# Select and Implement a Social Media Management Platform

Rein in social media by choosing a management platform that's right for you.

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# ANALYST PERSPECTIVE

**Enterprise use of social media for customer interaction has exploded. Select the right management platform to maximize the value of your social initiatives.**

"Social media has rapidly become a ubiquitous channel for customer interaction. Organizations are using social media for use cases from targeted advertising, to sales prospecting, to proactive customer service. However, the growing footprint of social media initiatives – and the constant proliferation of new social networks – has created significant complexity in effectively capturing the value of social.

Organizations that are serious about social manage this complexity by leveraging dedicated social media management platforms. These platforms provide comprehensive capabilities for managing multiple social media networks, creating engagement and response workflows, and providing robust social analytics. Selecting a best-fit SMMP allows for standardized, enterprise-wide capabilities for managing all aspects of social media.

This report will help you define your requirements for social media management and select a vendor that is best fit for your needs, as well as review critical implementation considerations such as CRM integration and security."

***Ben Dickie,***
*Research Director, Enterprise Applications*
*Info-Tech Research Group*

# Executive summary

## Situation

- Social media has reached maturity as a proven, effective channel for customer interaction across multiple use cases, from customer analytics to proactive customer service.
- Organizations are looking to IT to provide leadership with social media technology enablement and integration with other enterprise systems.

## Complication

- The proliferation of social media networks, customer data, and use cases has made ad hoc social media management challenging.
- Many organizations struggle with shadow IT when it comes to technology enablement for social media; SMMP fragmentation leads to increased costs and no uniformity in enterprise social media management capabilities.

## Info-Tech **Insight**

1. **SMMP selection must be driven by your overall customer experience management strategy:** link your SMMP selection to your organization's CXM framework.
2. **Shadow IT will dominate if IT does not step in:** even more so than other areas, SMMP selection is rife with shadow IT.
3. **Ensure strong points of integration between SMMP and other software such as customer relationship management (CRM).** SMMPs can contribute to a unified, 360-degree customer view.

## Resolution

- **Social media management platforms (SMMPs)** reduce complexity and increase the results of enterprise social media initiatives. SMMPs integrate with a variety of different social media services, including Facebook, Twitter, LinkedIn, and YouTube. The platforms offer a variety of tools for managing social media, including account management, in-band response and engagement, and social monitoring and analytics.
- The value proposition of SMMPs revolves around enhancing the effectiveness *and* efficiency of social media. Using an SMMP to manage social media is considerably more cost effective than ad hoc (manual) management.
- IT must partner with other departments (e.g. Marketing) to successfully evaluate, select, and implement an SMMP. Before selecting an SMMP, the organization must have a solid overall strategy for leveraging social media in place. If IT does not work as a trusted advisor to the business, shadow IT in social media management will be rampant.

# Framing the SMMP selection and implementation project

## This Research Is Designed For:

- ✓ IT directors advising the business on how to improve the effectiveness and efficiency of social media campaigns through technology.
- ✓ IT professionals involved in evaluating, selecting, and deploying an SMMP.
- ✓ Business analysts tasked with collection and analysis of SMMP business requirements.

## This Research Will Help You:

- ✓ Clearly link your business requirements to SMMP selection criteria.
- ✓ Select an SMMP vendor that meets your organization's needs across marketing, sales, and customer service use cases.
- ✓ Adopt standard operating procedures for SMMP deployment that address issues such as platform security and CRM integration.

## This Research Will Also Assist:

- ✓ Executive-level stakeholders in the following roles:
  - Vice-president of Sales, Marketing, or Customer Service.
  - Business unit managers tasked with ensuring strong end-user adoption of an SMMP.

## This Research Will Help Them:

- ✓ Understand what's new in the SMMP market.
- ✓ Evaluate SMMP vendors and products for your enterprise needs.
- ✓ Determine which products are most appropriate for particular use cases and scenarios.

# Social media management platforms augment social capabilities within a broader customer experience ecosystem

## Customer Experience Management (CXM)

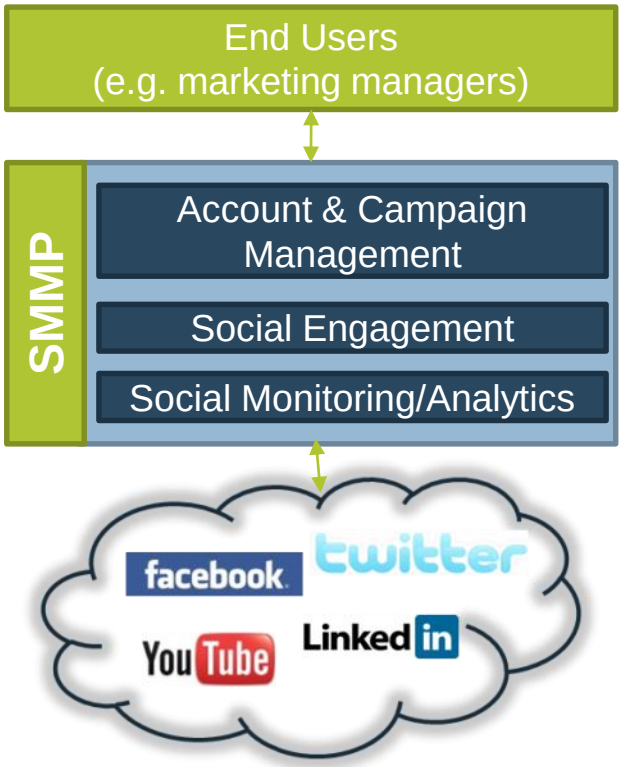
Social Media Management Platforms are one piece of the overall customer experience management ecosystem, alongside tools such as CRM platforms and adjacent point solutions for sales, marketing, and customer service. Review Info-Tech's CXM blueprint to build a complete, end-to-end customer interaction solution portfolio that encompasses SMMP alongside other critical components. The CXM blueprint also allows you to develop strategic requirements for SMMP based on customer personas and external market analysis.

# SMMPs reduce complexity and increase the effectiveness of enterprise social media programs

- **SMMPs** are solutions (typically *cloud* based) that offer a host of features for effectively monitoring the social cloud and managing your organization's presence in the social cloud. SMMPs give businesses the tools they need to run social campaigns in a timely and cost-effective manner.

- The typical SMMP integrates with *two or more* social media services (e.g. Facebook, Twitter) via the services' API or a dedicated connector. SMMPs are ***not*** simply a revised "interface layer" for a single social media service. They provide layers for advanced management and analytics across multiple services.

- The unique value of SMMPs comes from their ability to manage and track multiple social media services. Aggregating and managing data from multiple services gives businesses a much more holistic view of their organization's social initiatives and reputation in the social cloud.




*SMMPs mediate interactions between end users and the social cloud.*

**Info-Tech Best Practice**

The increasing complexity of social media, coupled with the rising importance of social channels, has led to a market for formal management platforms. Organizations with an active presence in social media (i.e. multiple services or pages) should strongly consider selecting and deploying an SMMP.

# Failing to rein in social media initiatives leads to more work, uninformed decisions, and diminishing returns

- The growth of social media services has made manually updating pages and feeds an ineffective and time-consuming process. The challenge is magnified when multiple brands, product lines, or geographic subsidiaries are involved.
  - **Use the advanced account management features of an SMMP to reduce the amount of time spent updating social media services.**
- Engaging customers through social channels can be a delicate task – high volumes of social content can easily overwhelm marketing and service representatives, leading to missed selling opportunities and unacceptable service windows.
  - **Use the in-band engagement capabilities of an SMMP to create an orderly queue for social interactions.**
- Consumer activity in the social cloud has been increasing exponentially. As the volume of content grows, separating the signal from the noise becomes increasingly difficult.
  - **Use the advanced social analytics of an SMMP to ensure critical consumer insights are not overlooked.**

**Ad Hoc Management vs. SMMPs: What's the difference?**

| Ad Hoc Social Media Management |
| --- |
| Social media initiatives are managed directly through the services themselves. For example, a marketing professional would log in to multiple corporate Twitter accounts to post the same content for a promotional campaign. |

| Social Media Management Platform |
| --- |
| Social media initiatives are managed through a third-party software platform. For example, a marketing professional would update all social account simultaneously with just a couple clicks. SMMPs also provide cross-service social analytics – highly valuable for decision makers! |

**Info-Tech Best Practice**

Effectively managing a social media campaign is not a straightforward exercise. If you have (or plan to have) a large social media footprint, now is the time to procure formal software tools for social media management. Continuing to manage social media in an ad hoc manner is sapping time and money.

# Review the critical success factors for SMMP across the project lifecycle, from planning to post-implementation

Info-Tech **Insight**

**Executive management support is crucial.** The number one overall critical success factor for an SMMP strategy is top management support. This emphasizes the importance of sales, service, and marketing and prudent corporate strategic alignment. A strategic objective in SMMP projects is to position top management as an enabler rather than a barrier.

| | Planning | Implementation | Post-Implementation | Overall |
|---|---|---|---|---|
| 1 | Appropriate Selection | Project Management | Top Management Support | Top Management Support |
| 2 | Clear Project Goals | Top Management Support | Project Management | Appropriate Selection |
| 3 | Top Management Support | Training | Training | Project Management |
| 4 | Business Mission and Vision | Effective Communication | Effective Communication | Training |
| 5 | Project Management | Supplier Supports | Appropriate Selection | Clear Project Goals |

Source: Information Systems Frontiers

# Dell uses a dedicated social media management platform to power a comprehensive social command center

## CASE STUDY

**Industry** *High-Tech*

**Source** *Dell*

With a truly global customer base, Dell gets about 22,000 mentions on the social web daily, and does not sit idly by. Having established a physical Social Media Command Center powered by Salesforce's Social Studio, **Dell was one of the companies that pioneered the command center concept for social response.**

**The SMMP carries out the following activities:**

- Tracking mentions of Dell in the social cloud
- Sentiment analysis
- Connecting customers who need assistance with experts who can help them
- Social media training
- Maintenance of standards for social media interactions
- Spreading best social media practices across the organization

**Today the company claims impressive results, including:**

- "Resolution rate" of 99% customer satisfaction
- Boosting its customer reach with the same number of employees
- One third of Dell's former critics are now fans

**Tools:**

- **Salesforce Social Studio**
- Three rows of monitors offering instant insights into customer sentiment, share of voice, and geography.

**Staff:**

- The center started with five people; today it is staffed by a team of 15 interacting with customers in 11 languages.
- Dell values human interaction; the center is not running on autopilot, and any ambiguous activity is analyzed (and dealt with) manually on an individual basis.

# Follow Info-Tech's methodology for selection and implementation of enterprise applications

Prior to embarking on the vendor selection stage, ensure you have set the right building blocks and completed the necessary prerequisites.

Follow Info-Tech's enterprise applications program that covers the application lifecycle from the strategy stage, through selection and implementation, and up to governance and optimization.

The **implementation and execution** stage entails the following steps:

1. Define the business case.
2. Gather and analyze requirements.
3. Build the RFP.
4. Conduct detailed vendor evaluations.
5. Finalize vendor selection.
6. Review implementation considerations.

**Info-Tech Insight**

A critical preceding task to selecting a social media management platform is ensuring a strategy is in place for enterprise social media usage. Use our social media strategy blueprint to ensure the foundational elements are in place prior to proceeding with platform selection.

# Use this blueprint to support your SMMP selection and implementation

**Launch the SMMP Project and Collect Requirements**

Phase 1

## Benefits

Use the project steps and activity instructions outlined in this blueprint to streamline your selection process and implementation planning. Save time and money, and improve the impact of your SMMP selection by leveraging Info-Tech's research and project steps.

**Select Your SMMP Solution**

Phase 2

Use Info-Tech's ***SMMP Vendor Landscape*** contained in **Phase 2** of this project to support your vendor reviews and selection. Refer to the use-case performance results to identify vendors that align with the requirements and solution needs identified by your earlier project findings.

**Get Ready for Your SMMP Implementation**

Phase 3

Info-Tech **Insight**

Not everyone's connection and integration needs are the same. Understand your own business's integration environment and the unique technical and functional requirements that accompany them to create criteria and select a best-fit SMMP solution.

# Use Info-Tech's use-case scenario approach to select a best-fit solution for your business needs

## Readiness

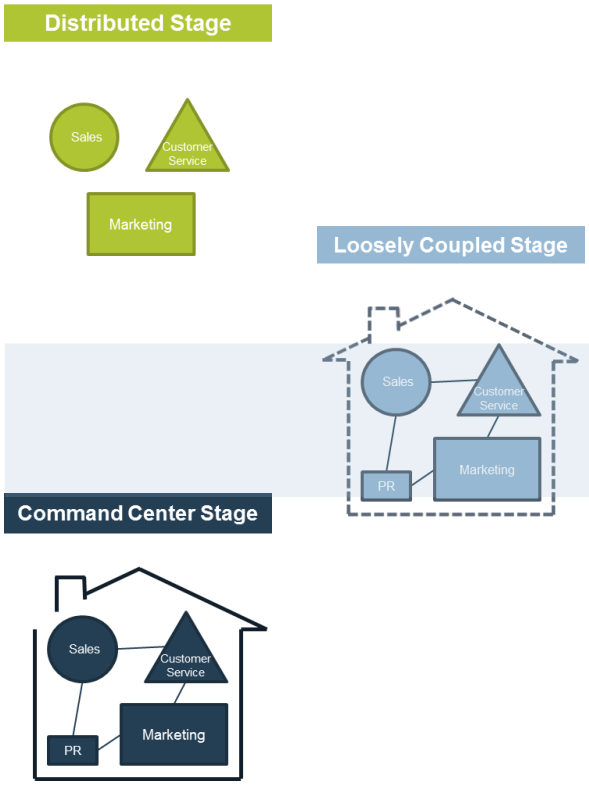
Determine where you are right now and where your organization needs to go with a social media strategy .

## Use-Case Assessment

Identify the best-fit use-case scenario to determine requirements that best align with your strategy.

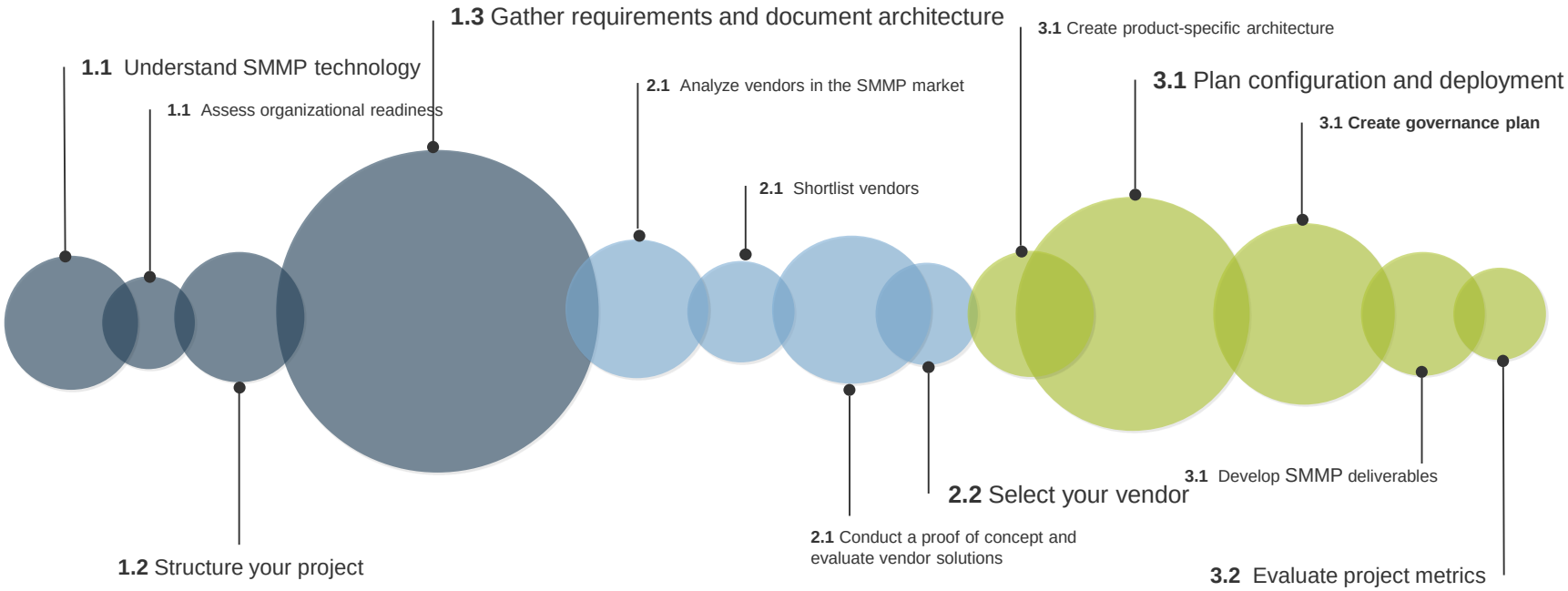
## Selection

Approach vendor selection through a use-case centric lens to balance the need for different social capabilities.



Adobe
Sendible
salesforce
Hootsuite
CISION
sprinklr
turn it on.
sproutsocial
sysomos

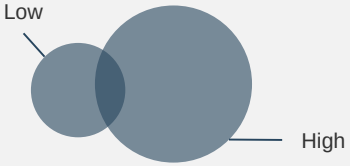
# Info-Tech walks you through the following steps to help you to successfully select and implement your SMMP




Locate your starting point in the research based on the current stage of your project.

*Milestones*

*Effort*




*Importance*

Average

Greater

*Phase*

# Info-Tech offers various levels of support to best suit your needs

## DIY Toolkit

"Our team has already made this critical project a priority, and we have the time and capability, but some guidance along the way would be helpful."

## Guided Implementation

"Our team knows that we need to fix a process, but we need assistance to determine where to focus. Some check-ins along the way would help keep us on track."

## Workshop

"We need to hit the ground running and get this project kicked off immediately. Our team has the ability to take this over once we get a framework and strategy in place."

## Consulting

"Our team does not have the time or the knowledge to take this project on. We need assistance through the entirety of this project."

