A really helpful **social media guide**

Module 3: Your action plan

Guiderails for success

Here are eight practical steps to help you get more out of social media:

Set clear goals

Are you aiming to build awareness, generate leads or keep clients engaged? Your goals shape your content and help you measure what's working.

Know your audience

Think about their age, life stage, profession, location and financial goals. Tailor your content to what matters to them.

Choose your channels wisely

You don't need to be on every platform. Pick one or two channels where your audience is active and where you can show up regularly. It's about being where your audience is and showing up with value.

Create a content plan

Build a bank of content that speaks to your audience's challenges and questions. Mix it up with tips, updates, client stories, FAQs and milestones. Keep it helpful and human.

Use a content calendar

Consistency builds trust. Plan your posts ahead of time and keep your feed active. Even one post a week makes a difference. Scheduling tools can help you stay on track and free up time to engage.

Engage, listen and respond

Social media is a two-way street. Like, reply, tag, and engage. Watch for feedback and respond thoughtfully. If a complaint comes through, make sure it's recorded or escalated. Being present builds trust and shows you care.

Cross promote

Make it easy for people to find and follow you. Add social icons to your website, email signature, newsletters and client communications. Every touchpoint is a chance to grow your audience.

Check your progress

Use platform insights or tools like Hootsuite, Zoho or Sprout Social to see what's working. Look at engagement, reach, clicks and follower growth. Use the data to refine your strategy and improve results.

A really helpful content planner

What do you want to achieve, and who do you want to talk to?

Build awareness
(followers)

Generate leads
(enquiries)

Keep clients engaged
(increase post likes)

Who are they?
(age, life stage, where they are in buying cycle)

What channels do they use?
(see our channel table in module 2)

What are they interested in?
(testimonials, guide tools)

A really helpful content planner

Now develop some content ideas.

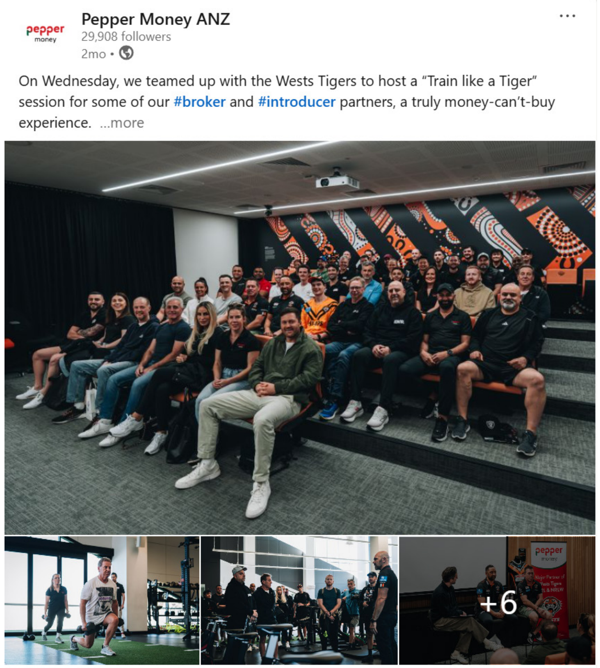
Think back to your goals and audience. What would they find engaging, entertaining, or educational? What would help you build awareness or generate leads with non-conforming audiences?

Engage

E.g. examples of people whose lives have been changed for the better because they found that they had options. This can give hope to others and encourage them to reach out.

Entertain

E.g. behind the scenes - let them know the real you and help build trust.



Educate

E.g. Building financial literacy is something we should all be trying for because it improves wealth outcomes.

A really helpful content planner

Make a plan and measure your progress.
Choose 1-2 channels where your audience is active and where you can show up consistently. Then map out a mix of content that covers each category.

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Week 1		Engage Reply, like, tag		Entertain Behind the scenes		Educate Share Pepper Money article	
Week 2							
Week 3							
Week 4							
Week 5							

- LinkedIn
- Facebook
- Instagram
- YouTube
- Tiktok

How are you tracking against your goals?

- Are your followers growing?
- Are you seeing leads or traffic from your socials?
- Are you getting engagement? (clicks / likes / shares / comments)

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