

Content strategy - Social media

Template

Lorena Uribe - Julio 2025

Introduction

If you're starting a new project and wondering how to approach content, this template is for you.

It's designed to guide you in building a content strategy right from the beginning.



Project overview

Before diving into content planning, it's essential to understand the bigger picture of the project—what we're trying to build, why it matters, and what success looks like.

How does it look like?

This project aims to _____.

[insert short project description – e.g., "launch a new feature that helps users track their monthly spending"].

We hope to _____.

[insert aspiration – e.g., "make personal finance feel more approachable and less overwhelming"].

The main goal is to _____.

[insert measurable goal – e.g., "increase adoption of this feature by 25% in the first 2 months"].

Key people

Knowing who the key people are, what they care about, and **how success looks from their perspective** helps us create content that's not only useful, but aligned with real needs.

Client

vs

Final user

The client or stakeholder is the person or team behind the project.

The final user is the person who will interact with the final product or content.

KEY PEOPLE

Client

Who they are

Person or team funding, approving, or managing the project.

Main goal

Achieve business objectives.

What they care about

KPIs, measurable results, timelines, brand consistency.

What they need from content

Strategic alignment with business goals, brand voice, and messaging.

Product knowledge level

High – understands vision, roadmap, and business context.

Relationship to the brand

Internal or contractual; decision-maker or influencer.

How we communicate

Meetings, strategy docs, decks, stakeholder updates.

KEY PEOPLE

Final user

Who they are

Person who will use the product or interact with the content.

Main goal

Solve a personal need or problem efficiently.

What they care about

Usability, clarity, empathy, and practical value.

What they need from content

Clear, useful, accessible content that meets their immediate needs.

Product knowledge level

Solve a personal need or problem efficiently.

Relationship to the brand

Usability, clarity, empathy, and practical value.

How we communicate

Interfaces, help texts, onboarding emails, in-app messages, tutorials.