**Diagnostics and consistent frameworks used throughout all four options**

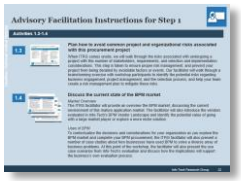
# Select and Implement a Social Media Management Platform – project overview

| | 1. **Develop a Technology Enablement Approach** | 2. **Select an SMMP** | 3. **Review Implementation Considerations** |
|---|---|---|---|
| **Best-Practice Toolkit** | **1.1 Determine if a dedicated SMMP is right for your organization**<br>Social Media Maturity Assessment Tool<br>Social Media Opportunity Assessment Tool<br>**1.2 Use an SMMP to enable marketing, sales, and service use cases**<br>SMMP Use-Case Fit Assessment Tool | **2.1 SMMP Vendor Landscape**<br>CRM Suite Evaluation and RFP Scoring Tool<br>**2.2 Select your SMMP**<br>SMMP Vendor Demo Script Template<br>SMMP RFP Template | **3.1 Establish best practices for SMMP implementation**<br>Social Media Steering Committee<br>**3.2 Assess the measured value from the project** |
| **Guided Implementations** | Identify organizational fit for the technology.<br>Evaluate social media opportunities within your organization.<br>Evaluate which SMMP use-case scenario is best fit for your organization | Discuss the use-case fit assessment results and the Vendor Landscape.<br>Review contract. | Determine what is the right governance structure to overlook the SMMP implementation.<br>Identify the right deployment model for your organization.<br>Identify key performance indicators for business units using an SMMP. |
| **Onsite Workshop** | **Module 1:**<br>Launch Your SMMP Selection Project | **Module 2:**<br>Plan Your Procurement and Implementation Process | |
| | **Phase 1 Outcome:**<br>• Social Media Maturity Assessment<br>• SMMP Use-Case Assessment | **Phase 2 Outcome:**<br>• Selection of an SMMP | **Phase 3 Outcome:**<br>• A plan for implementing the selected SMMP |

# SMMP selection and implementation workshop overview

Contact your account representative or email Workshops@InfoTech.com for more information.

| *Day 1* | *Day 2* | *Day 3* | *Day 4* | *Day 5* |
|---|---|---|---|---|
| **Preparation** | **Workshop Day** | **Workshop Day** | **Workshop Day** | **Working Session** |
| **Workshop Preparation**<br>• Facilitator meets with the project manager and reviews the current project plans and IT landscape of the organization.<br>• A review of scheduled meetings and engaged IT and business staff is performed. | **Morning Itinerary**<br>• Conduct activities from *Develop a technology enablement approach for social media phase*, including social media maturity and readiness assessment.<br>• Conduct overview of the market landscape, trends, and vendors.<br>**Afternoon Itinerary**<br>• Interview business stakeholders.<br>• Prioritize SMMP requirements. | **Morning Itinerary**<br>• Perform a use-case scenario assessment.<br>**Afternoon Itinerary**<br>• Review use-case scenario results; identify use-case alignment.<br>• Review the SMMP Vendor Landscape vendor profiles and performance. | **Morning Itinerary**<br>• Continue review of SMMP Vendor Landscape results and use-case performance results.<br>**Afternoon Itinerary**<br>• Create a custom vendor shortlist.<br>• Investigate additional vendors for exploration in the market. | **Workshop Debrief**<br>• Meet with project manager to discuss results and action items.<br>• Wrap up outstanding items from workshop.<br>**(Post-Engagement): Procurement Support**<br>• The facilitator will support the project team to outline the RFP contents and evaluation framework.<br>• Planning of vendor demo script. **Input:** solution requirements and use-case results. |




The light blue slides at the end of each section highlight the key activities and exercises that will be completed during the engagement with our analyst team.

# Use these icons to help direct you as you navigate this research

Use these icons to help guide you through each step of the blueprint and direct you to content related to the recommended activities.

This icon denotes a slide where a supporting Info-Tech tool or template will help you perform the activity or step associated with the slide. Refer to the supporting tool or template to get the best results and proceed to the next step of the project.

This icon denotes a slide with an associated activity. The activity can be performed either as part of your project or with the support of Info-Tech team members, who will come onsite to facilitate a workshop for your organization.

This icon denotes a slide that pertains directly to the Info-Tech Vendor Landscape on CRM technology. Use these slides to support and guide your evaluation of the CRM vendors included in the research.

# PHASE 1

## Develop a Technology Enablement Approach for Social Media

Select and Implement a Social Media Management Platform

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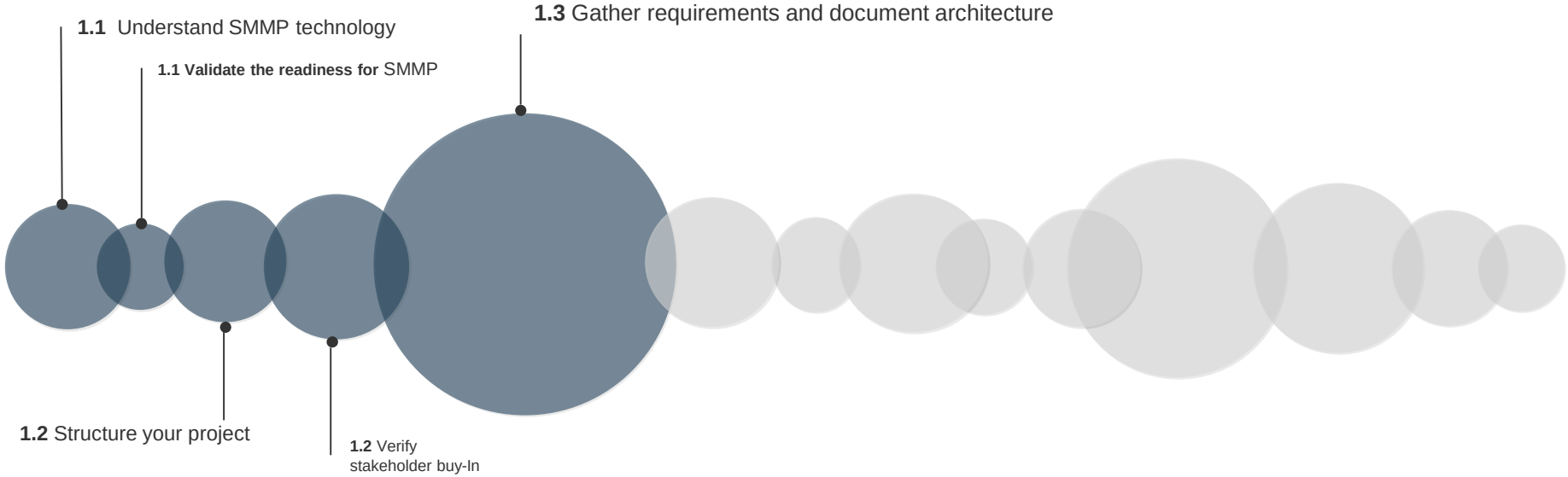
# Phase 1: Develop a technology enablement approach for social media




*Estimated Timeline: 1-3 Months*

**Info-Tech Insight**

Before an SMMP can be selected, the organization *must* have a strategy in place for enterprise social media. Implementing an SMMP before developing a social media strategy would be akin to buying a mattress without knowing the size of the bed frame.

**Major Milestones Reached**

- Project launch
- Completion of requirements gathering and documentation

**Key Activities Completed**

- Readiness assessment
- Project plan / timeline
- Stakeholder buy-in
- Technical assessment
- Functional assessment

**Outcomes from This Phase**

*Social Media Maturity Assessment*

# Phase 1 outline

**Call 1-888-670-8889** or email GuidedImplementations@InfoTech.com for more information.

Complete these steps on your own, or call us to complete a guided implementation. A guided implementation is a series of 2-3 advisory calls that help you execute each phase of a project. They are included in most advisory memberships.

## Guided Implementation 1: Develop a technology enablement approach for social media

**Proposed Time to Completion: 2 weeks**

### Step 1.1: Determine if a dedicated SMMP is right for your organization

**Start with an analyst kick-off call:**

- Assess your readiness for the SMMP project.
- Evaluate social media opportunities within your organization.

**Then complete these activities…**

- Assess your social media maturity.
- Inventory social media networks to be supported by the SMMP.

**With these tools & templates:**

*Social Media Maturity Assessment Tool*

*Social Media Opportunity Assessment Tool*

### Step 1.2: Use an SMMP to enable marketing, sales, and service use cases

**Review findings with analyst:**

- Discuss how an SMMP can assist with marketing, sales, and customer service.
- Evaluate which SMMP use case scenario is best fit for your organization.

**Then complete these activities…**

- Assess best-fit use-case scenario.
- Build the metrics inventory.

**With these tools & templates:**

*SMMP Use-Case Fit Assessment Tool*

## Phase 1 Results & Insights:

- Social Media Maturity Assessment
- SMMP Use-Case Assessment

# Phase 1, Step 1: Determine if a dedicated SMMP is right for your organization

**1.1**

**Determine if a dedicated SMMP is right for your organization**

**1.2**

Use an SMMP to enable marketing, sales, and service use cases

**This step will walk you through the following activities:**

- Assess where your organization sits on the social media maturity curve.
- Inventory the current social media networks that must be supported by the SMMP.
- Go/no-go assessment on SMMP.

**This step involves the following participants:**

- Digital Marketing Executive
- Digital Strategy Executive
- Business stakeholders

## Outcomes of this step

- Social media maturity assessment
- Inventory of enterprise social media
- SMMP Go/no-go decision

# Before selecting an SMMP, start with the fundamentals: build a comprehensive strategy for enterprise social media

## Why build a social media strategy?

- Social media is neither a fad nor a phenomenon**;** it is simply another tool in the business process. Social channels *do not* necessitate a radical departure from the organization's existing customer interaction strategy. Rather, social media should be added to your channel mix and **integrated within the existing CRM strategy.**
- Social media allows organizations to form direct and indirect connections through the ***Friend-of-a-Friend* (FOAF)** model, which increases the credibility of the information in the eyes of the consumer.
- Social media enables organizations to share, connect, and engage consumers in an environment where they are comfortable. **Having a social media presence is rapidly becoming a pre-requisite for successful business-to-consumer enterprises.**

## Important considerations for an enterprise social media strategy:

- Determine how social media will complement existing customer interaction goals.
- Assess which social media opportunities exist for your organization.
- Consider the specific goals you want to achieve using social channels and pick your services accordingly.
- Not all social media services (e.g. Facebook, Twitter, LinkedIn) are equal. Consider which services will be most effective for goal achievement.

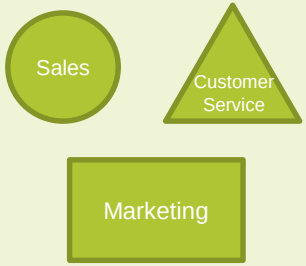
**For more information on developing a strategy for enterprise social media, please refer to Info-Tech's research on Social Media.**

# Implement a social media strategy by determining where you are right now and where your organization needs to go

Organizations pass through three main stages of social media maturity: distributed, loosely coupled, and command center. As you move along the maturity scale, the business significance of the social media program increases. **Refer to Info-Tech's *Implement a Social Media Program* for guidance on how to execute an ongoing social media program.**

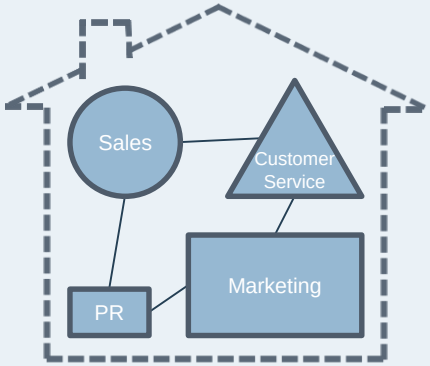
**Business Significance**

## Distributed Stage



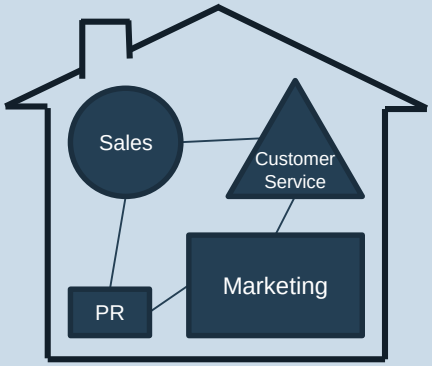

- Open-source or low-cost solutions are implemented informally by individual depts. for specific projects.
- Solutions are deployed to fulfill a particular function without an organizational vision. The danger of this stage is lack of consistent customer experience and wasted resources.

## Loosely Coupled Stage




- More point solutions are implemented across the organization. There is a formal cross-departmental effort to integrate some point solutions.
- Risks include failing to put together an effective steering committee and not including IT in the decision-making process.

## Command Center Stage




- There's enterprise-level steering committee with representation from all areas: execution of social programs is handled by a fully resourced physical (or virtual) center.
- Risks include improper resource allocation and lack of end-user training.

**Maturity Stages**

**Optimal stages for SMMP purchase**

# Assess where your organization sits on the social media maturity curve

## 1.1.1 30 Minutes

Before you can move to an objective assessment of your social media program's maturity, take an inventory of your current efforts across different departments (e.g. Marketing, PR, Sales, and Customer Service). Document the results in the *Social Media Maturity Assessment Tool* to determine your social media readiness score.

| Department | Social Media Initiative(s) | Current Status |
|---|---|---|
| *Marketing* | *Branded Facebook page with updates and promotions* | *Stalled: insufficient resources* |
| *Sales* | *LinkedIn prospecting campaign for lead generation, qualification, and warm open* | *Active: however, new reps are poorly trained on LinkedIn prospect best practices* |
| *Customer Service* | *Twitter support initiative: mentions of our brand are paired with sentiment analysis to determine who is having problems and to reach out and offer support* | *Active: program has been highly successful to date* |
| *HR* | *Recruitment campaign through LinkedIn and Branch Out* | *Stalled: insufficient technology support for identifying leading candidates* |
| *Product Development* | *Defect tracking for future product iterations using social media* | *Partially active: Tracked, but no feedback loop present* |
| Social Media Maturity Level | | ***Distributed*** |

### INPUT

- Social media initiatives
- Current status

### OUTPUT

- Current State Maturity Assessment

### Materials

- Whiteboard
- Markers
- Sticky notes

### Participants

- Digital Strategy Executive
- Business stakeholders

# Determine your organization's social media maturity with Info-Tech's *Maturity Assessment Tool*

## 1.1 *Social Media Maturity Assessment Tool*

Assessing where you fit on the social media maturity continuum is critical for setting the future direction of your social media program. We'll work through a short tool that assesses the current state of your social media program, then discuss the results.

**Info-Tech's *Social Media Maturity Assessment Tool* will help you determine your company's level of maturity and recommend steps to move to the next level or optimize the status quo of your current efforts.**

INFO-TECH **TOOL**

**Social Media Current State Assessment**

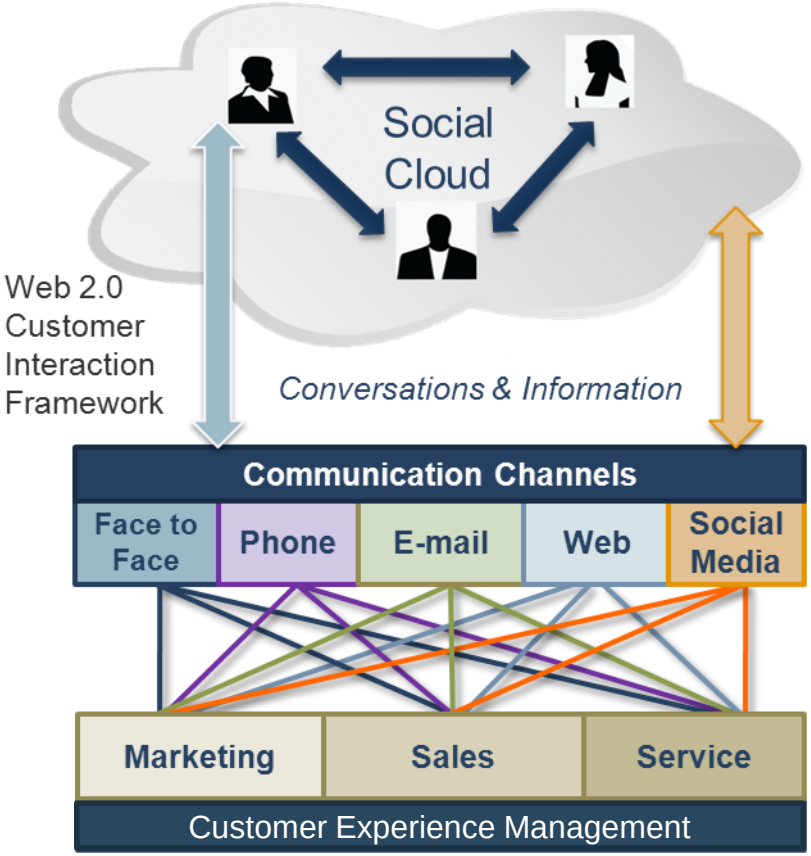
Fill in the white fields with "Strongly Agree," "Agree," "Disagree," or "Strongly Disagree" from the drop-down menus. The tool will automatically calculate your maturity score, and provide applicable feedback on the Scorecard tab.

| | Statement | Response |
|---|---|---|
| 1 | We have a set of specific social media goals for achieving well-defined business objectives. | Strongly Agree |
| 2 | Our organization handles a very large volume of customers over social channels. | Strongly Agree |
| 3 | Our organization handles highly complex customer interactions, particularly for customer service. | Strongly Agree |
| 4 | The technology we use to handle customer interactions over social channels is integrated with our CRM solutions. | Strongly Agree |
| 5 | Our social media program began in a single department, but has since spread to other business units. | Strongly Agree |
| 6 | We have a full-time employee(s) who is dedicated to handling customer interactions over social channels (for example, a Social Media Manager). | Strongly Agree |
| 7 | Our departments have a shared governance structure in place for managing our social media program (for example, a Social Media Steering Committee). | Strongly Agree |
| 8 | IT has a seat at the table when it comes to social media governance. | Strongly Agree |
| 9 | IT takes a proactive stance toward managing the risks that come with social media (for example, end-user training on social media as a malware vector). | Strongly Agree |
| 10 | IT takes a proactive stance on supporting social media management tools and technologies. | Strongly Agree |
| 11 | Our organization has adopted a robust Social Media Management Platform for managing social channels, and gathering customer and competitive insights. | Strongly Agree |
| 12 | We have a clear set of metrics in place for gauging the success of our social media initiatives. | Strongly Agree |
| 13 | We have a specific process in place for handling inbound and outbound social interactions. | Strongly Agree |

Show me the Results

# The social cloud is a dominant point of interaction: integrate social channels with existing customer interaction channels

- Instead of thinking of customers as an island, think of them interacting with each other and with organizations in the **social cloud**. As a result, **the social cloud itself becomes a point of interaction,** not just individual customers.
- The social cloud is accessible with services like social networks (e.g. Facebook) and micro-blogs (Twitter).
- Previous lessons learned from the integration of Web 1.0 e-channels should be leveraged as organizations add the social media channel into their overall customer interaction framework:
  - ✓ Do not design exclusively around a single channel. Design **hybrid-channel solutions** that include social channels.
  - ✓ Balance customer segment goals and attributes, product and service goals and attributes, and channel capabilities.




**Info-Tech Best Practice**

Don't believe that social channel integration will require an entire rebuild of your CXM strategy. Social channels are just new interaction channels that need to be integrated – as you've done in the past with Web 1.0 e-channels.

