

SOCIAL MEDIA MANAGEMENT MASTERCLASS

**A masterclass on how to become a professional social
media manager, start and run your own company**

**A YAC COLLECTIVE MASTERWORK
THIS PUBLICATION IS INTENDED FOR EDUCATIONAL USE ONLY.
© 2025**

A GIFT FOR YOU

Before you dive into this course, we've got something special lined up.

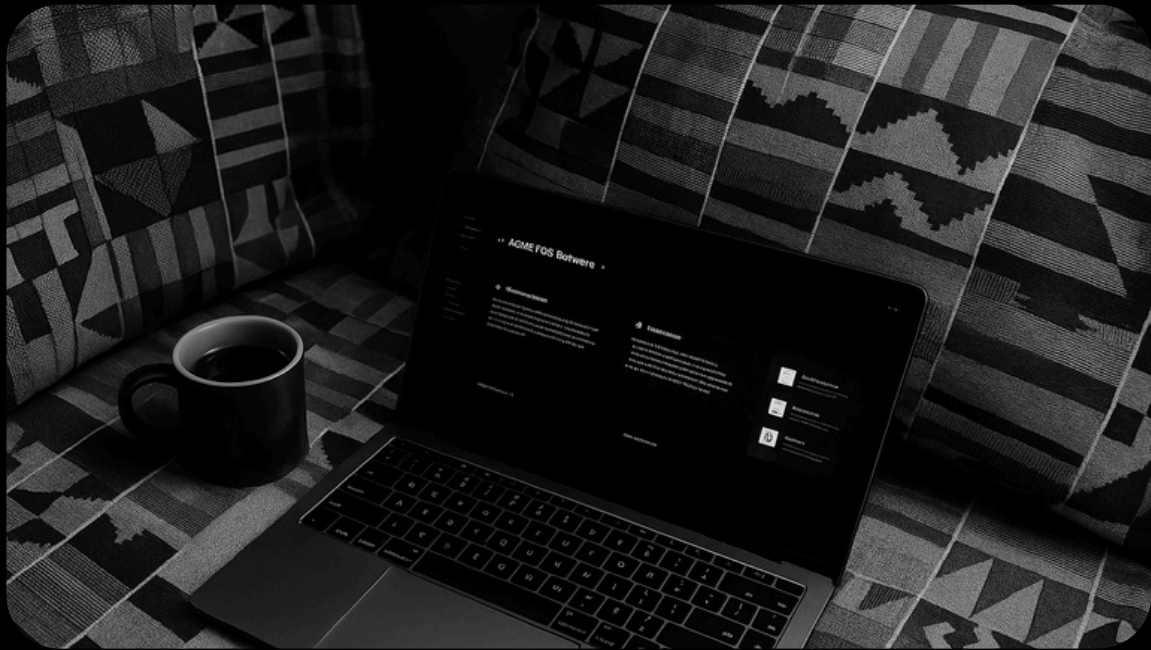
At YAC Collective, we believe in remote work, independence, but most importantly, profitability and passive income.

Every course, eBook, or digital product we put out is designed to empower you to learn, earn, and build freedom on your terms.

This course comes with a fully customizable Canva preset, giving you full access to the original design. You're free to remix, add your own expertise, rebrand it, and resell it as your own digital product. Just our way of giving back and helping more creators win.

Because that's the YAC way.

[Copy & Customize Your Own Digital Product **here.**](#)



This is everything you need to lock in as a pro social media manager, learn the skills, start your own agency, build your team, and create real passive income. It's like a degree, but better, made for the now, built for the boss in you. No fluff, just a course that actually works and puts you in control.

We built this to work for everyone, whether you're just getting started or already deep in the game. Learn everything you need to become a pro social media manager, launch your own agency, lead a team, and build real passive income. This isn't just content, it's CEO training. It's like a degree, but actually useful. Built for the new era of digital citizens who are ready to lock in, level up, and lead.



JEROME OMARA

FOUNDER OF YAC COLLECTIVE

I discovered remote work in 2020 when the world shifted during COVID, landing a role at a social media marketing company where I made hundreds of dollars a week from my laptop. Since then, I've worked with two of Uganda's biggest media houses, gaining hands-on experience in social media management, reporting, and digital strategy, while being mentored by some of the industry's best. My journey combines real-world execution with professional insight, making this book a reflection of both experience and expertise in social media management.



1

CHAPTER

INTRODUCTION

YACCOLLECTIVE.COM

WELCOME TO THE MASTERCLASS

Welcome to the Social Media Management course, your ultimate guide to building a successful remote career while making money. Social media managers are in high demand, with businesses of all sizes seeking skilled professionals to manage their online presence. In fact, the average social media manager can earn anywhere from \$40,000 to \$100,000 per year, with some even making up to \$150,000 annually, depending on experience and clientele.

Whether you choose to work for yourself or manage social media for small to large companies, this course will teach you how to craft effective strategies, create engaging content, and generate income, all from the comfort of your home or office. Let's dive in and start building your path to a profitable career in social media management.

- TAKE IT ONE CHAPTER AT A TIME Remember, this course is self-paced.
- TAKE NOTES Your retention goes up by 34% just by taking notes as you read. This is why the slides are available to download and print.
- FINISH IT You just invested a good amount of money into your business. Get the highest ROI you can and finish the course content.

In this chapter, we'll cover the essential steps to kickstart your social media management business in a world where everyone thinks they can manage social media, but companies are actively seeking true professionals who understand strategy, growth, and results.

We'll start by guiding you through choosing the right business name and establishing your LLC, ensuring you're legally and professionally set up for long-term success. Then, we'll dive into building a brand that stands apart in a crowded digital space.

You'll learn how to identify what kind of social media manager you truly are, whether your strengths lie in content creation, strategy, or community engagement. We'll help you create a schedule that fits your life and show you how to set boundaries so you can grow your business without burning out, including how to take time off without guilt or disruption.



But this course goes far beyond the surface level of social media management. While others stop at tips and trends, this program teaches you how to monetize your skills, sign high-value clients, and even start and scale your own digital agency. You won't just learn how to manage social media; you'll learn how to run a real business.

Finally, we'll tackle the mindset hurdles that can hold new entrepreneurs back. Whether it's imposter syndrome, fear of failure, or doubt around pricing, we'll give you the tools to overcome those mental blocks so you can move forward with clarity and confidence.

By the end of this chapter, you won't just have a plan, you'll have the foundation of a profitable, sustainable business in one of the fastest-growing fields in digital marketing.

WHY SOCIAL MEDIA MARKETING

- 66% of Africans purchase a product after seeing a brand's social media post.
- 500 million people in Africa are using the internet, and the number of social media users grows by approximately 300 million every year.
- The demand for social media managers in Africa is rapidly growing, with the creator economy projected to expand at an annual growth rate of 28.5%.



WHAT TYPE OF SOCIAL MEDIA MANAGER ARE YOU?

- Freelance social media manager
- Social media agency owner
- In house social media manager

FREELANCE SOCIAL MEDIA MANAGER

Working with 3-4 clients, you are solely responsible for everything: content creation, copywriting, posting, reporting, and back office/client acquisition.

The best part? You get to keep almost all of your revenue! This setup is great for introverts who enjoy working alone.

As a freelance social media manager, it's harder to take time off since you're handling everything on your own (though not impossible).

This is usually where most newer social media managers start, but maintaining a full client roster can become your main stressor.

SOCIAL MEDIA AGENCY OWNER

The next step for freelance social media managers, if they want to grow and move beyond day-to-day content creation, is building an agency. Like me, I enjoyed leadership, managing a team, and focusing on the big picture, especially as I was burning out from daily content work.

This transition takes time; you're shifting from working in your business to working on your business, and it doesn't happen overnight. While you can bring in a lot of revenue, you also have payroll to manage.

Having a team allows you to offer more services since different people bring different skill sets. It also becomes way easier to take time off, as your team can manage things while you're away. However, staying profitable becomes your main stressor.

IN HOUSE SOCIAL MEDIA MANAGER

This is a great option for social media managers who prefer not to work alone but also don't want the responsibility and stress of running an agency. As an in-house social media manager, you don't have to worry about finding the next client or staying profitable, you just get to be a social media manager.

While there's less money in this role since you don't own the business and earn a set salary, there's also way less stress. Depending on how you're hired, you may manage multiple clients within an agency or focus on just one brand if you're working in-house. If you're with a larger brand, you'll likely be part of a team.



IN HOUSE SOCIAL MEDIA MANAGER

- STEP ONE Establishing your business
- STEP TWO Developing a stand out brand
- STEP THREE Setting your services

YOUR BRAND NAME

Come up with your business name.

Is it easy to remember? Is it easy to spell? Is the domain and social username available?

Word inspiration: Media, Social, Marketing, Digital.

Once you've picked a name, secure your domain and all usernames.

ESTABLISHING YOUR SERVICE OFFERINGS

What services are you going to offer?

It's okay if it's just social media management. But if you have a creative background, here are some other services you might offer under the agency umbrella:

- Email Marketing
- Branding
- Brand Photography
- Content Photography
- Content Videography
- UGC & Influencer Management
- Website Development
- Facebook/Instagram Advertising



DEVELOP A STANDOUT BRAND

I cannot recommend investing in your own brand enough. It WILL pay off, and I wish I had done this from the start!

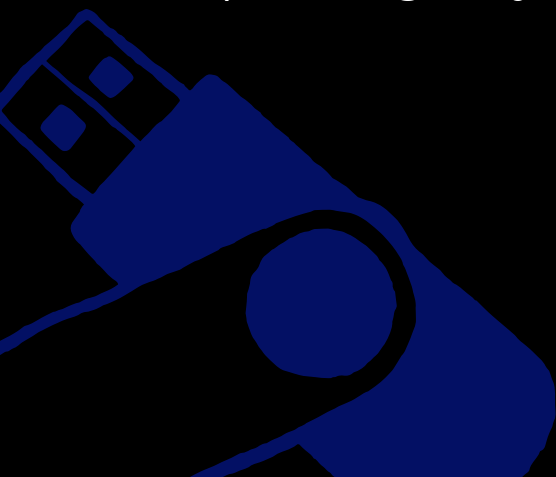
- If you don't have a lot of initial funds, you can DIY your brand. Here's how:
- Think about your brand identity . Do you want it to be edgy, fun, colorful, bold, high-fashion, calm, or minimal?
- Create a Pinterest inspiration board to gather visual ideas.
- Find two fonts that work well together on Creative Market.
- Develop your brand color palette to maintain a consistent aesthetic.
- Create a simple logo using your chosen fonts.
- Even if you start small, a strong brand will help set you apart!

WORK/LIFE BALANCE SETTING YOUR SCHEDULE

One of the great things about this work is that you get to choose when you work. Having a schedule is crucial to keeping your work intentional and your life balanced. Start by thinking about your open times and when you're available to work.

For example, here's my personal schedule as an agency owner, one that took years to build and reflects my dream routine: I drop my kids off at school at 8 AM, work out from 8–9 AM, and then work from 10 AM to 2 PM. From 2–3 PM, I pick up the kids and help with homework.

Between 3–5 PM is optional work time depending on the season, and 5–8 PM is reserved for dinner, family time, and bedtime routines. If you're working more full-time hours at the beginning, that's completely normal. The key is to define the priorities in your life and determine what your work hours will be each week. Once you begin to exceed those hours, it's a sign that it may be time to either hire help or raise your prices to trim your client roster, depending on your goals.



FILLING YOUR SCHEDULE

- Okay now when are you going to do what?
- Not every single day is going to look the same and that's okay I like to keep creative work first thing as this takes more of my mental energy
- Things to do everyday Check the Later blog & Adam Mosseri IG for any social media updates
Community engagement for clients
- Create a story or hop on stories for your own brand Other things to do as a social media manager (not every day) that you need to include in your schedule
- Create content calendars (including YOURS)
- Develop stories for clients Create Reel/TikTok prompts for clients Film Reels for your business
- Answer client inquiries and do discovery calls
Send proposals Post any stories & manual posts for clients Strategy development and optimization Reporting Community engagement

TIME MANAGEMENT TIPS

Task Batching

- Group similar tasks together to reduce the mental load and eliminate the time it takes for your brain to switch from one task to another.
- Example: Batch your meetings together instead of spreading them throughout the day.

Time Blocking

Mindfully schedule your time to create dedicated space for deep focus work. Eliminate the need for constant switching or interruptions.

Stay in Flow

Minimize distractions, be on Do Not Disturb mode, set boundaries, and prepare your environment so you don't need to get up unnecessarily.



GETTING YOUR FIRST CLIENTS

Not going to lie, it is HARD

The first few clients might be:

- A real estate firm through a family connection
- A small business you reached out to
- A local brand where you know the owners

First few clients are often family friends or acquaintances that own businesses.

Look for businesses that are established but clearly don't have someone managing their socials.

Have a referral program in place! This will help you turn the first few clients into a full client roster.

USE YOUR SOCIALS

You are your first client, and if you aren't showing what you can do on your own social media, it's going to be VERY hard to get clients.

- Posting daily
- Getting on stories daily
- Posting Reels/TikToks at least 3x a week

Most of your future potential clients will reach out to YOU, so this is temporary.

Creative Ways to Get Your First Few Clients

- Reach out to your network

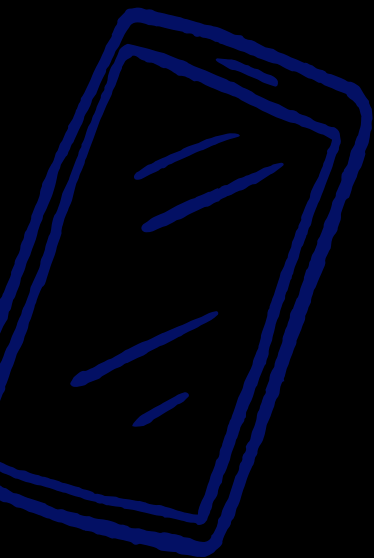
Friends, family, or acquaintances who run businesses are a great place to start.