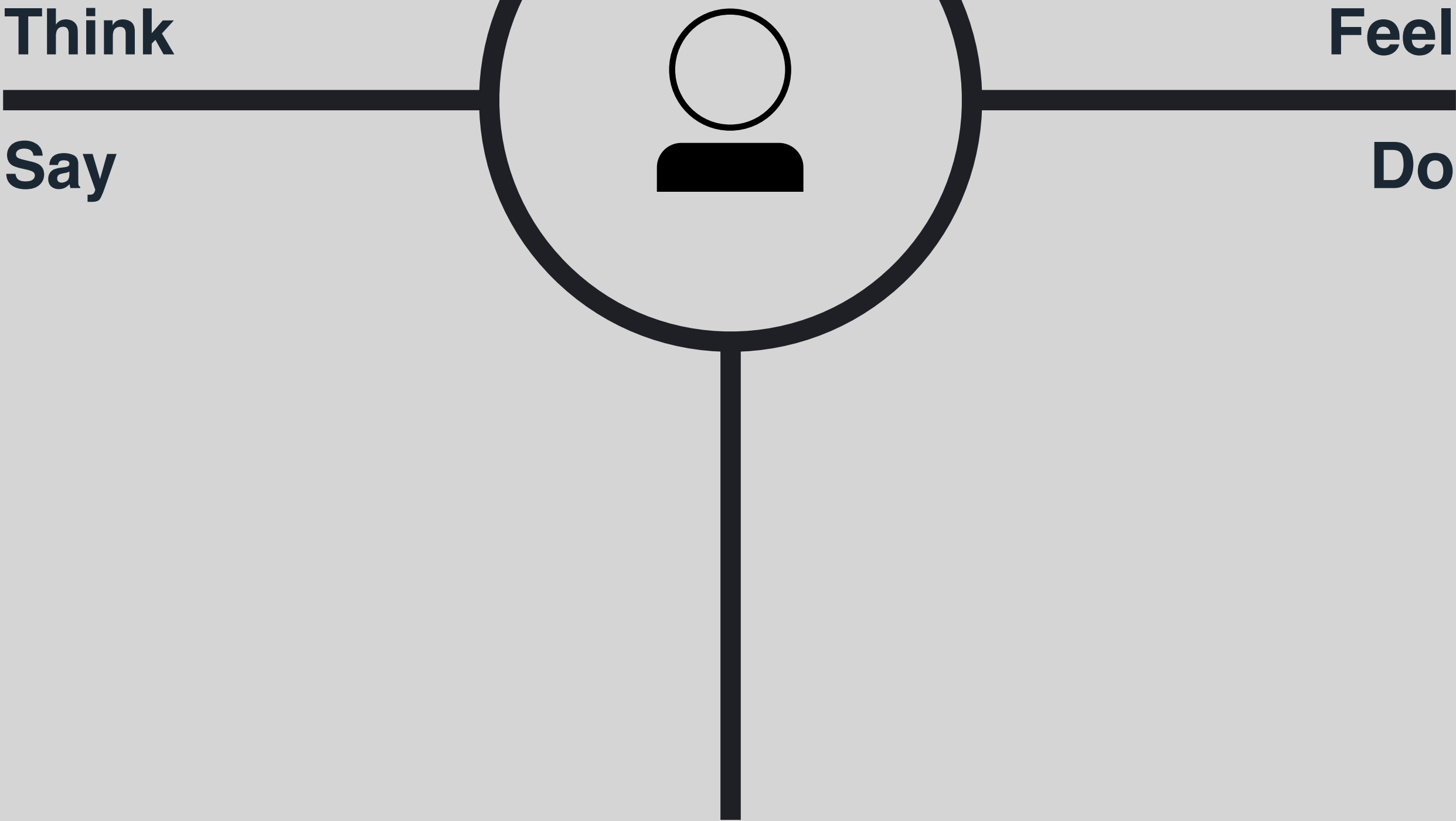
Empathize

An **empathy map** helps us understand the key people—it's a simple but powerful tool to visualize what they **think, feel, say, and do.**

EMPATHIZE

Empathy map

Take a few minutes to put yourself in the user’s shoes and fill in each section of the map.

