually include a snapshot slide, with 3-4 takeaways below that set up the rest of my report,” says Furubayashi. “This lets me set the tone right off the bat, but also get any big points on people’s radar quickly. You don’t want to bury the lede.”*

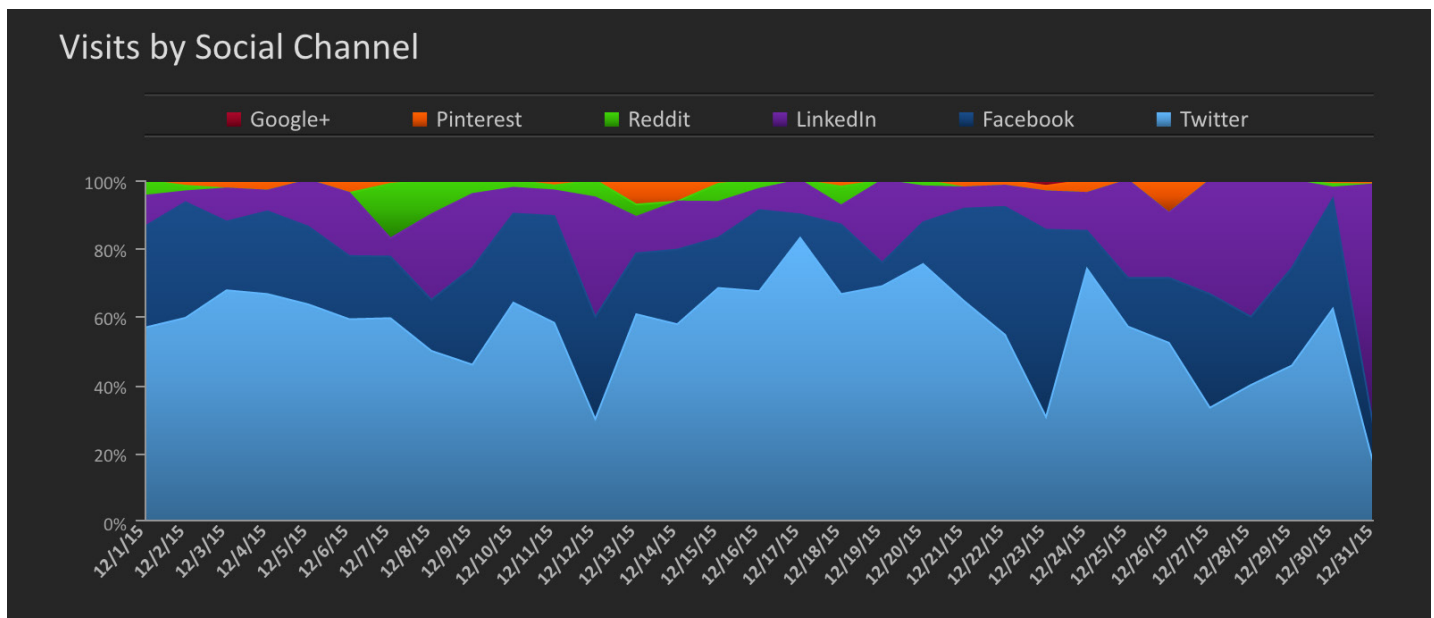
**Jade Furubayashi**

*Simply Measured, Social Media Manager*

Show key metrics like audience, conversions, and engagement, and keep your metrics focused around period-over-period change. These growth metrics will resonate with the leaders in your marketing organization.

## 2 Focus on Goals

After presenting your snapshot, focus on your goals and the KPIs surrounding them. If you have specific metrics you're reaching for each month or quarter, now is the time to hone in on those, and address the impact you made. If your goal has been to drive more traffic to your blog from Twitter, focus on those click-thrus.