- Create Reels or posts

Make content that showcases what you would do with a specific account, even if it's just a mock-up.

- Design a portfolio page

Make a page specifically showing your graphic design skills and strategic insights tailored to the brand you're pitching.



TIME MANAGEMENT TIPS

Task Batching

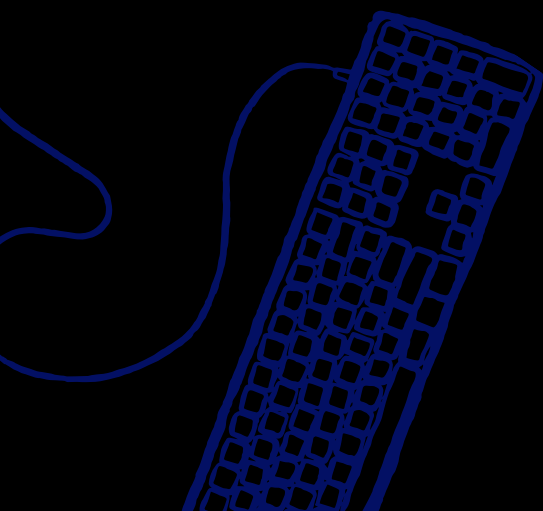
- Group similar tasks together to reduce the mental load and eliminate the time it takes for your brain to switch from one task to another.
- Example: Batch your meetings together instead of spreading them throughout the day.

Time Blocking

Mindfully schedule your time to create dedicated space for deep focus work.
Eliminate the need for constant switching or interruptions.

Stay in Flow

Minimize distractions, be on Do Not Disturb mode, set boundaries, and prepare your environment so you don't need to get up unnecessarily.





2

CHAPTER

YACCOLLECTIVE.COM

FILLING YOUR ROSTER FROM SCRATCH

Not going to lie, it's hard in the beginning.

- Focus on small, established businesses that clearly aren't managing their social media well. Don't waste your time pitching big brands right away.
- Set up a referral program. This allows your first few clients to help bring in others.
- Use your own social media as proof of your skills. You are your first client. If you're not consistently showing what you can do on your own platforms, it will be much harder to convince someone to hire you.

What you should be doing now:

- Posting daily
- Showing up on stories every day
- Posting Reels or TikToks at least three times a week

This stage doesn't last forever. Once your content starts showcasing your skills, most of your future clients will begin reaching out to you.

Cold pitching is fine at the start. Just know that it's a stepping stone, not your long-term strategy.

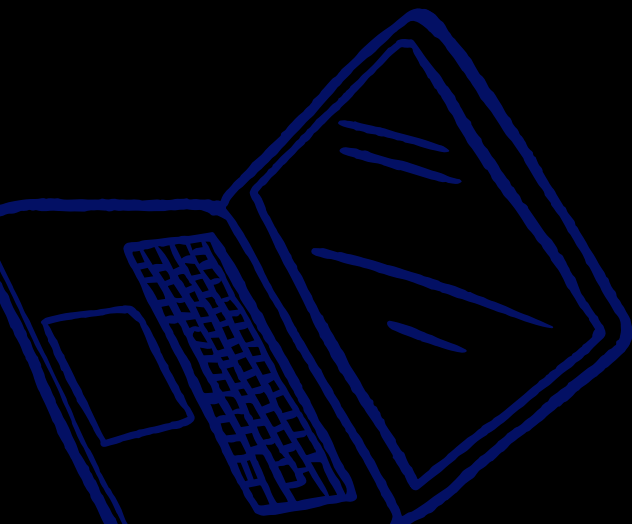
Creative Ways to Get Your First Few Clients

- Reach out to your network. Start with people you already know, friends, family, past coworkers, anyone who owns or works for a small business that might need social media help.
- Create Reels or posts that showcase your skills. Pick a real brand or a hypothetical business and show what you would do if you were managing their account.
- Add a specific section to your portfolio dedicated to your graphic design work, content examples, and strategic insights. Tailor it to the types of brands you're pitching so they can clearly see the value you bring.

WHAT IS A HIGH VALUE CLIENT?

High-Value Clients Are Ready for Social Media Management

- They already have their branding, website, and customer journey foundations in place.
- They understand the value of social media management and what it can do for their business.
- They have high-quality content photography or the budget to invest in it.
- They are aligned with your values, style, and approach.
- They typically have a budget of \$2,500 or more.
- They see social media management as an investment, not just another expense.
- They also expect a premium experience, with systems and communication that reflect professionalism.



- And that's exactly what we'll teach you.
- Understanding Your Niche
- Your niche doesn't have to mean sticking to one specific industry.

- For example, we don't limit ourselves to a single field, but we do intentionally work with forward-thinking, bold, and creative brands. That's the reason our branding, tone, and messaging are crafted the way they are.

- Start thinking about the types of clients you want to attract, and let your branding and content reflect that. Your dream clients should see themselves in your work.

- You attract high-value clients by positioning yourself for them and promoting your services with clarity and confidence



ATTRACTION MARKETING

When clients reach out to you via Instagram or the contact form on your website (usually sent there by your organic social media presence), it's a sign that your brand is doing the work for you.

This becomes more common as you grow your own account and gain more experience. The more you invest, both time and money, in the look and feel of your brand, the more it will pay off.

What attracts high-quality, inbound clients:

- Well-done branding that aligns with your ideal client
- A professional, easy-to-navigate website
- An active and relatable social media presence
- Branded photoshoots that give your content a polished, premium feel

Your branding and website should be specifically designed to attract the type of clients who are already reaching out to you.

Your social media strategy and content matter more than you think. They shape how people perceive your value, your expertise, and whether or not they want to work with you

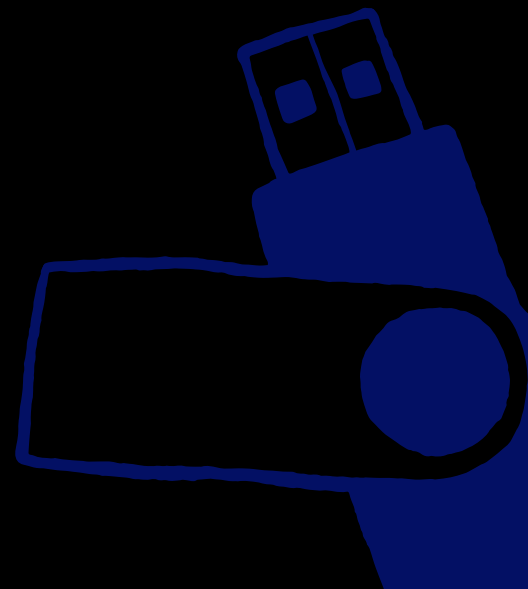
ATTRACTING HIGH VALUE CLIENTS

The pain points of low-budget clients and high-value clients are very different, and your approach needs to reflect that.

If you want to work with high-value clients, your branding, website, systems, and most importantly, your messaging must be aligned with what they care about.

Here's what high-value clients are looking for:

- They care about strategy, not just posting.
- They want to create trends, not chase them.
- They understand that organic social media is just one part of a larger marketing plan.
- They already know the value of social media management, what they want to know is why you are the right person to deliver results.



To attract and convert high-value clients:

- Use entertaining content that speaks directly to their specific pain points
- Share educational content that positions you as the expert they've been looking for
- Present case studies and real proof to show that your strategies work and can drive transformation

High-value clients expect a higher level of clarity, confidence, and expertise. Speak to that, consistently, and they will come to you.



ACTIVE MARKETING

This is where you take action to get in front of your potential clients, rather than waiting for them to come to you.

Here are some proven strategies:

- Reach out to similar brands.
- For example, if you're currently managing a wedding planner's account, try pitching to other wedding planners in different cities or regions.
- Cold pitching through email, Instagram DMs, or LinkedIn.
- Craft personalized, strategic messages that show how you can add value to their brand.
- Run paid ads on platforms like Facebook, Instagram, or TikTok.
- Paid content can be incredibly powerful when done right. However, don't just boost posts, that's not a real ad strategy.
- If you're serious about learning paid advertising, check out our Facebook Ads Masterclass for in-depth training.

Keep in mind: this approach takes more work on your end, and there's no guarantee that the people you reach out to are actively looking for a social media manager. That's why messaging and targeting matter so much.

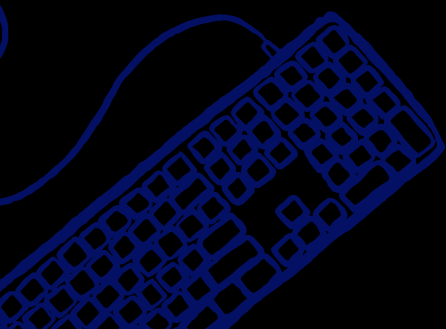
SETTING UP A REFERRAL PROGRAM

Referral Programs: A Powerful Way to Fill Your Roster Fast

Referral programs are one of the most effective ways to build your client list quickly, especially when you're just getting started.

But the key is this: set up a referral program and make sure your clients know it exists. Mention it during onboarding and follow-up check-ins so it stays top of mind.

Your referral program can look however you want.



Here's an example of what we use:

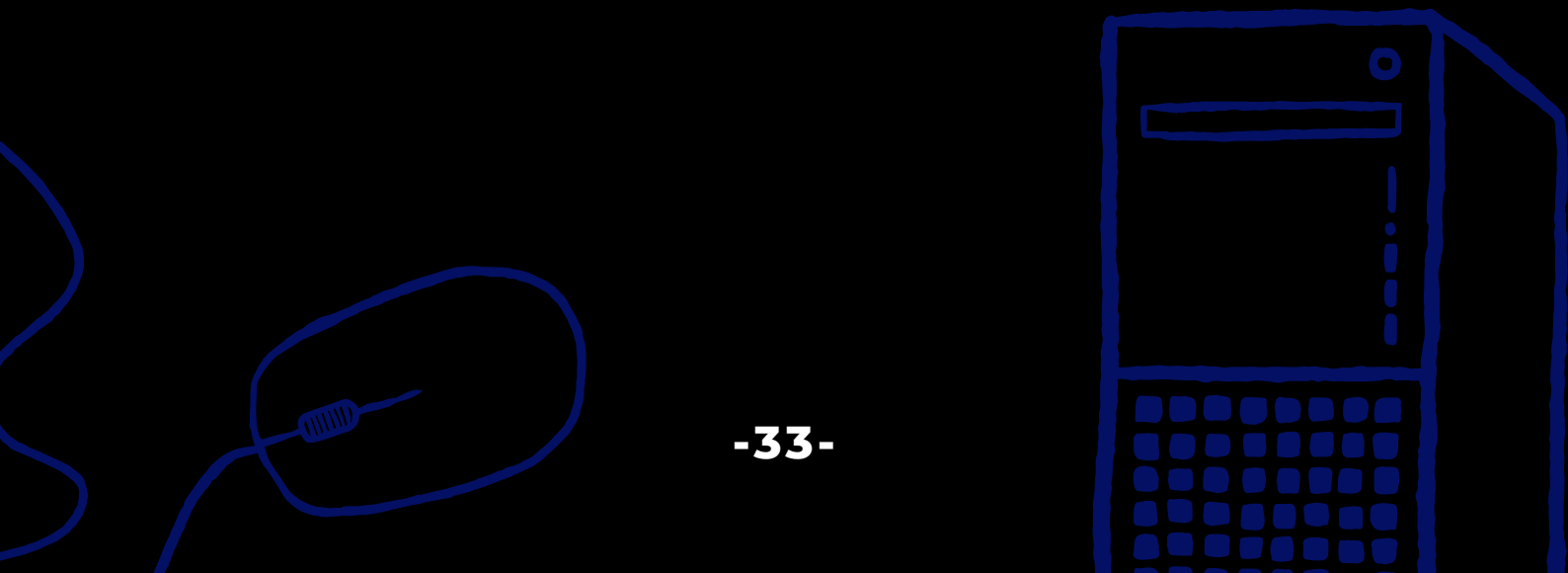
10 + 10 Referral Program

- Both the referring client and the new client receive 10% off their monthly services
- The discount applies every month for as long as both are active clients
- Yes, it requires a bit of tracking, but it's been totally worth it

You don't have to go this route. You can also offer:

- A one-time cash referral bonus
- A thoughtful gift or handwritten thank-you note
- A free bonus service or upgrade

Do what works for your business financially, but do something. The more valuable and attractive your referral incentive, the more likely your clients will be excited to refer you.



BOOKING HIGH VALUE DISCOVERY CALLS

What is a Discovery Call

A discovery call is a 20–30 minute phone or video meeting that allows both you and the potential client to determine if you're a good fit to work together.

Best Tips for a Successful Discovery Call

Set It Up Professionally

Use an appointment scheduler to make scheduling easy and professional.

Recommended tools:

- Dubsado (our preferred choice)
- Acuity
- Calendly

Be Confident and Focus on the Client

Approach the call with confidence and professionalism.

Let the client talk while you actively listen. Your main goal is to uncover the pain points they're experiencing in their business.

Avoid Talking Pricing During the Call

If the client asks about pricing, politely defer by saying something like:

“I’ll be sending over a proposal within the hour that outlines everything for you.”

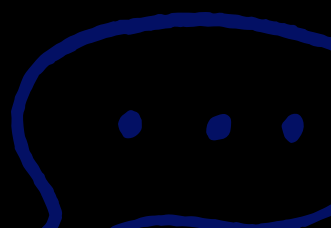
This helps keep the focus on their needs and ensures they receive the full context of your services and pricing.

Follow Up with a Proposal

After the call, send a clear and organized proposal. Include:

- A breakdown of your services
- Clear expectations and deliverables
- Full pricing details

Let the proposal speak for itself once the client has had time to reflect on the conversation.