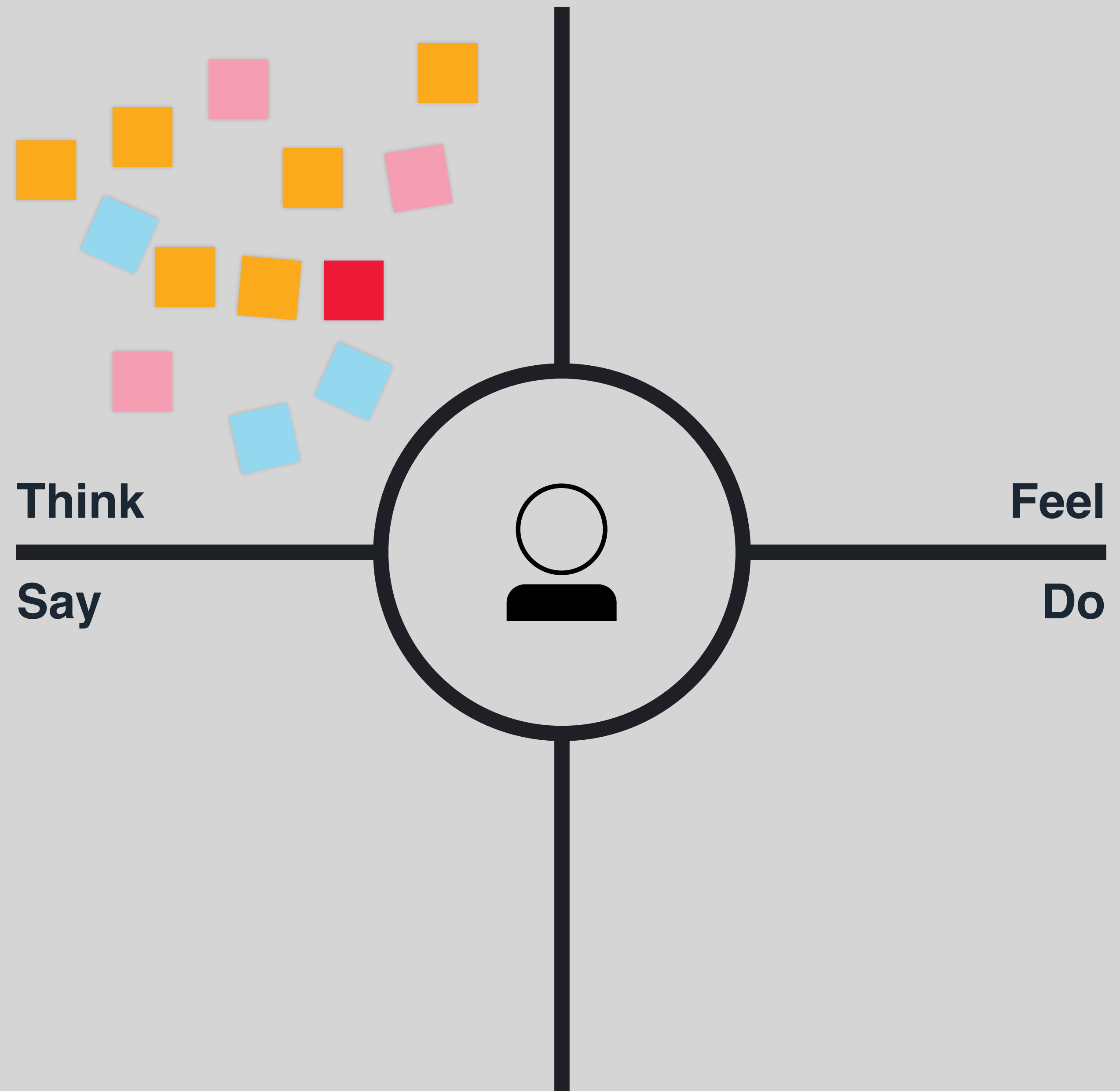


EMPATHIZE

Think

What are they thinking?

- *"Is this tool really worth switching from what I already use?"*
- *"I hope this helps me save time, not add more work."*
- *"I don't fully understand how the pricing works."*



