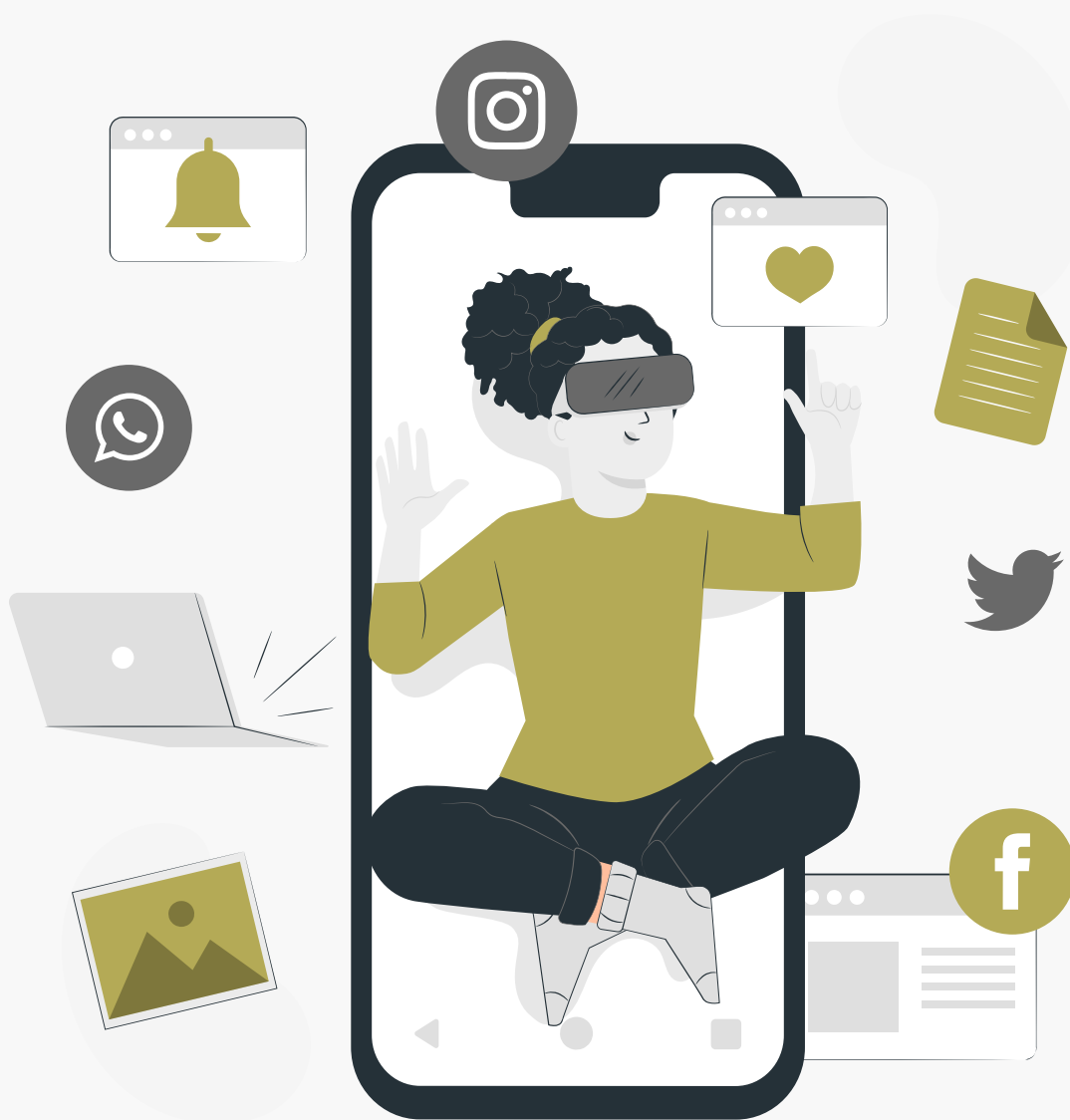


The Ultimate Social Media Strategy Guide for Social Media Managers at Mid-Sized Brands



At Levo, we help social media managers like you align with leadership goals, build better campaigns, and simplify workflows. We believe social should drive results—not just reach.