THINGS TO COVER ON A DISCOVERY CALL

Key Topics to Cover on a Discovery Call

- **Platforms They Want You to Manage**

Clarify which social media or digital platforms they expect you to handle (e.g., Instagram, TikTok, LinkedIn, email marketing, etc.).

- **Current Pain Points in Their Business**

Understand what challenges they're facing and what's not currently working for them.

- **Your Current Onboarding Lead Time**

Let them know how long it typically takes from agreement to full onboarding.

- **Your Onboarding Process.**

Walk them through the steps involved once they decide to move forward with you, including timelines and expectations.

- **When Content Will Actually Go Live**

- Set realistic expectations for when they'll begin to see deliverables published.

- **Contract Length**

Discuss how long your standard contract is (e.g., 3 months, 6 months, ongoing with 30-day notice, etc.).

- **What You Need**

List the things you require to work effectively (e.g., access to accounts, brand assets, point of contact, content approvals, etc.).

- **Cadence of Content Calendars and Revisions**

Explain how often they'll receive content calendars, how far in advance, and how the revision process works.

- **Overview of Your Process**

Give a high-level summary of how you work, your workflow, tools you use, communication style, and what they can expect at each stage.

THINGS TO COVER ON A DISCOVERY CALL

Key Topics to Cover on a Discovery Call

- **Platforms They Want You to Manage**

Clarify which social media or digital platforms they expect you to handle (e.g., Instagram, TikTok, LinkedIn, email marketing, etc.).

- **Current Pain Points in Their Business**

Understand what challenges they're facing and what's not currently working for them.

- **Your Current Onboarding Lead Time**

Let them know how long it typically takes from agreement to full onboarding.

- **Your Onboarding Process.**

Walk them through the steps involved once they decide to move forward with you, including timelines and expectations.

DISCOVERY CALL QUESTIONS

Discovery Call Questions to Ask Your Potential Client

- **Tell us about your brand and what you've done for digital marketing in the past.**

Get background on their business, target audience, and any strategies or platforms they've used before.

- **What pain points are you currently experiencing in your business?**

Identify the challenges they're facing that might be holding them back.

- **What problems have you faced with your social media in the past?**

Uncover frustrations or gaps with previous management, engagement, consistency, or growth.

- **What are a few goals you have for your business that you're looking to achieve this year?**

Understand their vision and how you can help align your services to support it.

- **What other services are you interested in now or possibly in the future?**

Explore opportunities for add-ons or long-term support like email marketing, paid ads, content creation, or branding.

RED FLAGS TO LISTEN FOR

- **Someone Who Is Late to the Call or Constantly Interrupts**

This may indicate a lack of respect for your time and boundaries. It's okay to gently acknowledge time constraints and set the tone for how you work.

- **Someone Who Only Wants to Talk About Pricing**

If the focus is solely on cost, rather than value or strategy, it can signal a misalignment in priorities. Politely steer the conversation back to goals and pain points, and remind them that pricing will be outlined in a detailed proposal after the call.

- **Someone Who Asks When They'll Hit Specific Metrics**

While it's good to be goal-oriented, promising exact results (like follower counts or revenue) is unrealistic. Be honest about what's within your control and focus on strategy and consistency.

- **Someone Who Wants to Be “Completely Hands Off”**

Collaboration is key. If a client expects to hand everything over without input or feedback, it can lead to misalignment and missed expectations. Clarify upfront that a successful partnership requires timely communication and occasional approvals.

- **Someone With No Brand or Content Photography and No Plan to Get One**

Strong visuals are essential for digital marketing. If they have no visual assets and no intention of investing in them, it could limit the effectiveness of your work. This should be discussed early and framed as a foundational need, not an optional extra.

ESTABLISHING YOUR PRICING

Step 1: Determine Your Hourly Rate

Your hourly rate should fall between \$55–\$125/hour, depending on your experience and business structure.

\$55/hour: A solid starting rate once you've completed your training and feel confident in your skills

Increase your rate over time as you gain more experience, invest in tools, or hire team members
Important:

This rate is for internal use only to help you calculate retainer packages. It's not something you share with clients directly.

Don't Forget to Factor In:

- Taxes
- Business tools and software
- Profit margin.

Step 2: Calculate a Retainer Fee Using Your Hourly Rate

Use your hourly rate to build monthly retainers based on the actual time each service requires. For example:

This method works for social media management, email marketing, Facebook/Instagram Ads, and more.

Break down each service into sub-services (e.g., content creation, scheduling, engagement, reporting)

Multiply the estimated hours for each sub-service by your hourly rate to calculate a fair and profitable retainer.

Tip: You can use the same approach for any service you want to offer, just outline the time commitment and tasks involved, then price accordingly.

HOW TO CREATE YOUR PROPOSALS

The Free Way

- Create a PDF template on Canva with all the info you'd include in a proposal.
- Duplicate and edit it for each new client.
- Add or delete sections as needed.
- Save as a PDF and send via email.

Dubsado

- Dubsado is the client management system we use and recommend.
- Create a full proposal template form with sections for each service.
- Add the form to the client portal.
- Remove sections that don't apply.
- Send to the client.

HOW TO CREATE YOUR PROPOSALS

Creating a Proposal in Dubsado

- Create a proposal form template with sections for each service you offer.
- When you're ready, duplicate the template for a new client.
- Edit the proposal by removing any services that don't apply.
- Add any client-specific notes or custom options.
- Attach the proposal to the client's portal or send it directly via email.

CREATING A PROPOSAL IN DUBSADO

- Create a proposal form template with sections for each service you offer.
- When you're ready, duplicate the template for a new client.
- Edit the proposal by removing any services that don't apply.
- Add any client-specific notes or custom options.
- Attach the proposal to the client's portal or send it directly via email.

THE PROPOSAL OUTLINE

Introduction

Appeal to the specific pain points they're experiencing in their business.

Use the insights you gathered during the discovery call to make it personal and relevant.

Services

Break down each proposed service.

Each service should have its own section and pricing. Examples include:

- Social Media Management
- Email Marketing
- Facebook Ads
- Content Photography

Next Steps

Clearly outline how they can move forward or ask questions.

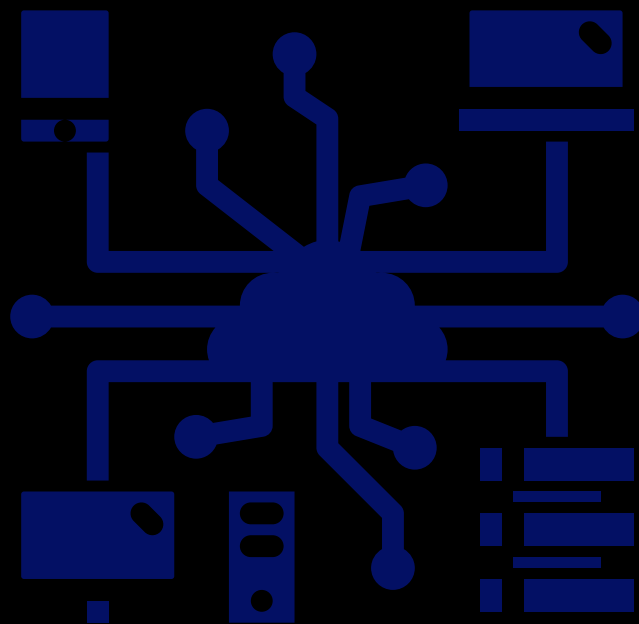
Include the link to your portfolio so they can review your past work.

CREATING A HIGH-CONVERTING PORTFOLIO

A portfolio is like your resume, but more important for the field of work we are in.

Even if you are just starting out, having a high-converting portfolio can make the difference between closing a new client and struggling to sign any clients at all.

Why is a client going to want to work with you?
Because you can prove to them that you know what you're doing.



WHAT TO INCLUDE IN YOUR PORTFOLIO

- Introduction to your company including a mission statement
- Overview of average key metrics
- Client case studies
- Graphic examples your team has created (posts, stories, TikToks)
- Testimonials
- What makes you unique
- Meet the team
- Contact page

HOW TO BUILD A PORTFOLIO IF YOU'RE JUST STARTING

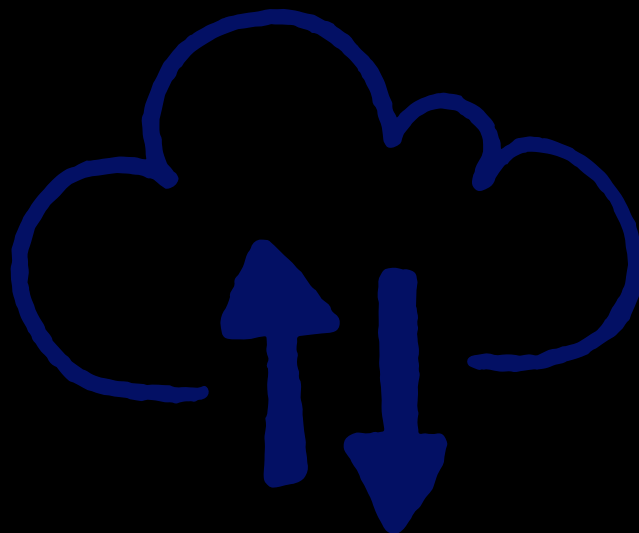
- Introduction to your company, including a mission statement
- Overview of average key metrics
- Use your own account as a case study, and add the potential client as a case study
- Create a feed mockup and give strategic direction
- (Give just enough to show you know what you're doing, but not so much that you're giving away a ton of free work)
- Only customize portfolios when you're new and need to show what you can do
- Graphic examples you have created (posts, stories, TikToks)
- Testimonials, if you have them (even one!)
- What makes you unique
- Contact page

CREATING A HIGH-CONVERTING PORTFOLIO

A portfolio is like your resume, but more important for the field of work we are in.

Even if you are just starting out, having a high-converting portfolio can make the difference between closing a new client and struggling to sign any clients at all.

Why is a client going to want to work with you?
Because you can prove to them that you know what you're doing.



SENDING YOUR PROPOSAL/PORTFOLIO

We include the link to our portfolio in the final section of our proposal.

We send a short but sweet email with a link to their proposal (which includes the link to the portfolio within).

Email Example:

“Hello [Client],

It was great meeting with you earlier! The proposal you requested is complete and can be viewed here.

Please don't hesitate to reach out with any questions, we'd love to get to work with you!”

PROPOSAL FOLLOW UPS

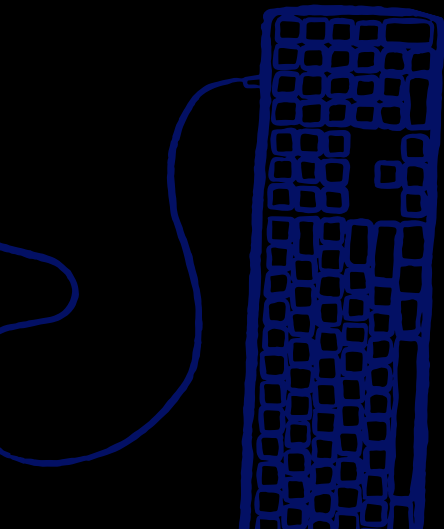
Usually a client will follow up with questions or letting us know they can't invest yet BUT if they don't respond, we send an automated follow up email if they don't respond in 3-4 business days.

"Hello! I hope you are having an incredible day! I wanted to follow up on the proposal we sent over a few days ago.

We'd love to get to work with you so please let me know if there is anything I can clarify.

Best, Jerome"

If we don't hear from them, we will send a final reminder email and let them know that their proposal pricing will expire DATE.



ONBOARDING LEAD TIME

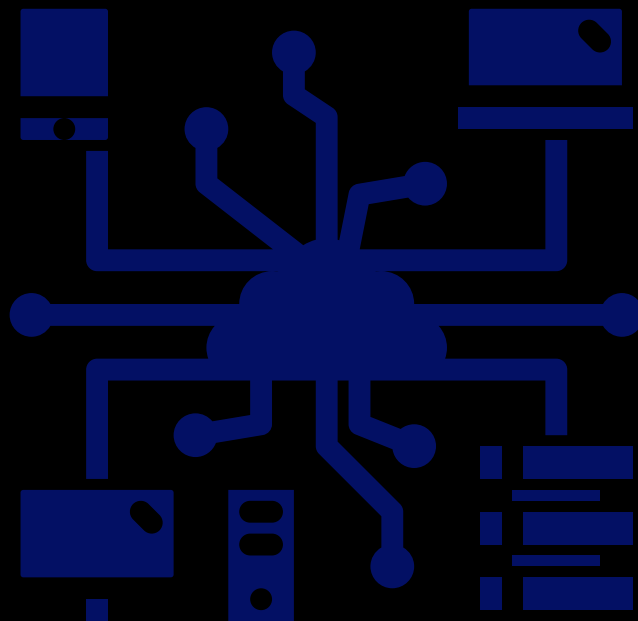
We usually have an onboarding lead time.

Once the proposal is accepted, we will send them the contract to sign and hold their spot on our client roster.

Our lead time can be anywhere from 2–8 weeks and depends on where we are at in our agency.

We make our onboarding lead time VERY clear on the discovery call.

The accepted proposal and contract go hand in hand, then once their onboarding date approaches, we will begin the onboarding process.



CLIENT ONBOARDING

The onboarding process begins.

From onboarding to content going live is usually a full 4 weeks.