EMPATHIZE

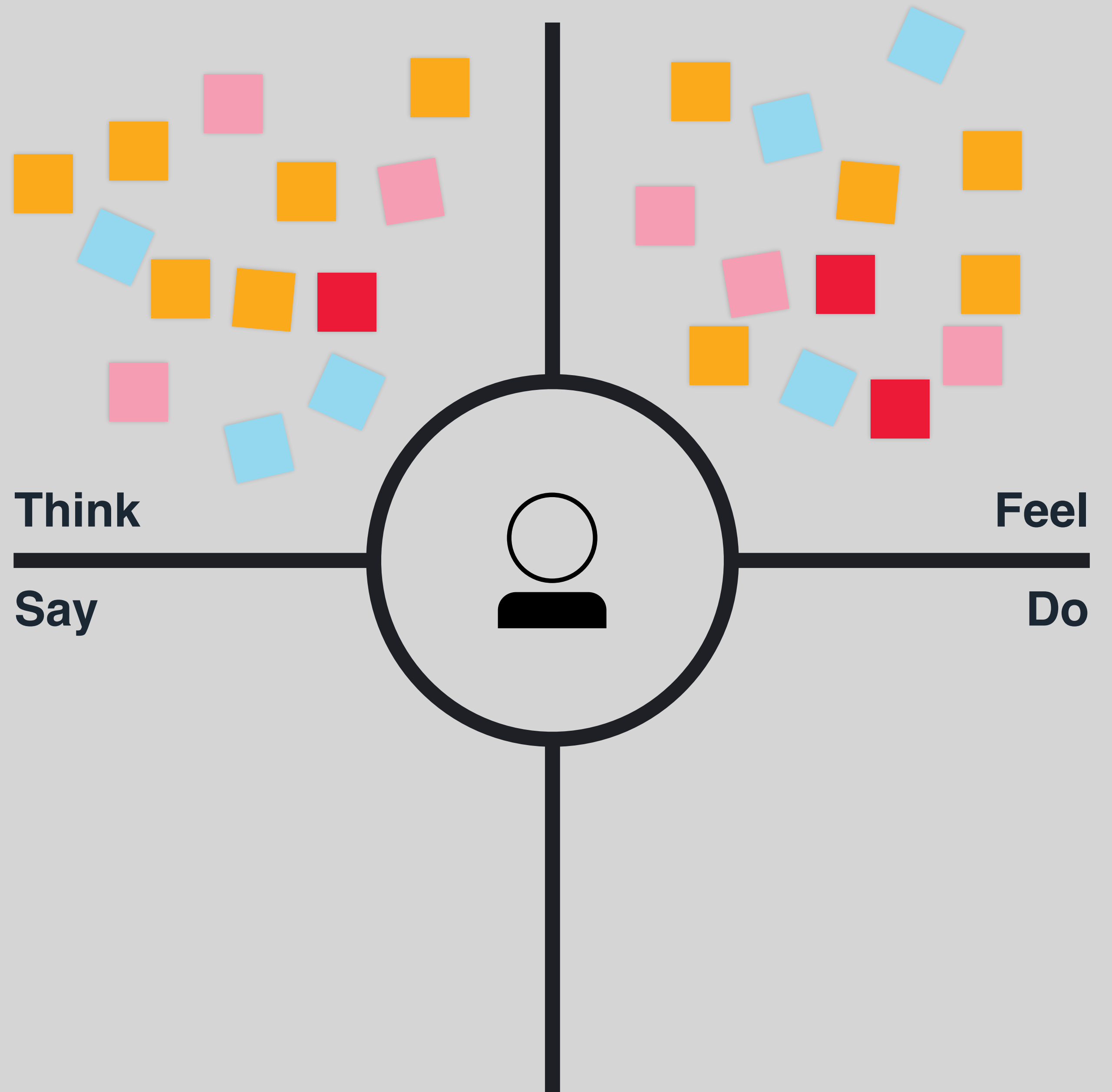
Feel

What are they feeling?

This is the emotional context

Are they:

