

Step by Step: How to Conduct a Social Media Audit for Your Dental Practice

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You might cringe at the word “audit,” associating it with stress-causing, time-wasting tax problems. Fortunately, not all audits are as daunting – or frightening – as those. A social media audit is a methodical review of your profiles, postings, and strategy, which yields valuable insight into potential problems and opportunities for improvement.

Overview: what a social media audit accomplishes

An audit is something like a health check for your social media presence. It can identify weak points, underperformance, and potential problems, discover your social strengths and pinpoint opportunities. From there, you can easily devise a “treatment plan” for optimization. Social media audits should be conducted regularly, like a person’s health checks. The timing can vary, depending on the scope of your social activities, but somewhere between one and four times a year is typically appropriate.

Audit your dental practice’s social media in five easy steps

Step 1: List your accounts

This might seem unnecessary, especially if your dental practice only uses a couple of networks. However, those active accounts might not be your only profiles. Maybe years ago, your practice manager and you both created Facebook pages. Only one is in use, but you never deleted the other. Possibly someone opened a Pinterest for your practice and never even used it. Or you might have added your practice on Nextdoor but found the audience lacking and forgot all about it...

For an established dental practice that has used social media since the early days, this step can turn out to be a bit challenging. If you are still unsure, try searching for your practice name on each social network. Once you have a complete list of existing accounts, add an entry for each account (if any) that you plan to create.

For each social profile, add the following details:

- Network
- Status – Is it active, inactive, or not yet created? If an account is inactive, make a note of whether you plan to revive or delete it. Also, note any accounts you do not have access to (i.e. created and managed by a former employee, lost passwords, etc.)
- Handle (publicly visible username)

Step 2: Set SMART goals

One of the most common mistakes dental practices and other small businesses make is using social media without a clear goal. You might allocate resources simply to keep your profiles active. However, it is virtually impossible to optimize your strategy without specific goals, much less measure its success.

Start by looking at the big picture, which is your overall marketing strategy. What role does social media play? How can you utilize each account to support your broader marketing and business goals? Because every network is different, you might have very different goals for each.

One way to verify that you have set good goals is to make sure they meet the SMART criteria. That means your goals are Specific, Measurable, Achievable, Relevant, and Time-bound.

Example of how a SMART social media goal supports broader marketing goals:

Instagram

Overall goal: Increase brand awareness, which is the first step in lead acquisition.

SMART goals: Increase Instagram reach by 25% in the next six months.

Why it works: Specific enough to be actionable, measurable because reach is a metric Instagram measures, achievable because 25% is a reasonable number with increased/optimized posting, relevant because reaching more people means raising awareness of your brand, and time-bound because there is a deadline.

Step 3: Evaluate social accounts

Before digging into the specifics of post-performance, you will want to make sure the profiles themselves are optimized. For each account, check the following and make a note of any deficiencies:

- **Information accuracy:** Is your business name complete and spelled correctly? Are the contact details, hours of operation, location, and other practice details accurate?
- **Branding:** If your practice has a brand identity guide, refer to it. Otherwise, note the current version of your logo and tagline, any colours that you use consistently, and your overall brand message. Then, verify that every profile accurately reflects your brand.
- **Consistency:** This is essentially an extension of branding because you want people to instantly recognize your practice, no matter the platform. Therefore, it is best to use the same image (usually logo) for your profile pictures and similar header or cover photos. Ideally, you want the same handle for every network (i.e. @mypractice on Facebook, Instagram, and Twitter). If your preferred handle is unavailable, choose something similar (i.e. @mypractice @my_practice).
- **Bio:** Virtually every network has a bio or “about” section. It should include a well-written, succinct description of your practice. Since bios are typically searchable, you will want to include keywords – but only if they fit with the natural flow of the copy. This is where you introduce yourself to potential followers (and potential patients), so making an excellent first impression is a top priority.
- **Completeness and general optimization:** Beyond basics, the business profile options vary widely from one network to the next. There might be different page types, the ability to add

tags, category options, a field for a mission statement, the option to add a call-to-action button... Check every available setting and select the one(s) most appropriate for your practice, and fill out every relevant text field.

Step 4: Gather post performance data

With just a few clicks, you can access an overwhelming volume of data about engagement and performance. Fortunately, most networks also make it easy to sort and filter data, giving you the most relevant numbers.

You need to decide a couple of things before you start. The first is the timeframe, which is most often one year. That means you will compare a metric (such as audience size or daily reach) from current data with the same date one year ago. The difference is called YoY (year over year) change. However, you can replace the year with any timeframe you choose.

The next decision is what you will use as KPIs (key performance indicators). For this, refer to your SMART goals for each account. What three (or more if needed) metrics best measure the success of those goals? If daily reach is not important, don't waste time monitoring it. If driving traffic is not a goal on this network, you don't need to be concerned with link clicks. Your KPIs are the relevant metrics.

For each account, record the following:

- Total number of posts in the past twelve months
- Audience demographics, if available
- Current audience size
- YoY (Year over Year) change in audience
- List the three overall best performing posts from the past year, with links to each
- For each KPI, record the current data
- For each KPI, record the YoY change

Step 5: Analyze and review

Ok, so you have audited all your social media accounts and filled an entire spreadsheet with data. Now it is time to review and analyze.

- *Troubleshoot* – Which networks are underperforming, and which goals are not being met? Make a note of these areas that specifically need improvement.
- *Look for patterns* – What do your best-performing posts have in common? Does your audience respond better to a particular format or topic? What are the strong points for each network (i.e. one might generate more messages while another drives more website traffic)?
- *Look for opportunities* – Are you under-utilizing common tactics such as video marketing, stories, or cross-posting? Would your accounts benefit from more frequent posting? How can you increase whatever media formats and topics resonate with your audience?
- *Refine your goals* – For each account, refer back to your chosen SMART goals and the KPIs relevant to each objective. Do they still make sense?

What now: implementation

Lastly, how do you compile all this data, information, and inspiration into an actionable plan? You go back through everything and create a to-do list (or allocate tasks to your team). Here is what it should include:

- Profile updates (and creation, if applicable): Compile all the notes you made about any inaccuracies or improvements needed on the social profiles and any that need to be created.
- Marketing plan update: Did you decide to revise any of your social marketing goals? If so, document those changes in your marketing plan. If you do not have a written social marketing plan, now is a good time to create one.
- Content calendar: Your audit results most likely pointed to some changes needed in the frequency and type of posts on each network. Detail these changes and create or revise your calendar accordingly.

Final thoughts: Yes, you need a social media audit

Perhaps your dental practice was among the first to join the social revolution, creating good profiles on all the important networks. You post regularly, have a respectable size following, and occasionally get likes or comments. If there are no problems with your social media, you might think there is no need for an audit. Before dismissing the idea, consider how many patients have said they do not need check-ups because they do not currently have dental problems.

About the Author:



Naren Arulrajah, President and CEO of [Ekwa Marketing](https://www.ekwa.com), has been a leader in medical marketing for over a decade. Ekwa provides comprehensive marketing solutions for busy dentists, with a team of more than 180 full time professionals, providing web design, hosting, content creation, social media, reputation management, SEO, and more. If you're looking for ways to boost your marketing results, call 855-598-3320 for a free strategy session with Naren. You may also schedule a session at your convenience with the Senior Director of Marketing – Lila, by

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