# Understand the different types of social media services and how they link to social media strategy and SMMP selection

Before adopting an SMMP, it's important to understand the underlying services they manage. **Social media services** facilitate the creation and dissemination of user-generated content, and can be grouped according to their purpose and functionality:

- **Social Networking:** Social networking services use the *Friend-of-a-Friend* model to allow users to communicate with their personal networks. Users can share a wide variety of information and media with one another. Social networking sites include Facebook and LinkedIn.
- **Blogging:** Blogs are websites that allow users to upload text and media entries, typically displayed in reverse-chronological order. Prominent blogging services include Blogger and WordPress.
- **Micro-Blogging:** Micro-blogging is similar to blogging, with the exception that written content is limited to a set number of characters. Twitter, the most popular service, allows users to post messages up to 140 characters.
- **Social Multimedia:** Social multimedia sites provide an easy way for users to upload and share multimedia content (e.g. pictures, video) with both their personal contacts as well as the wider community. YouTube is extremely popular for video sharing, while Instagram is a popular option for sharing photos and short videos.

**Info-Tech Best Practice**

In many cases, services do not fit discretely within each category. With minor exceptions, creating an account on a social media service is free, making use of these services extremely cost effective. **If your organization makes extensive use of a particular service, ensure it is supported by your SMMP vendor.**

# Inventory the current social media networks that must be supported by the SMMP

1.1.2

1. List all existing social media networks used by your organization.
2. For each network, enumerate all the accounts that are being used for *organizational* objectives.
3. Identify the line of business that administers and manages each service.

| Network | Use Case | Account | Ownership |
|---|---|---|---|
| **Facebook** | • *Branding*<br>• *Marketing*<br>• *Social Monitoring* | • *Facebook recruitment* | • *Corporate Communications*<br>• *Marketing* |
| **Twitter** | • *Social monitoring*<br>• *Customer response* | | • *Corporate*<br>• *Customer Service* |
| … | … | | … |

**INPUT**

- Social media services

**OUTPUT**

- Inventory of enterprise social media

**Materials**

- Whiteboard
- Markers

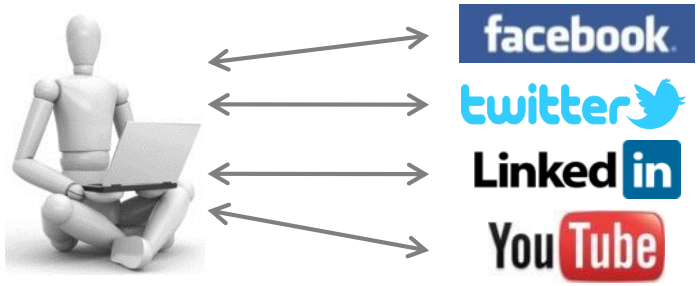
**Participants**

- Project team

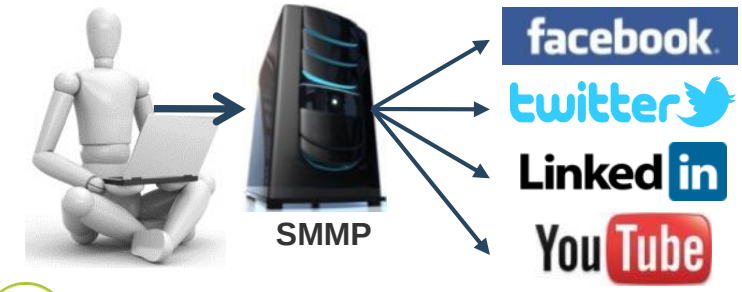
# An explosion of social media services and functionality has made effectively managing social interactions a complex task

- **Effectively managing social channels is an increasingly complicated task.** Proliferation of social media services and rapid end-user uptake has made launching social interactions a challenge for small *and* large organizations.
- Using multiple social media services can be a nightmare for **account management** (particularly when each brand or product line has its own set of social accounts).
- The volume of data generated by the social cloud has also created barriers for successfully responding in-band to social stakeholders (social engagement), and for carrying out social analytics.
- There are two methods for managing social media: **ad hoc management** and **platform-based management**.
  - Ad hoc social media management is accomplished using the built-in functionality and administrative controls of each social media service. It is appropriate for small organizations with a very limited scope for social media interaction, but poses difficulties once "critical mass" has been reached.

**Ad Hoc Management**




**Platform-Based Management**




*Ad hoc management results in a number of social media touch points. SMMPs serve as a single go-to point for all social media initiatives*

**Info-Tech Best Practice**

Managing social media is becoming increasingly difficult to do through ad hoc methods, particularly for larger organizations and those with multiple brand portfolios. Ad hoc management is best suited for small organizations with an institutional client base who only need a *bare bones* social media presence.

# Select social media services that will achieve your specific objectives – and look for SMMPs that integrate with them

**What areas are different social media services helpful in?**

| Domain | Opportunity | Consumer Social Networks (Facebook) | Micro-Blogging (Twitter) | Professional Social Networks (LinkedIn) | Consumer Video Sharing Networks (YouTube) |
|---|---|---|---|---|---|
| Marketing | Building Positive Brand Image | Proven Useful* | Proven Useful* | | Potentially Useful |
| | Increase Mind Share | Proven Useful* | Proven Useful* | | Potentially Useful |
| | Gaining Customer Insights | Proven Useful* | Proven Useful* | Proven Useful* | Potentially Useful |
| Sales | Gaining Sales Insights | Potentially Useful | Proven Useful* | Potentially Useful | |
| | Increase Revenue | Potentially Useful | Proven Useful* | Potentially Useful | |
| | Customer Acquisition | Proven Useful* | Proven Useful* | Proven Useful* | |
| Service | Customer Satisfaction | Proven Useful* | Proven Useful* | Proven Useful* | Proven Useful* |
| | Increase Customer Retention | Proven Useful* | Proven Useful* | Potentially Useful | |
| | Reducing Cost of Service | Potentially Useful | Potentially Useful | Potentially Useful | Proven Useful* |

Proven Useful*

Potentially Useful

*Proven useful by Info-Tech statistical analysis carried out on a cross-section of real-world implementations.

Social media is invaluable for **marketing, sales, and customer service.** Some social media services have a higher degree of efficacy than others for certain functions. Be sure to take this into account when developing a social media strategy.

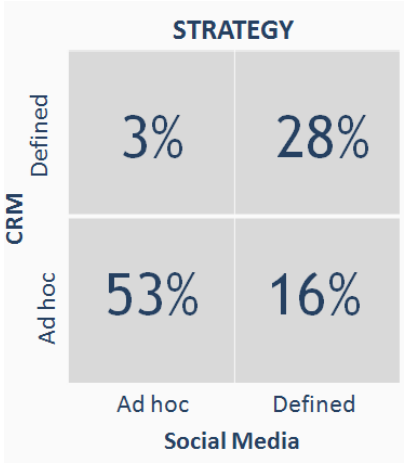
Info-Tech **Best Practice**

Different social media services are more effective than others for different goals. For example, YouTube is useful as an avenue for marketing campaigns, but it's of substantially less use for sales functions like lead generation. The services you select while planning your social media strategy must reflect concrete goals.

# Ad hoc social media management results in manual, resource-intensive processes that are challenging to measure

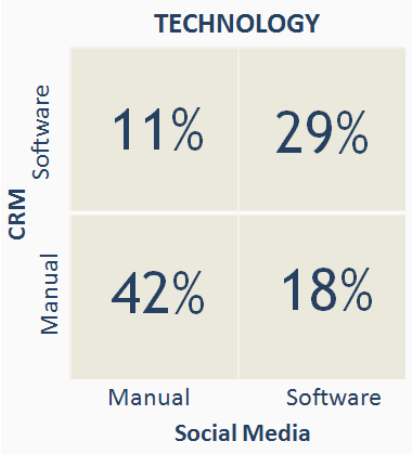
- Most organizations that have pursued social media initiatives have done so in an ad hoc fashion rather than outlining a formal strategy and deploying software solutions (e.g. SMMP).
- Social media is often a component of **Customer Experience Management (CXM);** Info-Tech's research shows many organizations are handling CRM without a strategy in place, too.
- **Social media management platforms reduce the resource-intensive processes required for ongoing social media involvement and keep projects on track by providing reporting metrics.**

*Social media **and** CRM are often being done without a defined strategy in place.*




Source: Info-Tech Survey, *N=64*

*Many processes related to social media are being done manually, despite the existence of SMMPs.*




> **When we started our social media campaign, it took 34 man-hours a week. An SMMP that streamlines these efforts is absolutely an asset.**
>
> – Edie May, Johnson & Johnson Insurance Company

# SMMPs provide functionality for robust account management, in-band customer response, and social monitoring/analytics

- Features such as unified account management and social engagement capabilities boost the *efficiency* of social campaigns. These features reduce duplication of effort (e.g. manually posting the same content to multiple services). Leverage account management functionality and in-band response to "do more with less."

- Features such as comprehensive monitoring of the social cloud and advanced social analytics (i.e. sentiment analysis, trends and follower demographics) allow organizations to more *effectively* use social media. These features empower organizations with the information they need to make informed decisions around messaging and brand positioning. Use social analytics to zero in on your most important brand advocates.

The value proposition of SMMPs revolves around enhancing the **effectiveness** and **efficiency** of social media initiatives.

**Three primary use cases for social media management:**

| | |
|---|---|
| **Social Listening & Analytics** | Monitor and analyze a variety of social media services: provide demographic analysis, frequency analysis, sentiment analysis, and content-centric analysis. |
| **Social Publishing & Campaign Management** | Executing marketing campaigns through social channels (e.g. Facebook pages). |
| **Social Customer Care** | Track customer conversations and provide the ability to respond in-platform to social interactions. |

**Info-Tech Best Practice**

SMMPs are a technology platform, but this alone is insufficient to execute a social media program. Organization and process must be integrated as well. See Info-Tech's research on developing a social media strategy for a step-by-step guide on how to optimize your internal organization and processes.

# Social analytics vary: balance requirements among monitoring goals and social presence/property management

**Segment your requirements around common SMMP vendor product design points. Current market capabilities vary between two primary feature categories: social cloud monitoring and social presence and property management.**

***Cloud-Centric*** Social Monitoring ***Content-Centric***

**Social cloud monitoring enables:**

- Brand and product monitoring
- Reputation monitoring
- Proactive identification of service opportunities
- Competitive intelligence

**Social presence and property management enables:**

- Monitor and manage discussions on your social properties (e.g. Twitter feeds, Facebook Pages, YouTube channels)
- Execute marketing campaigns *within* your social properties

## Social Analytics

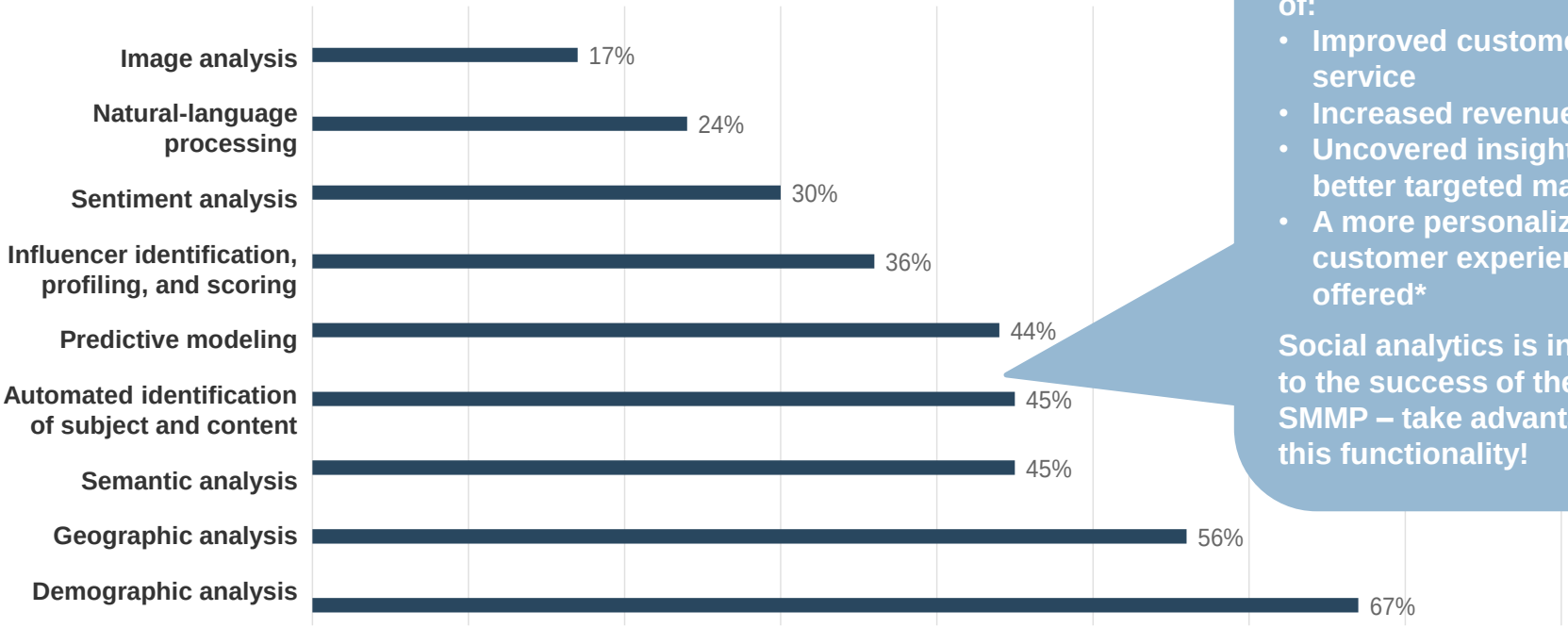
*Social analytics provide insights to both dimensions of social media monitoring.*

Some firms only need social cloud monitoring, some need to monitor their own social media properties, and others will need to do both. Some vendors do both while other vendors excel in only one feature dimension. If you are NOT prepared to act on results from social cloud monitoring, then don't expand your reach into the social cloud for no reason. You can always add cloud monitoring services later. Likewise, if you only need to monitor the cloud and have no or few of your own social properties, don't buy advanced management and engagement features.

# Use social analytics to gain the most value from your SMMP

Research indicates successful organizations employ both social cloud monitoring and management of their own properties with analytical tools to enhance both or do one or the other well. Few vendors excel at both larger feature categories. But the market is segmented into vendors that organizations should be prepared to buy more than one product from to satisfy all requirements. However, we expect feature convergence over the next 1–3 years, resulting in more comprehensive vendor offerings.

## Most sought social media analytics capabilities*




**Value driven from social analytics comes in the form of:**

- **Improved customer service**
- **Increased revenue**
- **Uncovered insights for better targeted marketing**
- **A more personalized customer experience offered***

**Social analytics is integral to the success of the SMMP – take advantage of this functionality!**

*Source: The State of Social Media Analytics (2016)

# **Cost/Benefit Scenario**: A mid-sized consumer products company wins big by adopting an SMMP

The following example shows how an SMMP at a mid-sized consumer products firm **brought in $36 000 a year.**

## Before: Manual Social Media Management

- ☒ **Account management:** a senior marketing manager was responsible for updating all twenty of the firm's social media pages and feeds. This activity consumed approximately 20% of her time. Her annual salary was $80,000. Allocated cost: $16,000 per year.
- ☒ **In-band response:** Customer service representatives manually tracked service requests originating from social channels. Due to the use of multiple Twitter feeds, several customers were inadvertently ignored and subsequently defected to competitors. Lost annual revenue due to customer defections: $10,000.
- ☒ **Social analytics:** Analytics were conducted in a crude, ad hoc fashion using scant data available from the services themselves. No useful insights were discovered. Gains from social insights: $0.

**Ad hoc management is costing this organization $26,000 a year.**

## After: Social Media Management Platform

- ☑ **Account management:** Centralized account controls for rapidly managing several social media services meant the amount of time spent updating social media was cut 75%. Allocated cost savings: $12,000 per year.
- ☑ **In-band response:** Using an SMMP provided customer service representatives with a console for quickly and effectively responding to customer service issues. Service window times were significantly reduced, resulting in increased customer retention. Revenue no longer lost due to defections: $10,000.
- ☑ **Social analytics:** The product development group used keyword-based monitoring to assist with designing a successful new product. Social feedback noticeably boosted sales. Gains from social insights: $20,000
- ☑ **Cost of SMMP:** $6,000 per year.

**The net annual benefit of adopting an SMMP is $36,000.**

# Go with an SMMP if your organization needs a heavy social presence; stick with ad hoc management if it doesn't

The value proposition of acquiring an SMMP does not resonate the same for all organizations: in some cases, it is more cost effective to forego an SMMP and stick with ad hoc social media management.

**Follow these guidelines for determining if an SMMP is a natural fit for your organization.**

## Go with an SMMP if…

- Your organization already has a large social footprint: you manage multiple feeds/pages on three or more social media services.
- Your organization's primary activity is B2C marketing; your target consumers are social media savvy. Example: consumer packaged goods.
- The volume of marketing, sales and service inquiries received over social channels has seen a sharp increase in the last 12 months.
- Your firm or industry is the topic of widespread discussion in the social cloud.

## Stick with ad hoc management if…

- Regulatory compliance prohibits the extensive use of social media in your organization.
- Your organization is focused on a small number of institutional clients with well-defined organizational buying behaviors.
- Your target market is antipathetic towards using social channels to interact with your organization.
- Your organization is in a market space where only a bare-bones social media presence is seen as a necessity (for example, only a basic informational Facebook page is maintained).

**Info-Tech Best Practice**

Using an SMMP is definitively superior to ad hoc social media management for those organizations with multiple brands and product portfolios (e.g. consumer packaged goods). Ad hoc management is best for small organizations with an institutional client base who only need a bare bones social media presence.

# Assess which social media opportunities exist for your organization with Info-Tech's tool

## 1.2 *Social Media Opportunity Assessment Tool*

Use Info-Tech's ***Social Media Opportunity Assessment Tool*** to determine, based on your unique criteria, where social media opportunities exist for your organization in marketing, sales, and service.

**Info-Tech Best Practice**

1. Remember that departmental goals will overlap; gaining customer insight is valuable to marketing, sales, and customer service.
2. The social media benefits you can expect to achieve will evolve as your processes mature.
3. Often, organizations jump into social media because they feel they have to. Use this assessment to identify early on what your drivers should be.

**Social Media Opportunity Questionnaire**

Please answer the following questions by clicking on the drop down box adjacent to the question and choose from the options available.

| | Question | Please Select a Response |
|---|---|---|
| 1 | Which of the following categories represents the business model for which you will be answering this questionnaire for? *Note: If your organization has multiple business models please fill this questionnaire out separately for each one.* | Business to Consumer |
| 2 | Our organization currently uses e-channels, such as our website and chat, to service customers. | |
| 3 | The online and offline market that | |
| 4 | A significant portion of our primary information about the products or | |
| 5 | Our organization is generally vulne | |
| 6 | Increasing our brand recognition is | |
| 7 | Research and development of our customer insights. | |
| 8 | Our sales are directly influenced by | |
| 9 | Having the most complete informa closing a sales deal. | |
| 10 | Our sales and service staff often h | |
| 11 | Timely response to customer com | |

**Social Media Opportunity Assessment Results**

| | |
|---|---|
| ☑ | Your organization has the opportunity to achieve this goal. |
| ☑ | Your organization may have an opportunity in this area. Further investigation with business units is recommended. |
| ☒ | Your organization will likely not benefit from investing resources into this area with social media. |

| Domain | Opportunity Area | Score |
|---|---|---|
| Marketing | Building Positive Brand Image | ☑ |
| Marketing | Increasing Mind Share | ☑ |
| Marketing | Gaining Marketing Customer Insights | ☑ |
| Sales | Gaining Sales Customer Insights | ☑ |
| Sales | Increasing Revenue | ☑ |
| Sales | Increasing Customer Acquisition | ☑ |
| Customer Service | Improving Customer Satisfaction | ☑ |
| Customer Service | Increasing Customer Retention | ☑ |

# Go/no-go assessment on SMMP

1.1.3

Identify whether an SMMP will help you achieve your goals in sales, marketing, and customer service.