- Overwhelmed
- Excited
- Frustrated

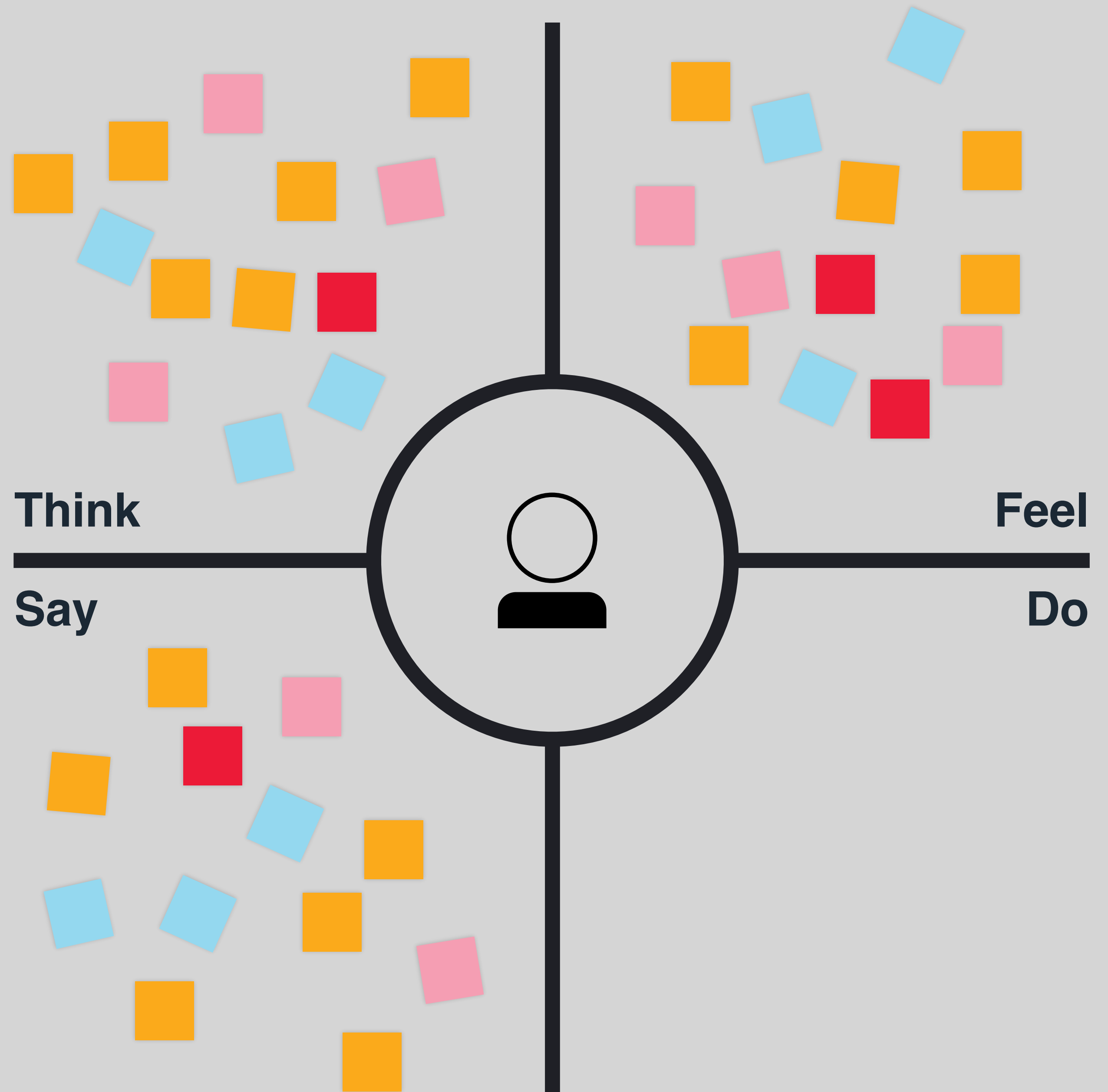


EMPATHIZE

Say

What are they saying out loud?

- *"This looks interesting, but I need to try it first."*
- *"Why can't I find a clear guide to get started?"*
- *"If it integrates with my current tools, I'm in."*

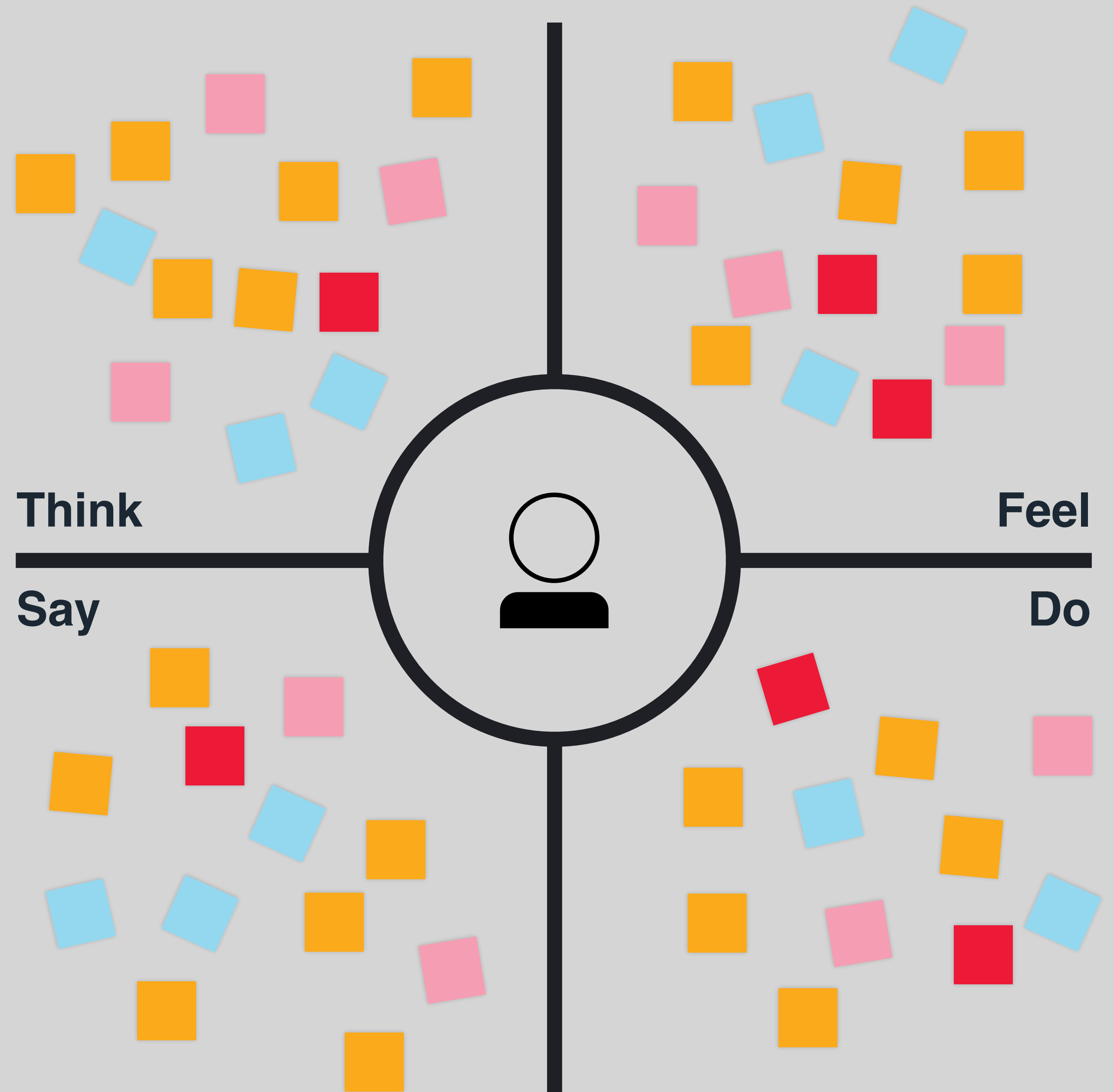


EMPATHIZE

Do

What actions are they taking?