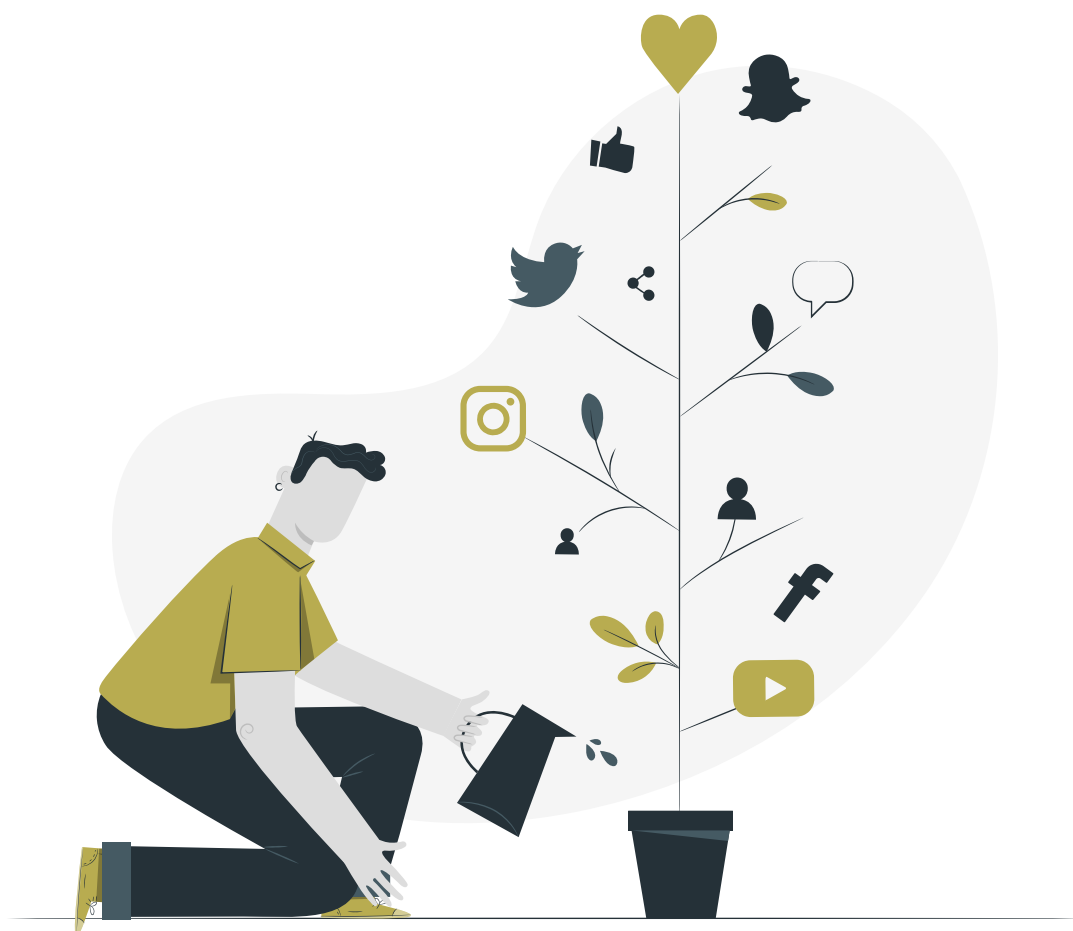
Why We Created This

Managing social media for a mid-sized brand comes with high expectations. You're not just posting memes or monitoring likes—you're responsible for driving awareness, engaging customers, supporting sales, and proving ROI. That's a lot to juggle, especially as algorithms change, content demand grows, and your internal resources stay lean.

This guide is designed to help you rise above the noise. We've distilled the most effective strategies, tools, and planning systems we use with our clients at Levo into one powerful playbook. Inside, you'll find detailed guidance on what works, how to organize it, and how to execute it at scale without burning out your team.

And to make it even easier, we've created a companion workbook at the end of this guide for every part of your strategy. Whether you're refreshing your approach or building a new one from scratch, you can work directly inside the workbook or use it to power your team's favorite tools.

Let's get started. Want hands-on help? [Book a free 30-minute consult](#) and let's discuss how to scale your strategy without adding more to your plate.





Step-by-Step

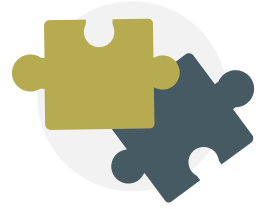
10 Strategies to Transform Your Social Media Performance

Each of the strategies below includes a deeper look into how to implement them inside your organization—moving from theory to action. Then, simply fill out our Social Media Strategy Workbook Planning Form at the end of this guide to elevate your social media to the next level.



