



SOCIAL MEDIA MANAGEMENT SYSTEMS

HOW TO BUILD A CASE FOR ADOPTION AND CHOOSE THE RIGHT PLATFORM

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Chances are, you're reading this because you've reached a threshold. You're on a social team for your company, or you're a marketing, PR, or communications pro who's been managing social media. You've been learning and growing your social program over the past several years and you know that the tools and/or processes you've been using are being pushed further than they were meant to go. You're doing the best with what you have – but you know it's time to take it to the next level.

Sound familiar? If it does, you've probably been reading about enterprise social media management systems and have some ideas about how they can help solve some of your biggest hurdles – and how they can propel your social efforts forward.

This paper will help you cross the chasm between using piecemeal tools to manage social media and executing streamlined, technology-driven social media efforts. Whether you're approaching decision makers for the first time about investing in a social management tool or about to embark on the vetting process, this guide provides a road map.

IN THIS GUIDE, WE'LL COVER:

- What is a Social Media Management System (SMMS)?
- Common challenges that can be overcome with an SMMS
- Bonus benefits an SMMS can provide
- A step-by-step guide to building a convincing case for an SMMS at your company
- How to develop your own unique checklist of software requirements based on your social media goals



WHAT IS A SOCIAL MEDIA MANAGEMENT SYSTEM (SMMS)?

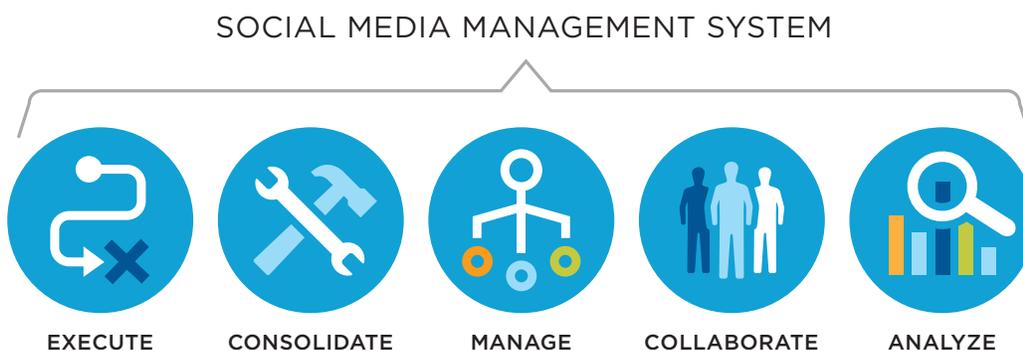
For companies in the market for social media tools, there's no shortage of options across many disciplines. From social media monitoring software that brands use to listen to conversations across the web to social collaboration software that creates internal social spaces for co-workers to interact, the social technology space can be dizzying.

The social media management system (SMMS) space grew from a need by brands to manage their numerous social media accounts. Altimeter Group defines an SMMS as “a software tool that uses business rules and approved employees and partners to manage multiple social media accounts such as Facebook, Twitter, and YouTube. This system contains features such as governance, workflow, intelligence, and integration capabilities across the enterprise. The success of these tools is dependent upon a business-led strategy, defined processes, trained staff, and ability to measure efforts.”¹

For social teams looking for these tools in one globally scalable platform, a social media management system comes into play by helping teams do the following:

- **Execute** social media plans
- **Consolidate** the functionality of the disparate tools they are currently using
- **Manage** multiple social presences from one location
- **Collaboratively** work to manage and track social media campaigns and conversations
- **Analyze** metrics to determine campaign success

These capabilities and others have helped hundreds of brands improve social media and make more meaningful connections. Many of the challenges common among prospective buyers are easily remedied by the adoption and integration of an enterprise-level social media management system.