1. Complete the questionnaire in the *Social Media Opportunity Assessment Tool*. Ensure all relevant stakeholders are present to answer questions pertaining to their business area.

2. Evaluate the results to better understand whether your organization has the opportunity to achieve each established goal in marketing, sales, and customer service with an SMMP or you are not likely to benefit from investing in a social media management solution.

**INPUT**

- Social Media Opportunity Questionnaire

**OUTPUT**

- SMMP go/no-go decision

**Materials**

- Whiteboard
- Opportunity Assessment Tool

**Participants**

- Digital Strategy Executive
- Business stakeholders

# Phase 1, Step 2: Use an SMMP to enable marketing, sales, and service use cases

**1.1**

Determine if a dedicated SMMP is right for your organization

**1.2**

**Use an SMMP to enable marketing, sales, and service use cases**

**This step will walk you through the following activities:**

- Profile and rank your top use cases for social media management
- Build the metrics inventory

**This step involves the following participants:**

- Project Manager
- Project Team

## Outcomes of this step

- Use case suitability
- SMMP metrics inventory

# SMMPs equip front-line sales staff with the tools they need for effective social lead generation

- Content-centric social analytics allow sales staff to see **click-through details** for content posted on social networks. In many cases, these leads are warm and ready for immediate follow-up.
- A software development firm uses an SMMP to post a whitepaper promoting its product to multiple social networks.
  - The whitepaper is subsequently downloaded by a number of potential prospects.
  - Content-centric analytics within the SMMP link the otherwise-anonymous downloads to named social media accounts.
  - Leads assigned to specific account managers, who use existing CRM software to pinpoint contact information and follow-up in a timely manner.
- Organizations that intend to use their SMMP for sales purposes should ensure their vendor of choice offers integration with LinkedIn. LinkedIn is the *business formal* of social networks, and is the network with the greatest proven efficacy from a sales perspective.

**Using an SMMP to assist the sales process can…**

- Increase the number of leads generated through social channels as a result of social sharing.
- Increase the quality of leads generated through social channels by examining influence scores.
- Increase prospecting efficiency by finding social leads faster.
- Keep account managers in touch with prospects and clients through social media.

Info-Tech **Best Practice**

Social media is on the rise in sales organizations. Savvy companies are using social channels at all points in the sales process, from prospecting to account management. Organizations using social channels for sales will want an SMMP to manage the volume of information and provide content-centric analytics.

# Incorporate social media into marketing workflows to gain customer insights, promote your brand, and address concerns

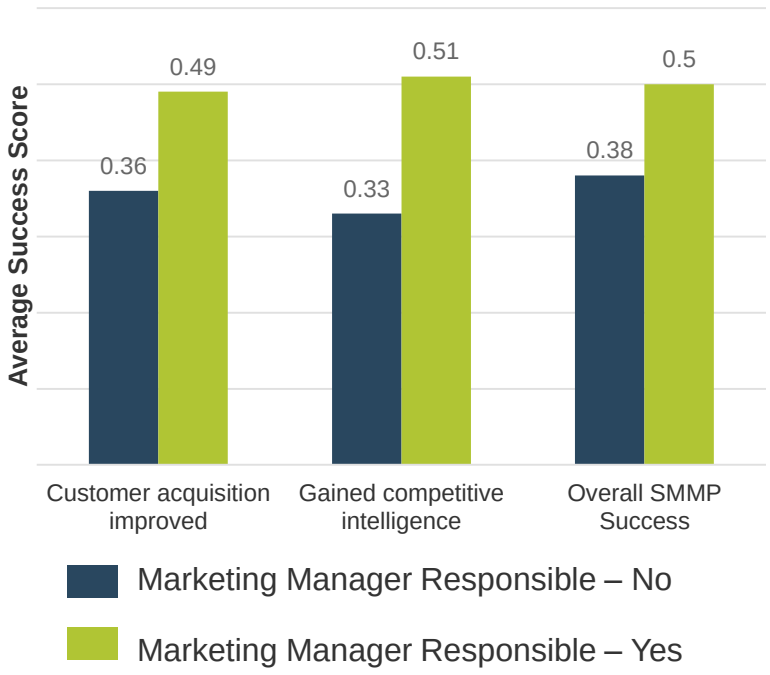
**While most marketing departments have used social media to some extent, few are using it to its full potential. Identify marketing workflows that can be enhanced through the use of social channel integration.**

- Large organizations must **define separate workflows** for each stakeholder organization if marketing's duties are divided by company division, brand, or product lines.
- Inquiries stemming from marketing campaigns and advertising must be handled by social media teams. For example, if a recent campaign sparks customer questions on the company's Facebook page, be ready to respond!
- Social media can be used to detect issues that may indicate product defects, provided defect tracking is not already incorporated into customer service workflows. If **defect tracking** is part of customer service processes, then such issues should be routed to the customer service organization.
- If **social listening** is employed, in addition to monitoring the company's own social properties, marketing teams may elect to receive notices of major trends concerning the company's products or those of competitors.

> *I'm typically using my social media team as a proactive marketing team in the social space, whereas I'm using my consumer relations team as a reactive marketing and a reactive consumer relations taskforce. So a little bit different perspective.*
>
> – Greg Brickl, IT Director, Organic Valley

# SMMPs allow marketers to satisfy all of their needs with one solution

- **Have a marketing manager jointly responsible for the selection of an SMMP to realize higher overall success.** This will significantly improve customer acquisition approval and competitive intelligence, as well as the overall SMMP success.
- The marketing manager should be involved in fleshing out the **business requirements** of the SMMP in order to select the most appropriate solution.
- Once selected, the SMMP has multiple benefits for marketing professionals. One pivotal benefit of SMMPs for marketing is the capability for **centralized account management.** Multiple social pages and feeds can be rapidly managed at pre-determined times, through an easy-to-use dashboard delivered from one source.
- Centralized account management is especially pertinent for organizations with a wide geographic client base, as they can manage wide social media campaigns within multiple time zones, delivering their messaging appropriately. (e.g. contests, product launches, etc.)



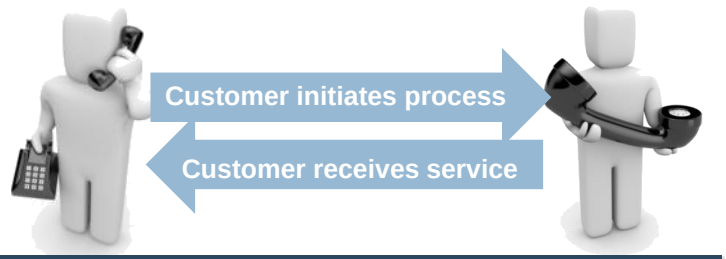

Source: Info-Tech Research Group
*N* = 37

**Info-Tech Best Practice**

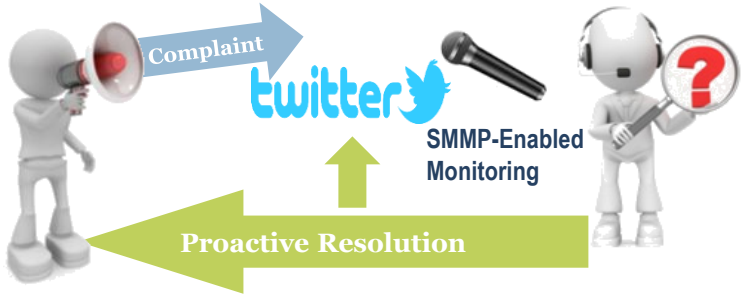
Managing multiple social media accounts on an ad hoc basis is time consuming and costs money. Lower costs and get the best results out of your social media campaigns by involving the marketing team in the SMMP selection process and knowing their functional requirements.

# Leverage SMMPs to proactively identify and respond to customer service issues occurring in the social cloud

- SMMPs are an invaluable tool in customer service organizations. **In-band response capabilities** allow customer service representatives to quickly and effectively address customer service issues – either reactively or proactively.
- **Reactive customer service** can be provided through SMMPs by providing response capabilities for private messages or public mentions (e.g. "@AcmeCo" on Twitter). Many SMMPs provide a queue of social media messages directed at the organization, and also give the ability to assign specific messages to an individual service representative or product expert. *Responding to a high-volume of reactive social media requests can be time consuming without an SMMP.*
- **Proactive customer service** uses the ability of SMMPs to monitor the social cloud for specific keywords in order to identify customers having issues. Forward-thinking companies actively monitor the social cloud for customer service opportunities, to protect and improve their image.




*Reactive service is customer-initiated.*




*SMMPs enable organizations to monitor the social cloud for service opportunities and provide proactive service in-band.*

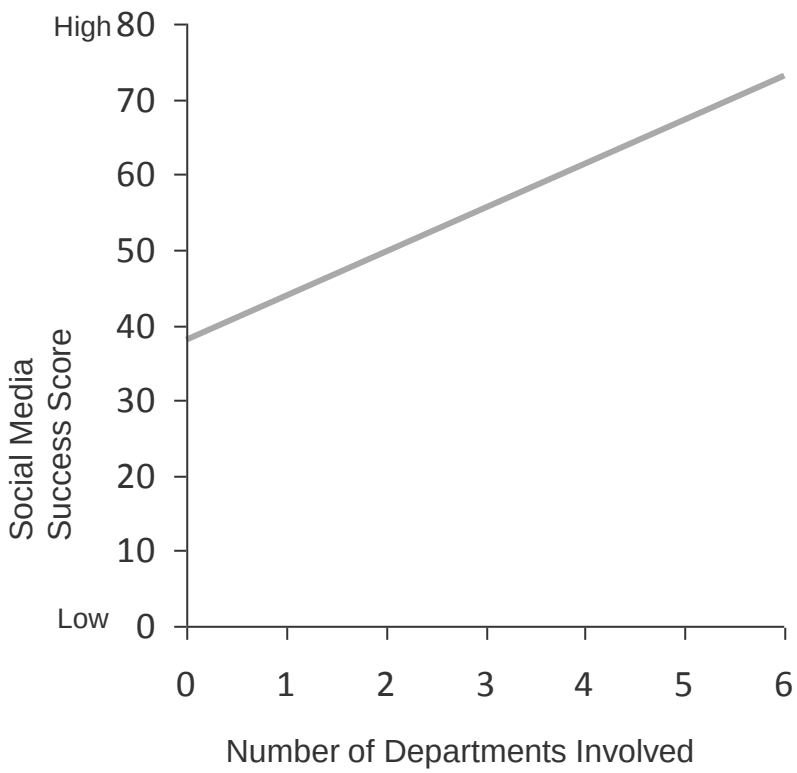
**Info-Tech Best Practice**

Historically, customer service has been "reactive" (i.e. customer initiated) and solely between the customer and supplier. Social media forces proactive service interactions between customer, supplier, and the *entire* social cloud. Using an SMMP significantly improves reactive *and* proactive service. The ability to integrate with customer service applications is essential.

# Customer service is a vital department to realize value from leveraging an SMMP

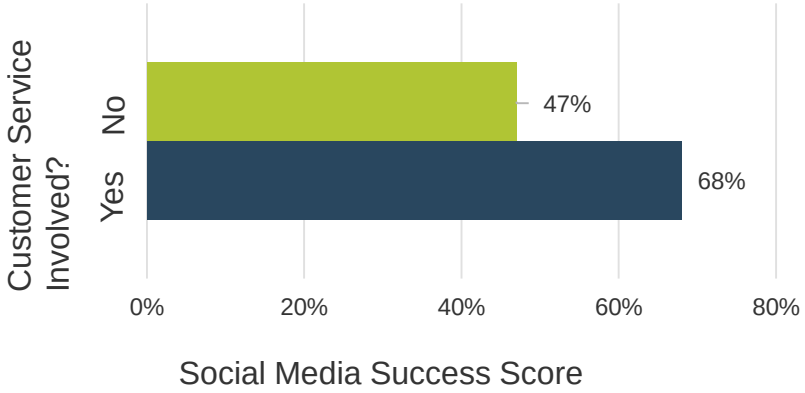
Info-Tech's research shows that the more departments get involved with social media implementation, the higher the success score (calculated based on respondents' report of the positive impact of social media on business objectives). On average, each additional department involved in social media programs increases the overall *social media success score* by 5%. For example, organizations that leveraged social media within the customer service department, achieved a higher success score than those that did not.

**The message is clear: encourage broad participation in coordinated social media efforts to realize business goals.**




Source: Info-Tech Research Group
*N=65*

## Customer Service Involvement Boosts Success



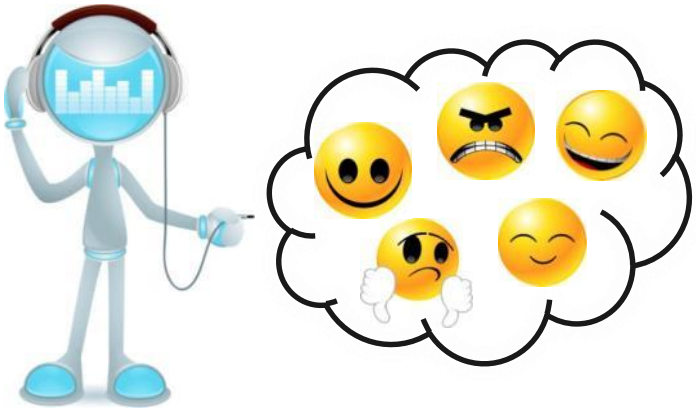
Our research indicates that the most important stakeholder to ensure steering committee success is Customer Service. This has a major impact on CRM integration requirements – more on this later.

# SMMPs are indispensable for allowing PR managers to keep tabs on the firm and its brands

- Public relations is devoted to **relationship management;** as such, it is critical for savvy PR departments to have a social media presence.
- SMMPs empower PR professionals with the ability to **track the sentiment of what is said about their organization.** Leverage keyword searches and heuristic analysis to proactively mitigate threats and capitalize on positive opportunities. For example, **sentiment analysis** can be used to identify detractors making false claims over social channels. These claims can then be countered by the Public Relations team.
- Sentiment analysis can be especially important to the PR professional through **change and crisis management situations**. These tools allow an organization to track the flow of information, as well as the balance of positive and negative postings and their influence on others in the social cloud.
- Social analytics provided by SMMPs also serve as a goldmine for **competitive intelligence** about rival firms and their products.

**Benefits of Sentiment Analysis for PR**

- Take the pulse of public perception of your brands (and competitors).
- Mitigate negative comments being made and respond immediately.
- Identify industry and consumer thought leaders to follow on social networks.



*Use sentiment analysis to monitor the social cloud.*

Info-Tech **Best Practice**

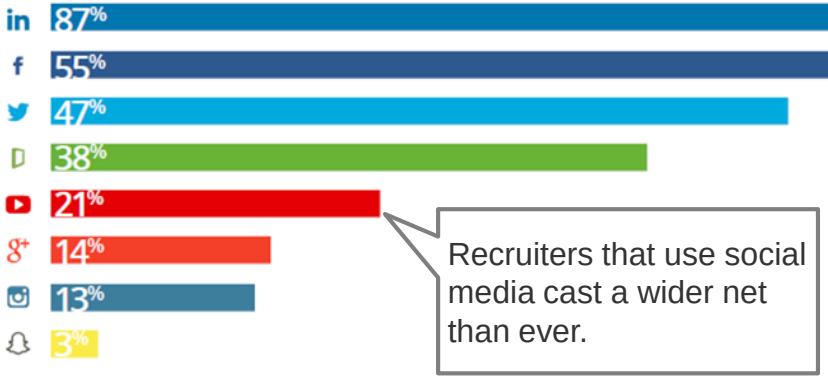
Leaving negative statements unaddressed can cause harm to an organization's reputation. Use an SMMP to track what is being said about your organization; take advantage of response capabilities to quickly respond and mitigate PR risk.

# SMMPs for recruiting is an emerging talent recruitment technique and will lead to stronger candidates

- Social media provides more direct connections between employer and applicant. It's faster and more flexible than traditional e-channels.
- SMMPs should be deployed to the HR silo to aid with recruiting top-quality candidates. Account management functionality can dramatically reduce the amount of time HR managers spend synchronizing content between various social media services.
- In-band response capabilities flag relevant social conversations and allow HR managers to rapidly respond to prospective employee inquiries. Rapid response over social channels gives candidates a positive impression of the organization.
- Analytics give HR managers insight into hiring trends and the job market at large – sentiment analysis is useful for gauging not just candidate interests, but also anonymous employee engagement.

**A social media campaign managed via SMMP can…**

- Increase the size of the applicant pool by "fishing where the fish are."
- Increase the quality of applicants by using monitoring to create targeted recruitment materials.
- Increase recruiting efficiency by having a well-managed, standing presence on popular social media sites – new recruiting campaigns require less "awareness generation" time.
- Allow HR/recruiters to be more in-touch with hiring trends via social analytics.




Only 4% of recruiters are NOT using social media for recruitment, while 50% of recruiters plan to increase their investment in SMR in the coming year.

Source: Jobvite, 2015

# Collapse your drivers for SMMP and link them to Info-Tech's Vendor Landscape use cases

## USE CASES

### Social Listening and Analytics

**What It Looks Like**

Functionality for capturing, aggregating, and analyzing social media content in order to create actionable customer or competitive insights.

**How It Works**

Social listening and analytics includes features such as sentiment and contextual analysis, workflow moderation, and data visualization.

### Social Publishing and Campaign Management

**What It Looks Like**

Functionality for publishing content to multiple networks or accounts simultaneously, and managing social media campaigns in-depth (e.g. social property management and post scheduling).

**How It Works**

Social publishing and campaign management include features such as campaign execution, social post integration, social asset management, and post time optimization.

### Social Customer Care

**What It Looks Like**

Functionality for management of the social customer service queue as well as tools for expedient resolution of customer issues.

**How It Works**

Social customer care use case primarily relies on strong social moderation and workflow management.

Identify the organizational drivers for social media management – whether it is recruiting, public relations, customer service, marketing, or sales – and align them with the most applicable use case.

# Profile and rank your top use cases for social media management using the *Use-Case Fit Assessment Tool*

1.2.1 1 Hour

1. Download your own version of the tool and complete the questionnaire on tab 2, Assessment.
   - Use the information gathered from your assessments and initial project scoping to respond to the prompts to identify the business and IT requirements for the tool.
   - Answer the prompts for each statement from a range of *strongly disagree* to *strongly agree*.
2. Review the outcomes on tab 3, Results.
   - This tab provides a qualitative measure assessing the strength of your fit against the industry use-case scenarios.
3. If not completed as a team, debrief the results and implications to your core project team.

