

INFLUENCER MARKETING HUB'S MARKETING PLAYBOOK SERIES

# Social Media Competitive Analysis Playbook

A guided workspace for benchmarking competitors, decoding what's actually working, and turning it into a plan you can act on this quarter.

**DESIGNED FOR**

Social media managers, brand marketers, and growth teams who want a repeatable way to study competitors instead of guessing.

**ESTIMATED COMPLETION TIME**

3–4 hours, completed in one sitting or spread across a week.

INSIDE THIS PLAYBOOK

- |                     |                       |                        |                     |                         |                       |                      |
|---------------------|-----------------------|------------------------|---------------------|-------------------------|-----------------------|----------------------|
| <b>01</b><br>Define | <b>02</b><br>Discover | <b>03</b><br>Benchmark | <b>04</b><br>Decode | <b>05</b><br>Prioritize | <b>06</b><br>Activate | <b>07</b><br>Improve |
|---------------------|-----------------------|------------------------|---------------------|-------------------------|-----------------------|----------------------|

## BEFORE YOU START

# Welcome

This playbook replaces a vague "let's see what competitors are doing" with a structured process: define the question, study the field, decode the patterns, and act. Twenty percent reading, eighty percent writing.

### ● WHAT YOU'LL BUILD

- A competitor shortlist** — the accounts worth tracking, ranked by relevance.
- A benchmark of audience, publishing and content** — how you stack up, page by page.
- A list of decoded patterns** — what their best-performing content has in common.
- A prioritized opportunity matrix** — the moves worth making first.
- A 30-day action plan** — with owners, dates and success metrics attached.
- An executive summary** — ready to share with your team or your manager.

### ● BEFORE YOU BEGIN

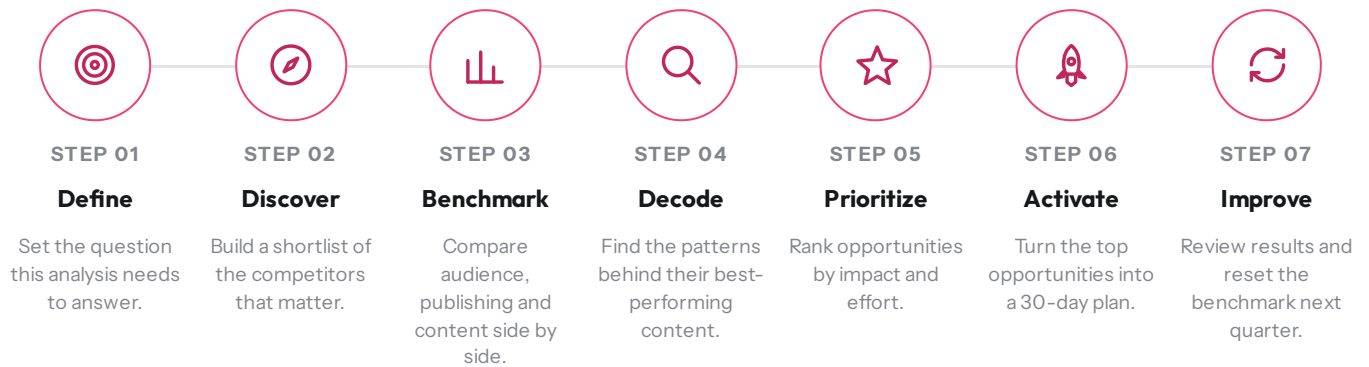
- A shortlist of 3-5 competitors you already have in mind.
- Access to your own analytics — followers, engagement, posting history.
- 60-90 minutes of uninterrupted focus for the first sitting.
- A pen. This is a workbook, not a slide deck — you'll be writing on it.

### ● HOW TO USE THIS PLAYBOOK

- Work through the seven steps in order — each one builds on the last.
- Answer the Decision Question on each page before filling in the workspace below it.
- Use the Validation Checklist to confirm a step is genuinely done, not just started.
- Keep the finished playbook — it's built to be reused every quarter.

# Seven steps, one continuous loop

Competitive analysis isn't a report you file away — it's a cycle you repeat. Move through Define to Improve once, then return to Benchmark next quarter with a fresh set of numbers.

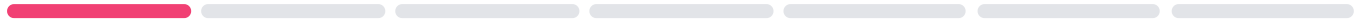


## ● HOW THE STEPS CONNECT

- 1 Define → Discover**  
A clear question narrows an unlimited list of possible competitors down to the ones actually worth studying.
- 2 Discover → Benchmark**  
Once you know who to watch, you can measure them consistently across audience, publishing and content.
- 3 Benchmark → Decode**  
Raw numbers become useful once you look for the patterns behind the highest-performing posts.
- 4 Decode → Prioritize**  
Insights only matter if you rank them — not every gap is worth closing right now.
- 5 Prioritize → Activate**  
The top-ranked opportunities become a dated, owned 30-day plan — not a someday list.
- 6 Activate → Improve**  
A quarterly review closes the loop and sets the benchmark for next time.