- Comparing the product with competitors
- Skipping optional steps during onboarding to get to the core feature quickly
- Searching online for tutorials or reviews before committing



An **as-is scenario** captures the current experience and helps us identify **pain points within a specific moment in time.**

EMPATHIZE

As-is scenario

specific moment

Clarify the goal

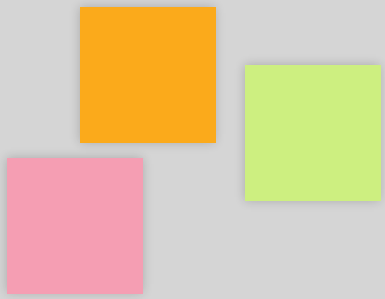





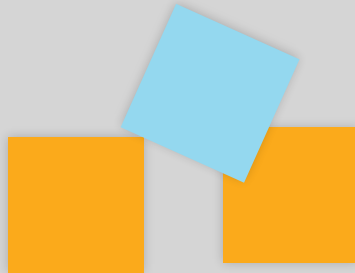





- Ask: *Why are we mapping this?*
- Example: “We want to understand why users drop off during onboarding.”

Pick a clear starting and ending point

- Define *where the process begins and ends*.
- Example: *Start:* User clicks “Sign Up” → *End:* User completes profile setup.

EMPATHIZE



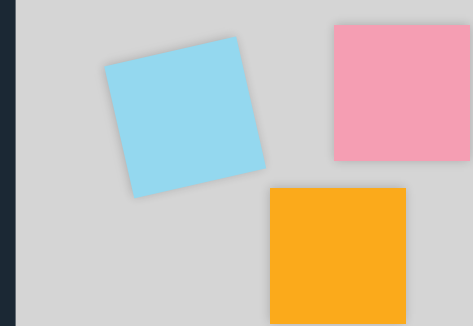
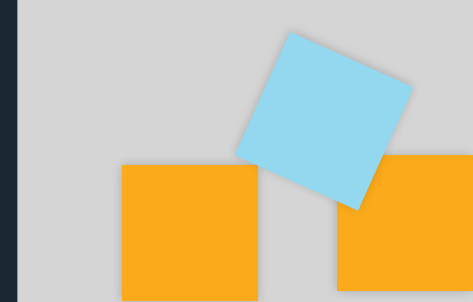
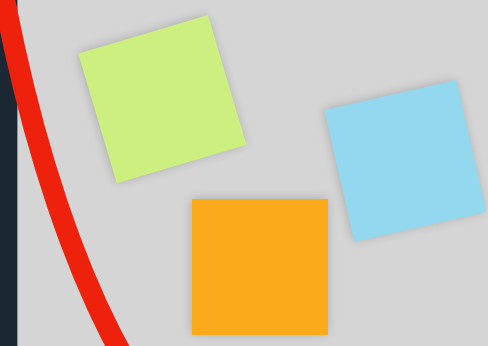
As-is scenario

	Step 1	Step 2	Step 3	Step 4
Do				
Think				
Feel				

Pain points show us where the experience fails and where to focus our efforts to create the most impact.

EMPATHIZE

Identify and circle pain points, as well as opportunities to improve the experience.

	Step 1	Step 2	Step 3	Step 4
Do				
Think				
Feel				

Competitive analysis

Before creating a content strategy, it's important to understand what others in your space are doing. A **competitive analysis** helps us see where we stand and **how we can stand out.**

How to do it:

Identify competitors – Direct (similar products) and indirect (alternative solutions).

Review their content – Look at their tone, messaging, channels, formats, and overall experience.

Spot patterns – What are they doing well? Where are they falling short?

Find opportunities – Identify gaps we can fill or ways to differentiate our content.

Holistic Problem-Framing

**Explore a problem from several perspectives,
to set the stage for ideation.
Look beyond the immediate issue to explore
its root causes, stakeholders, user needs, and
business context.**

How to do it:

User view

What does the user need? What frustrates them?