**INPUT**

- Project Manager
- Core project team

**OUTPUT**

- Use-case suitability

**Materials**

- Whiteboard
- Markers

**Participants**

- Project Manager
- Core project team

# Use the *SMMP Use-Case Fit Assessment Tool* to identify which areas you should focus on

## 1.3 *Use Case Fit Assessment Tool*

**Use the *Use-Case Fit Assessment Tool*** to understand how your unique requirements map into a specific SMMP use case.

This tool will assess your answers and determine your relative fit against the use-case scenarios.

Fit will be assessed as "*Weak,*" "*Moderate,*" or "*Strong.*"

Consider the common pitfalls, which were mentioned earlier, that can cause IT projects to fail. **Plan and take clear steps to avoid or mitigate these concerns.**

Note: These use-case scenarios are not mutually exclusive. Your organization can align with one or more scenarios based on your answers. If your organization shows close alignment to multiple scenarios, consider focusing on finding a more robust solution and concentrate your review on vendors that performed strongly in those scenarios or meet the critical requirements for each.

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**SMMP Use-Case Fit Assessment Tool**

**Purpose of this Tool**
This tool asks a series of targeted questions that will help you determine the use-case scenarios that align with your organization's specific requirements for SMMP. This tool will identify how strongly your organization's process automation requirements align with Info-Tech's functional use cases for the SMMP Vendor Landscape Analysis. These scenarios include: **Social listening and analytics, social publishing and campaign management, and social customer care.** Depending on your organization's unique considerations, the tool will identify your alignment with one or more scenarios, on a scale of *weak/moderate/strong*.

**Outcome**
Use these results to guide your vendor evaluation and document requirements for your RFP. Use the *Select and Implement an SMMP* blueprint and Vendor Landscape materials to support your procurement project.

For acceptable use of this tool, refer to Info-Tech's Terms of Use. These documents are intended to supply general information only, not specific professional or personal advice, and are not intended to be used as a substitute for any kind of professional advice. Use this document either in whole or in part as a basis and guide for document creation. To customize this document with corporate marks and titles, simply replace the Info-Tech information in the Header and Footer fields of this document.

# Identify the marketing, sales, and customer service metrics that you will target for improvement using an SMMP

## Create measurable S.M.A.R.T. goals for the project.

Consider the following questions when building your SMMP metrics:

1. What are the top **marketing objectives** for your company? For example, is building initial awareness or driving repeat customers more important?
2. What are the corresponding **social media goals** for this business objective?
3. What are some of the **metrics** that could be used to determine if business and social media objectives are being attained?

| Use Case | Sample Metric Descriptions | Target Metric |
|---|---|---|
| **Social Listening and Analytics** | Use a listening tool to flag all mentions of our brands or company on social | Increase in mentions with neutral or positive sentiment, decrease in mentions with negative sentiment |
| **Social Publishing and Campaign Management** | Launch a viral video campaign showcasing product attributes to drive increased YT traffic | Net increase in unaided customer recall |
| **Social Customer Care** | Create brand-specific social media pages to increase customer sentiment for individual brand extensions | Net increase in positive customer sentiment (i.e. as tracked by an SMMP) |

# Build the metrics inventory

## 1.2.2 45 Minutes

1. Identify the top **marketing, sales, and customer service objectives** for your company? For example, is building initial awareness or driving repeat customers more important?
2. What are the corresponding **social media goals** for each business objective?
3. What are some of the **metrics** that could be used to determine if business and social media objectives are being attained?

| Marketing/PR Objectives | Social Media Goals | Goal Attainment Metrics |
|---|---|---|
| *E.g. build a positive brand image* | • *Create brand-specific social media pages to increase customer sentiment for individual brand extensions* | *Net increase in positive customer sentiment (i.e. as tracked by an SMMP)* |
| *E.g. increase customer mind share* | • *Launch a viral video campaign showcasing product attributes to drive increased YT traffic* | *Net increase in unaided customer recall* |
| *E.g. monitor public mentions* | • *Use a listening tool to flag all mentions of our brands or company on social* | *Increase in mentions with neutral or positive sentiment, decrease in mentions with negative sentiment* |

### INPUT

- Marketing, sales, and customer service objectives

### OUTPUT

- Metrics inventory

### Materials

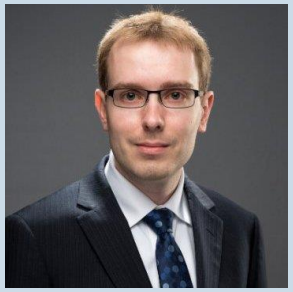
- Whiteboard
- Markers

### Participants

- Project Manager
- Core project team

# If you want additional support, have our analysts guide you through this phase as part of an Info-Tech workshop

## Book a workshop with our Info-Tech analysts:



- To accelerate this project, engage your IT team in an Info-Tech workshop with an Info-Tech analyst team.
- Info-Tech analysts will join you and your team onsite at your location or welcome you to Info-Tech's historic Toronto office to participate in an innovative onsite workshop.
- Contact your account manager (www.infotech.com/account), or email Workshops@InfoTech.com for more information.

## The following are sample activities that will be conducted by Info-Tech analysts with your team:

**1.1.1**

Assess where your organization sits on the social media maturity curve

1.1.1 30 Minutes

Before you can move to an objective assessment of your social media program's maturity, take an inventory of your current efforts across different departments (e.g. marketing, PR, sales, and customer service). Document the results in the Social Media Maturity Assessment Tool.

| Department | Social Media Initiative(s) | Current Status |
|---|---|---|
| Marketing | Branded Facebook page with updates and promotions | Stalled: insufficient resources |
| Sales | LinkedIn prospecting campaign for lead generation, qualification, and warm open | Active, however, new reps are poorly trained on LinkedIn prospect best practices |
| Customer Service | Twitter support initiative: mentions of our brand are paired with sentiment analysis to determine who is having problems and to reach out and offer support | Active: program has been highly successful to date |
| HR | Recruitment campaign through LinkedIn and Branch Out | Stalled: insufficient technology support for identifying leading candidates |
| Product Development | Defect tracking for future product iterations using social media | Partially active: Tracked, but no feedback loop present |

INPUT
- Social media initiatives
- Current status

OUTPUT
- Current State Maturity Assessment

Materials
- Whiteboard
- Markers
- Sticky notes

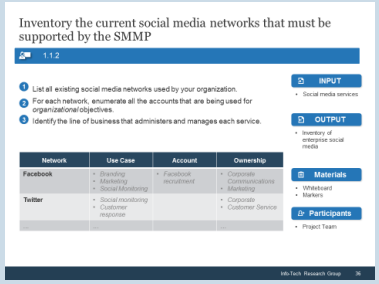
Participants
- Digital Strategy Executive
- Business stakeholders

Info-Tech Research Group 32

### Assess your organization's social media maturity

An Info-Tech analyst will facilitate a discussion to assess the maturity of your organization's social media program and take an inventory of your current efforts across different departments (e.g. Marketing, PR, Sales, and Customer Service).

**1.1.2**



Inventory the current social media networks that must be supported by the SMMP

1.1.2

1. List all existing social media networks used by your organization.
2. For each network, enumerate all the accounts that are being used for organizational objectives.
3. Identify the line of business that administers and manages each service.

| Network | Use Case | Account | Ownership |
|---|---|---|---|
| Facebook | • Branding<br>• Marketing<br>• Social Monitoring | • Facebook recruitment | • Corporate Communications<br>• Marketing |
| Twitter | • Social monitoring<br>• Customer response | | • Corporate<br>• Customer Service |
| | | | |

INPUT
- Social media services

OUTPUT
- Inventory of enterprise social media

Materials
- Whiteboard
- Markers

Participants
- Project Team

Info-Tech Research Group 36

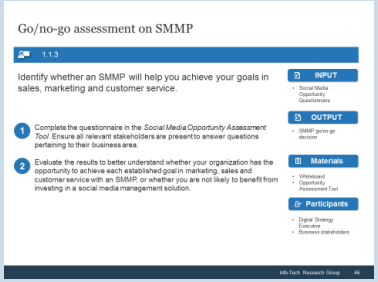
### Inventory your current social media networks

The analyst will facilitate an exercise to catalog all social media networks used in the organization.

# If you want additional support, have our analysts guide you through this phase as part of an Info-Tech workshop

**Book a workshop with our Info-Tech analysts:**

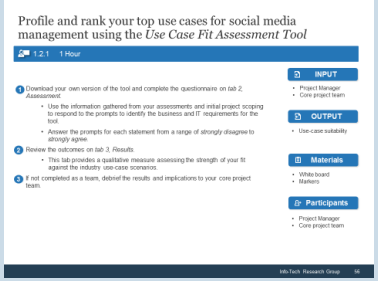
**1.1.3**




## Go/no go assessment on SMMP

Based on the maturity assessment, the analyst will help identify whether an SMMP will help you achieve your goals in sales, marketing, and customer service.

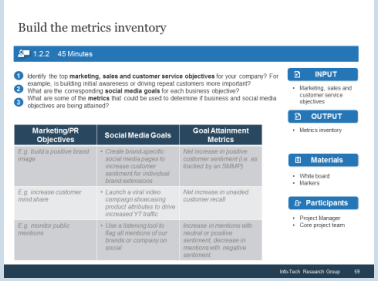
**1.2.1**




## Rank your top use cases for social media management

An analyst will facilitate the exercise to answer a series of questions in order to determine best-fit scenario for social media management for your organization.

**1.2.2**




## Build the metrics inventory

An analyst will lead a whiteboarding exercise to brainstorm and generate metrics for your organization's social media goals.

# PHASE 2

## Select an SMMP

This phase also includes
**Info-Tech's**
**SMMP Vendor Landscape**

**Select and Implement a Social Media Management Platform**

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Info-Tech's products and services combine actionable insight and relevant advice with
ready-to-use tools and templates that cover the full spectrum of IT concerns.
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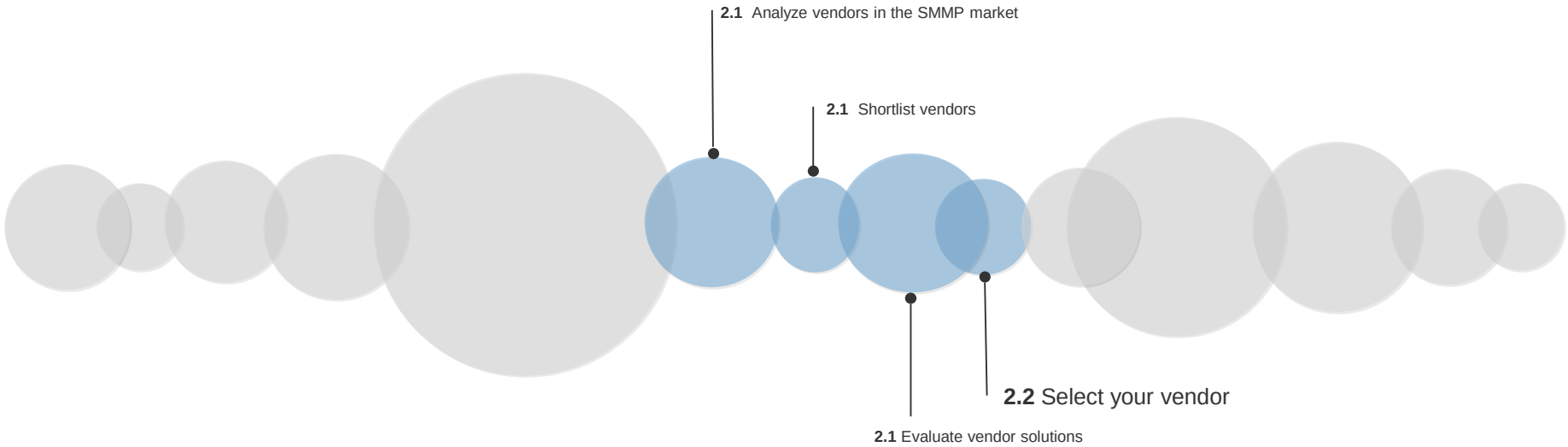
# Phase 2: Select an SMMP




*Estimated Timeline: 1-3 Months*

**Info-Tech Insight**

Taking a use-case-centric approach to vendor selection allows you to balance the need for different social capabilities between analytics, campaign management and execution, and customer service.

**Major Milestones Reached**

- Vendor Selection
- Finalized and Approved Contract

**Key Activities Completed**

- RFP Process
- Vendor Evaluations
- Vendor Selection
- Contract Negotiation

**Outcomes from This Phase**

The completed procurement of an SMMP solution.

- Selected SMMP solution
- Negotiated and finalized contract

# Phase 2 outline

**Call 1-888-670-8889** or email GuidedImplementations@InfoTech.com for more information.

Complete these steps on your own, or call us to complete a guided implementation. A guided implementation is a series of 2-3 advisory calls that help you execute each phase of a project. They are included in most advisory memberships.

## Guided Implementation 2: Select an SMMP

**Proposed Time to Completion: 4 weeks**

### Step 2.1: Analyze and shortlist SMMP vendors

**Start with an analyst kick-off call:**

- Evaluate the SMMP marketspace.
- Re-evaluate best-fit use case.

**Then complete these activities…**

- Review vendor profiles and analysis.
- Create your own evaluation framework and shortlisting criteria.

**With these tools & templates:**

- SMMP Vendor Landscape (included here)
- *SMMP Vendor Shortlist Tool*

### Step 2.2: Evaluate vendor responses

**Review findings with analyst:**

- Determine your SMMP procurement strategy.
- Reach out to SMMP vendors.

**Then complete these activities…**

- Prioritize your requirements.
- Create an RFP for SMMP procurement.
- Evaluate vendor responses.
- Set up product demonstrations.

**With these tools & templates:**

- *SMMP RFP Template*
- *SMMP Vendor Demo Script Template*
- *SMMP Evaluation and RFP Scoring Tool*

## Phase 2 Results & Insights:

- Finalize vendor and product selection

# Phase 2, Step 1: Analyze and shortlist vendors in the space

**2.1**

**Analyze and shortlist vendors in the space**

**2.2**

Select your SMMP solution

**This step will walk you through the following activities:**

- Review vendor landscape methodology
- Shortlist SMMP vendors

**This step involves the following participants:**

- Core team
- Representative stakeholders from Digital Marketing, Sales, and IT

## The SMMP Vendor Landscape includes the following sections:

**2.1.1** Info-Tech Methodology

**2.1.2** Review the SMMP Evaluation

- Use Case 1: Social Listening and Analytics
- Use Case 2: Social Publishing and Campaign Management
- Use Case 3: Social Customer Care

**2.1.3** SMMP Vendor Profiles and Scoring

**2.1.4** Create a Custom Vendor Shortlist

# VENDOR LANDSCAPE

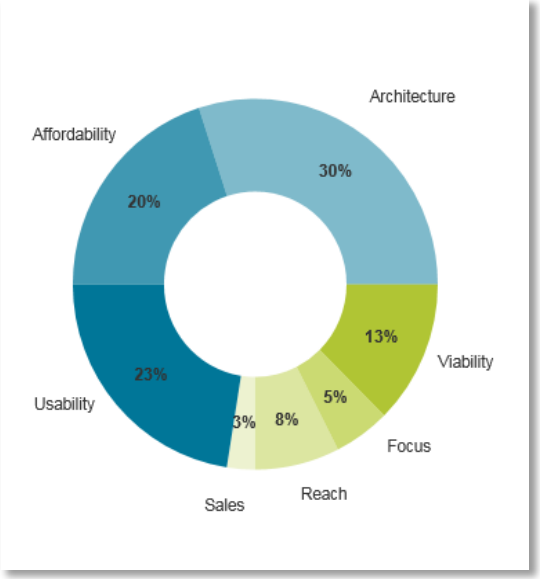
Info-Tech's **Methodology**

# Vendor Landscape use-case scenarios are evaluated based on weightings of features and vendor/product considerations

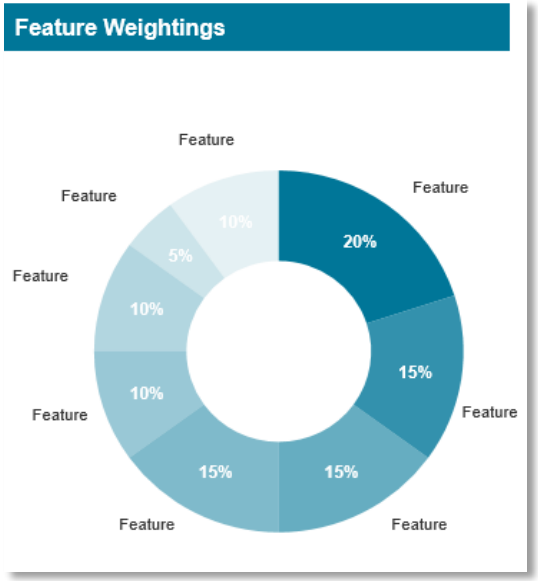
Use cases were scored around the features from the general scoring identified as being relevant to the functional considerations and drivers for each scenario.

## Calculation Overview

*Advanced Features Score X Vendor Multiplier = Vendor Performance for Each Scenario*



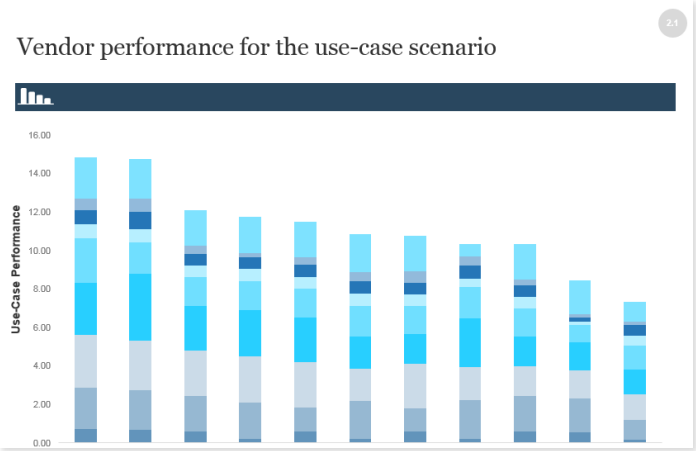

Product and Vendor Weightings




Advanced Features Weightings

Please note that both advanced feature scores and vendor multipliers are based on the specific weightings calibrated for each scenario.

# Vendor performance for each use-case scenario is documented in a weighted bar graph




## Vendor Performance

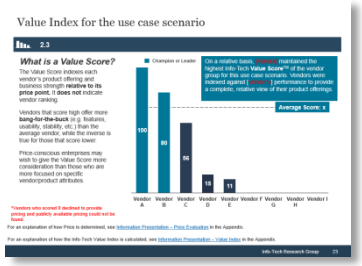
Vendors qualify and rank in each use-case scenario based on their relative placement and scoring for the scenario.

## Vendor Ranking

**Champion:** The top vendor scored in the scenario

**Leaders:** The vendors who placed second and third in the scenario

**Players:** Additional vendors who qualified for the scenarios based on their scoring




## Value Score™

Each use-case scenario also includes a Value Index that identifies the Value Score for a vendor relative to their price point. This additional framework is meant to help price-conscious organizations identify vendors who provide the best “bang for the buck.”