01

Align Social Strategy with Business Objectives



Great social media is only great if it maps to your business goals. Work with leadership to identify core goals such as lead generation, pipeline acceleration, customer retention, or brand awareness. Then, define KPIs by platform and align reporting structures.

For example, LinkedIn may drive MQLs (Marketing Qualified Leads) while Instagram focuses on reach and engagement. Set quarterly OKRs (Objectives and Key Results) that feed into overall marketing strategy.

02

Elevate Content with Purpose and Brand Pillars



Mid-sized brands can quickly become chaotic in content production. Instead, define 3–5 brand pillars (e.g., innovation, transparency, empowerment) and map each piece of content to the [customer journey](#).

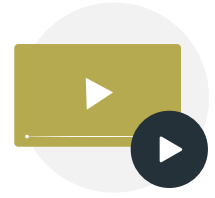
Check out our articles to learn more about how to do this, including our content marketing matrix!

1. [What are the three most critical stages of the Buyer's Journey – and what content works best for them.](#)
2. [High-Value Content Checklist: Six tips to create search-friendly, share-worthy content.](#)

Organize your content calendar around these themes to ensure consistency and message clarity. Each piece of content should have a role—is it creating awareness, driving consideration, or nudging conversion?

03

Invest in Platform-Native Video



Video content remains king, but only when tailored. Repurposing long-form webinars across Reels, Shorts, and Stories will fall flat. Instead, build native-first content:



Reels

15–30 seconds, fast edits, text overlays



LinkedIn

Thoughtful CEO commentary or culture highlights



YouTube Shorts:

Educational or how-to Budget for simple gear (ring light, mic) and a repurposing plan built into your production workflow. Check out our guide [5 Tips: How to make YouTube work for you](#) for more.

04

Redefine Engagement as Community Building

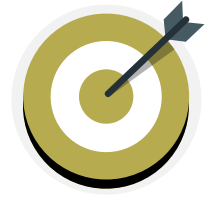


Engagement should be a strategic function, not just a reactive task. Develop guidelines for proactive engagement (e.g., 20 daily comments on industry posts, spotlighting a follower each week). Build rituals—like monthly AMAs or social listening sessions—to create recurring touchpoints.

Use tools like Sprout or Brandwatch to monitor sentiment and shift brand perception over time.

05

Building Smarter Paid Strategy



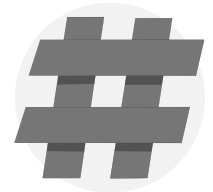
Mid-sized brands often waste ad spend by boosting organic content instead of building funnels. Set up campaigns using platform-native tools with:

- Cold audience reach
- Warm retargeting
- Conversion-focused CTAs
- Use lookalike audiences based on CRM lists or website traffic
- A/B test copy and visuals rigorously

Always tie back to cost-per-result and ROAS (Return on Ad Spend).


06

Hashtag and Trend Research as Intent Strategy



Hashtags are still underleveraged by brands aiming for discoverability. Use niche and mid-volume tags to target communities, not just trends. Track trending audio and formats weekly for Reels and TikTok. Create a brand hashtag and encourage UGC submissions to build digital footprint and community.

We recommend:

-  TrendTok Analytics
-  RiteTag
-  Flick

07

Develop Strategic Partnerships and Influencer Programs



Shift away from transactional influencer deals. Instead, cultivate ambassador-style partnerships with content creators who align with your values. Offer co-branded content opportunities, affiliate revenue share, or exclusive content previews. Build a searchable database of influencers and partners with KPIs to monitor performance and lifecycle.

08

Let Data Shape Your Editorial Calendar



Audit what's working using native analytics and third-party tools.

Identify:

- ★ Top-performing content types
- 🕒 Optimal posting times per platform
- # Hashtag and keyword performance

Use this data to build a forward-looking editorial calendar each quarter. Reserve 10–20% of content for experimentation. Build in monthly analytics reviews to remain agile.

09

Operationalize UGC and Employee Advocacy



Treat your customers and internal team as brand extensions.

For UGC:





-  Run monthly contests tied to brand values
-  Feature followers in Stories and grid posts For employee advocacy
-  Train team members on how to share branded content
-  Provide pre-approved templates or visuals
-  Recognize top sharers publicly or with incentives

10

Integrate Social with CRM and Lifestyle Marketing



Make social part of your cross-channel marketing. Sync social behavior (clicks, views, DMs) with CRM data to:

-  Trigger email workflows
-  Personalize offers
-  Retarget non-converters with tailored messaging
-  Collaborate with your lifecycle team to run social-exclusive drip campaigns or retarget users based on funnel stage

Bridge the gap between awareness and retention with data-connected workflows.