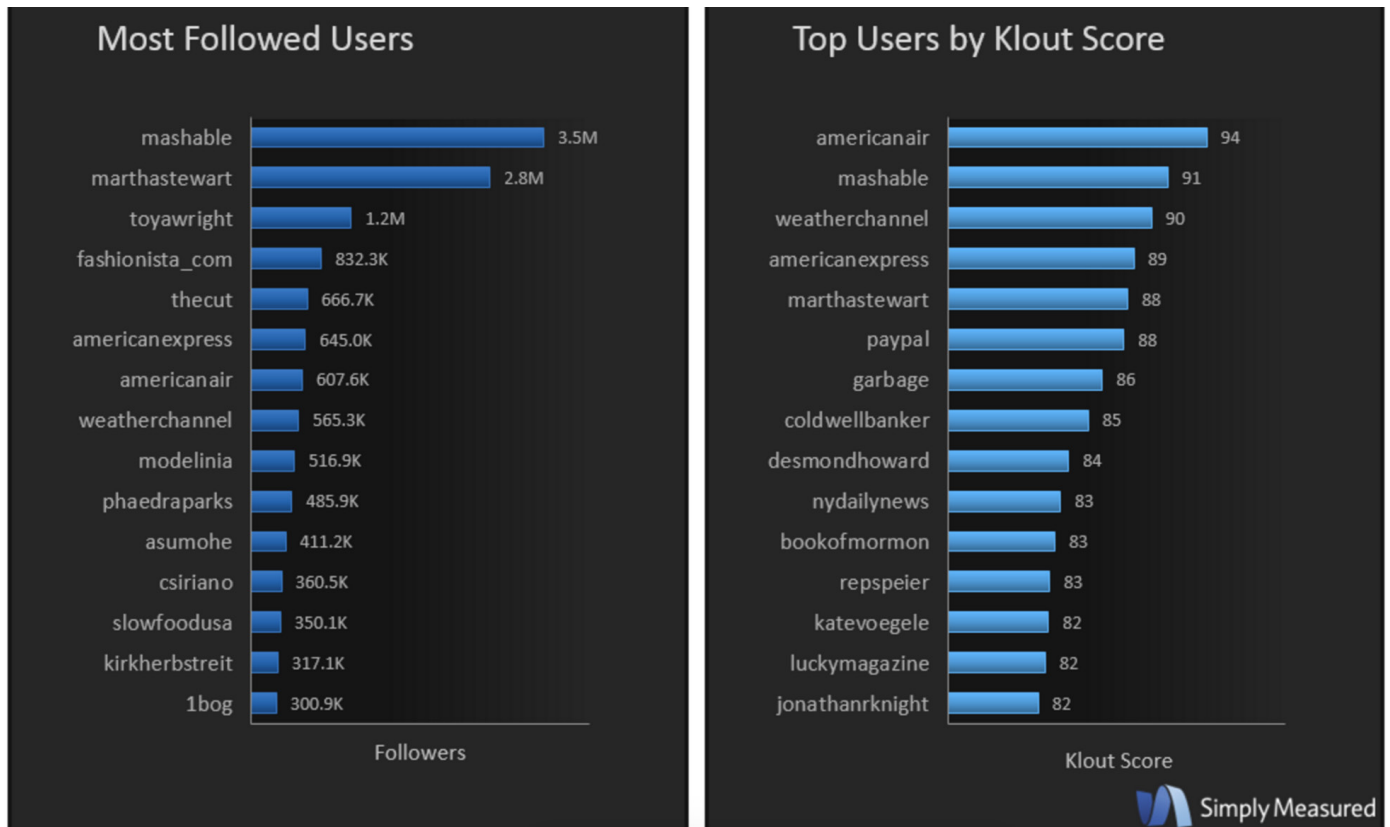
This component of your report should focus on easy-to-track numbers so that you can give a month-over-month summary of how programs have performed, and what might be missing.

“Since we have a heavy focus on content here, I spend quite a bit of time analyzing site traffic,” says Furubayashi. “When I’m looking at this myself, I use our blog report and Google Analytics to understand specific campaign UTM’s. I typically share a chart from our Social Traffic report. It showcases trends and totals for all of our major social channels.”

### 3

## Zero in on Key Initiatives

If your main activity for the month was engaging with influencers, identify the progress made to that point.



The key here is to focus. Don't overwhelm your audience with too many charts. The value of your data is only as strong as your ability to use it. In this context, that means not sharing unnecessary metrics. Focus on what you and your team have decided is important and save the extraneous stuff for your own analysis.