# VENDOR LANDSCAPE

Review the SMMP Vendor Evaluation

# SMMP market overview

## How It Got Here

- The SMMP market was created in response to the exploding popularity of social media and the realization that it can be harnessed for a wide variety of enterprise purposes (from consumer intelligence to marketing campaigns and customer service).
- As the number of social media services has expanded, and as the volume of content generated via social networks has ballooned, it became increasingly difficult to mine insights and manage social campaigns. A number of vendors (mostly start-ups) began offering platforms that attempted to streamline and harness social media processes.
- As usage of social media expanded beyond just the marketing and PR function, being able to successfully scale a social strategy to a large number of customer care and sales interactions became paramount: SMMPs filled a niche by offering large-scale response and workflow management capabilities.

## Where It's Going

- The market is segmented into two broad camps: SMMPs focused on **social listening and analytics,** and SMMPs focused on **social engagement.** Although the two have begun to converge, there continues to be a clear junction in the market between the two, with a surprising lack of vendors that are equally adept at both sides.
- With the rise of SMMPs, the expectation was that CRM vendors would offer feature sets similar to those of standalone SMMPS. However, CRM vendors have been slow in incorporating the functionality directly into their products. While some major vendors have made ground in this direction in the last year, organizations that are serious about social will still need a best-of-breed SMMP.
- Other major trends include using application integration to build a 360-degree view of the customer, workflow automation, and competitive benchmarking.

Info-Tech **Insight**

As the market evolves, capabilities that were once cutting edge become default and new functionality becomes differentiating. Supporting multiple social media services and accounts has become a Table Stakes capability and should no longer be used to differentiate solutions. Instead focus on an SMMP's social listening, campaign management, and customer care to help you find a solution that best fits your requirements.

# Review Info-Tech's Vendor Landscape of the SMMP market to identify vendors that meet your requirements

## Vendors Evaluated

Adobe

CISION

Hootsuite

salesforce

Sendible

sproutsocial

sprinklr
turn it on.

sysomos

Each vendor in this landscape was evaluated based on their **features, product considerations,** and **vendor considerations.** Each vendor was profiled using these evaluations and, based on their performance, qualified and placed in specific use-case scenarios.

# These vendors were included due to consideration of their market share, mind share, and platform coverage

Vendors included in this report provide a comprehensive, innovative, and functional solution for integrating applications and automating their messaging.

| Included in this Vendor Landscape: |
| --- |
| **Adobe:** Adobe Social is a key pillar of Adobe's ecosystem that is heavily focused on social analytics and engagement. |
| **Hootsuite:** A freemium player with strong engagement and collaboration tools, particularly well suited for SMBs. |
| **Salesforce:** Social Studio is a leading social media management solution and is a key channel of Salesforce Marketing Cloud. |
| **Sendible:** A fairly new entrant to the social media management space, Sendible offers robust campaign management capability that is well suited for agencies and SMBs. |
| **Sprinklr:** A leading solution that focuses on social customer care, offering strong ability to prioritize, route, and categorize high-volume social messaging. |
| **Sprout Social:** A great choice for mid-sized companies looking to provide robust social engagement and customer care. |
| **Sysomos:** Their MAP and Heartbeat products offer customers in-depth analysis of a wide array of social channels. |
| **Viralheat (Cision):** Now a Cision product, Viralheat is an excellent option for analytics, social response workflow management, and in-band social engagement. |

# Table Stakes represent the minimum standard; without these, a product doesn't even get reviewed

## *The Table Stakes*

| Feature: | What it is: |
|---|---|
| **Multiple Services Supported** | The ability to mange or analyze at least two or more social media services. |
| **Multiple Accounts Supported** | The ability to manage or analyze content from at least two or more social media accounts. |
| **Basic Engagement** | The ability to post status updates to multiple social media sites. |
| **Basic Analytics** | The ability to display inbound feeds and summary info from multiple social media sites. |

## *What does this mean?*

The products assessed in this Vendor Landscape meet, at the very least, the requirements outlined as Table Stakes.

Many of the vendors go above and beyond the outlined Table Stakes, some even do so in multiple categories. This section aims to highlight the products' capabilities **in excess** of the criteria listed here.

Info-Tech **Insight**

If Table Stakes are all you need from your SMMP solution, the only true differentiator for the organization is price. Otherwise, dig deeper to find the best price to value for your needs.

# Advanced Features are the capabilities that allow for granular differentiation of market players and use-case performance

## *Scoring Methodology*

Info-Tech scored each vendor's features on a cumulative four-point scale. Zero points are awarded to features that are deemed absent or unsatisfactory, one point is assigned to features that are partially present, two points are assigned to features that require an extra purchase in the vendor's product portfolio or through a third party, three points are assigned to features that are fully present and native to the solution, and four points are assigned to the best-of-breed native feature.

For an explanation of how Advanced Features are determined, see Information Presentation – Feature Ranks (Stoplights) in the Appendix.

| Feature: | What we looked for: |
|---|---|
| Social Media Channel Integration - Inbound | Ability to monitor social media services, such as Facebook, Twitter, LinkedIn, YouTube, and more. |
| Social Media Channel Integration - Outbound | Ability to publish to social media services such as Facebook, Twitter, LinkedIn, YouTube, and more. |
| Social Response Management | Ability to respond in-band to social media posts. |
| Social Moderation and Workflow Management | Ability to create end-to-end routing and escalation workflows from social content. |
| Campaign Execution | Ability to manage social and media assets: tools for social campaign execution, reporting, and analytics. |
| Social Post Archival | Ability to archive social posts and platform activity to create an audit trail. |
| Trend Analysis | Ability to monitor trends and traffic on multiple social media sites. |
| Sentiment Analysis | Ability to analyze and uncover insights from attitudes and opinions expressed on social media. |
| Contextual Analysis | Ability to use NLP, deep learning and semantic analysis to extract meaning from social posts. |
| Social Asset Management | Ability to access visual asset library with access permissions and expiry dates to be used on social media. |
| Post Time Optimization | Ability to optimize social media posts by maximizing the level of interaction and awareness around the posts. |
| Dashboards and Visualization | Ability to visualize data and create analytics dashboards. |

# Vendor scoring focused on overall product attributes and vendor performance in the market

## *Scoring Methodology*

Info-Tech Research Group scored each vendor's overall product attributes, capabilities, and market performance.

Features are scored individually as mentioned in the previous slide. The scores are then modified by the individual scores of the vendor across the product and vendor performance features.

Usability, overall affordability of the product, and the technical features of the product are considered, and scored on a five-point scale. The score for each vendor will fall between worst and best in class.

The vendor's performance in the market is evaluated across four dimensions on a five-point scale. Where the vendor places on the scale is determined by factual information, industry position, and information provided by customer references and/or available from public sources.

| Product Evaluation Features | |
|---|---|
| Usability | The end-user and administrative interfaces are intuitive and offer streamlined workflow. |
| Affordability | Implementing and operating the solution is affordable given the technology. |
| Architecture | Multiple deployment options, platform support, and integration capabilities are available. |

| Vendor Evaluation Features | |
|---|---|
| Viability | Vendor is profitable, knowledgeable, and will be around for the long term. |
| Focus | Vendor is committed to the space and has a future product and portfolio roadmap. |
| Reach | Vendor offers global coverage and is able to sell and provide post-sales support. |
| Sales | Vendor channel partnering, sales strategies, and process allow for flexible product acquisition. |

# Balance individual strengths to find the best fit for your enterprise

| | Product | | | | Vendor | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | Overall | Usability | Afford. | Arch. | Overall | Viability | Focus | Reach | Sales |
| **Adobe** | Good | Good | Good | Good | Exemplary | Exemplary | Exemplary | Exemplary | Exemplary |
| **Hootsuite** | Good | Good | Good | Good | Good | Good | Exemplary | Adequate | Adequate |
| **Salesforce** | Good | Exemplary | Adequate | Good | Exemplary | Exemplary | Good | Exemplary | Exemplary |
| **Sendible** | Good | Good | Exemplary | Adequate | Adequate | Adequate | Good | Adequate | Adequate |
| **Sprinklr** | Good | Adequate | Good | Adequate | Good | Good | Good | Adequate | Good |
| **Sprout Social** | Good | Good | Good | Good | Good | Good | Good | Adequate | Good |
| **Sysomos** | Good | Good | Exemplary | Adequate | Good | Good | Good | Adequate | Adequate |
| **Viralheat (Cision)** | Good | Exemplary | Good | Adequate | Adequate | Good | Adequate | Good | Inadequate |

**Legend** | Exemplary | Good | Adequate | Inadequate | Poor

For an explanation of how the Info-Tech Harvey Balls are calculated, see Information Presentation – Criteria Scores (Harvey Balls) in the Appendix.

# Balance individual strengths to find the best fit for your enterprise

| | Evaluated Features | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Social Media Channel Integration - Inbound | Social Media Channel Integration - Outbound | Social Response Mgmt | Social Moderation & Workflow Mgmt | Campaign Execution | Social Post Archival | Trend Analysis | Sentiment Analysis | Contextual Analysis | Social Asset Management | Post Time Optimization | Dashboards & Visualization |
| **Adobe** | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is best in its class | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is best in its class | Feature is fully present in its native solution | Feature is best in its class | Feature is partially present | Feature is best in its class |
| **Hootsuite** | Feature is best in its class | Feature is best in its class | Feature is present at additional cost | Feature is present at additional cost | Feature is present at additional cost | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is present at additional cost | Feature is present at additional cost | Feature is present at additional cost | Feature is best in its class | Feature is present at additional cost |
| **Salesforce** | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is best in its class | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is best in its class | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is present at additional cost | Feature is absent | Feature is fully present in its native solution |
| **Sendible** | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is present at additional cost | Feature is fully present in its native solution | Feature is present at additional cost | Feature is fully present in its native solution | Feature is absent | Feature is present at additional cost | Feature is absent | Feature is fully present in its native solution | Feature is present at additional cost | Feature is fully present in its native solution |
| **Sprinklr** | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is best in its class | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is present at additional cost | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is absent | Feature is fully present in its native solution |
| **Sprout Social** | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is present at additional cost | Feature is present at additional cost | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is present at additional cost | Feature is partially present | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is present at additional cost |
| **Sysomos** | Feature is fully present in its native solution | Feature is present at additional cost | Feature is present at additional cost | Feature is present at additional cost | Feature is fully present in its native solution | Feature is present at additional cost | Feature is best in its class | Feature is fully present in its native solution | Feature is best in its class | Feature is absent | Feature is fully present in its native solution | Feature is fully present in its native solution |
| **Viralheat (Cision)** | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is present at additional cost | Feature is present at additional cost | Feature is fully present in its native solution | Feature is fully present in its native solution | Feature is present at additional cost | Feature is partially present | Feature is absent | Feature is fully present in its native solution | Feature is present at additional cost |

For an explanation of how Advanced Features are determined, see [Information Presentation – Feature Ranks (Stoplights)](#) in the Appendix.

Legend

- = Feature is best in its class
- = Feature is fully present in its native solution
- = Feature is present at additional cost
- = Feature is partially present
- = Feature is absent

# USE CASE 1

## Social Listening and Analytics

**Seeking functionality for capturing, aggregating, and analyzing social media content in order to create actionable customer or competitive insights.**

# Feature weightings for the social listening and analytics use-case scenario

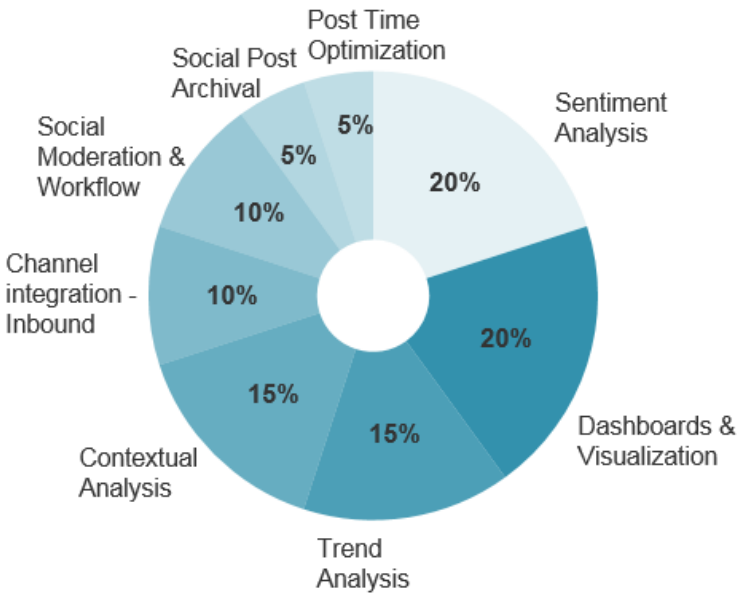
## Core Features

| | |
|---|---|
| **Sentiment Analysis** | Uncovering attitudes and opinions expressed on social media is important for generating actionable customer insights. |
| **Dashboards and Visualization** | Capturing and aggregating social media insights is ineffective without proper data visualization and analysis. |
| **Trend Analysis** | The ability to monitor trends across multiple social media services is integral for effective social listening. |
| **Contextual Analysis** | Understanding and analyzing language and visual content on social media is important for generating actionable customer insights. |

## Additional Features

| |
|---|
| **Social Media Channel Integration – Inbound** |
| **Social Moderation and Workflow Management** |
| **Social Post Archival** |

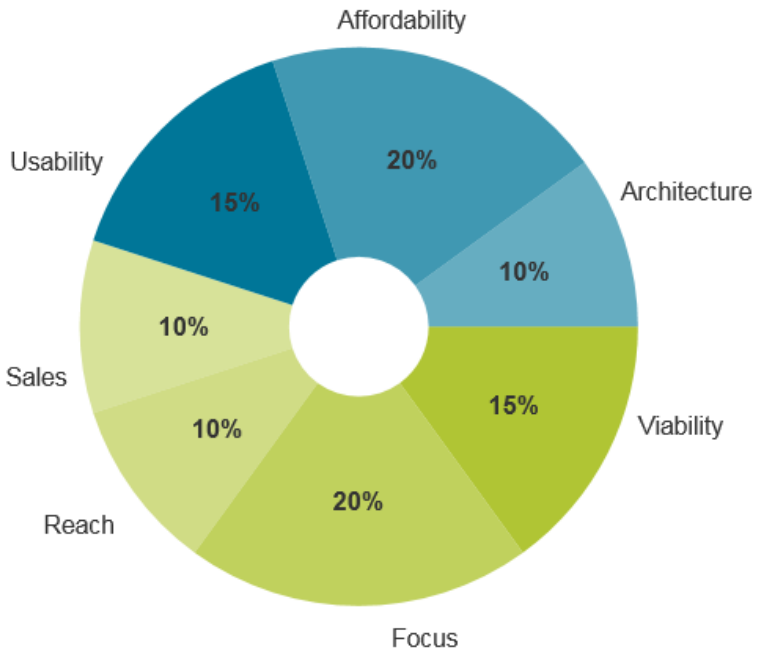
## Feature Weightings



# Vendor considerations for the social listening and analytics use-case scenario

| Product Evaluation Features | |
|---|---|
| Usability | A clean and intuitive user interface is important for users to fully leverage the benefits of an SMMP. |
| Affordability | Affordability is an important consideration as the price of SMMPs can vary significantly depending on the breadth and depth of capability offered. |
| Architecture | SMMP is more valuable to organizations when it can integrate well with their applications, such as CRM and marketing automation software. |

| Vendor Evaluation Features | |
|---|---|
| Viability | Vendor viability is critical for long-term stability of an application portfolio. |
| Focus | The vendor is committed to the space and has a future product and portfolio roadmap. |
| Reach | Companies with processes that cross organizational and geographic boundaries require effective and available support. |
| Sales | Vendors need to demonstrate flexibility in terms of industry and technology partnerships to meet evolving customer needs. |



# Vendor performance for the social listening and analytics use-case scenario

## Champions for this use case:

**Salesforce:** Salesforce Social Studio offers excellent trend and in-depth contextual analysis and is among the best vendors in presenting visually appealing and interactive dashboards.

## Leaders for this use case:

**Sysomos:** Sysomos MAP and Heartbeat are great offerings for conducting social media health checks using in-depth contextual analytics.

**Adobe:** Adobe Social is a great choice for digital marketers that need in-depth sentiment and longitudinal analysis of social data – particularly when managing social alongside other digital channels.

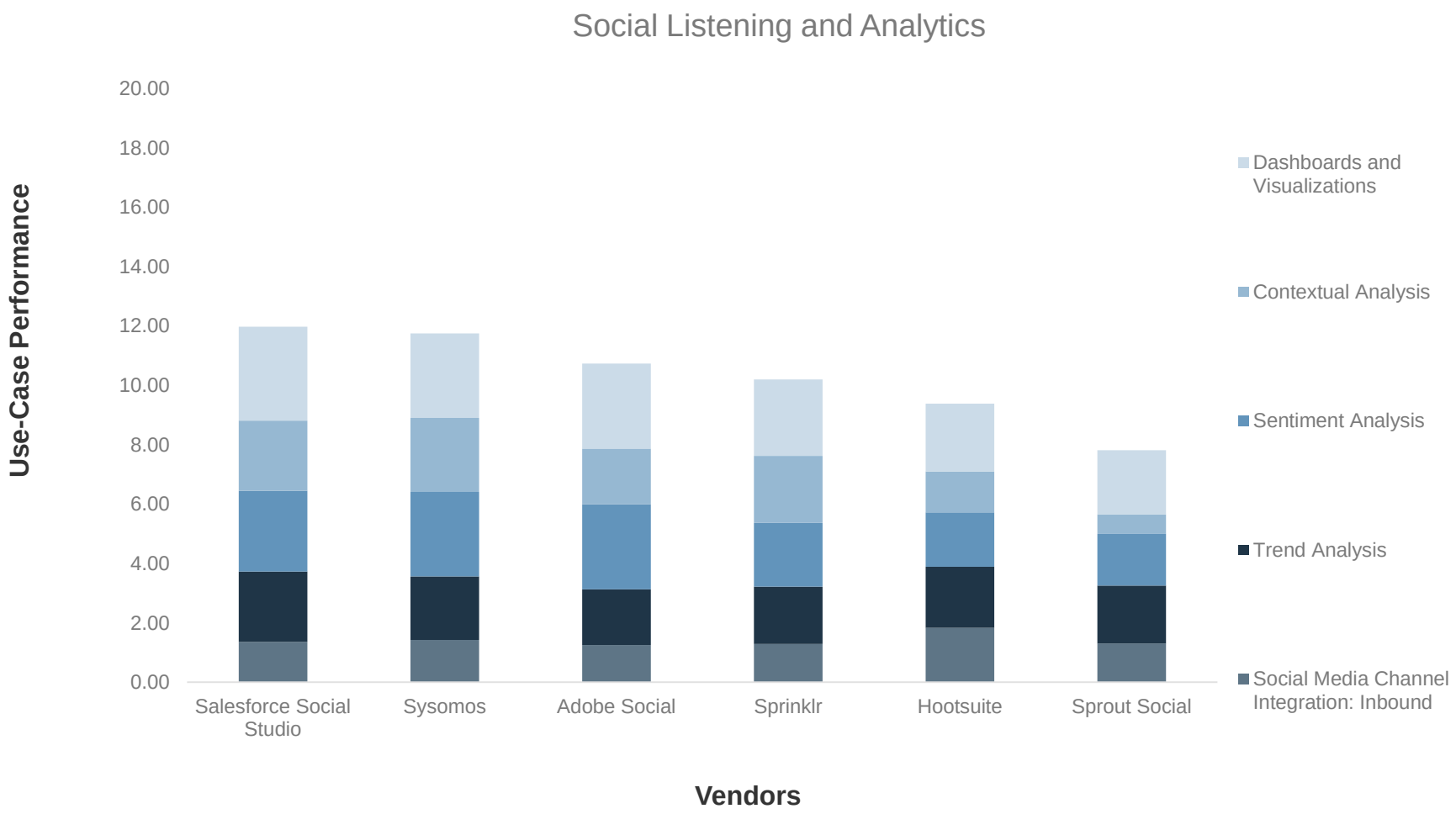
## Best Overall Value Award

**Sysomos:** A strong analytics capability offered in Sysomos MAP and Heartbeat at a relatively low cost places Sysomos as the best bang for your buck in this use case.