Week 1:

- Send onboarding documents
- First invoice due
- Onboarding questionnaire due
- Potentially scheduling a content photography shoot if we are managing (this will push onboarding timeline by at least 1 week)
- Have our onboarding call (COO, strategist, creative director, social media manager, and client)
- Cover any questions we may have from questionnaire
- Schedule social media strategy presentation
- Begin social media strategy development

Week 2:

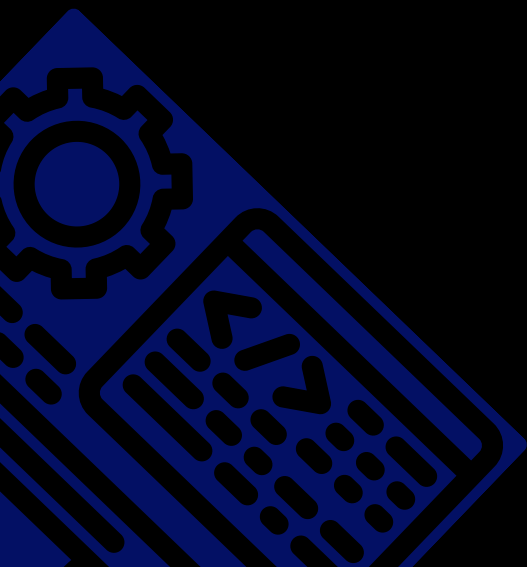
- Social media strategy development
- Shot list developed
- Send new client gift

Week 3:

- Social media strategy presentation and revisions
- Content calendar 1 development OR content shoot

Week 4:

- Content calendar 1 is sent and revisions are made OR edits for photos are delivered, and we begin content calendar development



THE ONBOARDING CALL

This is your client's first experience with the team as a whole, invoke confidence.

Come to the call prepared with questions and LEAD them through the call.

We usually create a Google doc of questions we have to ensure we get everything answered.

- Discuss preferred means of communication:
- Slack channel? Email only? Whatsapp?
- Get logged into their accounts on the call so you can easily get codes if needed.
- You can use LastPass to save your client's passwords (always recommend strong passwords).
- We ALWAYS recommend our clients have two-factor authentication turned ON.

SECURITY TIP: You should also back up your clients' accounts every 3 months during check-ins.

- Schedule the social media strategy presentation.

SOCIAL MEDIA MANAGER ONBOARDING DOCS

The Contract

Again, this should be signed soon after the proposal is accepted and dated to start on their onboarding date.

Legalpreneur has a contract vault where you can purchase one specific to social media management for VERY cheap.

A few small business attorneys have this option! Make sure to include your scope of work, ad hoc content policy, cancellation policy, and means of communication to prevent weekend phone calls.

The Onboarding Questionnaire

This is sent through Dubsado and is for you to ask the questions and gather the info you need to develop their strategy.

The Invoice

This MUST be paid before work begins. This will protect you from working on an account and getting ghosted.

NEW CLIENT GIFT IDEAS

- Branded gift box
- Brightland Oils
- Handwritten card
- Sweets / cookie box
- Lunya sleep mask
- Scented candles
- Wine

SOCIAL MEDIA MANAGER ONBOARDING DOCS

The Contract

Again, this should be signed soon after the proposal is accepted and dated to start on their onboarding date.

Legalpreneur has a contract vault where you can purchase one specific to social media management for VERY cheap.

A few small business attorneys have this option! Make sure to include your scope of work, ad hoc content policy, cancellation policy, and means of communication to prevent weekend phone calls.

The Onboarding Questionnaire

This is sent through Dubsado and is for you to ask the questions and gather the info you need to develop their strategy.

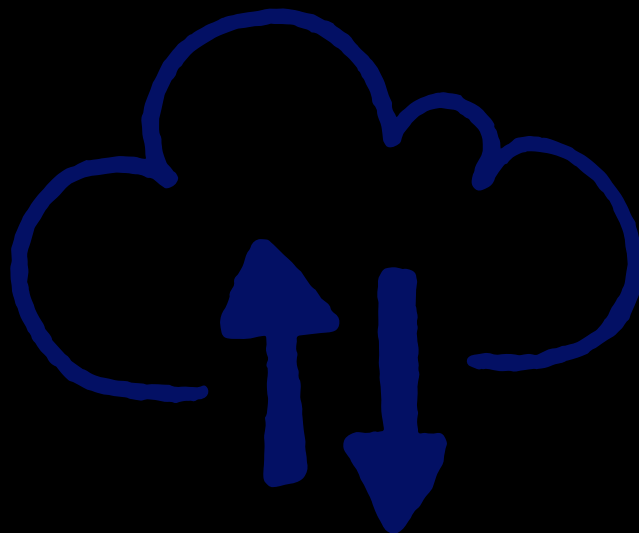
The Invoice

This MUST be paid before work begins. This will protect you from working on an account and getting ghosted.

CLIENT COMMUNICATION

Client Communication Boundaries

- As long as you're working with great clients, most will respect the communication boundaries set in your contract.
- Yes, social media is always on, but you don't have to be.
- Set your available hours and don't respond outside of those.
 - Tip: Use email scheduling if you're working late.



Tools We Use:

- Slack
- Email
- Loom
- WhatsApp (depending on the client's preference)

Best Practices:

- We prefer creating a client-specific Slack channel for quick, easy communication.
- Make sure the means of communication work for both you and the client.
 - Example: One of our clients hates Slack, so we use email only.
-
- Never text your clients.
 - If they do text (they might have your number from the discovery call), respond via email.
- Loom is excellent for content revisions.

CLIENT CHECK IN FORMS

Besides communication around content, approvals, and revisions, we like to have:

- Monthly strategy/brainstorming calls to align and plan for launches, etc.
- These calls help maintain a healthy client relationship, keep everyone on the same page, and give insight into how the client is feeling about their account.

Client Check-In Cadence:

- 3 Months – Check-In Questionnaire
- 5 Months – Contract Re-Up Email
- (We'll share this email template when we talk about raising rates)
- 9 Months – Check-In Questionnaire

CLIENT RETENTION

Besides communication around content, approvals, and revisions, we like to have:

- Monthly strategy/brainstorming calls to align and plan for launches, etc.
- These calls help maintain a healthy client relationship, keep everyone on the same page, and give insight into how the client is feeling about their account.

Client Check-In Cadence:

- 3 Months – Check-In Questionnaire
- 5 Months – Contract Re-Up Email
- (We'll share this email template when we talk about raising rates)
- 9 Months – Check-In Questionnaire

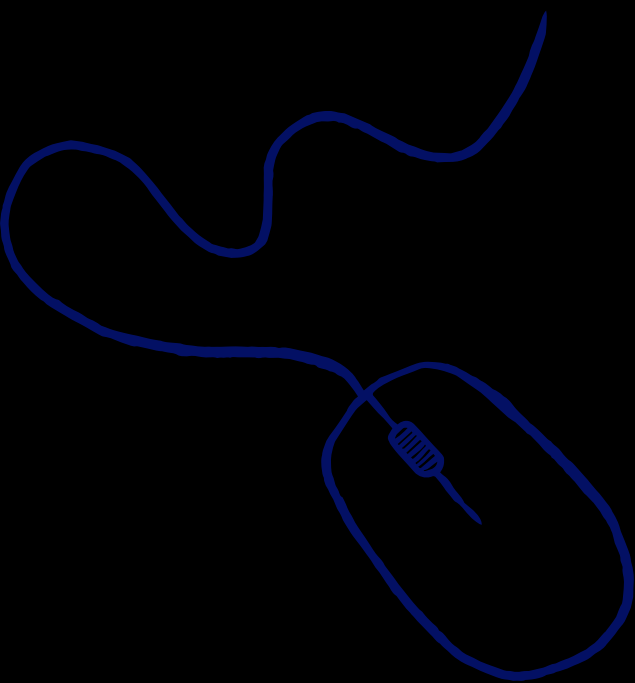
CONTRACT RE-UP

We send this contract re-up email a full 30 days before their contract is set to expire

- Gives them time to plan
- Gives us time to plan
 - Do we need to replace them?
 - Do we need to hire another team member if we have a potential new client in the pipeline and this client stays on?

We often give them a 6-month and 1-year option, especially if we are raising their rate for the next term.

We don't raise their rate every 6 months, usually, this is annual.



RAISING YOUR RATES

Here are some situations when it's the right time to raise your rates:

- When your talent/skill/abilities have increased
- If you've grown in your experience
- You have invested in learning
- You've added more to your team
- You've invested in more robust tools
- If you've been undercharging for years and you are overworked and underpaid
- A client is taking more time than originally estimated
- You were unsure what to charge when you first started
- A client is more needy than you had prepared for
- When a client's contract is up
- We send our price increase email with at least 30 days notice to give our client and us time to prepare
- If they don't want to move forward, then we have a full month to fill their slot on our roster

HOW TO RAISE YOUR PRICES

- Getting to Your Target Retainer Fee
- Use the retainer fee calculator chart
- Develop a step-up program to raise the rates of your current clients
- Make sure that ALL NEW proposals are sent using updated pricing
- Focus on filling your client roster with clients that are truly ready to invest in social media management



A STEP UP PROGRAM

This is if you have current clients that are basically not paying enough.

- First, you need to figure out what is “enough”, aka what is your minimum retainer?

This is different for every agency and depends on your overhead/employees.

By minimum retainer, we don't mean having packages that offer part-time social media management.

This just opens the door to lower budget clients that aren't actually ready for social media management. It's a poor cycle to get into.

- Then you need to decide what clients are worth keeping and who you need to cut ties with.

Decide this based on who you enjoy working with, even if their retainer rate is too low.

- Do they have creative assets?
- Are they communicative?
- Respectful of your time and strategy?

If no, then cut ties and open up this time to get new clients.

If yes, then move them into your step up program.

IMPLEMENTING YOUR STEP UP PROGRAM

If your new minimum retainer is \$270, but most of your clients pay \$100–\$120, you can step them up gradually or all at once.

All at once:

Pro: you can increase your revenue quickly

Con: higher chance of losing a client

Reasons for it:

- New updated pricing
- New package structure (moving them off of part-time SMM)
- New tools or investments you've made (like a course or Sprout Social)

Send the increased pricing email one at a time to limit a potential large hit to your revenue; go in order of which client's contract is up first.

Remember: you can't send a price increase during a contract.

Gradually:

Pro: less chance of losing a client

Con: takes longer to increase revenue

Every 6 months (in line with their contract re-up) increase their rate.

This method works best if you aren't covering a massive retainer discrepancy.

It's just a simple math game.

If you step up the retainer for 3 clients that are currently paying \$1200 and you increase their rate to \$2700, and all of them don't want to move forward, you lose a total of \$3600 from monthly revenue.

BUT if you spend time to replace those clients, and you acquire 3 clients at \$270, you'll replace that lost revenue in less than 2 months. Every month after that, you've added \$450 in revenue that you didn't have before.

GIVE YOURSELF THE POWER

- If you have built a strong foundation with your branding, website, and social presence, then you can position yourself to have the power when moving retainer rates up.
- The mindset of: either their retainer rate increases or I find a client who is ready to invest at a higher price point.
- If you have steady client inquiries, then you can wait for an accepted proposal to send this step-up email.
- If they don't want to move forward, then you have a client to replace them.



- If they don't want to move forward, then you have a client to replace them.
- If they do want to move forward, congrats! You get to grow your agency.
- Make it known in proposals that the onboarding lead time is 2-3 weeks to give you some lead time.
- If the proposal with a new client gets accepted, send the step-up email to the existing client right away.
- If they both want to move forward and you have no room to accommodate the growth, you have 2 weeks to hire someone and an additional week to onboard them with your systems before bringing the new client on.



LIMITING BELIEFS

- “If I raise my prices, I’m going to lose all my clients.”

So what if you do? Your goal is to build a high-value client roster that values and is ready for social media management.

- “I don’t have my degree in this and therefore I can’t charge more.”

This is BS. This is not surgery; this is digital marketing. Experience and work ethic are more important than a degree.

- “No high-value clients reach out to me, so I’m stuck with the clients I have.”

This is a mindset of way too many social media managers. Your business is up to you and the changes you make for it.

Ask yourself: What kind of agency do you want to build?

LIMITING BELIEFS

- “If I raise my prices, I’m going to lose all my clients.”

So what if you do? Your goal is to build a high-value client roster that values and is ready for social media management.

- “I don’t have my degree in this and therefore I can’t charge more.”

This is BS. This is not surgery; this is digital marketing. Experience and work ethic are more important than a degree.

- “No high-value clients reach out to me, so I’m stuck with the clients I have.”

This is a mindset of way too many social media managers. Your business is up to you and the changes you make for it.

Ask yourself: What kind of agency do you want to build?

WHAT IF YOU LOSE A CLIENT?

- Although it might not feel like it, losing a client is not the worst thing that can happen.
- If you lose a client because you thoughtfully increased your rate, that client wasn't a good fit to begin with.
- It's better to spend time building a high-value client roster than trying to force it with low-value clients.

Let's break it down:

- Making \$10K/month as a social media manager...
- 10 clients paying \$1,000/month
- Your work will feel rushed, chaotic, and overwhelming
- You'll likely deal with low-budget clients
- Many won't have quality content (photography or videography)

- You'll face constant scope creep and boundary-pushing
- High client turnover, low results

Your portfolio and schedule both suffer or:

- 4 clients paying \$2,700/month
- Your work feels intentional and strategic
- You're working with serious, high-value clients
- They often have professional content ready
- They respect your time, process, and boundaries
- Low turnover, strong results
- Your portfolio grows, and more inquiries roll in
- Losing a misaligned client is simply clearing space for the right one.
- You're building a business, not chasing approval.

WHAT IF YOU LOSE A CLIENT?

- Although it might not feel like it, losing a client is not the worst thing that can happen.
- If you lose a client because you thoughtfully increased your rate, that client wasn't a good fit to begin with.
- It's better to spend time building a high-value client roster than trying to force it with low-value clients.