Look, I get it. There are a lot of cool charts, and you want to share EVERYTHING you did this month," says Furubayashi. "But it's important to keep it simple and focus on your main objectives and value-drivers. One or two slides max for this section."

## 4 Identify Opportunities

Your monthly report shouldn't be strictly for looking back. The purpose of social measurement is to understand what happened so you can use it to plan for the future. The purpose of a report is to show the results of that process. Take some time to analyze the data you've shared and speak to the opportunities to double down or correct mistakes.

"I always include a slide of key lessons from the month, and another one with my plan for the coming month," says Furubayashi. "This lets me point out areas where I missed the mark in a constructive way, and showcase my plan to fix them. It also gives me an opportunity to talk about why I won in specific areas and how I plan on investing more in that area."

## 5 Don't Sugarcoat the Facts

We all want to position ourselves as successful, but it's not constructive to do so without addressing our failures. This is the immense – and sometimes ignored – value of social data. We're able to see exactly where we went wrong, and address the issue. If a campaign failed to achieve the results you were hoping for, there is a lot you can learn from it.

"I may geek out over data more than the average social media manager, but when an initiative doesn't work out, I don't consider it over," says Furubayashi. "It means I get to dig into the data around the campaign to figure out where I went wrong. It's like a puzzle. When I'm putting my report together, I always make sure to call out what I'll be doing better."

## 6 Keep It Short

You have to put this together every *month*. Don't make extra work for yourself. It's also important to remember that other people have to read your report every *month* and they don't want to take on a novel each time.

"Everyone is busy, so it's best to keep your report short, efficient and informative," says Furubayashi. "Make sure your monthly review showcases the high-level stats and plans, but hold off on the nitty gritty details. Everyone appreciates getting quickly to the point."

Sample Monthly

# REPORT FRAMEWORKS

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It's important that your monthly report has the right structure, so that it is simple and easy to understand for each stakeholder. Below are two sample structures, walking through an example of what could be included in a monthly report for your team, and a monthly report for your boss. The metrics and framework included here will vary based on what the goal of your monthly reporting actually is.

This report is designed to communicate how social initiatives are progressing to leadership. It shows successes and setbacks, and always keeps budget and overall company goals in mind.

## The Team Report

**Audience for This Report:** Community managers and/or social media managers

**Purpose:** Tactical, for strategy adjustment

**Time:** 30 minutes

**Typical Metrics:** Change from previous period, progress toward goals

**Context:** Used as a regular check-in

**Extra Credit:** Include competitors' performance during similar campaign or same time period



# 1 Snapshot

Give a quick look (“quick” is the operative word) at the state of your social program. This way any stakeholder can skim for the aspects they care about.

Owned Channels									
CHANNEL	# OF ACCOUNTS	AUDIENCE	% change	BRAND POSTS	% change	TOTAL ENGAGEMENT	% change	ENGAGEMENT AS A % OF AUDIENCE	% change
Google+	1	2,066,430	-0.1%	0	N/A	0	N/A	0.00%	0.0%
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Tumblr	1			42	N/A	169	-71.0%	0.00%	0.0%
<b>TOTAL</b>	<b>7</b>	<b>4,159,420</b>	<b>1.6%</b>	<b>2,158</b>	<b>24.5%</b>	<b>486,411</b>	<b>8.1%</b>	<b>11.78%</b>	<b>6.6%</b>

Earned Media									
CHANNEL	# OF MENTIONS	% change	POTENTIAL REACH	% change	POTENTIAL IMPRESSIONS	% change			
Twitter	68,859	11.2%	85,539,380	-26.4%	648,129,999	-11.2%			
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<b>TOTAL</b>	<b>74,619</b>	<b>11.4%</b>	<b>97,478,706</b>	<b>N/A</b>	<b>697,035,473</b>	<b>-13.7%</b>			

[Click here to see a larger version of a snapshot](#)

This scorecard from Simply Measured’s Cross-Channel Social Performance Report highlights major stats and changes from across all your social channels.

# 2 Current Goals

We currently have three primary initiatives.

## I. Twitter Engagement

To focus our efforts on increasing Twitter engagement month-over-month.