## Players in the social listening and analytics scenario

Sprinklr
Hootsuite
Sprout Social

# Vendor performance for the social listening and analytics use-case scenario



# Value Index for the social listening and analytics scenario

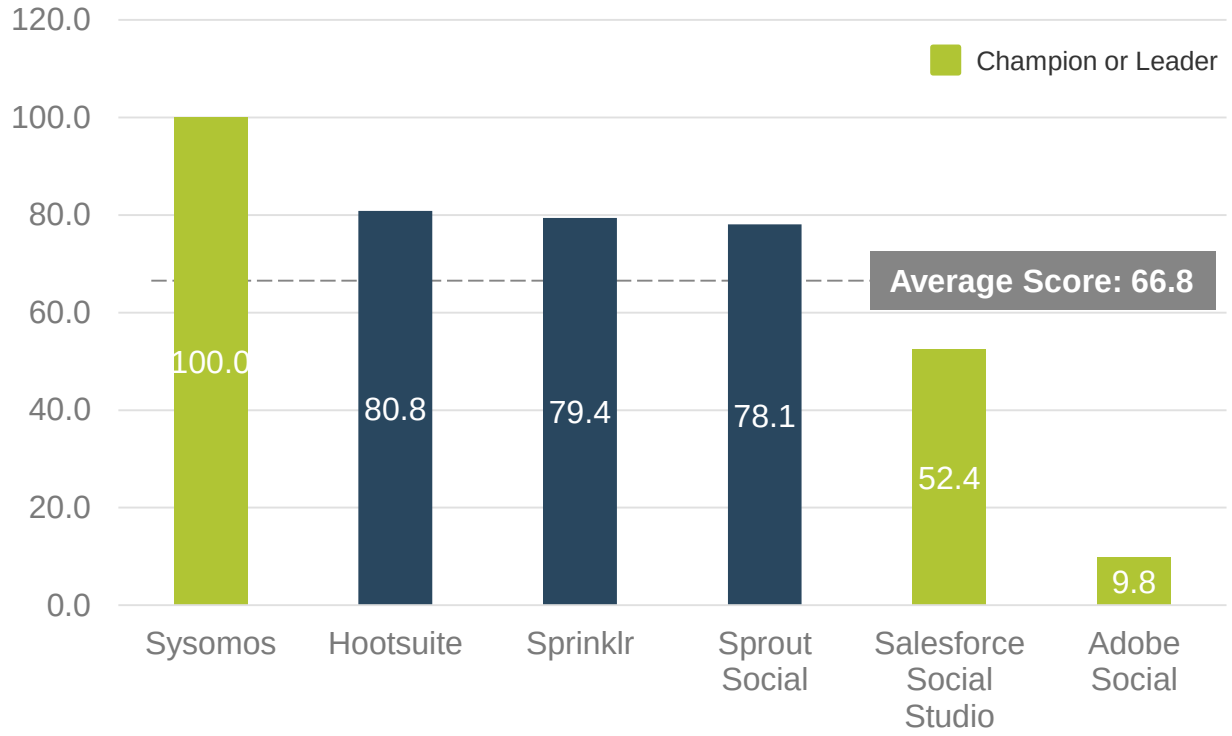
## *What is a Value Score?*

The Value Score indexes each vendor's product offering and business strength **relative to its price point.** It **does not** indicate vendor ranking.

Vendors that score high offer more **bang-for-the-buck** (e.g. features, usability, stability) than the average vendor, while the inverse is true for those that score lower.

Price-conscious enterprises may wish to give the Value Score more consideration than those who are more focused on specific vendor/product attributes.

On a relative basis, Sysomos maintained the highest Info-Tech **Value Score**™ of the vendor group for this use-case scenario. Vendors were indexed against Sysomos' performance to provide a complete, relative view of their product offerings.




For an explanation of how price is determined, see Information Presentation – Price Evaluation in the Appendix.

For an explanation of how the Info-Tech Value Index is calculated, see Information Presentation – Value Index in the Appendix.

# USE CASE 2

## Social Publishing and Campaign Management

**Seeking functionality for publishing content to multiple networks or accounts simultaneously, and managing social media campaigns in-depth (e.g. social property management and post scheduling).**

# Feature weightings for the social publishing and campaign management use-case scenario

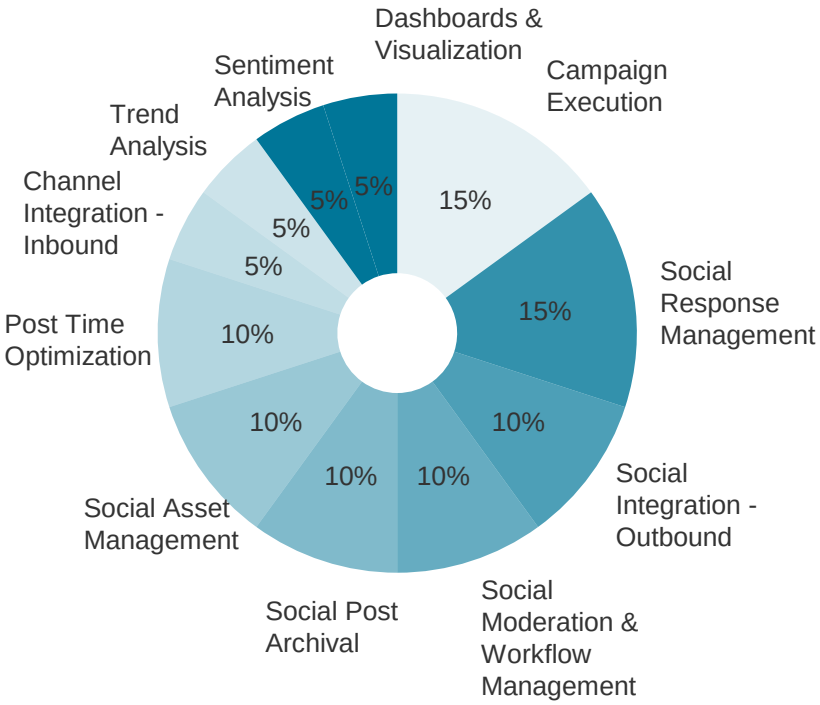
## Core Features

| | |
|---|---|
| **Campaign Execution** | The ability to manage multiple social media services simultaneously is integral for carrying out social media campaigns. |
| **Social Response Management** | Creating response workflows is equally important to publishing capability for managing social campaigns. |

## Additional Features

- **Social Media Channel Integration – Outbound**
- **Social Moderation and Workflow Management**
- **Social Post Archival**
- **Social Asset Management**
- **Post Time Optimization**
- **Social Media Channel Integration – Inbound**
- **Trend Analysis**
- **Sentiment Analysis**
- **Dashboards and Visualization**

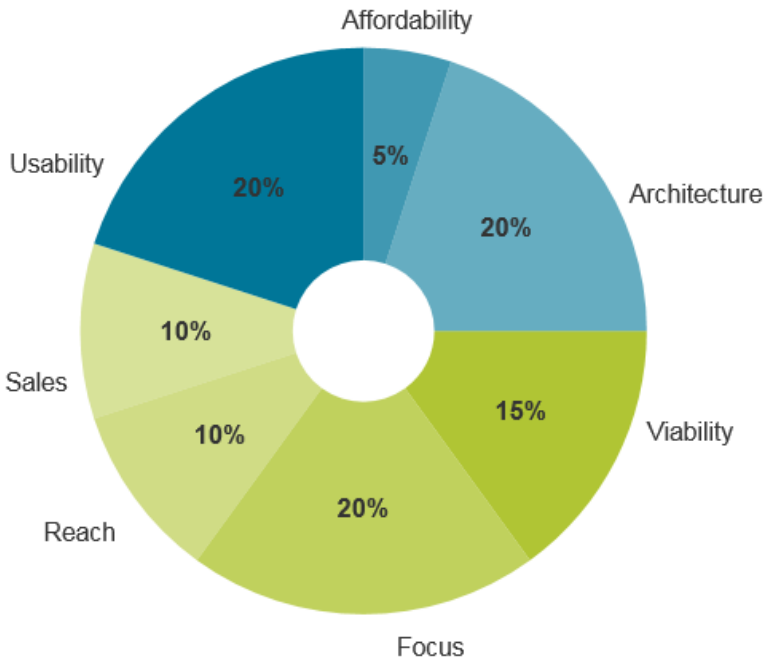
## Feature Weightings



# Vendor considerations for the social publishing and campaign management use-case scenario

| Product Evaluation Features | |
|---|---|
| Usability | A clean and intuitive user interface is important for users to fully leverage the benefits of an SMMP. |
| Affordability | Affordability is an important consideration as the price of SMMPs can vary significantly depending on the breadth and depth of capability offered. |
| Architecture | SMMP is more valuable to organizations when it can integrate well with their applications, such as CRM and marketing automation software. |

| Vendor Evaluation Features | |
|---|---|
| Viability | Vendor viability is critical for long-term stability of an application portfolio. |
| Focus | The vendor is committed to the space and has a future product and portfolio roadmap. |
| Reach | Companies with processes that cross organizational and geographic boundaries require effective and available support. |
| Sales | Vendors need to demonstrate flexibility in terms of industry and technology partnerships to meet evolving customer needs. |



# Vendor performance for the social publishing and campaign management use-case scenario

## Champions for this use case:

**Adobe:** Adobe has the best social campaign execution capability in the market, enabling marketers to manage and auto-track multiple campaigns. It also offers a strong asset management feature that allows users to leverage Marketing Cloud content.

## Leaders in this use case:

**Salesforce:** SFDC has built a social marketing juggernaut, offering top-notch response workflows and campaign execution capability.

**Hootsuite:** Hootsuite has good response capabilities backed up by a strong team collaboration feature set. It offers simplified cross-platform posting and post-time optimization capabilities.

## Best Overall Value Award

**Sendible:** Sendible offers the best value for your money in this use case with good response workflows and publishing capability.

## Players in the social publishing and campaign management scenario

Sprout Social
Sprinklr
Sendible

# Vendor performance for the social publishing and campaign management use-case scenario

# Value Index for the social publishing and campaign management scenario

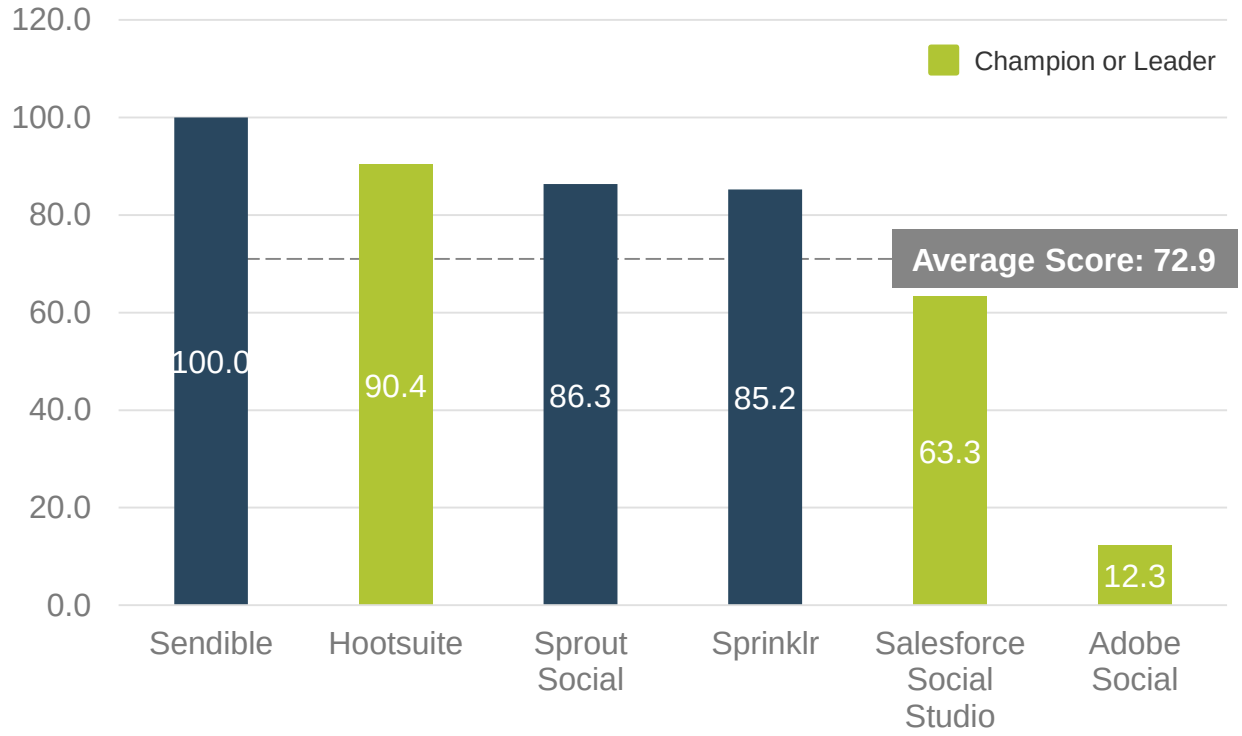
## *What is a Value Score?*

The Value Score indexes each vendor's product offering and business strength **relative to its price point.** It **does not** indicate vendor ranking.

Vendors that score high offer more **bang-for-the-buck** (e.g. features, usability, stability) than the average vendor, while the inverse is true for those that score lower.

Price-conscious enterprises may wish to give the Value Score more consideration than those who are more focused on specific vendor/product attributes.

On a relative basis, Sendible maintained the highest Info-Tech **Value Score**™ of the vendor group for this use-case scenario. Vendors were indexed against Sendible's performance to provide a complete, relative view of their product offerings.




For an explanation of how Price is determined, see Information Presentation – Price Evaluation in the Appendix.

For an explanation of how the Info-Tech Value Index is calculated, see Information Presentation – Value Index in the Appendix.

# USE CASE 3

## Social Customer Care

**Seeking functionality for management of the social customer service queue as well as tools for expedient resolution of customer issues.**

# Feature weightings for the social customer care use-case scenario

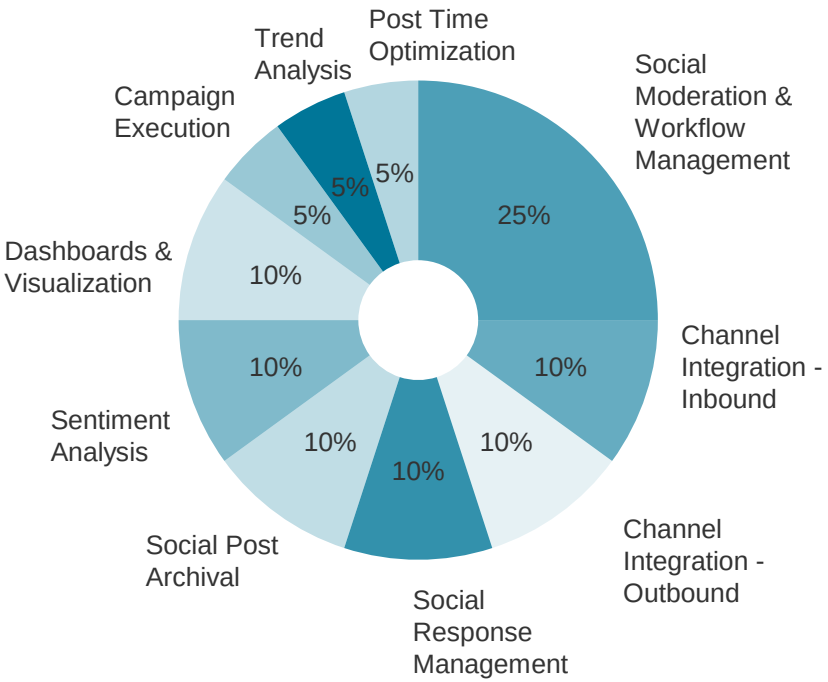
## Core Features

| | |
|---|---|
| **Social Moderation and Workflow Management** | Creating escalation workflows is important for triaging customer service, managing the social customer service queue and offering expedient resolution to customer complaints. |

## Additional Features

- **Social Media Channel Integration – Outbound**
- **Social Moderation and Workflow Management**
- **Social Response Management**
- **Social Post Archival**
- **Sentiment Analysis**
- **Dashboards and Visualization**
- **Campaign Execution**
- **Trend Analysis**
- **Post Time Optimization**

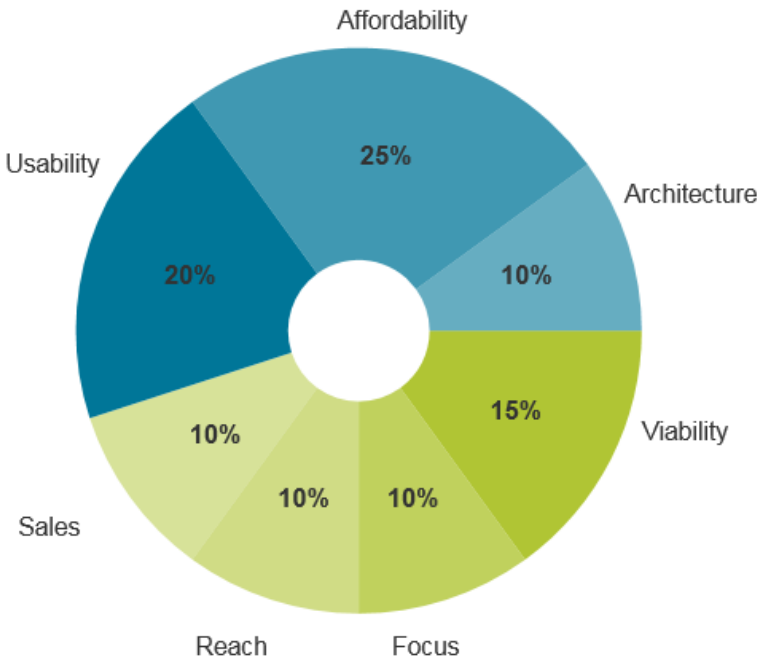
## Feature Weightings



# Vendor considerations for the social customer case use-case scenario

| Product Evaluation Features | |
|---|---|
| Usability | A clean and intuitive user interface is important for users to fully leverage the benefits of an SMMP. |
| Affordability | Affordability is an important consideration as the price of SMMPs can vary significantly depending on the breadth and depth of capability offered. |
| Architecture | SMMP is more valuable to organizations when it can integrate well with their applications, such as CRM and marketing automation software. |

| Vendor Evaluation Features | |
|---|---|
| Viability | Vendor viability is critical for long-term stability of an application portfolio. |
| Focus | The vendor is committed to the space and has a future product and portfolio roadmap. |
| Reach | Companies with processes that cross organizational and geographic boundaries require effective and available support. |
| Sales | Vendors need to demonstrate flexibility in terms of industry and technology partnerships to meet evolving customer needs. |



# Vendor performance for the social customer care use-case scenario

**Champions for this use case:**

**Salesforce:** Salesforce offers exceptional end-to-end social customer care capability with strong response escalation workflows.