Let's break it down:

- Making \$10K/month as a social media manager...
- 10 clients paying \$1,000/month
- Your work will feel rushed, chaotic, and overwhelming
- You'll likely deal with low-budget clients
- Many won't have quality content (photography or videography)

CLIENT BREAKUPS - IT'S THEM

Sometimes, you realize a client relationship isn't working out the way you hoped. **Here are a few signs it's time to let go:**

- The client is far needier than expected
- The client is costing you more time, energy, or resources than they're paying for
- You simply don't enjoy working with them and would rather replace them

When this happens, you typically have two options:

- Option 1: End the Contract Early
- Only do this if your contract includes a termination clause allowing you to end early
- Always act with more kindness than necessary, especially in business
- Give at least 30 days' notice
- Send a polite and clear email explaining why the partnership is no longer a good fit and what the next steps are

(Tip: It's often best to do this shortly after they've paid their latest invoice)

CLIENT BREAKUPS, IT'S YOU THIS TIME

Sometimes, losing a client isn't about them, it's about where you are in your growth.

And that's okay. This is all part of the learning process.

There will be clients you lose simply because you weren't yet ready for that level of responsibility or complexity.

It could be due to:

- Mistakes
- Poor results
- Mismanaged systems
- Gaps in communication or experience

Yes, it sucks. But don't beat yourself up. Take it as a powerful lesson.

Each misstep is showing you where to grow, what to improve, and how to prepare better for the next level of clients.

This is not failure. This is progress disguised as pain.

CLIENT OFFBOARDING, ENDING THINGS SMOOTHLY

Whether a client chooses not to renew or you've decided not to re-up their contract, a clear and respectful offboarding process is essential. Thankfully, it can be simple, quick, and effective.

- Fulfill the Contract Fully
- Make sure all deliverables and content are completed up to the contract end date.
- Example: If their final invoice was paid on January 10th, make sure they receive content through February 10th.
- Set Clear Expectations

1. **Let them know that on the final day:**

You will disconnect any scheduling or reporting software tied to their accounts

You will remove yourself from their social media platforms and tools

They have X number of days to download and move any files from shared drives (e.g., Dropbox or Google Drive)

2. File Cleanup

After that time, files will be deleted to free up space and close the project officially.

This system not only keeps things professional but also protects your time, space, and energy.

Ending on a smooth note leaves room for referrals, future opportunities, and mutual respect.

Would you like this formatted as part of an offboarding checklist or client goodbye email template?





3

CHAPTER

CHAPTER THREE INCLUDES SOCIAL MEDIA STRATEGY SYSTEM, THE STRATEGY DOCUMENT, ONGOING STRATEGY AND OPTIMIZATION CREATING STRATEGY, BACKED CONTENT AND PRESENTING THE STRATEGY TO YOUR CLIENT

YACCOLLECTIVE.COM

SOCIAL MEDIA STRATEGY SYSTEM

After our onboarding call, we begin working on the client's social media strategy.

As an agency, this process is led by our social media manager and strategist, who tag-teams the creation of the strategy document.

If you're working as a freelancer, you'll create this document on your own.

We'll go over how our agency structures this process in Chapter 6.

The social media strategy development typically takes 1–2 weeks.

After it's complete, we present the strategy to the client via screen share on Google Meet or Zoom.

This meeting is already scheduled during the onboarding call.

SOCIAL MEDIA STRATEGY DEVELOPMENT

A social media strategy document is a detailed plan that guides how you show up online.

It brings together your goals, audience insights, content approach, and platform tactics, all in one place.

It can feel like a lot at first, but it's meant to give you (and your client, if applicable) clarity and direction.



THE INTRO

A good strategy document template should be easy to customize to fit your (or your client's) branding.

This can be as simple as adjusting a few colors, swapping in brand photos, and updating fonts to reflect the overall visual identity.

The welcome or intro page typically stays the same, with minor edits based on which platforms are being managed.

The Table of Contents is usually finalized last, once all sections are complete, since page numbers may shift depending on how many platforms or content areas are included.

This flexible approach helps ensure the document feels personalized, professional, and aligned with the brand it represents.

WHO WE ARE

The "Who We Are" section of a strategy document is typically built using information gathered from the brand's materials, such as a questionnaire, website, social platforms, or onboarding conversations.

- **Mission & Offerings**

These are often found directly on the brand's website or in their introductory documents. They help clarify what the business does and why it exists.

- **Tone of Voice**

This is usually expanded by reviewing how the brand communicates, through social media captions, website copy, newsletters, and any other public-facing content. The tone should match the personality of the brand (e.g., bold, nurturing, playful, elegant).

- **Signature Phrases**

Many brands have consistent phrases or messaging that appear frequently. If the brand were to trademark a signature saying or tagline, what would it be?

Example: Nike = "Just Do It."

- **Core Values**

These may be gathered from direct questions, initial client calls, or by observing how the brand shows up.

Even if values aren't explicitly stated, they can often be inferred from how the brand operates, what it prioritizes, and how it communicates.

This section sets the tone for the rest of the strategy and helps ensure the social media content stays aligned with the heart of the brand.

BRAND STORY

People don't just buy products, they buy solutions to their problems. A strong brand story starts by focusing on the solution first.

Begin by identifying what product or service the brand offers, and more importantly, why someone would choose to buy it.

What problem is the brand solving for its audience? Once the main problem/solution is clear, explore how the brand's approach is different from others in the same space.

To do this:

- Look at the brand's direct competitors (often listed in onboarding materials or found through research)
- Analyze how this brand stands out, whether through values, experience, quality, pricing, tone, or community

Ask:

- What makes their offering unique?
- What do they do better or differently?
- Why would someone choose them over a competitor?

This section is about positioning, telling the story of the brand in a way that connects emotionally with the audience while clearly highlighting its strengths and point of difference.

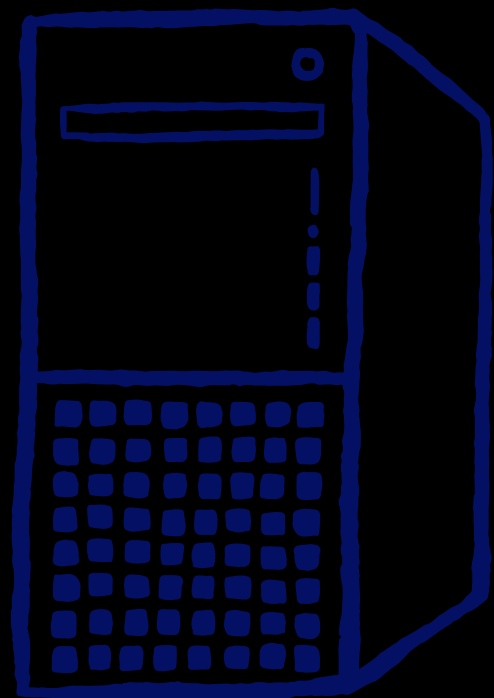
FOLLOWER PAIN POINTS

This is where we start connecting the brand's mission to social media strategy.

Here, we expand on the earlier problem/solution concept by breaking it down into more specific categories, especially from the follower or audience perspective.

The key is to identify:

- What is the audience struggling with?
- What emotions are tied to those struggles?
- What kind of transformation is the brand offering?



Remember: People don't buy the product or service, they buy the solution it provides.

Your content should:

- Speak directly to the pain points of your audience
- Highlight the transformation your brand offers
- Use emotion to connect, inspire action, and build trust

This emotional insight becomes foundational to the messaging, visuals, and tone used across platforms. It's the heart of content that converts.

SOCIAL POSITIONING

This section helps visually define where the brand stands in the market compared to its competitors.

Using the brand's unique value proposition and an understanding of its competitors, we create a simple positioning map that shows what sets the brand apart.

To build this:

- Identify two key qualities that describe the brand's approach or offering (e.g., premium vs. affordable, playful vs. professional)
- Place those qualities on a two-axis graph, with their opposites on the other ends of the axes

Then:

- Plot the brand and its competitors based on these qualities
- Use this visual to better understand how the brand is perceived, and how to communicate that difference clearly on social media

This tool is especially helpful when developing tone, visuals, and content direction that reinforce the brand's distinct place in the market.

BRAND COLLABORATIONS

This section outlines the types of brands, influencers, or creators the brand could potentially collaborate with in the future.

These are meant to serve as inspirational guidelines rather than a fixed list of confirmed partnerships. The focus is on identifying:

- The qualities and characteristics that make for strong alignment
- The aesthetic, values, or audience overlap that would make a collaboration feel natural and strategic

Even if some suggestions feel like a big reach, they still help define:

- The style of brand associations we aim for
- The vibe and credibility we want the brand to be seen alongside

This list is curated through:

- Reviewing who the brand follows
- Suggested accounts from social media platforms
- Influencers or brands with a similar tone, mission, or audience

Ultimately, it helps guide future partnership decisions by keeping them intentional and aligned with the brand's identity.

SOCIAL MEDIA BREAKDOWN

This page outlines all of the social media platforms managed by Yac Collective, with a focus on the specific platforms we'll be handling for the client.

It provides a quick, high-level overview of each platform and its strengths, helping clarify why certain platforms were chosen for the brand's goals.

This section is typically pre-filled and only requires highlighting the relevant platforms for each client.

It also serves as a helpful guide to understanding the unique benefits and audience behavior on each platform (e.g., Instagram for visual storytelling, TikTok for viral reach, LinkedIn for professional credibility, etc.).

It's a simple but essential page that sets the tone for the content approach across platforms.

SOCIAL MEDIA BREAKDOWN

This section includes detailed pages for each of the platforms being managed for the client.

These pages outline the purpose, strengths, and strategy for each selected platform.

If you're using a template, you can simply remove any platforms that are not relevant to the client's scope of work.

This breakdown is especially useful when clients ask, **“Which platforms should I be on?”**

It provides clarity on where their audience is most active and where their content is most likely to perform well.

HASHTAG & KEYWORD ANALYSIS

This section begins with an initial brainstorm of relevant keywords and phrases that a potential customer or client might search for, either on Google or social media platforms.

Once you have a list, research each one on social media to evaluate:

- Number of hits or uses
- Suggested/related hashtags that appear alongside
- What competitors are using in their posts
- Tools like Later or other scheduling platforms can also help generate hashtag ideas

Be sure to double-check each hashtag or keyword directly on the platform to make sure it's:

- Still active
- Aligned with the brand
- Not being used in a misleading or unrelated context

This ensures that every hashtag and keyword is strategic, relevant, and likely to drive discoverability.

TARGET AUDIENCE

This is where we define a target persona, a detailed profile of the brand's ideal customer or follower, based on available insights.

It's important to remember that this is just a target, not a reflection of every potential buyer or audience member. However, having a clear persona helps guide voice, content, and strategy with more focus.

Tips for Building the Persona:

- Use information from brand questionnaires, conversations, or existing content to understand who the brand is trying to reach.
- Create a Pinterest board (or moodboard) that reflects the aesthetic, lifestyle, and interests of this ideal audience member.
- Use Pinterest suggestions or similar tools to gather more visual and thematic inspiration.
- Think about real people in your life who fit this profile to make the persona feel authentic and relatable.
- Identify 4–6 content pillars based on this persona's top interests, these will help structure content themes that resonate with the audience.

This persona becomes the foundation for crafting messages that speak directly to the brand's ideal community.

CONTENT PILLARS

Each content pillar represents a core theme or category that guides what the brand shares on social media. These pillars help ensure the content stays focused, consistent, and aligned with the target audience.

Each pillar should have its own dedicated space to explore:

- What types of content fall under this pillar (e.g., tips, testimonials, tutorials, lifestyle)
- Why it matters to the audience, including how it connects to their interests, needs, or pain points
- How it supports the brand's mission and marketing goals

This section acts as the bridge between the target persona and the brand's content strategy, making sure every piece of content speaks to the right people in the right way.

AUDIENCE JOURNEY

Using the target persona you've developed, this section maps out the step-by-step journey your ideal audience member takes, from not knowing the brand to becoming a loyal customer or advocate.

Step 1: The Problem

Start by identifying the core problem or pain point the audience is experiencing. What challenge or need drives their interest in a solution?

Step 2: Awareness

How does this person discover the brand through organic social media? Think reels, shares, hashtags, community engagement, or influencer features.

Step 3: Curiosity & Research

Once they're aware, how do they explore more? This could involve browsing the brand's profile, saving posts, watching highlights, or visiting the website.

Step 4: Trust Building

This stage includes the content that builds credibility, testimonials, behind-the-scenes, education, or storytelling that helps the audience feel connected and confident.

Step 5: Conversion

This is the desired action: making a purchase, booking a service, joining a waitlist, or signing up for an email. Define the client's main social goal here.

Step 6: Loyalty & Advocacy

After conversion, how does the brand turn buyers into repeat customers and enthusiastic sharers? This includes community engagement, UGC encouragement, shoutouts, and continued value.

This framework ensures your content and strategy walk your audience intentionally through every stage, from curiosity to brand love.

SMART GOALS

SMART goals are:

- **Specific** – Clearly defined outcomes
- **Measurable** – Trackable progress or success indicators
- **Attainable** – Realistic within current resources and growth rate
- **Relevant** – Aligned with the brand's overall vision and objectives
- **Timely** – Bound to a clear timeframe

Use this section to outline unique, goal-driven milestones at the 3-month, 6-month, 9-month, and 12-month marks.

These can be based on:

- Current metrics (followers, engagement, reach, website clicks)
- Industry averages
- Client-specific objectives, such as collaborations, campaigns, or community-building efforts

Including both quantitative goals (e.g., grow followers by 20%) and qualitative goals (e.g., increase brand trust through weekly storytelling content) gives a full picture of success.

This roadmap keeps strategy aligned, accountable, and progressive.

THE BIO + AESTHETIC

This is where the visual and profile transformation begins.

For the bio audit, it's important to ensure the profile is:

- Clear and easy to read
- Using strong keywords for searchability
- Includes a functional and simple link (e.g. Linktree or direct website link)
- Has relevant pinned posts
- Features well-organized highlights that match the brand look and offer helpful info

After auditing, suggestions are shared and discussed during the strategy presentation call.

For the aesthetic, we begin shaping the visual style using mock-ups from the first content calendar. This provides the client with a preview of how the feed will look moving forward.

These visuals are built using custom templates tailored to the brand's guidelines, ensuring a cohesive, professional, and appealing presence right from the start.