## II. 1 Billion Impressions

To surpass 1 billion potential impressions by EOY.

## III. Best the Competition

To beat our top competitor in Twitter engagement every month.

## 3 Results and Milestones

### I. 50% Increase of Twitter Engagement MOM

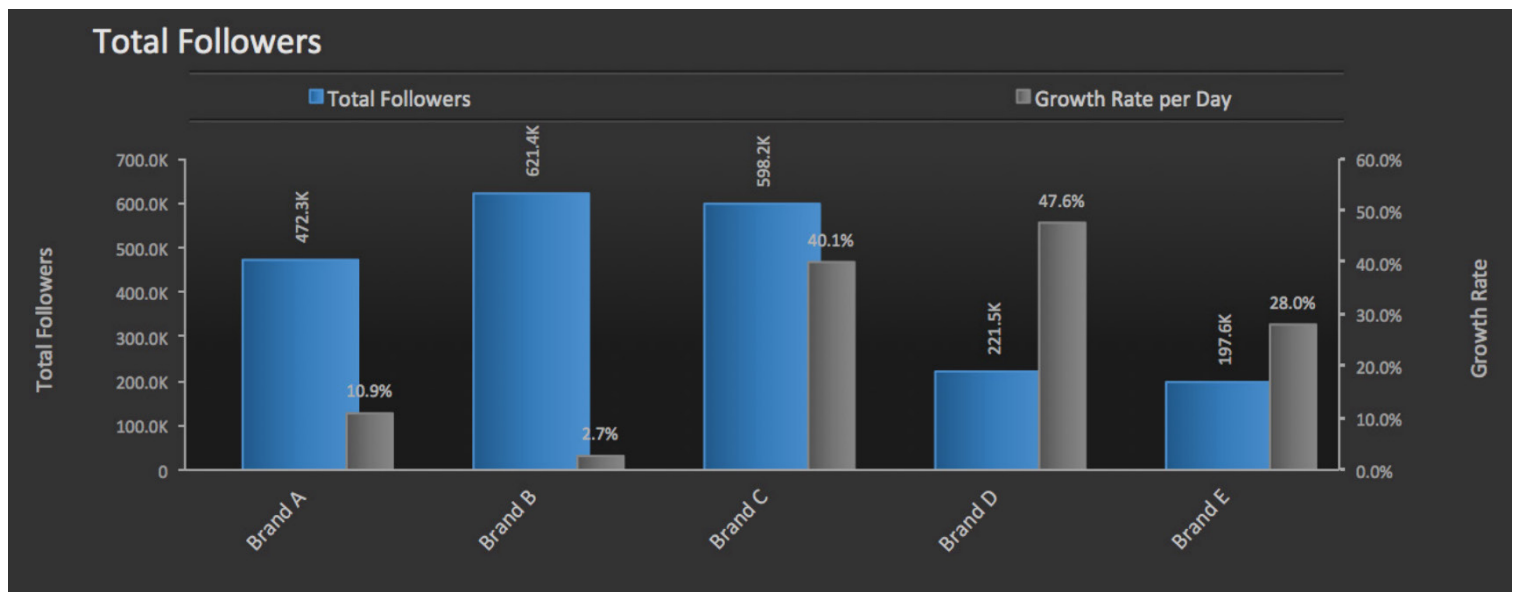
92% of organic brand mentions across all our active social channels were on Twitter. We also have found that the more we post, the greater return we see on the network.

### II. On Track for Potential Impressions

We generated over 660 million potential impressions in this period alone. It may be time to revisit our initially stated goal of 1 billion potential impressions by EOY and aim for something bigger.

### III. Beating our Top Competitor

These were the Twitter engagement stats for our top competitor. By comparing our competitor's numbers to ours in the scorecard at the beginning of this document, we generated almost three times the amount of engagement this month. #Winning!



This chart from the Simply Measured Twitter Competitive Analysis Report shows total audience and growth rate for any Twitter handles.