COMMON CHALLENGES MARKETERS OVERCOME WITH A SOCIAL MEDIA MANAGEMENT SYSTEM

Let's look at how social media software tools are alleviating pain points and adding to the richness of social media outreach.

| CHALLENGE FACED BY SOCIAL TEAMS | SOLUTION PROVIDED BY AN SMMS |
|--|---|
| <p>There are too many presences to manage manually or through free or low-cost tools.</p> <p>Described by Forrester Research as “social presence growing pains,”² the management of numerous Facebook Pages, Twitter accounts, YouTube channels, etc. has become a burden. Companies are managing an average of 178 social media accounts.³</p> <p>This situation has only expanded as new social networks have entered the marketplace. In the past year, networks like Google+, Pinterest, and Instagram have catapulted onto marketers’ radar.</p> | <p>Social media management tools aggregate the management of these platforms into one centralized location – one platform, one login, one system. Publishing status updates and other content and managing the conversations on these networks are all important aspects to a social management tool.</p> |
| <p>The number of employees involved in the management of social presences is unmanageable.</p> <p>As social businesses mature and grow and social media is embraced at every level of the organization, the need for a centralized “home base” for every stakeholder to access becomes immense. This challenge is compounded in the case of companies with social presences managed by dozens - even hundreds - of separate admins across various locations, franchises, or branches globally.</p> | <p>These tools support multiple users, each with his or her own login and permission-access level within an account for each location, franchise, or agent. This means that not only can individual teams (marketing, sales, customer service, etc.) collaborate, but the corporate social media team can work within the same platform with national and global offices.</p> |
| <p>Community moderation has become unruly.</p> <p>Ad hoc processes for responding to community members are disorganized and often result in long email threads about how to respond to particular comments. This is sometimes exacerbated by an onslaught of email notifications from social media platforms. Both contribute to slow response times, overlooked posts, and generally low quality conversations with consumers.</p> | <p>Customizable workflow tools, task assignments, and approval processes are features of social media management systems that allow all stakeholders to be involved in an organized way – from community managers’ day-to-day conversations to reviews by a legal representative in cases where dialog is especially sensitive.</p> |

| CHALLENGE FACED BY SOCIAL TEAMS | SOLUTION PROVIDED BY AN SMMS |
|--|--|
| <p>Social media campaigns and content are limited only by the tools - and there's no budget for custom work.</p> <p>When great ideas for social media campaigns are nixed because the resources aren't available to develop them, the need for a feature-rich platform becomes evident.</p> | <p>Comprehensive SMMS tools include the ability to launch white-labeled, customizable social media campaigns designed to handle the volume of an enterprise-level audience that are similar to campaigns that would require much more time and budget to execute. These include contests and custom Facebook apps that engage audiences by providing an interactive experience that isn't cookie-cutter.</p> |
| <p>Complying with industry regulations about social media is impossible without third-party functionality.</p> <p>Regulated industries such as healthcare, banking, and insurance are subject to strict rules related to their online interaction with the public. The effort to create a vibrant social media program and stay in compliance with the rules can seem like a significant, nearly insurmountable challenge.</p> | <p>Social media management tools offer many of the feature sets needed to streamline required tasks, such as archiving incoming and outgoing conversations, pre-approving posts, and others. Brands that manage full-scale social programs and are responsible for ensuring that their efforts meet compliance standards and regulatory requirements rely on these software tools.</p> |
| <p>Accountability is rising. Real, dollar-value ROI is a necessity.</p> <p>Tracking and data analysis gathered together from disparate tools can be too fragmented to see trends and true results over time. Being able to align social media data with overall business data to track impact on revenue is among the top concerns of corporate social strategists. The number one internal objective for corporate strategists is creating ROI measurements, with 48% indicating this as a priority.⁴</p> | <p>Social media management tools have data tracking incorporated. Because the feature sets are so robust, reporting interfaces provide an incredible amount of analytics in one place. Many also offer third-party integration, which offers even deeper tracking. As Forrester writes in its SMMS report: "Marketers who want to integrate social media metrics with their web analytics platform, social with non-social content management, and social CRM with overall CRM, will benefit from the enterprise integrations available from these platforms."⁵</p> |
| <p>You need a system in place to help mitigate the risk of a public relations firestorm.</p> <p>Companies are working out internally how to ensure employees aren't damaging the brand while also not limiting interaction so much that it interferes with meaningful dialog. Too much control deflates the conversation; too little could spell embarrassment, and at worst, legal ramifications.</p> | <p>Mistakes, such as posting a tweet meant for a personal account to a corporate one, are eliminated by having a third-party platform connected to only corporate accounts, unlike free tools where personal and professional accounts are accessible side by side. More significant threats, such as the unintended release of privileged company information or customer data, are also mitigated by use of these tools. Permission levels give the option of only allowing selected staff to publish posts and other content, while approval processes provide a review checkpoint before certain content is distributed.</p> |

