SAVE THIS ♡NE

■ THE PLAYBOOK · 00 · CROSS-PLATFORM

How to Run a Social Media *Audit*

The Complete Cross-Platform Framework

A master audit for people who need to understand the whole ecosystem, so ten dashboards stop arguing with each other.

2027 EDITION CHECKED AGAINST OFFICIAL GUIDANCE · OCTOBER 2026

@ACThePlug

ASHLEY "AC" TRYBULA

A social media audit can become a beautiful graveyard of screenshots if you are not careful. Followers. Impressions. Engagement rates. Top posts. Competitors. Thirty-seven charts later, everybody nods and nobody knows what to do Monday morning.

My preference is to audit social as a **system**. Each platform has a job. Each content format has a job. Each metric should tell us something about discovery, attention, relationship or conversion. Then we decide what to change.

This master framework builds on the platform-specific Playbooks for Instagram, LinkedIn, TikTok, Facebook, Threads, YouTube, WhatsApp, Snapchat, Reddit and Pinterest. The goal is to understand what each platform contributes to the larger audience ecosystem, so no network gets judged by a KPI built for a different one.

AC'S MASTER RULE

Normalize the **questions**, not the metrics. "Did this deepen the audience relationship?" works on every platform. "Was the engagement rate 4.2%?" usually does not.

BEFORE YOU START RECENT SHIFTS TO ACCOUNT FOR

- Originality is now enforced across the major feeds. Instagram extended its originality rules to photos and carousels on April 30, 2026 [12]; Facebook says accounts that keep posting mostly unoriginal content can be made non-recommendable and demonetized [4]; YouTube renamed its repetitious content policy to "inauthentic content" on July 15, 2025 [16]; and wholly AI-generated videos stopped being eligible for Spotlight recommendation in July 2026 [18].
- Core metric definitions moved. Views replaced impressions and plays across Meta's creator tools [14], the Facebook Page Insights API retired impressions and page fans on November 15, 2025 [19], and from August 24, 2026 YouTube counts a view as soon as playback starts [15].
- Viewers can now shape what they see. Pinterest lets people turn down AI-generated images by category [20], TikTok is testing a control for how much AI content appears in For You [21], LinkedIn members can flag posts as "Seems Like AI Slop" [17], and Instagram and Threads both added feed controls that let people adjust their recommended topics [22][23].
- AI answers now sit inside the platforms. Reddit's AI search summarizes posts and comments with citations [24], YouTube is moving creators from the Inspiration tab to its Ask Studio chat tool [25], and Facebook began rolling out a creator assistant that explains why content performed [26].
- Paid and paying relationships reached conversational surfaces. WhatsApp Status ads are built in Meta Ads Manager [27], Channel admins can sell monthly subscriptions [28], Snapchat opened Creator Subscriptions [29], and LinkedIn announced paid Advice Sessions for U.S. Business Premium members [30].

SECTION 01

Define the job of every platform before looking at performance

Write one sentence for each platform: **This platform exists to ____ for this audience by ____.**

Examples: Instagram = cultural discovery + visual storytelling. LinkedIn = professional authority + relationship building. TikTok = discovery + entertainment/education. Facebook = original reach + community conversation. Threads = live conversation + idea testing. YouTube = deep viewing + search/discovery + habit, now including the TV screen. WhatsApp = permission-based messaging + service/updates + conversion. Snapchat = discovery + habitual viewing + community. Reddit = community intelligence + trust + conversation. Pinterest = visual search + planning + evergreen traffic.

Your answers can be different. The important thing is that the team agrees. Otherwise one person will call a platform successful because it generated reach while another calls it a failure because it generated no clicks.

SECTION 02

Establish the audit window and data rules

Use a period long enough to reveal patterns: often 60 to 90 days for active accounts, plus year-over-year or prior-period comparisons when seasonality matters.

Document changes that distort the comparison: major news events, paid campaigns, staff changes, posting gaps, platform feature launches, account restrictions or one extraordinary viral post.

Do not let one anomaly become the strategy. I usually report both **total performance** and a “typical content” view that helps the team see the median, recurring pattern.