# The Executive Report

**Audience for This Report:** Other departments and executives

**Purpose:** Communicate performance and support department budget requests

**Time spent:** 1-2 hours

**Typical Metrics:** Goals achieved measured alongside social budget allocated

**Context:** Used to communicate successes and setbacks to executive team

**Extra Credit:** Identify and compare your ROI to competitors' ROI



## Snapshot

Give a quick look (“quick” is the operative word) at the state of your social program. This way any stakeholder can skim for the aspects they care about.

Owned Channels									
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*[Click here to see a larger version of a snapshot](#)*

This scorecard from Simply Measured's Cross-Channel Social Performance Report highlights major stats and changes from across all your social channels.

## 2 Current Goals

We had two major goals during the quarter, tied to broader marketing objectives.

### I. Increase Traffic to Our Website

A primary goal was to drive more traffic to our website this quarter, leading to higher conversion rates for our sales team.

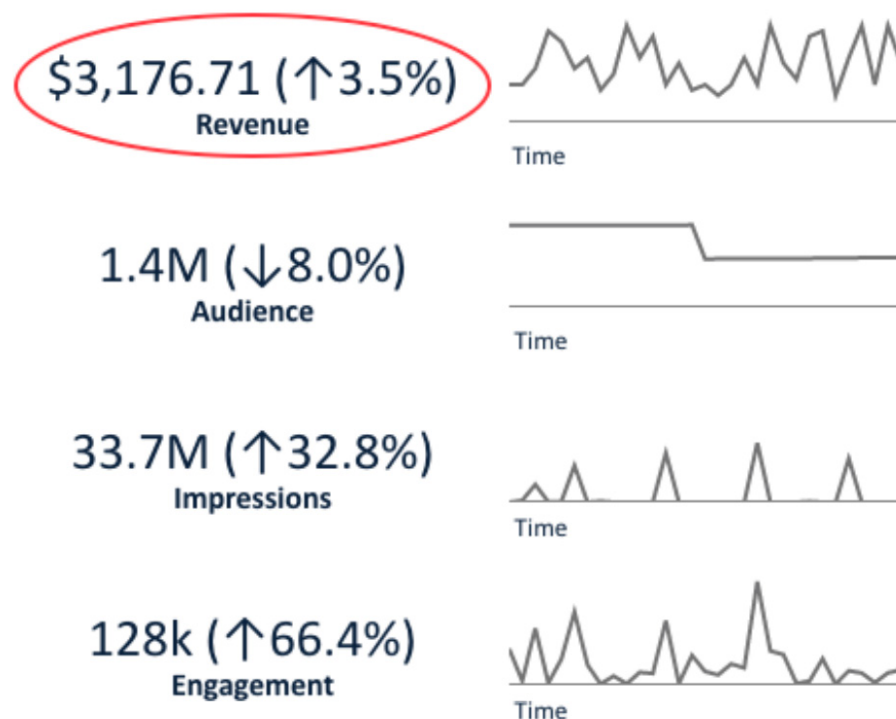
### II. To Make Ad Spend Leaner without Sacrificing Momentum

Optimizing our advertising for greater impact was a big priority for us.