BEYOND PAIN POINTS: BONUS BENEFITS THAT MOVE YOUR SOCIAL MEDIA AHEAD OF THE GAME

Adopting a social media management platform means understanding not only what challenges can be solved, but also the added benefits of adopting such a system.

| ADDED BENEFIT | |
|--|---|
| Costs of a social media management system are offset by time savings and unnecessary custom development work. | Because social media management systems streamline all social media efforts, time savings for social media teams in terms of community moderation, tracking, content management, and publishing can be significant. Many of these tools also include do-it-yourself features for creating customizable design pieces, such as custom Facebook Page apps and Facebook contests. The budget saved by not spending dollars on custom development of white-labeled campaigns could be as much or more than the initial cost of the social software investment. |
| Collaborative environment for social media publishers. | Because colleagues are using the same software system, the selected SMMS becomes a “home base,” allowing teams to work collaboratively. Approval processes, task assignments, and notifications help create an efficient moderation space that not only serves internal teams, but also customers who enjoy faster response times and a greater variety of custom branded content. Post scheduling also lets each person on the team see what’s been scheduled, published, etc. |
| Organized scalability. | By having the functionality to support hundreds of unique logins, as well as hundreds of separate accounts within the system, SMMS tools provide the potential to scale social media across global enterprises. Having this infrastructure in place means scaling social media interaction and tracking across an unlimited number of local level presences. The possibilities for franchises of all types, real estate, insurance, medical offices, bank branches, and other industries is powerful. |
| Customized organization. | <p>The ability to organize content in a way that makes sense for your team is a simple feature of an SMMS that can have an enormous impact. Tagging pieces of content you create, as well as community-generated content like tweets and Facebook comments, helps your team organize all inbound and outbound social media content in a variety of ways:</p> <ul style="list-style-type: none"> • Community feedback tagging to reference at a later time (e.g. gathering product suggestions, qualitative product feedback) • User tagging to track active or influential members of your community • Content tagging to organize elements of individual social media campaigns |

NEXT STEPS: BUILDING THE CASE FOR A SOCIAL MANAGEMENT PLATFORM

Your team is ready to investigate, but getting buy-in to start the process might be a challenge. Marketing today is fractured, with the C-Suite struggling to successfully execute campaigns within the range of channels customers are using, from traditional advertising and email to mobile and social media. In fact, their top concern is keeping up with the proliferation of channels over the next three to five years.⁶

Plus, the quest for proving social media ROI is ongoing even at the most advanced companies. The pressure to prove returns on current efforts – and then lobbying to invest in social media technology on top of that – might be met with hesitation.

Hundreds of companies have stood at these crossroads over the past several years and took the path toward investment. How do you encourage buy-in for an enterprise social marketing tool?

Step 1: Prepare to be a champion.

Step 2: Get initial buy-in for an investment in social technology.

Step 3: Fine-tune your requirements and begin the vetting process.

Step 4: Pitch the vendors that best meet your needs.

STEP 1

PREPARE TO BE AN INTERNAL CHAMPION

When social media was first gaining steam, many professionals found themselves playing the role of the ad hoc social media champion within their organizations. They were the ones presenting the case for social media and defining why their brand should get involved or increase their initiatives. Now, as more companies' social media programs have expanded, similar champions for social management technology have emerged.

Be an internal champion for investing in social management technology and secure the first-round go-ahead to pursue a full-blown search. By winning over the appropriate people in your company on the concept, you can move ahead with confidence.

HOW DO YOU MAKE THIS INITIAL CASE?