SOCIAL MEDIA STRATEGY PRESENTATION

Be prepared for this presentation to take a full hour. This is your opportunity to walk the client through the strategy and set the tone for collaboration going forward.

Remember:

- You are the expert. Approach the presentation with confidence and clarity.
- The client may request some revisions, but these should be minor, more related to brand-specific preferences (like tone or visual direction) rather than the overall strategy.

The goal of the presentation is to:

- Explain the strategy clearly
- Address questions in real time
- Make adjustments on the spot if needed
- Get the strategy approved so content development can begin right after

Once the strategy is approved, you'll begin building their first content calendar.

ONGOING STRATEGY AND OPTIMIZATION

Creating a social media strategy isn't just a one-time task, it's something that should be used, reviewed, and optimized regularly throughout your working relationship with the client.

Weekly Strategy Updates

- These should be discussed in internal team calls or, if you're a freelancer, added to your weekly workflow.
- Use this time to review industry updates (e.g., from Instagram's Adam Mosseri, platforms like Later, or current social trends).
- Pay attention to new audio trends, design styles, and formats that could improve performance.

Monthly Internal Strategy Meetings

- Analyze the client's monthly report.
- Look at what's performing well and identify areas to test and improve.
- Review new opportunities, potential campaign ideas, or shifts in audience behavior.

Monthly External Client Meetings

- These meetings include the strategist, social media manager, and the client.
- Use this time to prepare for any launches, promotions, or seasonal campaigns.
- Revisit the campaign timeline and make adjustments based on current performance.
- Review analytics and discuss how to respond to any negative trends or unexpected results.

We recommend refreshing a client's full strategy annually to stay aligned with their evolving goals, brand updates, and market changes.

This keeps the strategy effective, focused, and forward-thinking.

LEVELS OF STRATEGY

There are different levels of strategy support you can offer a client, and each may be suitable at different stages of your business.

Basic Strategy Support

- This typically involves monthly reporting using simple scheduling software like Later or Metricool.
- It's ideal for early-stage freelancers or smaller client retainers.

Advanced Strategy Support

- Uses more in-depth analysis tools such as Sprout Social or Hootsuite Analytics.
- Provides weekly or monthly reports with platform-level insights.
- Begins incorporating goal tracking and performance trends over time.

Intensive Strategy Support

- Involves a deeper dive into analytics with post-by-post performance analysis.
- Allows for highly detailed monthly breakdowns and recommendations.
- This level of support usually requires a dedicated strategy team or more time capacity.

If you have been a freelancer for a while and you're wanting to charge a premium rate, this more advanced strategy offering would be a good thing to implement.

THE INTENSE STRATEGY OFFERING

The Intense Strategy level is a premium service we now include for all clients in our agency. However, it took us time to build this system, so don't feel pressured to implement it immediately if you're a freelancer.

That said, this level of support is a great option if you're a freelancer looking to work with just a few higher-paying or more intensive clients.

What's included in this tier:

- Meeting notes after each strategy or review session
- General updates to content pillars as the brand evolves
- Deep performance analysis for each platform, going beyond surface metrics to understand content effectiveness and trends

This offering adds substantial value and allows for a more strategic, collaborative, and data-informed client relationship.

THE OVERALL MARKETING FUNNEL

It's important to remember that organic social media is just one part of a larger marketing funnel.

While organic content is highly effective for building brand awareness, engaging your audience, and establishing trust, it's usually not enough on its own to drive conversions.

Research shows that it takes an average of 10–12 touchpoints for a potential customer to convert.

Relying entirely on organic social media to deliver all of these interactions is both difficult and limiting.

That's why it's crucial to integrate social content into a broader marketing strategy, one that may include email campaigns, paid advertising, SEO, lead magnets, events, and other customer engagement tactics to fully support the conversion journey.

THE SOCIAL MEDIA MARKETING FUNNEL

The social media marketing funnel is a subset of the broader marketing funnel, designed to guide potential customers from awareness to conversion using strategic content at every stage.

Each level of the funnel supports a different goal and will reflect different types of metrics. It's important to understand that:

- Top-of-funnel (TOFU) content is designed to attract the widest audience. This includes content like entertaining Reels, viral posts, relatable memes, or inspirational quotes. These usually have the highest engagement because they are broad and widely shareable.
- As users move further down the funnel, towards consideration and conversion, the content becomes more focused and niche, targeting those who are actively interested. Engagement may decrease in volume but increase in quality and intent.

By strategically aligning your social media content with different parts of the funnel, you ensure you're nurturing your audience at every stage of the buyer's journey.

HOW TO CREATE A SOCIAL MEDIA CAMPAIGN

A social media campaign is a focused marketing effort that uses various platforms and content formats to engage with a target audience and achieve a specific business goal.

Think of it as guiding your target persona through a marketing funnel, with the end goal being a meaningful conversion, whether that's course sign-ups, product sales, lead generation, or brand awareness.

A strong campaign answers the question:

“How are we using social media to reach this specific goal?”

For example:

If your client is launching a new online course and their goal is to get 100 sign-ups, your campaign will include a mix of teaser content, value-driven posts, testimonials, countdowns, and clear calls-to-action, distributed across the platforms their audience uses most.

As a social media strategist or manager, your role is not just to grow followers, it's to use social media intentionally to help your client reach their business objectives.

Understanding how different content types move a user from awareness to action is the key to creating successful campaigns.

HOW TO STAY UP TO DATE ON TRENDS

Keeping up with trends and platform updates doesn't have to be overwhelming. A simple, intentional approach can go a long way in helping you stay relevant and strategic.

Staying on Top of Trends

Trends are constantly evolving, especially on platforms like TikTok, where new sounds, formats, and challenges emerge rapidly.

Here's how to manage it:

- **Start with TikTok:** Trends often appear here first, so it's a good platform to monitor regularly.
- **Trust your instinct:** Use your creativity and observation, sometimes trends come from just keeping your "eye" on what's gaining traction.
- **Create trends, don't just follow:** While jumping on trends can be beneficial, always prioritize originality. Consistently following trends can make your brand feel reactive rather than strategic.
- **Stay on-brand:** Not every trend is meant for every client. Only incorporate those that align with your client's voice, goals, and audience.

Staying Informed on Platform Updates
Understanding changes to the platforms themselves is just as important as following content trends.

Here's a reliable process:

- **Follow key sources:**

Later Blog for regular insights and industry news

Adam Mosseri (Instagram CEO) on Instagram for firsthand platform updates

- **When an update drops:**

Research it — Understand what the change is and how it impacts users/brands

Inform your clients — Send a short update if it affects their strategy

Test it out — Experiment with the new feature and evaluate its impact (e.g., Threads, Reels features, algorithm shifts)



CHAPTER 4

CHAPTER FOUR OUTLINES THE ENTIRE CONTENT CREATION WORKFLOW—FROM DEVELOPING THE CONTENT CALENDAR AND DESIGNING PLATFORM-SPECIFIC POSTS TO SCHEDULING, INTERNAL AND EXTERNAL REVIEWS, AND FINALLY PUBLISHING. IT ALSO COVERS COMMUNITY ENGAGEMENT STRATEGIES AND HOW WE USE SCHEDULING PLATFORMS TO STREAMLINE EXECUTION.

YACCOLLECTIVE.COM

CONTENT CREATION SYSTEM

We create content calendars bi-weekly with a one week buffer to give our clients a week to send back revisions

Find a cadence that works for you and your client (this may be bi-weekly or monthly)

- Content ideation

Strategy backed content ideas in a Google doc

- Design

Design the Instagram grid and then the content (graphics, covers, pins etc)

- Copywriting

Write the copy

- Revisions process

Send content to clients for approval and make revisions

- Schedule and go live!

Schedule content

CONTENT SCHEDULING TOOLS

We use Later scheduling.

There are a few scheduling tools out there so find the one that works for you!

Later, Notion, Buffer, Planoly, Sprout, Hopper... We used Planoly the first few years and made the switch to Later in 2021 because it's more robust and we had a few hiccups with Planoly.

Later schedules for:

- Instagram
- Facebook
- Pinterest
- TikTok
- Twitter
- LinkedIn

Your scheduling tool will be one of the bigger investments you make, but it's worth it!

You can turn off auto-posting and post everything manually if that's your thing, but it's important to have a central location for all the client's content.

CONTENT CALENDAR CADENCE

The more frequently a content calendar is sent, the more communicative your client needs to be.

The less frequently a calendar is sent, the more stable and consistent your client must be.

For example, this cadence won't work well for a product-based business that sells out quickly.

It's also harder to include fresh trends when you're creating content far in advance.

90% of our clients have a bi-weekly content calendar.

If content is going live on April 1st, the content calendar should be sent by March 25th so there's one week for the revision process.

This means content is being developed the week of March 18th.

Find a cadence that works for you!

If you're a freelancer, it may take some time to get clients on a good schedule so that you're not rushing to create all content in the same week.

You can bulk up 1 or 2 of the content calendars by adding additional content to push them forward a week.

GRID ORGANIZATION / DESIGN

While strong content is the priority, having a cohesive and branded Instagram feed helps visually represent the brand well.

Use Canva to plan out your grid flow before designing.

Here's a quick method:

- Screenshot the last row of scheduled content using your scheduler's preview link.
- Upload that screenshot into Canva.
- Add squares on top to simulate new posts.
- Play with colors, visuals, and photos to find the right aesthetic flow.
- Align your grid mock-up with your content ideation doc, ensuring each square reflects the post and its date.

This makes it easy to maintain both design consistency and strategic purpose.

CONTENT REVIEWS – INTERNAL

This applies if you're running an agency. Internal review ensures a second set of eyes approves content for feed flow, copy, and overall quality before it's sent to the client.

Once the content calendar is complete, it should be submitted to the person responsible for internal review, this could be you (if your team is small) or someone with a keen eye for detail and design.

The process:

- Submit content calendar
- Internal review
- Edits made
- Final version sent to client

Internal content reviews are typically used for new clients and new team members, usually for the first 4 rounds of content, or longer if needed. After this, the social media manager can send content directly to the client.

CONTENT REVIEWS – EXTERNAL

We create one ongoing email thread where all client content is shared consistently to keep things streamlined and easy to follow.

In this email, we include:

- A content calendar preview link (we use Later). This allows clients to click on each post to view the copy and scheduled time. The preview displays all scheduled feed posts and Reels.
-
- Stories and TikToks are shared via Dropbox folders.
- Pinterest Pins are sent in a PDF document (you can use a template or Canva with captions in the comments section).

We ask clients to review and send back any revisions within 4 days, so we have days 5–7 to implement changes. Always include the revision deadline in bold to ensure clarity.

If revisions are not received on time, content is paused. We never post content that has not been approved.

THE REVISIONS PROCESS

We give both our clients and ourselves one week to review content and make final edits. Expect more edits at the beginning of the relationship, as everyone is still getting into the flow, this is totally normal.

Tip: Ask your client to use Loom to record their feedback!

Loom allows them to screen record while reviewing the content, making the process quick and clear. We also use Loom internally when sending revisions to each other before sharing with the client.

SCHEDULING CONTENT

Most content can be automatically scheduled to go live using a scheduling tool, as long as the client has a business account.

Some account types and certain content formats still need to be posted manually.

We still organize everything in Later, even content that needs manual posting. This way, everything is in one place, and we receive reminders when it's time to manually post.

We schedule all feed content (Reels and posts) before sending to the client for revisions. Everything else is scheduled after client feedback is received and revisions are made.

COMMUNITY ENGAGEMENT STRATEGY

We recommend spending 20–30 minutes per day on community engagement for your clients (Monday to Friday).

Inbound Engagement (on your client's account):

- Respond to all comments with authentic, human replies.
- Repost appropriate tagged stories and user-generated content.
- Reply to direct messages (if applicable).

Outbound Engagement (to attract new followers):

This involves engaging with other accounts to bring attention to your client's page.

We use a tiered strategy:

- **Tier 1:** Accounts that share 1–2 of your client’s values. Like and comment on 3–5 of their posts. Aim to save 5+ of these accounts to your Tier 1 Instagram folder daily.
- **Tier 2:** Accounts that could directly benefit from your client’s product/service. Engage by commenting thoughtful questions and sparking conversation.

Save at least 3 of these to your Tier 2 folder daily.

- **Tier 3:** Accounts that share most or all of your client’s values, especially if they’ve already engaged with your client’s page. These go into your Tier 3 folder to build deeper, ongoing

COMMUNITY ENGAGEMENT STRATEGY

We recommend spending 20–30 minutes per day on community engagement for your clients (Monday to Friday).

Inbound Engagement (on your client's account):

- Respond to all comments with authentic, human replies.
- Repost appropriate tagged stories and user-generated content.
- Reply to direct messages (if applicable).

Outbound Engagement (to attract new followers):

This involves engaging with other accounts to bring attention to your client's page.



5

CHAPTER

CHAPTER FIVE COVERS HOW TO TRACK AND IMPROVE PERFORMANCE ON SOCIAL MEDIA USING ANALYTICS TOOLS. IT EXPLAINS HOW TO USE A REPORTING TEMPLATE, WHAT KEY METRICS MEAN, HOW TO TEST CONTENT ORGANICALLY, FIX POOR RESULTS, AND UNDERSTAND EXTERNAL FACTORS THAT AFFECT PERFORMANCE.

YACCOLLECTIVE.COM

OUR STRATEGY DEPARTMENT

As a freelance social media manager, you'll be creating reports and analyzing data as well as creating content etc.

If you're wanting to build an agency, you may grow a strategy department.

We have strategists on our team dedicated to the strategy, reporting, and optimization of client's content.

Each strategist has about 10–15 clients under them that they:

- Stay up to date on trends, changes, and updates
- Create social media strategies alongside the social media manager
- Create analytic reports for clients
- Come up with testing ideas
- Help the social media manager implement the learnings from the analytic reports with monthly internal calls
- Answer client questions regarding key metrics on monthly client calls

Each client has a social media manager, creative director, and a strategist.