## 3 Results and Milestones

### I. Traffic to Site Tied to Engagement, Not Audience

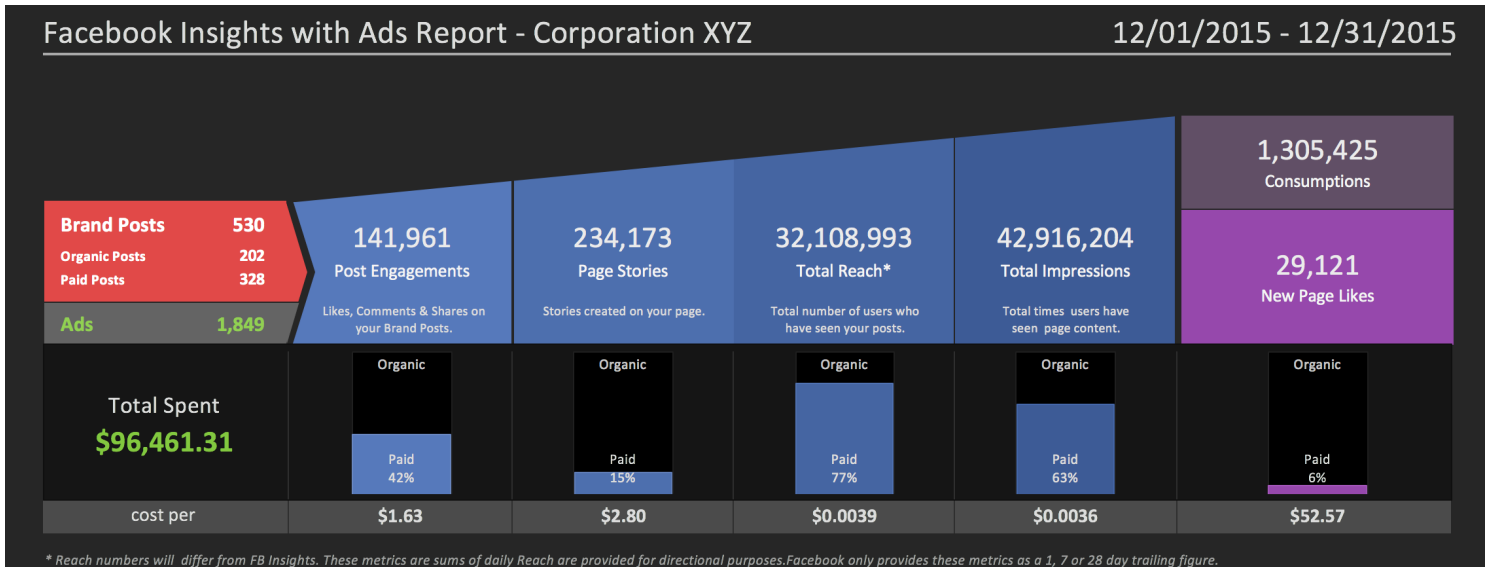
We generated \$3,176.71 (up 3.5% MOM) that can be directly tied to social visits. This is encouraging, because it shows us that our impact on revenue is more tied to impressions and engagement -- which can be driven with less ad spend -- than audience size.



This graphic from the Simply Measured Facebook Insights with Ads Report shows engagement, audience, and revenue metrics in one place.

## II. Ad Spend Down, Engagement Up

We made “doing more with less” a major goal this month. Buy spending smarter, we were able to spend less (\$1.63 average cost per impression this month vs. \$1.93 last month) and still see 66.4% engagement growth.



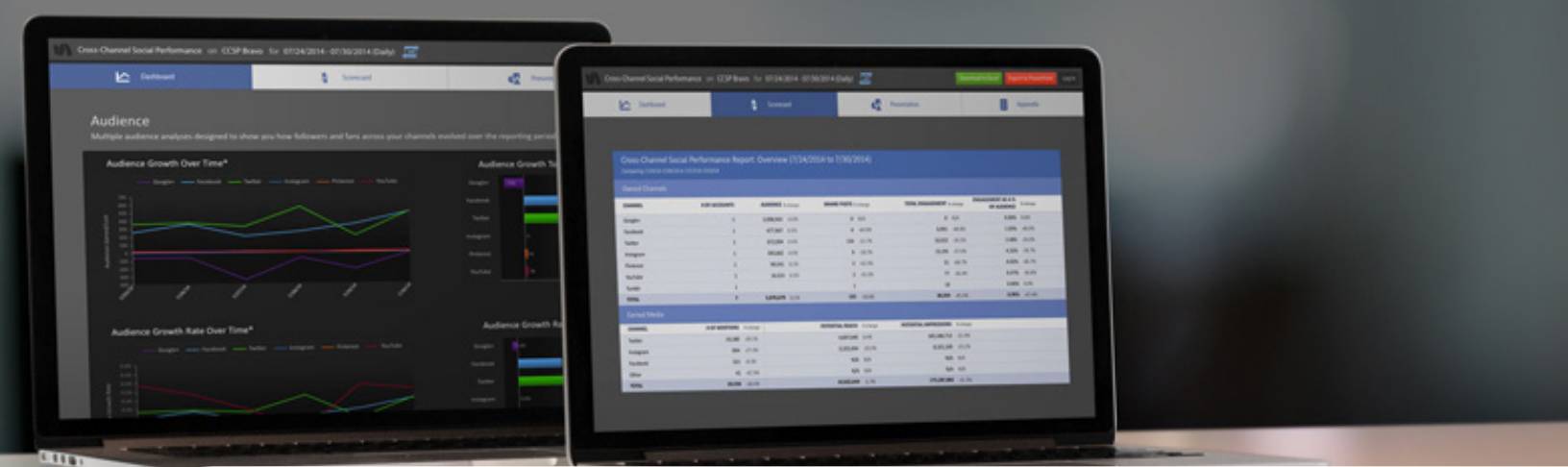
This megaphone from the Simply Measured Facebook Insights with Ads Report shows a holistic view of your brand’s paid, earned, and owned impact across the channel.

