

The Social Media Retainer Scope Card

Compare the work behind the monthly fee

A practical worksheet for business owners and marketing leads comparing social media agency proposals. Use it with your shortlist to identify responsibilities, limits and missing costs. It does not replace the final service agreement.

Before you compare

Business	Priority audience and market
Main job social content needs to do	Accounts and languages we need covered
What our team can reliably supply each month	Client decision-maker
Available production and review time	Must-have services
Optional services	

Give each agency the same answers. If its recommendation differs, ask it to explain the trade-off.

1. Complete one card for each proposal

Agency	Proposal date/version
Quoted monthly fee and currency	Applicable taxes included or additional
Initial term, payment dates and renewal arrangement	

The counting rule

What counts as one deliverable?	Does a cross-platform adaptation count separately?
Are revisions included in that count?	If the fee buys team capacity, how is capacity defined and prioritised?

Complete the scope register on page 2. For any split responsibility, record each person's task rather than assigning a single vague owner.

Included: in the stated fee, with a written limit. Client supplies: our team completes the work. Extra: additional agreed charge. Unclear: needs an answer before comparison. Not needed: deliberately outside our requirements.

Scope register

Use one status for every item. Record the exact deliverable, responsibility and cost boundary.

Scope item	Status	Exact quantity, limit or coverage	Agency responsibility	Our responsibility	Extra cost or unresolved question
Channels and account types					
Languages and translation review					
Research and team interviews					
Topics, captions and scripts					
Original designs and edits					
Adaptations and cross-posting					
Filming and photography					
Production travel and expenses					
Stock assets, music and licences					
Scheduling and publication checks					
Revisions and corrections					
Comments, messages and moderation					
Enquiry handoff					
Reporting and review meeting					
Source files and reusable assets					
Paid advertising management					
Advertising/media spend					
Influencers or external creators					
Tools and other charges					

2. Write the working boundaries

Use precise owners, dates and limits. Keep answers aligned with the revised proposal.

Production and approval

Client inputs needed, owner and due date

Included revision rounds and definition of a round

Who verifies product claims and customer permissions

What happens if agency delivery is late

Named reviewer and backup reviewer

What becomes a new paid request

What happens if client input is late

Whether unused capacity rolls over or expires

Community coverage

Channels covered

Response target within those hours

Questions the agency may answer from approved information

Business escalation owner and backup

Authority for prices, refunds and other customer commitments

Coverage days, hours and time zone

Volume allowance or capacity limit

Questions requiring escalation

Weekend, event and urgent-issue arrangements

Reporting

Objective and metric definitions

How organic and paid activity are distinguished

Who reviews the report and agrees the next changes

Data sources and reporting period

How sales feedback or enquiry quality is included, where available

Account control and exit

Business administrator for each account

Files and reports delivered at the end

Who handles scheduled content and unresolved enquiries

Date and process for changing agency access

Agency access required

Usage or licence restrictions

Notice period, outstanding fees and handover charges

3. Compare the shortlist

Use the same scope, currency and tax basis across the proposals.

Agency A

Agency B

Agency C

Decision question	Agency A	Agency B	Agency C
Monthly fee on the same tax basis			
Required extras			
Work our team must supply			
Must-have scope still missing			
Account/file handover gaps			
Important answer still unclear			

Do not convert "unclear" to "included". Request the answer in the revised proposal so the comparison and agreement stay aligned.

Your decision record

Preferred scope and why it fits our team

Trade-offs we knowingly accept

Questions that must be resolved before approval

Decision owner and review date

Want to discuss the scope?

Book a 30-minute conversation with Debate Marketers. Bring your completed worksheet and the items you want to clarify.

calendly.com/debatemarketers/30min