1. Provide a lay of the land: Illustrate the facts about this type of technology adoption.

Social media continues to change daily, and more staggering numbers about the impact it has had on businesses continue to be released. Making the case for any technology adoption can be assisted with facts. Here are a few:

- **Companies are placing more dollars behind social media, and the trend is expected to continue:** Social media spending is expected to triple within 5 years, jumping to almost 20% of marketing budgets, according to The CMO Survey from February 2012.⁷
- **More companies are seeing the need for software and are investing in social media management tools:** Adoption rates of social media management platforms exceeded expectations – 64% of 140 top social media programs have adopted this kind of social software, more than the expected 58% for 2011. But despite this adoption, brands are adopting free or low-cost tools that don't meet their needs, says Altimeter Group's Jeremiah Owyang.⁸

- **There are more people involved in managing a company's social media, making the need for a centralized software tool even more important:** 70% more employees within a company work on social media than they did in August 2011, jumping from an average of 5.3 employees to 9. The numbers of outsourced professionals working for brands on social has increased 122% in that time period.⁹
- **Social customer service can affect the bottom line:** Having tools in place that allow social teams to respond to questions and comments on social sites efficiently make social customer service better. 64% of people in one survey said getting a response to a question on Twitter would make them more likely to buy that company's products.¹⁰ And it also works in reverse — 49.5% of consumers said they'd be "far less likely to buy" from a company after noticing unanswered customer questions on a social media page.¹¹

Note: How are your competitors performing? An added argument can be made if your team will be able to execute campaigns and make other improvements with an SMMS that will give you an edge over your competitors.

2. Look at your social media objectives and goals and the tactics you are pursuing to achieve them. Match them to the general capabilities of social management software tools.

Mapping the high-level capabilities of social media management systems to the tactics you're using to meet specific goals can illustrate direct applications of an enterprise tool. Review your current tactics to see how an SMMS tool can support what you're doing now. If your social media strategy is tied to business objectives (which is recommended), the link between success with social software and the support of overall business goals will be clear and easily explained.

For example, if your company's goal is to expand the business further into the European market, select social management tools that can scale easily and support the management of social presences from a central location, support language targeting, and provide a collaborative Social CRM tool is important and can support the main business goal.

By conducting this high-level investigation up front, you'll be able to make a well-researched case and create a framework that will guide your search for vendors later on.

STEP 2

GET INITIAL BUY-IN FOR AN INVESTMENT IN SOCIAL TECHNOLOGY

You've done the research necessary to present an argument for your cause. With stats about the social media space, your brand's specific industry, and your own internal plans and goals at your fingertips, go for the green light.

You might be asking, "Why wouldn't we choose a tool we like and then make our case?" Choosing a social media management platform is an important decision. This process is critical, but it takes time. Being able to carve out time among other duties to begin this step will ensure it's done right and will benefit you in the end.

STEP 3

FINE-TUNE YOUR REQUIREMENTS AND BEGIN THE VETTING PROCESS.

You've made a great case for an investment, and you have the thumbs up to proceed with doing the research necessary to choose a specific platform. This is where taking the research you've conducted about your own social media program turns into crafting a specific list of requirements for your unique situation.

Having a detailed list will be enormously important for talking to vendors. Having a go-to list of qualifications will:

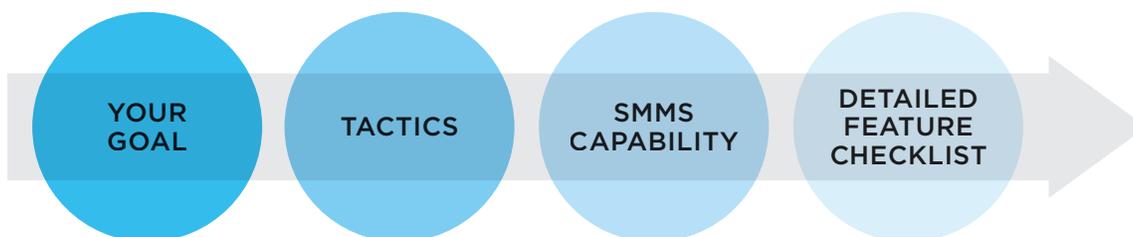
- Ensure that you ask the right questions for the goals and objectives you have established.
- Ask all the vendors on your list the same question so that you can make an apples-to-apples comparison.
- Allow you to more freely explore the added benefits of a social marketing platform. Once you've established if each vendor has what you need - you can look beyond the must-haves and learn about what the added features of the platforms could bring to your program.

How do you build your customized checklist of features? Your company's list of requirements are as individual as social media programs themselves, but by knowing your social media goals, you'll be able to determine what features you need - not the features that are popular.