Avoid These Common Pitfalls

Even experienced teams slip up, but awareness and structure can keep you ahead. Here's how to spot and avoid the most common traps:

1 Misaligned KPIs

Align platform metrics (e.g., engagement, CTR) with overarching business goals (e.g., lead quality, pipeline velocity). Review OKRs quarterly with leadership to ensure you're tracking what matters most.

2 Over-prioritizing Aesthetics

A polished grid is great, but effectiveness comes first. Run A/B tests to balance creative quality with clarity and conversion. Use data to guide design iterations, not just internal preference.

3 Disconnected Content from CRM/email Flows

Social doesn't work in a silo. Integrate tools like HubSpot or Klaviyo so content triggers the right follow-up emails or nurtures. Plan campaigns that bridge social and email with unified messaging.

4 Underutilizing Employee and Customer Voices

Turn internal teams and happy customers into ambassadors. Provide social kits, talking points, and shareable content. Launch campaigns that reward participation (e.g., recognition, incentives).

5 Reactive Content Planning

Build a quarterly calendar informed by past data and future goals. Leave room for trend agility, but base your plan on strategy, not last-minute gaps. Use tools like Airtable or Notion to create visibility across teams.

With the right planning and processes in place, your team can avoid these missteps and create a social strategy that delivers results with consistency and confidence.

What's Next?

You now have a complete guide to structure, execute, and optimize your brand's social media strategy—from high-level alignment to tactical content planning. Whether you're launching a new campaign, refining your engagement, or building internal advocacy, this guide is built to grow with you.

Now, simply fill out our [Social Media Strategy Workbook: 10-Step Planning Form](#) to help you implement the guide.

If you're feeling stretched thin or need an expert partner to co-create or optimize your systems, we're here to help. [Book a free 30-minute consult with Levo](#) and let's build something smart, streamlined, and scalable together.

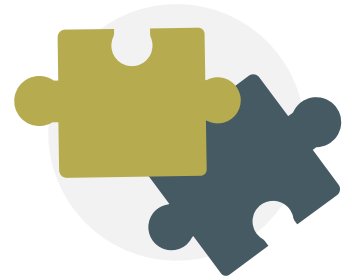


Social Media Strategy Workbook

10-Step Planning Form



Align Social Strategy with Business Objectives



Instructions:

Define your business goals and align your platform-specific KPIs accordingly.

- What are your primary business objectives for this quarter?
- What social KPIs support each of these goals?

Priority #1

Business Objective:

KPIs:

Priority #2

Business Objective:

KPIs:

Priority #3

Business Objective:

KPIs:

- What does success look like by platform?

 Instagram

Success looks like:

 Facebook

Success looks like:

 X

Success looks like:

 Threads

Success looks like:

 TikTok

Success looks like:

 YouTube

Success looks like:

 LinkedIn

Success looks like:

Platform Name:

Success looks like:

Platform Name:

Success looks like:

Platform Name:

Success looks like:

Platform Name:

Success looks like:

Elevate Content with Purpose and Brand Pillars



Instructions:

Define your brand pillars and map content to each funnel stage.

- What are your 3–5 brand pillars?
- How does each pillar support the customer journey?
- What type of content aligns with each?

Brand Pillar:

Awareness

Consideration

Conversion

Kind of Content:

Brand Pillar:

Awareness

Consideration

Conversion

Kind of Content:

Brand Pillar:

Awareness

Consideration

Conversion

Kind of Content:

Brand Pillar:

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Kind of Content:

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Awareness

Consideration

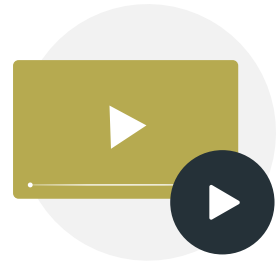
Conversion

Kind of Content:

Invest in Platform-Native Video

Instructions:

Plan short-form videos tailored for each platform.



- What kind of video content performs best per platform
- What resources do you need to produce native video?

YouTube

Kind of Content:

Resources Needed:

Instagram

Kind of Content:

Resources Needed:

TikTok

Kind of Content:

Resources Needed:

 Facebook

Kind of Content:

Resources Needed:

 x

Kind of Content:

Resources Needed:

 Threads

Kind of Content:

Resources Needed:

 LinkedIn

Kind of Content:

Resources Needed:

Platform Name:

Kind of Content:

Resources Needed:

Platform Name:

Kind of Content:

Resources Needed:

Platform Name:

Kind of Content:

Resources Needed:

Platform Name:

Kind of Content:

Resources Needed:

Redefine Engagement as Community Building

Instructions:

Set proactive engagement goals and processes.