SECTION 03

Re-baseline metrics before you compare periods

Several platforms changed what their headline numbers mean. Meta moved its creator tools to Views as the primary distribution metric [14] and retired impressions and page fans from the Page Insights API [19]. YouTube now counts a view the moment a video starts to play across Shorts, long-form and live, while Partner Program earnings stay tied to engaged views [15]. A year-over-year chart that crosses one of those dates can show growth or decline that is really a change of definition.

Check: the exact metric name and definition each platform used at the start and end of the window; any API or export field that was renamed or removed; whether dashboards and client decks still label old metrics with new names.

Fix: rebuild benchmarks as ratios that survived the change (shares, saves, follows or watch time per 1,000 views or reach) and annotate every chart that crosses a definition change.

SENIOR STRATEGIST NOTE

Put a **metric changelog** at the top of every audit report: platform, metric, old definition, new definition, date. It takes ten minutes, and it stops the most common bad decision in a cross-platform review, which is cutting a channel because its numbers "dropped" when the counting rules changed.

SECTION 04

Audit account health and positioning

For every account, check: naming consistency; bio/About language; profile/cover imagery; links; pins/featured content; account status/recommendation eligibility; verification/impersonation issues; rights/copyright health; current CTA; and reserved handles on platforms that are opening new identity features, such as WhatsApp usernames [31].

This is also the entity layer. A person or brand should look like the same person or brand everywhere, even if the tone changes by platform.

The profile-level question is simple: **If a stranger lands here because one post traveled, do they understand what they have found and why they should stay?**

SECTION 05

Audit originality and AI use across the portfolio

Originality has moved from a best practice to an eligibility rule. Meta reported in January 2026 that 75% of Instagram recommendations in the U.S. come from original posts [13]. Instagram ties recommendation eligibility to whether most of an account's posts over a rolling 30-day window are original [12]. Facebook may deprioritize unoriginal content and can make repeat offenders non-recommendable and demonetized [4]. YouTube's inauthentic content policy covers repetitive or mass-produced videos [16]. Snapchat removed wholly AI-generated video from Spotlight recommendation [18].

At the same time, audiences have more ways to filter AI content out of their own feeds [17][20][21]. Undisclosed or low-effort AI work now carries two risks: the platform limits it, and viewers learn to skip it.

Check: the share of posts in the window that are original, adapted from your own work, or reposted from elsewhere; which assets used generative AI and whether each platform's disclosure or label rules were followed; watermarks or visible cross-posting tells; and whether any account has an open originality or policy flag.

Ask: If a platform removed every unoriginal post from recommendation tomorrow, which accounts would lose most of their reach?

SENIOR STRATEGIST NOTE

Run a one-page **originality census** across the portfolio: one row per account, columns for original, adapted, reposted and AI-assisted posts in the last 30 days. Any account below a clear original majority goes to the top of the 30-day plan, before any work on hooks or timing.

SECTION 06

Build one master content inventory

Export or log every post in the audit window and add standard tags: platform, date, format, content pillar, objective, talent/host, original vs. adapted, AI-assisted or not, timely vs. evergreen, campaign/franchise, link/no link, paid/organic.

Then add platform-native performance metrics. The columns will differ, and they should. Instagram shares and saves are different from YouTube retention. LinkedIn out-of-network impressions are different from TikTok completion. WhatsApp response or Channel behavior is different from Pinterest outbound traffic. Snapchat returning viewers are different from Reddit contribution quality.

The shared layer is the content taxonomy. That is what lets you ask cross-platform questions such as: Which content pillar consistently travels? Which talent creates repeat audiences? Which topics are strong on discovery platforms but weak on depth platforms?

SECTION 07

Audit the funnel: Discovery → Attention → Relationship → Conversion

Discovery: Did new people encounter us? Non-follower reach, views, recommendation traffic, search, Browse/Suggested, Spotlight, Pinterest search/browse, subreddit/community discovery, Channel follows and out-of-network reach.

Attention: Did the content earn consumption? Watch time, retention, completion, swipe-through, click-through, dwell/engagement proxies, Story progression, Pin engagement and message/update consumption.

Relationship: Did people interact or return? Shares, saves, comments/replies, follows, returning viewers, repeat commenters, subreddit participation, Channel reactions/polls, direct conversations and other recurring audience signals.

Conversion: Did the audience do the thing the strategy requires? Website visit, lead, purchase, registration, app install, show view, sponsorship value, paid subscription, message resolution, catalog action, outbound click or first-party sign-up.