Creating Your Company's Must-Have Checklist

This is where the preparation you have completed really counts. Refer back to the outline you created in Step 1 and take it a step further by digging into the details of the general capability. Instead of focusing on broader business goals, focus on the specific tactics and processes and the functionality of each platform.

By starting with your goals, you're able to easily pinpoint exactly what your team needs. In the example on the following page, a B2C retailer with one Facebook Page and one Twitter account is mapping out one of its goals to the requirements it has for social media. If you are a highly regulated industry, for instance, your checklist likely also includes requirements for approvals, archiving posts, and the ability to bring your legal team into the community management process for assistance with sensitive issues.



EXAMPLE OF A GOAL MAPPED TO SMMS CAPABILITY FEATURE

1. GOAL: INCREASE SALES FROM SOCIAL SITES

2. TACTICS TO REACH THIS GOAL

- Engaging daily Facebook content optimized for the most impact
- Competitive social media promotions, such as contests
- Distribution of promotions designed to drive traffic to the online store and convert

3. SMMS CAPABILITY

- Contests and Sweepstakes
- Facebook tab creation
- Multiple network support
- Creative asset management
- Analytics to track performance of individual posts to optimize
- Ability to track sales from social media

4. DETAILED FEATURE CHECKLIST

- **Contests and Sweepstakes:**
 - Unlimited contests of a variety of types: photo, video, and text-based contests
 - Community voting capabilities (as well as option to choose winner internally)
 - Free-form design for contest layout
 - Built-in contest sharing, including Facebook sharing
 - Voter verification
 - Compliance with Facebook promotional guidelines
- **Facebook App Creation**
 - Flexible design tools that can be easily used by non-developers
 - A toolset for designing apps that includes interactive options, such as social plug-ins, slideshows, sign-up forms, interior app pages, and more
 - Simple Facebook app publishing to hundreds of Facebook Pages
 - Ability to create, publish, and edit unlimited Facebook apps in-house
 - Analytics on activity within each Facebook app
 - Option to serve app designs to Page visitors based on criteria such as fan status, age, country, language, and mobile viewing
 - Ability to schedule the publishing and/or replacement of app designs across hundreds of Pages
 - App designs that can be optimized for mobile users and are usable on mobile devices

YOUR
GOAL

TACTICS

SMMS
CAPABILITY

DETAILED
FEATURE
CHECKLIST

Contests and
sweepstakes

Facebook
app creation

- **Multiple Network Support**

- Simultaneous distribution to multiple social networks
- Ability to send variety of content to the Facebook News Feed (photos, albums, videos, links, text, as well as apps such as sign-up forms, Flash files, and other shareable content, etc.)
- Ability to tailor messages for each platform to stay in line with network style and voice
- Trackable URL shortener
- Option to have vanity URL
- White-labeled Facebook publishing app for sending content to the News Feed
- Message scheduling



Multiple network support

- **Creative Asset Management**

- Content calendar for organizing content schedule
- Hosted content library for images, designs, videos, audio files, and PDF documents
- Ability to share content to multiple sub-accounts for locations, agent, or franchises



Creative asset management

- **Analytics to track performance of individual posts to optimize**

- In-depth social reporting at the Facebook post level across Facebook Pages
- In-platform analysis of post performance to highlight your most well-received content



Analytics to track performance of individual posts to optimize

- **Ability to track sales from social media**

- Ability to tag links published through the software with web analytics tracking so that you can see the visits referred by social sites that resulted in sales (e.g. Omniture, Google Analytics)



Ability to track sales from social media

ADDITIONAL POINTS TO CONSIDER:

- **Price:** An investment in social media software often means redirecting funds from other initiatives. Have a ballpark range as you begin the official vetting process, but be flexible if your requirements point you to an SMMS that is priced higher than that figure. The extra expense could be worth the effort in saved time and custom development costs, not to mention the positive impact that over time boost its ROI: increased brand awareness, exceptional social customer service, content marketing, and more.
- **Training and Implementation:** Are the members of your team savvy when it comes to learning new platforms? Would formal training or on-demand training suit your group (or both)? A good training program means you will maximize the benefits of the tool because you have a full understanding of its functionality. Getting up to speed on the software you choose is also a critical factor in the success of the platform. Many enterprise social software vendors offer licenses based on annual term, and losing even a few weeks of valuable time can reverberate throughout the term of your license. A skilled and involved implementation team will have you up and running and confident within weeks.
- **Support:** Like training, robust support options can make sure your team is getting the most value from its social media management system. Does the platform offer free technical support, as well as integration and strategy support? Viewing your SMMS vendor as a partner means working with them regularly to pinpoint ways to leverage the features of the platform, which increases value.