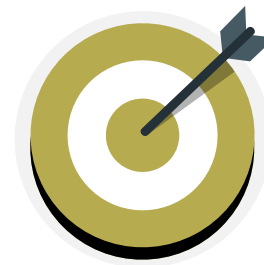
- What rituals or recurring engagement campaigns can you implement?
- Who manages your community touchpoints?
- What tools are in place for engagement monitoring?

Engagement Campaigns:

Responsible Party:

Tools:

Build Smarter Paid Strategies



Instructions:

Outline your funnel-based paid strategy.

- What stages of the funnel will you target with paid ads?
- What is your monthly ad spend and ROI goal?
- What audiences will you test and retarget?

Stage of Funnel:

Monthly Ad Spend:

Test Audiences:

Retarget Audiences:

Stage of Funnel:

Monthly Ad Spend:

Test Audiences:

Retarget Audiences:

Stage of Funnel:

Monthly Ad Spend:

Test Audiences:

Retarget Audiences:

Stage of Funnel:

Monthly Ad Spend:

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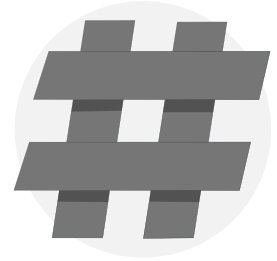
Stage of Funnel:

Monthly Ad Spend:

Test Audiences:

Retarget Audiences:

Hashtag and Trend Research as Intent Strategy



Instructions:

Define your hashtag and trend tracking system.

- What niche or branded hashtags will you use?
- How will you track trends weekly?
- Who is responsible for sourcing and implementing trends?

Niche Hashtags:

Branded Hashtags:

Weekly Tracking:

Responsible:

Develop Strategic Partnerships and Influencer Programs



Instructions:

Identify strategic influencer or partner relationships.

- What influencers align with your brand values?
- What will your partner program offer (affiliates, exclusives)?
- What performance metrics will you track?

Influencers:

Offerings:

Performance Metrics:

Let Data Shape Your Editorial Calendar



Instructions:

Analyze past performance to shape future content.



- What content types and formats perform best?
- When are your audience's peak activity times?
- What experiments will you run next quarter?

Highest Performing Content Types:

Peak Activity Times:

Experiments:

Operationalize UGC and Employee Advocacy

Instructions:

Create repeatable processes for UGC and internal advocacy.



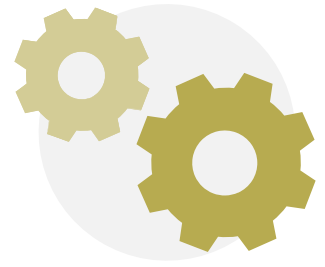
- What UGC campaigns can you launch this quarter?
- How will you empower employees to contribute?
- What tools or templates will you provide?

UGC Campaigns:

Empower Employees:

Tools & Templates:

Integrate Social with CRM and Lifecycle Marketing



Instructions:

Connect social insights with CRM or lifecycle tools.

- What actions should trigger lifecycle campaigns?
- How will social data integrate with your CRM?
- What platforms or workflows are required?

Trigger Actions:





Integration with CRM:

Platforms & Workflows:

Bring It All Together: Build Your Social Media Content Plan

Once you've followed the above 10 steps, the next step is integration.

Use the Social Media Content Plan template on the next page to visually map everything:

-  Align 1–2 business goals with your quarterly strategy
-  List 3–5 content pillars beneath each goal
-  Connect content pillars to specific tactics or formats (e.g., Reels, carousels, testimonials)
-  Integrate into your monthly and weekly content calendar

This template brings clarity to your strategy and ensures all content is created with purpose.

Use our workbook or adapt this framework into your preferred tool like Airtable, Asana, Notion, or Google Sheets.

Social Media Content Plan



Business Goals	Goal 1	Goal 2		
Social Media Goals	Goal 1	Goal 2	Goal 3	
Content Pillars	Pillar 1	Pillar 2	Pillar 3	Pillar 4
Cornerstone Content	Piece 1	Piece 2	Piece 3	Piece 4
Social Media Formats	Tactic 1	Tactic 2	Tactic 3	Tactic 4