# CONCLUSION

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As social media matures, it becomes more important to evaluate your efforts so you can help your brand grow and prove the worth of your efforts. By following your progress throughout the month, reviewing key metrics, and tying your success to ROI, you're taking a sophisticated and honest approach to your social media marketing.

Having a solid monthly reporting plan means that you can explain why your work is important, know when it's time to regroup, and, just as importantly, when it's time to celebrate.



## ABOUT SIMPLY MEASURED

Simply Measured is the most complete social analytics solution, empowering marketers with unmatched access to their social data to more clearly define their social strategy and to optimize their tactics for maximum impact.

Our goal is to put the tools to understand business data in the hands of business users. We think reporting should be simple, attractive, and accessible for everyone – not just data scientists. Our software streamlines the process from data to deliverables and eliminates the countless hours spent on everyday reporting tasks. We do this by putting cloud data sources at your fingertips, providing a marketplace of best practice reports, and allowing you to generate beautiful solutions on the web, in Excel, and in PowerPoint with a couple of clicks.

Want to try Simply Measured?  
**Request a Free 14 Day Trial**



# HUBSPOT SOCIAL INBOX

## FOCUS ON WHAT MATTERS

You want to know what your customers and leads are saying about you on social media. But how do you know who's who? HubSpot's Social Inbox plugs into your contacts database, color-codes your customers and leads, helps you prioritize your engagement, and delivers real social ROI.



### PRIORITIZED SOCIAL ENGAGEMENT

Spend more time connecting with the people that matter to your business. HubSpot's Social Inbox shows you social activity on your connected accounts or published content.



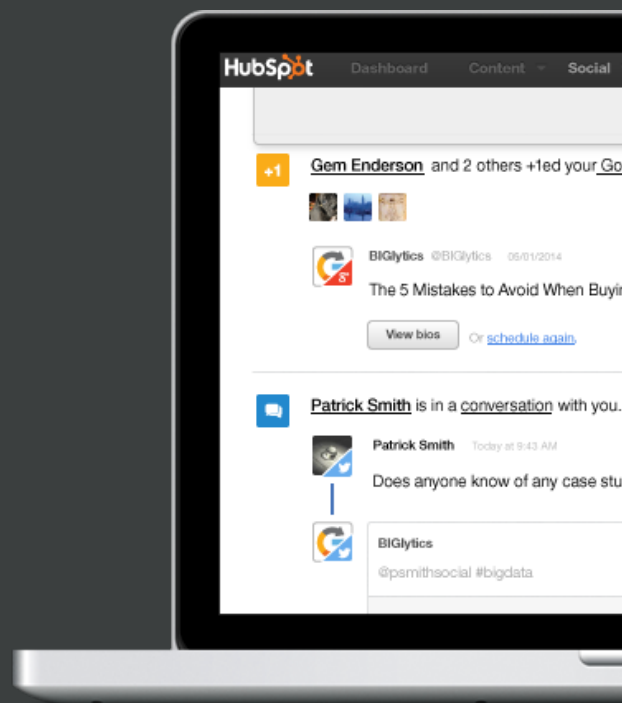
### BETTER SOCIAL MONITORING

Through color-coding and prioritized streams of your customers and contacts, HubSpot shows you which Twitter mentions are most important to your business.



### SMARTER SOCIAL PUBLISHING

Don't batch and blast. HubSpot's social media publishing helps you become smarter about the way you schedule and publish content on social media.



**TRY HUBSPOT FOR FREE**