STEP 4 PITCH THE VENDORS THAT MEET YOUR NEEDS.

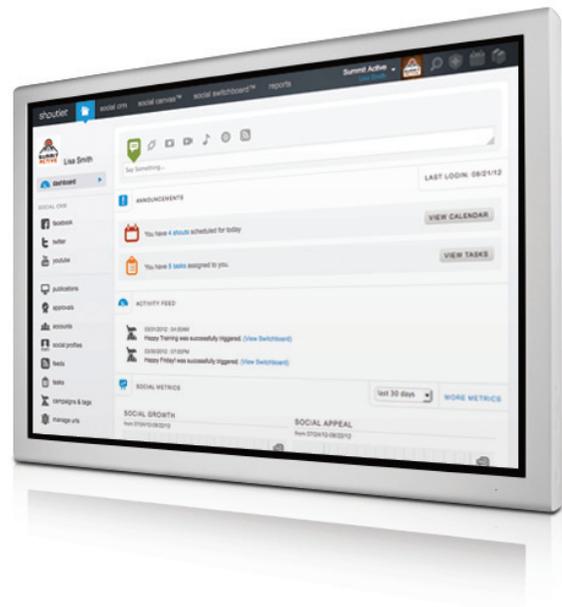
You've seen the software vendors (or issued a Request for Proposal), completed your checklist, and learned about the full features of each platform. Making the final selection on a social media management system will call for a careful weighing of price, capabilities, usability, and more. You've done your due diligence, and the only thing left is to sign and begin expanding your social media program.

ABOUT SHOUTLET

Shoutlet is a leading enterprise social marketing platform. It includes Facebook, Twitter, and YouTube management, Social CRM, trigger-based social publishing features, HTML5 web app building, and analytics, in addition to tools designed to help global brands manage and measure social media programs for hundreds of locations, franchises, branches, or agents.

More than 400 top brands and agencies have chosen Shoutlet as their social media management system after conducting comprehensive reviews of companies in the industry.

Learn why brands and agencies selected Shoutlet and continue to use it to power their social media. Visit shoutlet.com to request a demo or call (608) 833-0088.



¹ "A Strategy for Managing Social Media Proliferation" Jeremiah Owyang with Andrew Jones and Christine Tran, Altimeter Group. January 2012.

² "Take Control of Your Social Media Program" Melissa Parrish, Forrester Research. April 2011.

³ Altimeter Group survey of 140 global corporate social media program managers at companies with more than 1,000 employees, as seen in "A Strategy for Managing Social Media Proliferation" Jeremiah Owyang with Andrew Jones and Christine Tran, Altimeter Group. January 2012.

⁴ "Career Path of the Corporate Social Strategist" Jeremiah Owyang, Altimeter Group, November 2010.

⁵ "Take Control of Your Social Media Program" Melissa Parrish, Forrester Research. April 2011.

⁶ IBM's The State of Marketing 2012, a survey of more than 350 marketers.

⁷ The CMO Survey February 2012, via [cmosurvey.org](http://www.cmosurvey.org) March 6, 2012 <http://www.cmosurvey.org/blog/social-media-spend-continues-to-soar/>

⁸ "A Strategy for Managing Social Media Proliferation" Jeremiah Owyang with Andrew Jones and Christine Tran, Altimeter Group. January 2012.

⁹ The CMO Survey February 2012, via [cmosurvey.org](http://www.cmosurvey.org) March 6, 2012 <http://www.cmosurvey.org/blog/social-media-spend-continues-to-soar/>

¹⁰ InboxIQ "Twitter Q&A Census" May 2011, via eMarketer: <http://www.emarketer.com/Article.aspx?R=1008440>

¹¹ Conversocial "The Consequences of Ignoring Your Customers" May 2011 via eMarketer <http://www.emarketer.com/Article.aspx?id=1008770&R=1008770>