Social media managers can handle about 4 full time social media management clients.

THE REPORTING SYSTEM

Reporting goes way beyond creating an analytic report and sending it off to clients.

The reporting system and strategy system are intertwined; you need one for the other.

You need to:

- Gather the metrics
- Analyze the metrics
- Implement the learnings

Ask yourself:

- What is going well?
- What is not going well?

Anyone can gather metrics using an analytic tool, a great social media manager knows how to analyze them.

It's what you do with the info that matters. We send analytic reports to our clients monthly and review key points on their monthly call. Internally, we use this data much more frequently.

Now that we have a larger roster of clients, reports are sent at different times throughout the month. If you're a freelancer, you can choose to spread them out or knock them all out at once.

ANALYTIC TOOLS – WHERE TO FIND THE METRICS

Your scheduling platform should offer a look at analytics. Depending on the tool you use, the analytics will be more or less advanced.

We use Later for scheduling and invested in Sprout Social specifically for in-depth analytics.

Use the tool that aligns with your retainer rate and experience.

Example: Investing in Sprout Social when I was just starting out would've been overkill, and I wouldn't have even known how to use it properly.

Creating an analytics report is actually quite simple. Reading the analytics and using that data is what makes an amazing social media strategist.

(We'll go over this next.)

METRICS AND WHAT THEY MEAN

- **Reach**

How many people are seeing the content.

→ Tied to top of funnel marketing (brand awareness)

- **Growth**

How quickly the account is growing.

→ A “good” growth rate is around 1–3% monthly for Instagram (varies by size).

→ Also aligned with top of funnel efforts.

- **Engagement**

Measures how many people are liking, commenting, or sharing a post.

→ Typically shown as an engagement rate (%).

→ Tied to the middle of the funnel (nurturing and connection).

- **Conversions**

Doesn't always mean sales, can include profile link clicks, website visits, etc.

→ Aligned with the bottom of the funnel (conversion and action).

THE REPORTING TEMPLATE

As a social media manager, it's important not only to create content but also to track and report what's working and what's not.

We provide our clients with monthly analytics reports in PDF format that include:

- Key takeaways
- Metrics overview
- Learnings from the past month

Important Metrics to Include:

- Followers
- Engagement
- Reach
- Website Clicks
- Profile Views
- Growth Rate

We grab screenshots from our reporting tool and add them into the document.

We really only pull the data our clients care about, but the reports we create are primarily for us.

It's easy to get stuck in the cycle of creating content and generating reports just to send off to clients.

But are we really reading them?

Are we analyzing the reports and using them to inform our content?

THAT is what makes a phenomenal social media manager.

REPORTING AND THE INTENSE STRATEGY OFFERING

We fill out the intense strategy document when reporting for clients. This document is then shared with clients during their next meeting.

Our strategist and social media manager also review it internally while ideating content, so they can optimize upcoming posts.

Keep in mind: reporting and strategy are deeply intertwined.

Reporting is the data, and strategy is how you implement and optimize based on that data.

IMPROVING POOR RESULTS

“Good” results are always relative to your client’s specific goals. For example, if their goal is brand awareness but they’re measuring success based on website clicks, results may seem poor, even if they’re actually hitting the right top-of-funnel metrics.

What to do if results aren't great:

1. Clarify the right success metrics for your client’s goals.
1. Not every month will be strong, identify which part of the marketing funnel needs support and target it with content.

Examples:

- Growth/Reach: Add more top-of-funnel content (Reels, collabs, influencer posts). Hook the audience and speak to their pain points.
- Engagement: Increase story frequency, post more educational/informative content, and boost outbound engagement.
- Website Clicks/Conversions: Use strong CTAs, link in stories, and offer value (freebies, discounts, workshops, blogs) to drive traffic.

COMMUNICATING POOR RESULTS

If a client sees one low metric in a monthly report, they likely won't be alarmed, social media performance naturally fluctuates.

But if results are poor overall or consistently declining, you must call it out and present a plan. You're the expert, waiting for the client to flag the issue is not ideal.

Instead:

- Highlight poor metrics clearly in the report.
- Prepare an action plan for your next call.

The action plan should include:

Identify the poor-performing metric specifically.

Analyze the cause by asking:

- Is it seasonal?
- Is it beyond our control?
- Are we lacking creativity or direction?
- Are we posting without real purpose or strategy?
- Are we missing the audience's true pain points?
- Is the content funnel unbalanced for their unique goals?

Even if the issue is external, provide strategic guidance on how to pivot or adapt. It's your job to lead, optimize, and reassure with solutions.

TESTING ON ORGANIC SOCIALS

Testing is a key part of social media management; it helps us figure out what works best so we can continually optimize content for each client.

Even if you hear advice from experts or blogs, it's your job to test it with your audience and see what actually performs.

We usually test over a month by experimenting with:

- Photo vs. graphic
- Video vs. photo
- Different hashtag groups
- Creative sizes
- Long vs. short form copy
- Polished vs. behind-the-scenes photos

Optimizing content just means:

Post more of what performs well (e.g., if short-form captions get more comments than long ones, stick with short form going forward).

Test one variable at a time.

Example: For two weeks, post only BTS photos. For the next two, post only polished ones. Keep everything else the same.

At the end of the month, compare reach, engagement, and shares.

EXTERNAL IMPACTS OF ANALYTICS

Keep in mind that results and metrics can fluctuate due to factors outside your control.

For example:

- End of Q4 tends to have lower engagement due to more paid ads and increased holiday activities
- Political events like elections
- Holidays that shift online behavior
- Metrics after a major launch or collaboration can spike then dip

These fluctuations are normal. Be aware of them so you can prepare your clients for possible dips in performance.

You can also offer suggestions to offset the dip, like:

- Increasing shareable content (e.g., memes, quotes, carousels)
- Shifting focus to brand awareness and community building during slow periods.

EXTERNAL IMPACTS OF ANALYTICS

Keep in mind that results and metrics can fluctuate due to factors outside your control.

For example:

- End of Q4 tends to have lower engagement due to more paid ads and increased holiday activities
- Political events like elections
- Holidays that shift online behavior
- Metrics after a major launch or collaboration can spike then dip

These fluctuations are normal. Be aware of them so you can prepare your clients for possible dips in performance.

You can also offer suggestions to offset the dip, like:

- Increasing shareable content (e.g., memes, quotes, carousels)
- Shifting focus to brand awareness and community building during slow periods.



6

CHAPTER

CHAPTER SIX COVERS HOW TO GROW FROM FREELANCER TO AGENCY OWNER BY ESTABLISHING STRUCTURE, HIRING AND DELEGATING EFFECTIVELY, AND MANAGING OPERATIONS LIKE PAYROLL, ONBOARDING, BENEFITS, AND TEAM MEETINGS. IT ALSO TOUCHES ON LEADERSHIP SKILLS, TOOLS FOR PRODUCTIVITY, AND ENSURING LONG-TERM PROFITABILITY AND BUSINESS GROWTH.

YACCOLLECTIVE.COM

BUILDING VS. SCALING

From Freelancer to Agency

Signs it's time to build:

- Your schedule is full and you're getting more client inquiries than you can handle
- Your rates are where you want them to be
- You want to offer a new service you don't currently have the bandwidth or skillset for
- You've outsourced help before, but only on a contract basis and have never hired anyone for consistent work

Remember, there's no perfect way to build your agency. We'll walk you through the exact progression of ours, but if yours looks different and works well, then AMAZING!

Improving a Current Agency

Signs it's time to rework your agency:

You have a few employees, but you're... [text cuts off here, feel free to paste the rest and I'll complete it for you]

BUILDING VS. SCALING

From Freelancer to Agency

Signs it's time to build:

- Your schedule is full and you're getting more client inquiries than you can handle
- Your rates are where you want them to be
- You want to offer a new service you don't currently have the bandwidth or skillset for
- You've outsourced help before, but only on a contract basis and have never hired anyone for consistent work

Remember, there's no perfect way to build your agency. We'll walk you through the exact progression of ours, but if yours looks different and works well, then AMAZING!



IMPROVING A CURRENT AGENCY

Signs it's time to rework your agency:

- You have a few employees, but you're barely able to pay yourself
- You have a few employees, but you want to build a larger team
- You have a team, but you feel it's time to change the structure
- You struggle with employee retention or hiring employees who can do the work as well as you do



IS YOUR REVENUE READY?

You can't charge the same rates you did as a freelancer. If you're moving into an overhead/leadership role, you need to afford overhead.

As a freelancer, your overhead is almost nothing. But as you build a team, overhead increases. You'll need to cover roles like Strategists, COOs, etc.

Your revenue should cover:

- Payroll (including your own)
- Taxes
- Tools
- Profit (aim for at least 20%)

Important:

Have savings before you build an agency. More people = more expenses.

What happens if you lose a client but still need to pay your team?

Recommendation: Have at least one full round of payroll saved before hiring. Your savings should increase before expanding.

THE TRUTH BEHIND BUILDING AN AGENCY

It's not easy, and you won't be profitable every month.

Yes, there were months I didn't pay myself.
If I could do it over, I'd start with more savings set aside.

It can feel messy and overwhelming.
There are seasons to grow, and seasons to sustain or scale.

It will be harder than you think, but more incredible than you imagine.

And remember: your agency doesn't have to look like theirs (or ours).

THE PROGRESSION

When you move from freelancer to agency, it takes time and flexibility within the roles.

Your first few hires will most likely be to replicate yourself.

This is a very difficult season in business, you'll be working on your business and in your business as you transition.

You'll still be handling client work, but also overseeing your employee's work.

We recommend using a phase-in/phase-out method when hiring for specific roles (we'll go over this more soon).

AGENCY STRUCTURE

To start, you will usually hire social media managers to help you with additional clients.

You will most likely still be managing clients at this time.

You might also hire someone that has a different skill set,

but you'll need to have clients ready to sign on for this service

in order to afford the cost of the employee.

CEO (YOU)



SOCIAL MEDIA MANAGER

AGENCY STRUCTURE (EXPANDED)

At this stage, you begin transitioning out of day-to-day content creation and focus more on running and growing the business.

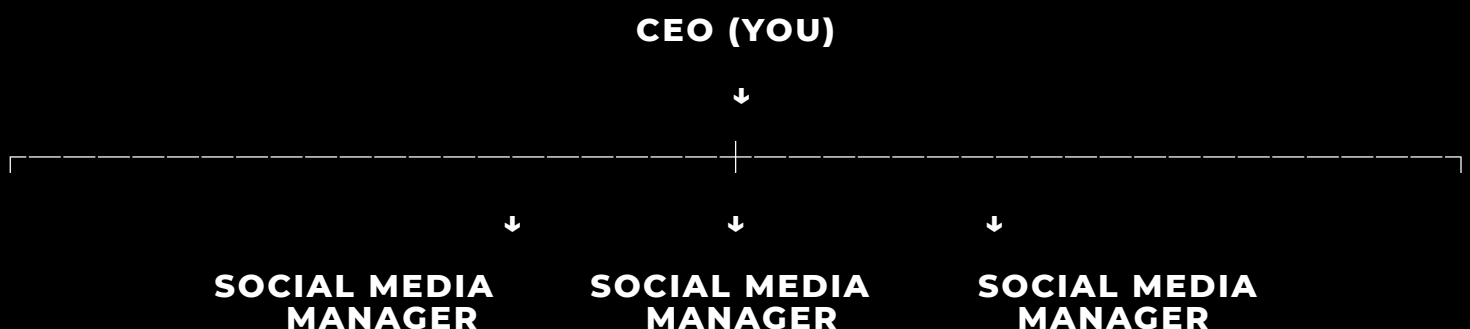
This is where the concept of overhead gets introduced:

You're no longer the one directly generating revenue through client work, but instead managing employees who do.

At this point, your social media managers are handling everything:

content creation, strategy, and reporting, but you haven't yet built an "agency-level" team with layers of support.

You're in the early building phase of your agency.



AGENCY STRUCTURE

- Your overhead is growing, and you're now fully focused on business leadership.
- The COO acts as your right hand, ensuring smooth operations and putting out fires.
- Strategists guide SMMs and own the client's strategic direction and reporting.
- Social Media Managers (SMMs) execute content creation and maintain parts of the strategy.



EXPANDED AGENCY STRUCTURE (WITH 3 EMPLOYEES)

- Your overhead now includes 3 employees, so your rates must reflect this increased support level.
- Clients benefit from more expertise and minds on their account, this justifies premium pricing.
- The SMM role is now elevated: they lead client meetings but collaborate on strategy with a strategist.
- Hire SMMs with confidence and communication skills, as they are now your client's main point of contact.

CEO (YOU)



COO

**(HANDLES OPERATIONS, ONBOARDING, SYSTEMS, CONTENT REVIEWS,
CLIENT ISSUES—ENSURES EVERYTHING RUNS SMOOTHLY)**



STRATEGIST

**(LEADS REPORTING, ANALYTICS, ONGOING STRATEGY,
COLLABORATES CLOSELY WITH SMMS ON DIRECTION)**



SOCIAL MEDIA MANAGERS

**(CLIENT-FACING ROLE. LEAD MEETINGS, COLLABORATE WITH STRATEGIST,
NO LONGER RESPONSIBLE FOR FULL STRATEGY OR REPORTING ALONE)**

ADVANCED AGENCY STRUCTURE WITH CREATIVE DIRECTORS

CEO (YOU)



COO

(OPERATIONS, ONBOARDING, SYSTEMS, LEADERSHIP, TEAM SUPPORT)



STRATEGISTS

(ANALYTICS, CLIENT REPORTING, STRATEGY OPTIMIZATION, DIRECTION)



CREATIVE DIRECTORS

(SENIOR SMMS WITH STRONG BRAND IMPLEMENTATION SKILLS)

→ **MANAGE THEIR OWN CLIENTS**

→ **ASSIST OTHER SMMS WITH:**

- **FEED IDEATION**
- **BRANDED ASSETS (ARROWS, STYLE)**
- **SOCIAL TEMPLATE DESIGN**



SOCIAL MEDIA MANAGERS (SMMS)

→ **CLIENT-FACING, HANDLE CONTENT CREATION AND COMMUNITY**

→ **COLLABORATE WITH CREATIVE DIRECTORS AND STRATEGISTS**

→ **MAY BE SPLIT FURTHER INTO:**

- **DESIGNERS**
- **COPYWRITERS**
- **INTERNS (OPTIONAL, FOR SUPPORT)**

- Creative Directors are elevated SMMs who both manage their own clients and support junior team members with higher-level design and brand input.
- Your overhead now includes CEO, COO, Strategists, and Creative Directors.
- You can choose to break the SMM role into specialized lanes like content writing and graphic design or introduce interns for extra help.