Not every platform needs to win every stage. Map the role instead of punishing a discovery platform for not behaving like email.

SECTION 08

Audit search and AI-answer discoverability

A growing share of discovery now starts with a question. Reddit's AI search answers with citations to posts and communities [24]. LinkedIn publishes guidance on making posts more visible to AI search [2]. Pinterest's visual search turns an image into descriptive search words [32]. TikTok lists video information such as captions, sounds and hashtags among its recommendation signals [3].

Check: the 10 to 20 questions your audience actually asks; whether your posts, profiles and videos use those words plainly in titles, captions, on-screen text and descriptions; and which of your posts appear in in-platform search and AI answers for those questions.

Ask: When someone asks the platform about your topic, do you show up, and does the answer describe you the way you would?

SENIOR STRATEGIST NOTE

Keep a fixed **question set** and run it monthly in each platform's search and AI answer tools. Log whether you appear, which post is cited and how you are described. It is the closest thing to a rank tracker social has, and it shows quickly which pillars need clearer language.

SECTION 09

Audit platform-native execution

Take one campaign or idea that appeared on multiple networks and compare the execution.

Was the hook adapted? Was the caption written for the local culture of the platform? Was the video re-edited or simply resized? Did the CTA make sense? Was the timing appropriate?

Platforms are also enforcing this directly. Reddit began rolling out a 12-hour pause for accounts that submit substantially similar content across multiple communities in October 2026 [33], and the originality rules in section 5 are aimed at reposted and lightly edited content [12][4].

Same idea across platforms can be smart operations. Same execution everywhere is usually where efficiency starts eating effectiveness.

SECTION 10

Audit audience quality, overlap and owned relationships

Who are you reaching on each platform? Where possible, compare geography, age, industry, seniority, follower/non-follower mix, new vs. returning, or other available audience dimensions.

Then ask what you cannot see in one dashboard: Are the same people following everywhere? Are different platforms serving different audience jobs? Which channel owns the deepest relationship?

This is where first-party data matters. If your strategy only knows audiences through platform dashboards, you are renting the relationship. Newsletter, SMS, WhatsApp, app and site registrations help you understand who chooses to stay connected beyond a public feed.

Paid relationships are now available inside the platforms too: WhatsApp Channel subscriptions [28], Snapchat Creator Subscriptions [29] and LinkedIn Advice Sessions [30]. Audit them as a relationship product with their own churn and service standards, and check that the free experience stays strong enough to keep feeding them.

SECTION 11

Audit content efficiency without worshipping it

Map the production effort against strategic value. Which formats are expensive and underperforming? Which low-lift formats create surprising value? Which high-performing formats depend on unsustainable heroics?

Efficiency is useful. But the cheapest content is not automatically the best content. A flagship video that builds authority, sponsorship and franchise value may be worth more than 20 inexpensive posts with shallow impact.

Use effort as one factor in the decision, not the whole decision. When AI tools cut production time, record where the time went: more testing and better packaging are good answers; more volume of the same post usually is not, given the originality rules above.

SECTION 12

Benchmark carefully

Competitor benchmarking is useful for understanding category norms, whitespace and format behavior. It becomes dangerous when it turns into “they did this, so we should too.”

Audit competitors for **patterns**: cadence, recurring franchises, platform-native packaging, talent, audience response, comment culture, content gaps, partnerships and positioning.

Do not assume their visible metrics equal business success. You do not have their internal conversion data, cost structure or objectives. And because view and reach definitions changed in the last two years [14][15], check that any public benchmark you borrow was measured the same way as your own numbers.

SECTION 13

Build the 30/60/90-day action plan

Every audit should end with action owners and dates.

30 days: fix profile/account health and any originality or policy flags; publish the metric changelog; stop obvious low-value work; launch low-risk tests.

60 days: test new formats/packaging; build repeatable franchises; strengthen comment/community workflows; start the monthly search and AI-answer check.

90 days: evaluate tests; reallocate resources; formalize winning systems; kill what did not earn the right to continue.

And use the same four buckets everywhere: **Stop / Start / Continue / Test.**

SECTION 14

The platform-specific diagnostic layer

Instagram: positioning, originality across Reels, photos and carousels, packaging, non-follower discovery with Trial Reels, shares/saves, search and conversion [1][12].