# Define the analysis



Before you look at a single competitor, decide what this analysis needs to prove.

## DECISION QUESTION

**What marketing question are you trying to answer?**

● **ANALYSIS BRIEF** — fill in each field below

### PRIMARY OBJECTIVE

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.....  
.....

### PLATFORMS IN SCOPE

.....  
.....  
.....

METRIC	WHY IT MATTERS	CURRENT BASELINE

### VALIDATION CHECKLIST

- The objective is written as a question, not a task.
- Every platform in scope connects back to the objective.
- Each metric has a current baseline, even a rough one.
- A teammate could read this brief and know what "done" looks like.



### COACH'S NOTE

If your objective could apply to any brand in any category, it's not specific enough yet. Name the actual decision this analysis will inform — a content shift, a channel bet, a pitch.



**Analysis Brief Completed**



# Build the competitor shortlist



Cast a wide net, then narrow it to the accounts that actually inform your objective.

**DECISION QUESTION**

**Which competitors actually deserve your attention?**

- **COMPETITOR SHORTLIST** — rank by relevance to your objective

COMPETITOR	CATEGORY	PRIMARY PLATFORM	WHY THEY MADE THE LIST

**VALIDATION CHECKLIST**

- The list includes direct, aspirational and adjacent competitors.
- Every entry has a stated reason for inclusion.
- The list is short enough to actually benchmark — five or fewer is ideal.



**COACH'S NOTE**

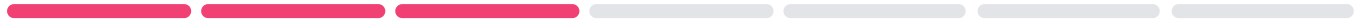
Resist the urge to track everyone in your category. A shortlist of five you actually study beats a list of twenty you never open again.



**Competitor Shortlist Completed**



# Audience & publishing benchmark



Line up your numbers next to theirs before you look at a single post.

**DECISION QUESTION**

**How does your audience and output compare to theirs?**

**AUDIENCE BENCHMARK**

ACCOUNT	FOLLOWERS	ENGAGEMENT RATE	GROWTH TREND (90D)

**PUBLISHING BENCHMARK**

ACCOUNT	POSTS / WEEK	BEST PERFORMING TIME	PLATFORM MIX

**VALIDATION CHECKLIST**

- Your own account is the first row in both tables.
- Every number has a source and a date, not a memory.
- Growth trend is marked up, down or flat – not left blank.

**COACH'S NOTE**

💡 Engagement rate alone can mislead. A small account with a loyal niche audience can out-engage a competitor ten times its size.

**Audience & Publishing Benchmark Completed**



# Content audit



Catalog what they post and how often — the raw material for the Decode step.

**DECISION QUESTION**

**What are they actually posting, and how often?**

● **CONTENT FORMATS**

FORMAT	SHARE OF POSTS	AVG. ENGAGEMENT	NOTES

● **POSTING RHYTHM** — mark X on days they publish

MON	TUE	WED	THU	FRI	SAT	SUN

**VALIDATION CHECKLIST**

- Every content format they use is listed, including one-offs.
- The posting rhythm covers a full week, not a single snapshot day.
- Notes capture format details a chart can't — series, collabs, paid boosts.



**COACH'S NOTE**

A quiet weekday often means the budget went to a paid push instead. Cross-check silent days against launches before you assume they went dark.



**Content Audit Completed**



# Positioning & community



Numbers show what they post. This page shows how they sound and who they talk to.

**DECISION QUESTION**

**How do they position themselves, and how do they treat their audience?**

● **POSITIONING MATRIX**

ACCOUNT	BRAND VOICE	VISUAL IDENTITY	STATED VALUE PROP

● **COMMUNITY MANAGEMENT**

ACCOUNT	REPLY SPEED	COMMENT TONE	USES UGC?

● **INITIAL OBSERVATIONS**

**VALIDATION CHECKLIST**

- Brand voice is described in words a copywriter could brief from.
- Community rows are based on a real sample, not one lucky comment.
- Initial observations name a pattern, not just a description.



**COACH'S NOTE**

Positioning lives in word choice as much as visuals. Screenshot three captions per competitor and read them back to back before you fill this in.



**Benchmark Completed**



# Find the pattern



Look past individual posts to what their best content has in common.

**DECISION QUESTION**

**What do their highest-performing posts have in common?**

**WINNING CONTENT**

POST / CAMPAIGN	FORMAT	RESULT	WHY IT WORKED

**COMPETITIVE SIGNALS** — the patterns you keep seeing repeat

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**VALIDATION CHECKLIST**

- At least five top-performing posts are logged across competitors.
- "Why it worked" is a reason, not a repeat of the result.
- Competitive Signals lists at least three recurring patterns.

**COACH'S NOTE**

One viral post is a data point, not a pattern. Only count something as a signal once you've seen it repeat across at least two posts or two competitors.