Business View

How does this problem affect the company? What are the goals?

Technical View

Are there system or resource limitations? What's feasible?

External Factors

Are there market, competitor, or regulatory influences?

Ideate

Now that we've explored the problem from every angle, it's time to **generate ideas** for how content can address those needs.

**Before you start, revisit your insights.
Look at the pain points, goals, and
opportunities you've identified.**

What does content need to achieve here?

IDEATE

Ideation for content strategy

Generate ideas for communication

Think in terms of **tools and formats**:

- Website copy
- Onboarding flows
- Microcopy for forms or buttons
- Help center articles or FAQs
- Email campaigns
- In-app messages
- Social content



Experience-Based Roadmap

Define a “minimum delightful experience**” by scoping big, visionary ideas into more achievable near-term outcomes—while still focusing on the user experience.**

Think big and use scalability.

Think big and use scalability.



1



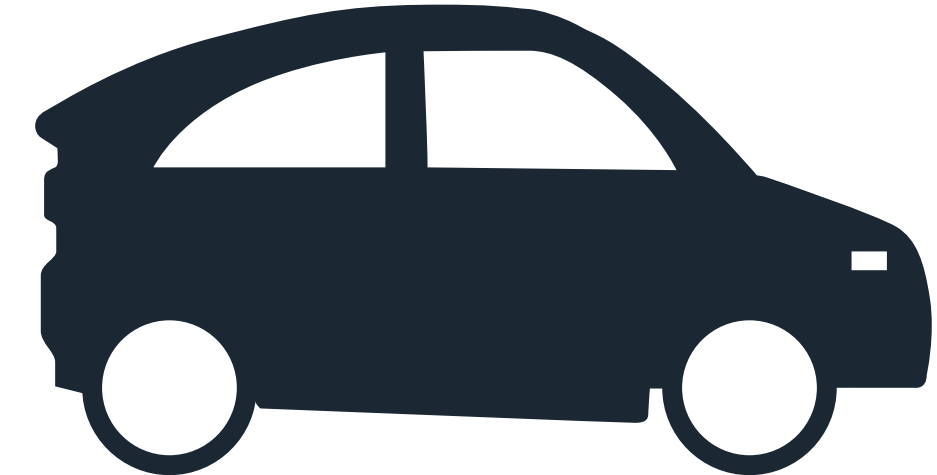
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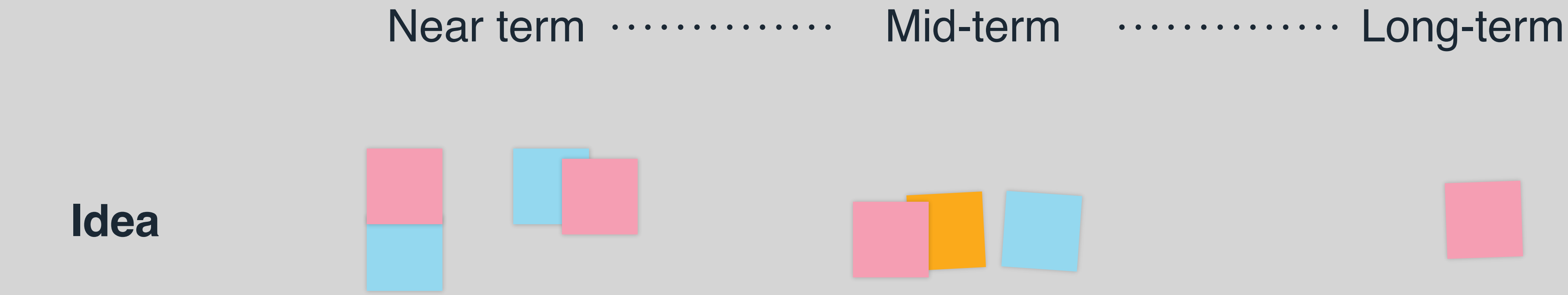


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Create a **timeline** (Near-term → Mid-term → Long-term)



Materialize

Once the strategy is defined, it's time to **make it real**. This step focuses on creating tangible outputs that turn our insights and roadmap into action.