LinkedIn: profile searchability and verification, content mix, audience relevance, out-of-network discovery, authority/AEO, collaboration and creator partnerships [2].

TikTok: hook, watch behavior, search/discovery signals, repeatable creative formats, AI labels and comment-led creation, plus the US rulebook under the joint venture [3].

Facebook: originality, recommendation reach, metric re-baselining after Views, freshness, community behavior, native adaptation and monetization readiness [4][14].

Threads: conversation depth, replies, topics, Communities, DMs, link and text-attachment behavior, idea testing and the paid hand-off [5].

YouTube: impressions/CTR, title and thumbnail testing, retention, traffic sources, returning viewers, next-watch design, Shorts, the TV screen and the August 2026 view-count change [6][7][15].

WhatsApp: purpose by surface, profile trust and usernames, acquisition/opt-in paths, messaging quality and AI agents, Channel/Status performance, Status ads, subscriptions, permission health and conversion [8][27].

Snapchat: Public Profile conversion, Spotlight discovery and originality, Story retention, returning viewers, traffic sources, subscriptions and reply/community signals [9][18].

Reddit: community fit, subreddit mapping, listening, contribution quality, moderator/rule alignment, disclosure, AI search presence, trust and authority [10][24].

Pinterest: search intent, profile/domain ownership, board architecture, Trends/Predicts, AI labels, visual search, saves, long-tail discovery and outbound traffic [11][20].

Use the individual Playbooks when one platform needs a deeper diagnosis. Each one includes the platform's current creative specs and safe zones.

CREATIVE SPECS

Creative specs and brand consistency across platforms

Your brand system has to flex across ten very different screens without turning into ten different brands. The goal of this part of the audit is to see whether people would recognize you on every platform within a second, and whether each asset is built for the surface it appears on.

SURFACE TYPE	WHERE IT SHOWS UP	WHAT TO CHECK	PRO TIP
Full-screen vertical video	Reels, TikTok, Shorts, Spotlight, Stories, Status	Key text and faces clear of each app's interface overlays; captions burned in or added natively	Build one master edit, then re-cut the first two seconds and the text placement for each app's safe area
Feed images and carousels	Instagram, LinkedIn, Facebook, Threads, Pinterest	Each platform's current feed ratio and crop on the profile grid or board	Design the cover so the main claim still reads when cropped to a square thumbnail
Thumbnails and covers	YouTube, TikTok and Reels covers, Pinterest Pins	Legibility at phone and TV size; consistent series markers	Shrink every thumbnail to the size it appears in search results before approving it
Profile images and banners	Every platform	Same mark everywhere; readable at comment size; banner text inside the safe area on mobile and desktop	Use a simple mark or a clear face for avatars and keep wordmarks and taglines for larger surfaces

SURFACE TYPE	WHERE IT SHOWS UP	WHAT TO CHECK	PRO TIP
Text-first posts	Threads, LinkedIn, Reddit, WhatsApp Channels	Opening line carries the point; formatting survives each app	Write your house voice rules per surface, then check five recent posts against them

Build your own system: one template per recurring series, one display style and one body style, a small palette that passes a contrast check, consistent avatar and logo placement, and series names that repeat across platforms. Let the platform's native look carry the post and your system carry the recognition.

Voice by surface: decide how you sound in bios, captions, comments and replies, DMs and long-form, and write it down. The point of view stays the same; the register changes by room.

Accessibility: captions on every video, alt text on images where the platform supports it, readable text sizes and color contrast that does not depend on color alone to carry meaning.

■ PRO TIP

Put the profile screenshot of every account side by side on one page. If a stranger cannot tell they belong to the same person or brand in five seconds, fix the avatars, names and bios before you redesign any templates.

■ DO	■ DON'T
+ Keep one recognizable mark, name and series system across every account	– Resize one asset and post it everywhere with another app's watermark
+ Re-cut video and re-crop images for each platform's safe area and ratio	– Change cover styles and colors from post to post so the grid looks random
+ Check every template on a real phone, and on a TV for YouTube	– Put key text under captions, buttons or profile overlays
+ Write voice rules per surface and audit five recent posts against them	– Make every post look like an ad to stay "on brand"

Copyable audit checklist

- ☐ **Objectives:** Is the job of every platform defined in one sentence?
- ☐ **Window:** Is the audit period long enough to reveal patterns and annotated for anomalies?
- ☐ **Metric changelog:** Have I documented metric definition changes (Views, view counting, retired API fields) before comparing periods?
- ☐ **Profiles:** Are names, bios, links, pins, handles and visual identities current and consistent?