**Pattern Finder Completed**



# Build the insight



Turn signals into insights, and insights into the gaps you can actually fill.

**DECISION QUESTION**

**Where is the gap between what they do and what you could do better?**

**CONTENT GAP FINDER**

WHAT THEY DO	WHAT YOU DO	THE GAP

**TOP FIVE INSIGHTS**

#	INSIGHT	SUPPORTING EVIDENCE

**VALIDATION CHECKLIST**

- Each gap row names a real difference, not a preference.
- The top five insights are ranked, not just listed.
- Every insight in the top five points to evidence from an earlier page.

**COACH'S NOTE**

An insight should change a decision. If nothing about your content plan would move because of it, it belongs in a notes page, not the top five.

**Insight Builder Completed**



# Prioritize the opportunities



Not every insight deserves action this quarter. Rank before you plan.

**DECISION QUESTION**

**Which opportunities are worth acting on first?**

- **OPPORTUNITY MATRIX** — plot each insight by impact and effort

<p><b>QUICK WINS</b> High impact, low effort — start here</p>	<p><b>MAJOR PROJECTS</b> High impact, high effort — plan properly</p>
<p><b>FILL-INS</b> Low impact, low effort — do when there's room</p>	<p><b>RECONSIDER</b> Low impact, high effort — deprioritize</p>

- **PRIORITY RANKING**

RANK	OPPORTUNITY	IMPACT	EFFORT	QUADRANT

**VALIDATION CHECKLIST**

- Every insight from Decode appears somewhere on the matrix.
- Impact and effort are rated independently, not lumped together.
- The ranking table lists at least three Quick Wins to start with.

**COACH'S NOTE**

💡 Effort is the axis teams underrate. A big-impact idea that needs a resource you don't have yet isn't a quick win — be honest about the quadrant.

**Opportunity Matrix Completed**



# Build the 30-day plan



Turn your top-ranked opportunities into dated, owned actions.

**DECISION QUESTION**

**What will you actually do in the next 30 days?**

● **30-DAY ACTION PLANNER**

WEEK	ACTION	OWNER	DUE

● **SUCCESS METRICS**

METRIC	CURRENT	30-DAY TARGET	HOW YOU'LL TRACK IT

● **WEEKLY CHECK-INS**

WEEK	WHAT MOVED	WHAT NEEDS ADJUSTING

**VALIDATION CHECKLIST**

- Every action traces back to a Quick Win or Major Project from Prioritize.
- Each row has a single named owner, not a team.
- Success metrics have a number attached, not just a direction.



**COACH'S NOTE**

A plan without a weekly check-in is a wish. Put the four check-ins on the calendar now, before momentum fades.



**30-Day Action Plan Completed**



# Review and reset

Close the loop: check what worked, then reset the benchmark for next quarter.

## DECISION QUESTION

### What did you learn, and what happens next quarter?

#### • QUARTERLY REVIEW

METRIC	30-DAY TARGET	ACTUAL RESULT	VARIANCE

#### • METRICS TO MONITOR NEXT QUARTER

METRIC TO MONITOR	WHY IT MATTERS NEXT

#### • NEXT QUARTER PRIORITIES

#### VALIDATION CHECKLIST

- Every metric from the Activate step is reviewed, including missed targets.
- Variance is explained, not just recorded.
- Next quarter's priorities are ranked, not just listed.



#### COACH'S NOTE

A missed target is more useful than a hit one – it tells you where the plan's assumptions were wrong. Write down why before you move on.



**Quarterly Review Completed**

**BRING IT TOGETHER**

# Executive Summary

One page a manager, client or teammate could read cold and understand exactly what you found and what happens next.

● **ANALYSIS OBJECTIVE**

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● **COMPETITIVE LANDSCAPE** — one paragraph

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● **THREE BIGGEST FINDINGS**

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● **HIGHEST PRIORITY OPPORTUNITY**

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**NEXT STEP**

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**SUCCESS METRIC**

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**VALIDATION CHECKLIST**

- A first-time reader understands the objective in one sentence.
- Every finding traces back to a specific earlier page.
- The next step has an owner and a date attached.



**COACH'S NOTE**

Write this page last, but put it first when you share the playbook. Nobody outside this process needs to see all fifteen pages — they need this one.



**Executive Summary Completed**

## CONGRATULATIONS

# You've completed the playbook

You now have a repeatable process — not just a one-time report. Reset the benchmark next quarter and the second pass will take a fraction of the time.

### ● COMPLETED DELIVERABLES

- Analysis Brief
- Competitor Shortlist
- Audience, Publishing & Content Benchmark
- Positioning & Community Snapshot
- Decoded Patterns & Top Five Insights
- Prioritized Opportunity Matrix
- 30-Day Action Plan
- Quarterly Review & Executive Summary

### NEXT COMPETITIVE ANALYSIS

**Set a reminder to reopen this playbook and reset the benchmark in 90 days.**