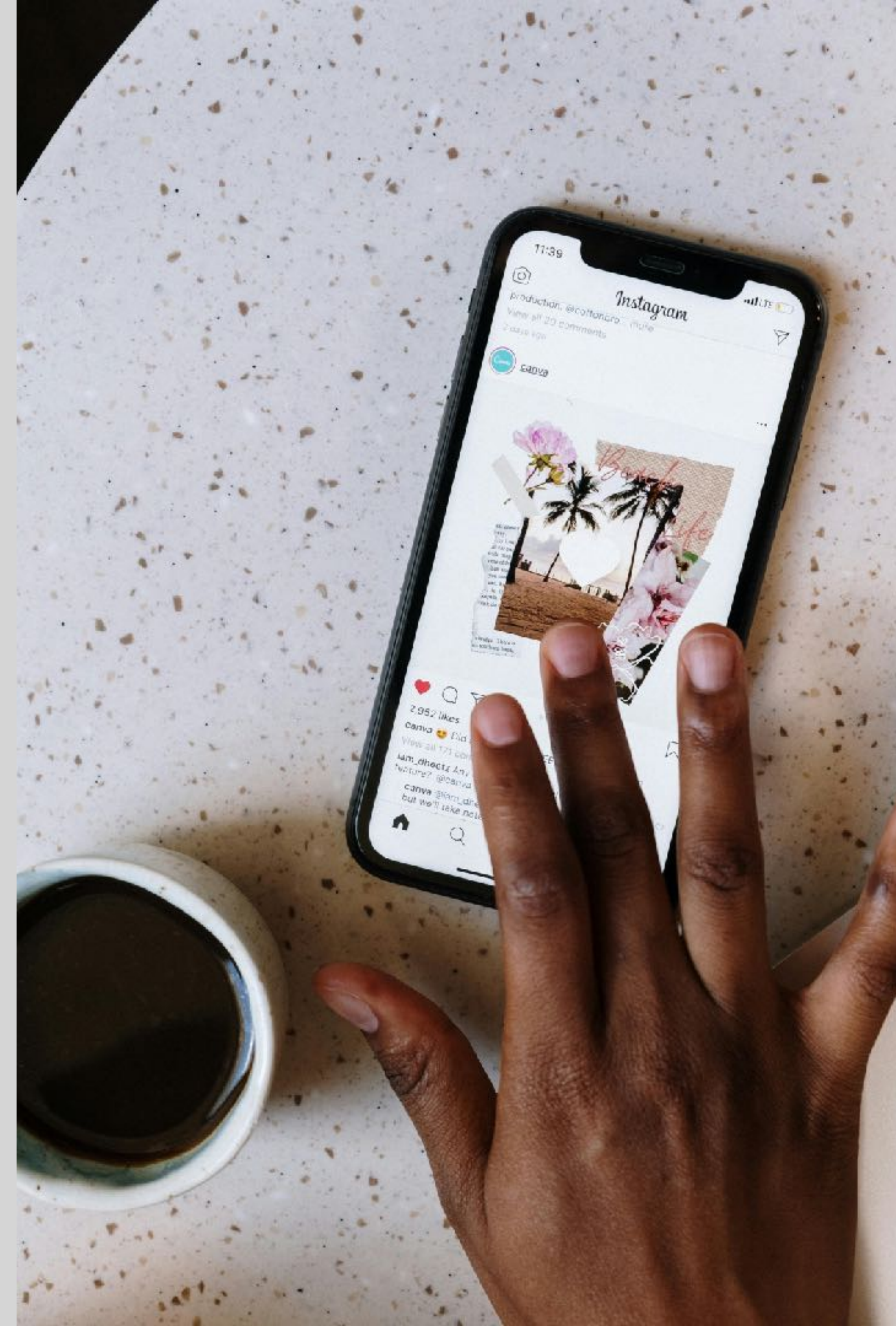
MATERIALIZE

Social Media Package

What you get:

- A **template for social posts** (visual + copy structure).
- A **content calendar** for 1–3 months.
- A **list of key themes** to keep communication consistent.

Goal: Ensure a cohesive, on-brand presence across channels.



MATERIALIZE

Website Content Plan

What you get:

- **Pages to include** (site map draft).
- **Content guidelines** for tone, messaging, and structure.
- Key **considerations for SEO and user experience**.

Goal: Build or improve a website that speaks to users' needs and supports business goals.



MATERIALIZE

Custom Strategy

What you get:

- A **tailored plan** based on your project needs (could include messaging frameworks, onboarding content, or internal documentation).

Goal: Address your unique content challenges with a made-to-measure solution.

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Thank you!

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