- ☐ **Health:** Are recommendation, rights, policy, originality or impersonation issues resolved?
- ☐ **Originality & AI:** What share of each account's recent posts is original, adapted, reposted or AI-assisted, and is AI use disclosed where required?
- ☐ **Inventory:** Do I have one tagged cross-platform content inventory?
- ☐ **Discovery:** Which platforms/content reliably reach new people?
- ☐ **Attention:** Which formats hold attention after discovery?
- ☐ **Relationship:** Where do people share, save, reply, follow and return?
- ☐ **Conversion:** What downstream action does each platform contribute to?
- ☐ **Search & AI answers:** Do we appear in in-platform search and AI answers for the questions our audience asks?
- ☐ **Platform fit:** Are ideas adapted natively rather than mechanically duplicated?
- ☐ **Audience:** Who is each platform actually reaching, and which relationships do we own directly?
- ☐ **Efficiency:** Which work is expensive, repeatable, scalable or strategically valuable?
- ☐ **Benchmarking:** What competitor patterns reveal whitespace instead of copycat opportunities?
- ☐ **Creative specs & consistency:** Is every account recognizable as the same brand, with assets built for each platform's current specs and safe areas?
- ☐ **Plan:** Are next steps assigned to 30/60/90-day Stop / Start / Continue / Test actions?

Audit scorecard

AUDIT AREA	WHAT I'M CHECKING	SCORE (1–5)	ACTION / EVIDENCE
Strategy clarity	Defined job, audience and objective for each platform		
Measurement integrity	Metric changelog, re-baselined benchmarks, annotated charts		
Account health	Profiles, rights, recommendations, identity consistency		
Originality & AI use	Original share of posts, AI disclosure, open policy flags		
Content system	Tagged pillars, formats, franchises and talent		
Discovery	New audience reach across platform-native surfaces		
Search & AI answers	Presence and description in in-platform search and AI answers		
Attention	Retention, watch behavior, clicks and consumption		

AUDIT AREA	WHAT I'M CHECKING	SCORE (1–5)	ACTION / EVIDENCE
Relationship	Shares, saves, replies, follows, returning behavior		
Conversion	Traffic, first-party data, subscriptions, leads, sales or business value		
Platform fit	Native packaging and distribution		
Creative consistency	Recognizable system, current specs, accessibility		
Efficiency	Resource-to-value alignment		
Testing system	30/60/90-day experiments and decision loop		

DECISIONS

How I'd turn this into action

Finish with a one-page decision summary: **three things to stop, three to start, three to continue and three tests to run.** Assign an owner and a date to every test. An audit without a decision is just organized hindsight.

SOURCES

Official sources and creator resources

Platform features change quickly. This Playbook was checked against official guidance available in October 2026. Verify feature availability inside your own account before treating any tool or metric as universal.

[1] Meta: Instagram Best Practices for Creators · https://about.fb.com/news/2024/10/best-practices-education-hub-creators-instagram/

[2] LinkedIn: How to Maximize AI Visibility for Your LinkedIn Posts · https://www.linkedin.com/business/marketing/blog/ai-search/how-to-maximize-ai-visibility-for-your-linkedin-posts

[3] TikTok Newsroom: How TikTok recommends videos #ForYou · https://newsroom.tiktok.com/how-tiktok-recommends-videos-for-you?lang=en

[4] Meta: Rewarding Original Creators on Facebook · https://about.fb.com/news/2026/03/rewarding-original-creators-on-facebook/

[5] Meta: New Threads Features / Insights / Topics · https://about.fb.com/news/2025/03/new-threads-features-more-personalized-experience-you-control/

[6] YouTube Help: Get started with YouTube Analytics · https://support.google.com/youtube/answer/9002587?hl=en

[7] YouTube Help: Advanced Mode analytics · https://support.google.com/youtube/answer/9717005

[8] WhatsApp Help Center: About channels on the WhatsApp Business app · https://faq.whatsapp.com/809740894165112