HIRING VS. CONTRACTED HIRING

- We prefer to hire employees because we want their “work” time to be fully dedicated to our company (YACC) and our clients.

Hiring employees:

- Encourages long-term loyalty
- Helps build a strong internal culture
- Allows better team integration and consistent quality
- Usually paid hourly or salary (we recently transitioned to salary)

HIRING EMPLOYEES

Application process

- Post it!

Best place to find employees in our opinion is your own socials!

Another great reason to be active here

Another great place is our FB group!

Feel free to look at our past hiring posts and steal the language

We star the emails that stand out and schedule interviews

- Mockup Assignment

The most important part of our hiring process - the mockup posts!

Choose a brand or two you love and have them create a social post, including copy for them! This will tell you ALOT about their skills and ability to capture a brand on socials

You are hiring them for their ability to implement a brand on social media, make sure you see plenty of examples of this if you are only looking at a portfolio

Resume - questions to look for

- Do they have experience with the tools we use in our agency?
- Do they have experience in a client facing role?
- What is their background in (design, photography, etc)
- How long were they in their past roles?



HIRING EMPLOYEES - THE INTERVIEW

We usually only interview our top 2-3 candidates
The interview should either be with just you if you are a smaller agency or your lead team

We have our COO, Lead Strategist, and CEO (me) on the interviews

Interview questions:

- Can you tell me about a time that a client disagreed with your direction, and how did you handle it?
- What has been your experience with a client facing role?
- Have you worked remotely before? What did you enjoy/not enjoy about it?
- What led you to apply to our agency?
- What are you looking for in your role long term?

Following the interview, we select our top applicant and send them an offer

We wait to get an acceptance before emailing the applicants who didn't get the job just in case, we want to offer it to them as a back up

HIRING EMPLOYEES – ONBOARDING

The onboarding process helps reinforce expectations and integrates them smoothly into our team.

1. Onboarding Email

Sent one week before their start date. This email outlines what to expect on day one, including meeting links, tool access, and key contacts.

2. First Day (Monday)

- Join our COCO Monday Meeting to meet the full team.
- Walkthrough of company culture and workflows.
- Start exploring onboarding tasks via Asana.

3. Asana Onboarding Board

A dedicated Asana board is created for each new hire with tasks like:

- Intro to company values and processes
- Tool access (Slack, Canva, Later, etc.)
- Client overviews
- Internal SOPs

4. First Week

- Get fully set up on all tools (Canva, Slack, Later, etc.)
- Walk through the Asana onboarding board
- Review client accounts and content styles
- Collaboratively set up their weekly schedule in Asana

5. Second Week

- Begin working on actual client work
- Integrate into internal processes and communication

6. Check-ins

- 30-Day Check-in:

One-on-one call with the CEO to review progress, assess fit, and discuss transitioning from part-time to full-time if applicable.

- 90-Day Check-in:

Final onboarding checkpoint. If successful, employee begins earning Paid Time Off (PTO) from this point.

HIRING EMPLOYEES – PAYROLL

Salary vs. Hourly:

We have our employees on salary instead of hourly.

- Hourly pay became difficult to track and made payroll fluctuate too much.
- Salary is more consistent and mirrors how we get paid ourselves, a set amount every month.

Contractors:

You can hire contractors (freelancers), but it's not ideal for long-term team building.

- Contractors are paid a set retainer or per project.
- It's harder to build loyalty and culture with them.
- That said, there's still a time and place for contract work if needed.

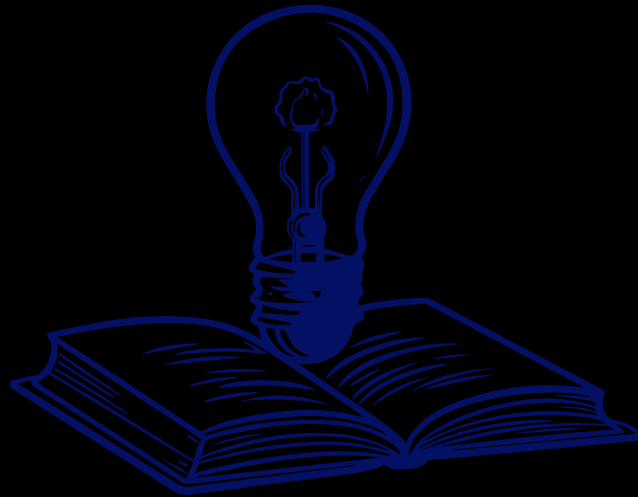
Payroll Tools:

Payroll can be managed via programs like QuickBooks or Gusto.

- We run ours through QuickBooks and have a team member who handles this for us.
- Important: Just because you've never run payroll doesn't mean you can't, it just means you'll need to learn!

Cadence & Legal Notes:

- Our payroll is processed biweekly (every other week).
- You can choose whatever cadence works for your business (weekly, monthly, etc.).
- Make sure to follow your state's payroll laws, where your business is registered is what matters, even if your team works remotely.



DELEGATION – PHASE IN MODEL

The Phase In Model for delegation means that all employees start in the same role (typically Social Media Manager) and gradually phase into more specialized roles as needed.

Examples of phased roles:

- Strategist
- Creative Director
- Operations
- Ads Manager

This approach ensures everyone gains foundational experience and respects the complexity of the SMM role.

Since social media management involves multiple skillsets, this also helps identify which employees are naturally drawn to specific strengths suited for more advanced roles.

Not everyone will move out of the SMM role. Some may become Lead SMMs, working alongside and mentoring junior SMMs.

Benefits of Phasing In:

- Reduces upfront overhead costs
- Allows employees to generate revenue while learning new responsibilities
- Provides internal growth paths and flexibility in team development

Phasing in a COO (Chief Operating Officer):

- A phased-in COO will retain 2 clients, continuing to bring in revenue.
- At the same time, they take on COO tasks like team management, systems, and operations.
- This allows you to cover essential operations without needing to afford a full-time COO immediately.

PROFITABILITY

As you build your agency, the biggest factor in your long-term success will be profitability.

A good business profit margin is typically 20%–30%. Not every month will be profitable, especially in the early stages of growth, but the more savings you have set aside before building, the better prepared you'll be.

It's okay to have months that aren't super profitable, but having consistent loss months is tough.

You need to be a profitable agency so you can:

- Invest back into your business (e.g., brand shoots, brand refreshes, team retreats)
- Build up savings and financial stability

How to Stay Profitable

- Calculate profit into each of your retainers
- Review your profit and loss statements every month
- Use your accounting software to track your finances accurately

This will help you clearly see what's happening in your business from a financial standpoint and make smart decisions.

LEADING A REMOTE TEAM

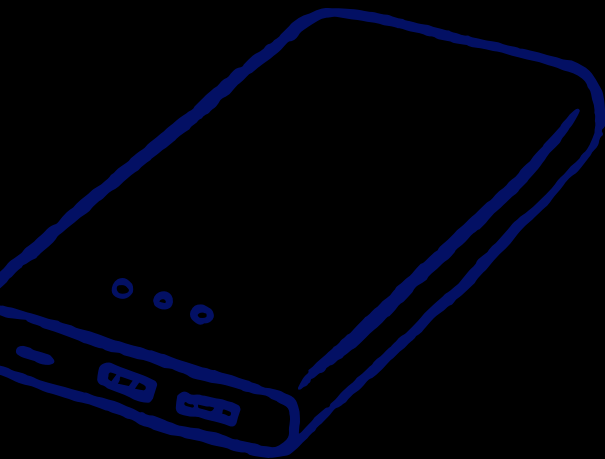
Team culture is critical, especially in a remote setting. I wanted to build a team that knows I value them beyond just their output.

Key practices that help create a strong, connected team:

- Weekly meetings that begin with a thoughtful prompt
- Occasional team retreats to build real connection
- Staying active on Slack, encouraging collaboration and support
- Being a “YES” first leader, open, responsive, and available
- Surprise treats: sending coffee or lunch via Venmo
- Listening to team members’ career goals and helping them pursue them
- Anonymous feedback forms every 6 months
- Individual employee reviews annually

Leading by example:

- Take care of yourself
- Don't tie your worth solely to work
- Take time off when needed



WHAT OUR AGENCY LOOKS LIKE WEEK TO WEEK

Monday

- Weekly all-team meeting

Wednesday Morning

- Possible Soirée (team culture or strategy check-in) Ongoing Responsibilities by Role

Onboarding New Clients

- Assigned Social Media Manager, Strategist, and Creative Director have an onboarding call
- They begin working on the new client's strategy immediately

Social Media Managers

- Handle content calendars (usually 2 clients at a time)
- Execute content creation and implementation

COO

- Onboards new employees and clients
- Optimizes internal systems
- Supports CEO with execution of big-picture goals

CEO

- Leads client acquisition efforts
- Oversees course creation and agency product development
- Sets and manages big-picture strategy
- Supports team and leads marketing direction
- Handles finances, compensation planning, and team check-ins

This structure keeps the agency running smoothly, ensures client success, and allows space for growth and leadership development.

PROBLEMS VS. SOLUTIONS IN YOUR BUSINESS

When you're just starting out, your biggest challenge is usually finding clients.

As you grow into an agency, the main challenge shifts to staying profitable.

But no matter what the problem is, remember: it's just a problem, and every problem has a solution. Great business owners don't fear problems; they approach them strategically.

You'll always face challenges in your business; they just evolve over time.

The sooner you get good at problem solving, the stronger you'll be.

Yes, it can feel lonely, scary, or overwhelming to be an entrepreneur...

But learning to love the process is the key to long-term success.

Solving one issue won't make everything suddenly feel easy.

Mastering the mindset of problem solving without emotional burnout, that's when things truly feel easier.

Easier said than done. **But worth it.**

TEAM MEETINGS

Monday Weekly Meeting

- Held every Monday to align the team.
- Meeting notes and itinerary are documented in a shared Google Doc.
- The meeting starts with a prompt to set the tone.
- The lead team provides updates such as:
 - Contract renewals
 - Client check-ins
 - New tools
 - Questionnaires
 - General agency news

Social Media Managers

- Each SMM shares client updates and gives a quick pulse or rating on the client relationship.
- They're encouraged to ask questions or raise any issues.

These meetings typically last about 1 hour and serve as a great way for the entire team to connect and stay updated on what's happening across the agency.

Soirée – Every Other Wednesday Morning
Led by a team member who wants to teach or share something with the team.

Topics may include:

- Social media campaign development
- Copywriting skills
- Personal development (e.g. values, boundaries, managing overwhelm)
- Strategy insights and updates
- Lessons from 1:1 mentorships (e.g., someone who took a copywriting course sharing takeaways)

Monthly Executive Call

- Held between the CEO and COO
Monthly Strategy Call

- Held between the CEO and all strategists
Slack Huddles

- Unplanned, quick audio calls on Slack.
- Used to collaborate or work through a challenge in real time.

This rhythm of communication keeps the team engaged, growing, and aligned with the agency's evolving goals.

FIRING AN EMPLOYEE

Firing someone should be handled with care, as you must have cause and documentation to justify the termination, otherwise, you could face legal consequences.

When an Employee Isn't a Good Fit

- Ideally, you should recognize this within the first 30 days.
- During this early period, in most places, you can terminate without cause.
- However, check your state or country's employment laws to confirm this.

When an Employee Isn't Performing Well

- Always keep performance concerns in writing.
- Clearly communicate what needs improvement and by when.
- Conduct a check-in (with yourself or the executive team) and follow up with an email summarizing the conversation.
- Let them know when the next check-in will be.
- Offer support and guidance, it's much easier and more cost-effective to help an employee improve than to replace them.

LOSING AN EMPLOYEE

When an Employee Quits

How you respond to an employee leaving speaks volumes about your leadership and agency culture.

Even if it feels like a huge loss, remember:

- You can't control whether someone stays or goes.
- What you can control is how you learn from the experience and what you implement moving forward.
- Always handle their exit with professionalism and grace.

Transition Expectations

- It's common courtesy for an employee to give 2 weeks to 1 months' notice.

That notice allows you time to:

- Find a replacement
- Communicate the transition to clients
- Ensure a smooth handover

Our Policy

- We require a one-month notice, and this is something we include in our employee contracts.
- A 2-week notice is difficult to manage in a client-based business, and one month allows us to:
 - Ease the client into the transition
 - Properly offboard the team member
 - Maintain continuity and quality

EMPLOYEE TRANSITION

No matter how you lose an employee, making the transition easy and seamless is crucial for your clients' experience and your agency's professionalism.

When an Employee Puts in Notice or You Decide to Let Them Go

Once you know:

- Who will replace the employee on the client's accounts
- Everyone involved is aware of the situation internally

Then, it's time to inform the client.

Client Communication Tips

- You don't need to share why the employee is leaving.

Just inform the client that:

- A new team member will be taking over their account.
- This new person will be working alongside their current SMM (Social Media Manager) for the next month to ensure a smooth and complete handover.

This transition strategy ensures clients stay confident in your agency and your service quality never dips.