[9] Snapchat Support: Viewing and Understanding Analytics · https://help.snapchat.com/hc/en-us/articles/24892451593108-Viewing-and-Understanding-Analytics

[10] Reddit Help: What is Reddit Pro? · https://support.reddithelp.com/hc/en-us/articles/24368510335892-What-is-Reddit-Pro

[11] Pinterest Business Help: Browse Pinterest Trends · https://help.pinterest.com/en/business/article/pinterest-trends

[12] Instagram for Creators: Rewarding Original Creators on Instagram (April 2026) · https://creators.instagram.com/blog/rewarding-original-creators-on-instagram

[13] Meta: 2026: AI Drives Performance · https://about.fb.com/news/2026/01/2026-ai-drives-performance/

[14] Meta for Creators: Introducing Views to Simplify Content Distribution · https://creators.facebook.com/introducing-views-to-simplify-content

[15] YouTube Help: How engagement metrics are counted · https://support.google.com/youtube/answer/2991785?hl=en

[16] YouTube Help: YouTube channel monetization policies · https://support.google.com/youtube/answer/1311392?hl=en

[17] LinkedIn Pressroom: How LinkedIn is Continuing to Tackle AI Slop · https://news.linkedin.com/2026/how-linkedin-is-tackling-ai-slop

[18] Snap Newsroom: Rewarding Authentic Creativity on Spotlight · https://newsroom.snap.com/rewarding-authentic-creativity-on-spotlight

[19] Meta for Developers: Page Insights API Updates · https://developers.facebook.com/blog/post/2025/08/15/page-insights-api-updates/

[20] Pinterest Newsroom: New tools to give users more control over Gen AI content · https://newsroom.pinterest.com/news/pinterest-rolls-out-new-tools-to-give-users-more-control-over-gen-ai-content/

[21] TikTok Newsroom: More ways to spot, shape and understand AI-generated content · https://newsroom.tiktok.com/more-ways-to-spot-shape-and-understand-ai-content?lang=en

[22] Instagram: Reels Algorithm Control (Your Algorithm) · https://about.instagram.com/blog/announcements/reels-algorithm-control

[23] Meta: Control Your Threads Feed With New Dear Algo Feature · https://about.fb.com/news/2026/02/threads-dear-algo/

[24] Reddit Help: Reddit's AI search · https://support.reddithelp.com/hc/en-us/articles/32026729424916-Reddit-s-AI-search

[25] YouTube Help: Learn about Ask Studio in YouTube Studio · https://support.google.com/youtube/answer/16291691?hl=en

[26] Meta: Introducing Creator Assistant and More Languages for AI Translations on Facebook · https://about.fb.com/news/2026/06/creator-assistant-more-languages-for-ai-translations-on-facebook/

[27] WhatsApp for Business: Ads in Status and Channels · https://business.whatsapp.com/whatsapp-ads

[28] WhatsApp Legal: Channels Subscription Terms · https://www.whatsapp.com/legal/channels-subscription

[29] Snap Newsroom: Snapchat Launches Creator Subscriptions · https://newsroom.snap.com/snapchat-launches-creator-subscriptions

[30] LinkedIn Pressroom: New Ways to Build Meaningful Connections · https://news.linkedin.com/2026/new-ways-to-build-meaningful-connections

[31] Meta: It's Time to Reserve Your WhatsApp Username · https://about.fb.com/news/2026/06/its-time-to-reserve-your-whatsapp-username/

[32] Pinterest Newsroom: Introducing new visual search features · https://newsroom.pinterest.com/en-ca/news/introducing-new-visual-search-features/

[33] Reddit Help: Changelog - October 8, 2026 · https://support.reddithelp.com/hc/en-us/articles/54353370049684-Changelog-October-8-2026

OFFICIAL CREATOR RESOURCES TO FOLLOW: @Creators on Instagram · LinkedIn Marketing Blog · TikTok Creator Academy · Facebook for Creators · YouTube Creators · WhatsApp Business · Snapchat Creators · Reddit Pro · Pinterest Create

ABOUT

About the author

Ashley "AC" Trybula is an award-winning content and audience executive, journalist and media leader working across media, culture, social and the creator economy. Her work spans content strategy, audience development, editorial leadership, video, original programming and digital distribution. She writes about audience growth, social media, digital culture, media leadership and the business of attention.

@ACTHEPLUG · THE PLAYBOOK