**Leaders in this use case:**

**Sprinklr:** Sprinklr's offering gives users high flexibility to configure escalation workflows and role-based permissions for managing the social customer service queue.

**Hootsuite:** Hootsuite's strength lies in the breadth of social networks that the platform supports in offering expedient resolution to customer complaints.

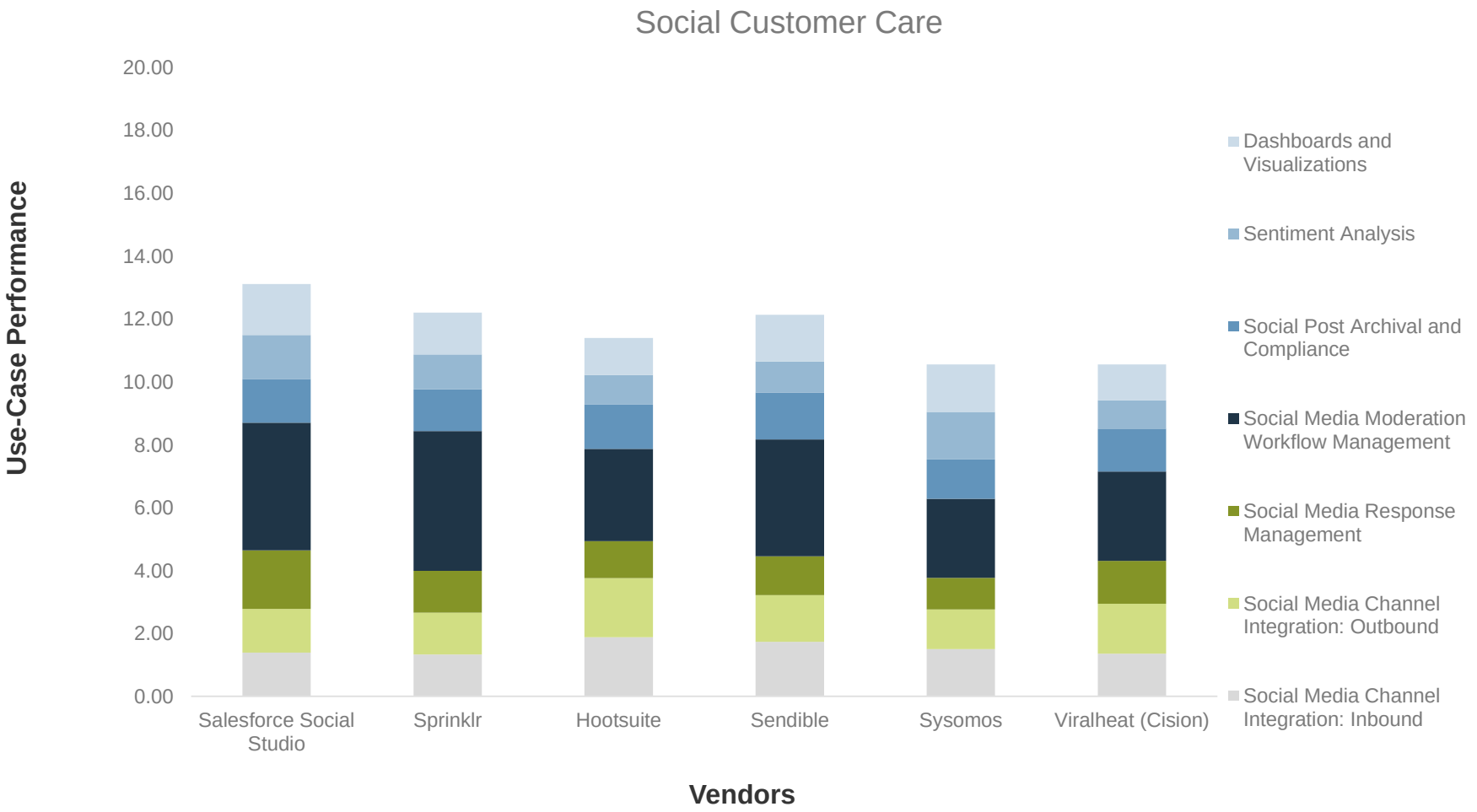
## Best Overall Value Award

**Sysomos:** Sysomos is the best bang for your buck in this use case, offering essential response and workflow capabilities.

## Players in the social customer care scenario

Sendible
Sysomos
Viralheat (Cision)

# Vendor performance for the social customer care use-case scenario



# Value Index for the social customer care scenario

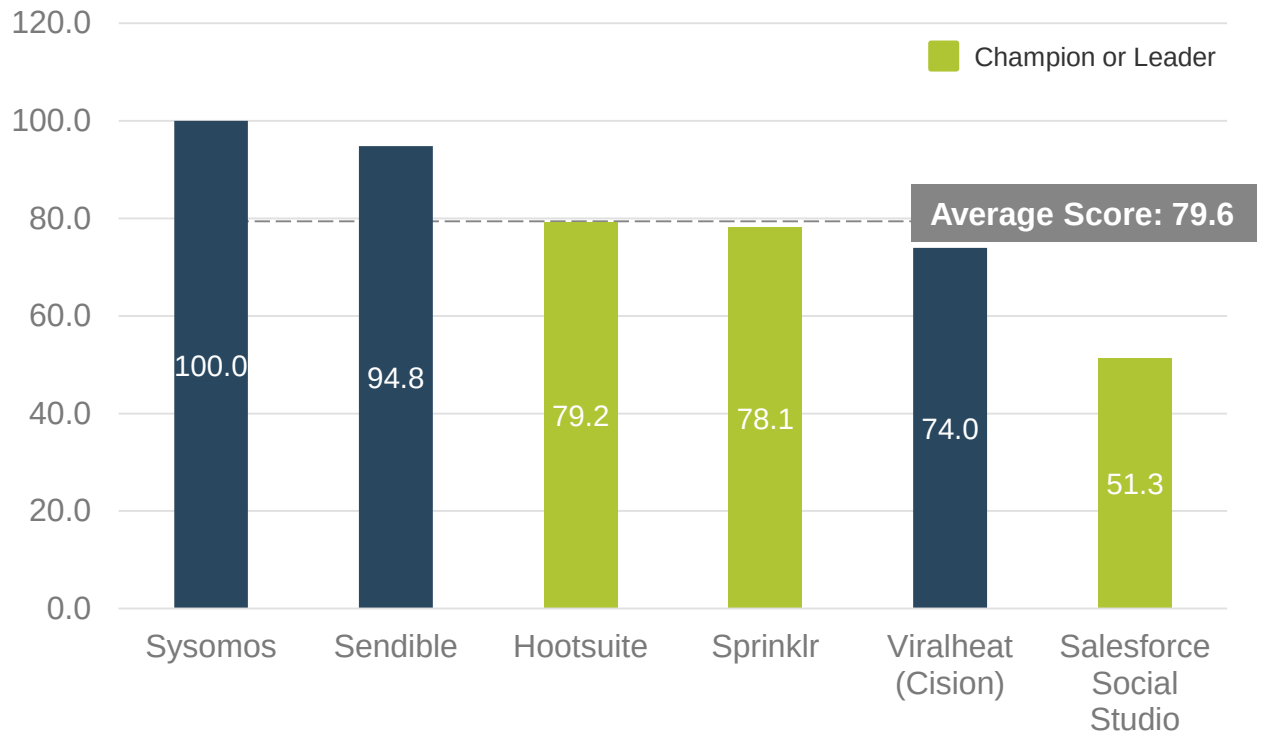
## *What is a Value Score?*

The Value Score indexes each vendor's product offering and business strength **relative to its price point.** It **does not** indicate vendor ranking.

Vendors that score high offer more **bang-for-the-buck** (e.g. features, usability, stability) than the average vendor, while the inverse is true for those that score lower.

Price-conscious enterprises may wish to give the Value Score more consideration than those who are more focused on specific vendor/product attributes.

On a relative basis, Sysomos maintained the highest Info-Tech **Value Score**™ of the vendor group for this use-case scenario. Vendors were indexed against Sysomos' performance to provide a complete, relative view of their product offerings.




For an explanation of how Price is determined, see Information Presentation – Price Evaluation in the Appendix.

For an explanation of how the Info-Tech Value Index is calculated, see Information Presentation – Value Index in the Appendix.

# VENDOR LANDSCAPE

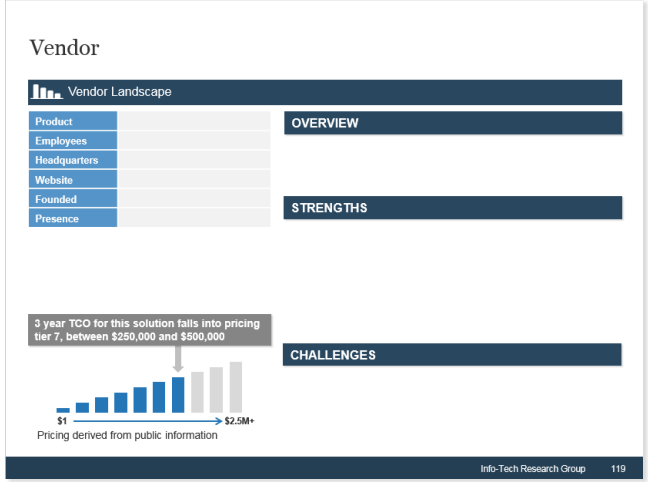
## Vendor Profiles and Scoring

# Use the information in the SMMP Vendor Landscape analysis to streamline your own vendor analysis process

This section of the Vendor Landscape includes the profiles and scoring for each vendor against the evaluation framework previously outlined.

## Vendor Profiles

- Include an overview for each company.
- Identify the strengths and weaknesses of the product and vendor.
- Identify the three-year TCO of the vendor's solution (based on a ten-tiered model).

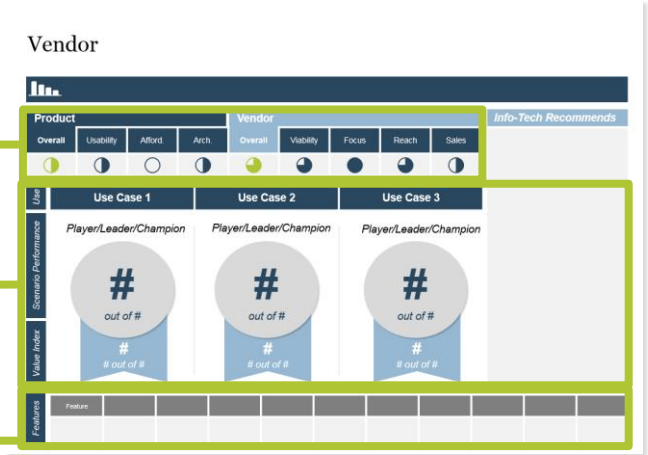



## Vendor Scoring

Use the Harvey Ball scoring of vendor and product considerations to assess alignment with your own requirements.

Review the use-case scenarios relevant to your organization's Use-Case Fit Assessment results to identify a vendor's fit to your organization's SMMP needs. (See the following slide for further clarification on the use-case assessment scoring process.)

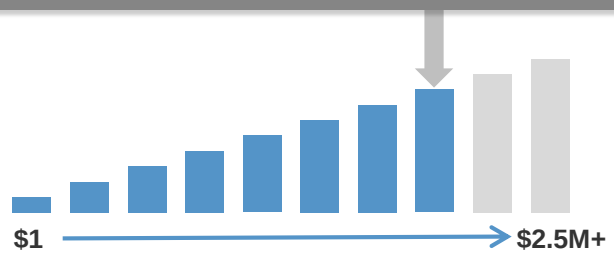
Review the stoplight scoring of advanced features to identify the functional capabilities of vendors.



# Adobe Social is a powerhouse for digital marketers, with extremely well-developed analytics capabilities

| | |
|---|---|
| **Product** | Adobe Social |
| **Employees** | 15,000+ |
| **Headquarters** | San Jose, CA |
| **Website** | Adobe.com |
| **Founded** | 1982 |
| **Presence** | NASDAQ: ADBE |

**3 year TCO for this solution falls into pricing tier 8 between $500,000 and $1,000,000.**




Pricing provided by vendor

## OVERVIEW

- Adobe Social is a strong offering included within the broader Adobe Marketing Cloud**.** The product is tightly focused on social analytics and social campaign execution. It's particularly well-suited to dedicated digital marketers or social specialists.

## STRENGTHS

- Adobe Social provides broad capabilities across social analytics and social campaign management; its integration with Adobe Analytics is a strong selling point for organizations that need a complete, end-to-end solution.
- It boasts great archiving capabilities (up to 7 years for outbound posts), meeting the needs of compliance-centric organizations and providing for strong longitudinal analysis capabilities.

## CHALLENGES

- The product plays well with the rest of the Adobe Marketing Cloud, but the list of third-party CRM and CSM integrations is shorter than some other players in the market.
- While the product is unsurprisingly geared towards marketers, organizations that want a scalable platform for customer service use cases will need to augment the product due to its focus on campaigns and analytics – service-related workflow and automation capabilities are not a core focus for the company.

# Adobe Social

| Product | | | | Vendor | | | | |
|---|---|---|---|---|---|---|---|---|
| **Overall** | Usability | Afford. | Arch. | **Overall** | Viability | Focus | Reach | Sales |

*Use*

| Social Listening & Analytics | Social Publishing & Campaign Management |
|---|---|

*Scenario Performance*

*Leader*

*Champion*

*Value Index*

**9.8**
*6 out of 6*

**12.3**
*6 out of 6*

*Features*

| Social Media Channel Integration - Inbound | Social Media Channel Integration - Outbound | Social Response Management | Social Moderation and Workflow Management | Campaign Execution | Social Post Archival | Trend Analysis | Sentiment Analysis | Contextual Analysis | Social Asset Management | Post Time Optimization | Dashboards and Visualization |
|---|---|---|---|---|---|---|---|---|---|---|---|

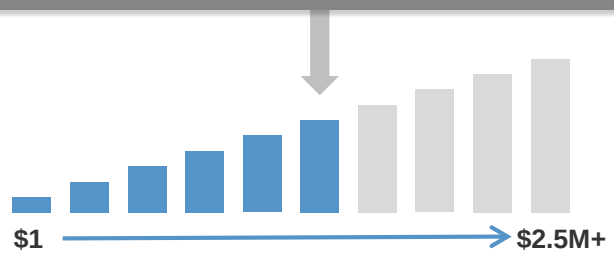
## *Info-Tech Recommends*

Adobe Social provides impressive features, especially for companies that position social media within a larger digital marketing strategy. Organizations that need powerful social analytics or social campaign execution capability should have Adobe on their shortlist, though the product may be an overbuy for social customer care use cases.

# Hootsuite is a capable vendor that offers a flexible solution for monitoring many different social media services

| | |
|---|---|
| **Product** | Hootsuite |
| **Employees** | 800 |
| **Headquarters** | Vancouver, BC |
| **Website** | Hootsuite.com |
| **Founded** | 2007 |
| **Presence** | Privately held |

**3 year TCO for this solution falls into pricing tier 6, between $100,000 and $250,000.**




Pricing derived from public information

## OVERVIEW

- In the past, Hootsuite worked on the freemium model by providing basic social account management features. The company has since expanded its offering and put a strong focus on enterprise feature sets, such as collaboration and workflow management.

## STRENGTHS

- Hootsuite is extremely easy to use, having one of the most straightforward interfaces of vendors evaluated.
- It has extensive monitoring capabilities for a wide variety of social networks as well as related services, which are supported through an app store built into the Hootsuite platform.
- The product provides a comprehensive model for team-based collaboration and workflow management, demonstrated through nice cross-posting and post-time optimization capabilities.

## CHALLENGES

- Hootsuite's reporting and analytics capabilities are relatively basic, particularly when contrasted with more analytics-focused vendors in the market.
- Running cross-channel campaigns is challenging without integration with third-party applications.

# Hootsuite

| Product | | | | Vendor | | | | |
|---|---|---|---|---|---|---|---|---|
| Overall | Usability | Afford. | Arch. | Overall | Viability | Focus | Reach | Sales |

| Use | Social Listening & Analytics | Social Publishing & Campaign Management | Social Customer Care |
|---|---|---|---|
| Scenario Performance | Player | Leader | Leader |
| | 5 out of 6 | VENDOR LANDSCAPE AWARD LEADER INFO-TECH | VENDOR LANDSCAPE AWARD LEADER INFO-TECH |
| Value Index | 80.8 2 out of 6 | 90.4 2 out of 6 | 79.2 3 out of 6 |

| Features | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Social Media Channel Integration - Inbound | Social Media Channel Integration - Outbound | Social Response Management | Social Moderation and Workflow Management | Campaign Execution | Social Post Archival | Trend Analysis | Sentiment Analysis | Contextual Analysis | Social Asset Management | Post Time Optimization | Dashboards and Visualization |

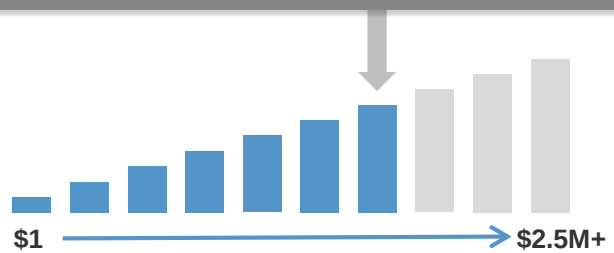
## *Info-Tech Recommends*

The free version of Hootsuite is useful for getting your feet wet with social management. The paid version is a great SMMP for monitoring and engaging your own social properties with good account and team management at an affordable price. This makes it ideal for SMBs. However, organizations that need deep social analytics may want to look elsewhere.

# Salesforce Marketing Cloud continues to be a Cadillac solution; it's a robust platform with a host of features

| | |
|---|---|
| **Product** | Salesforce Social Studio |
| **Employees** | 24,000+ |
| **Headquarters** | San Francisco, CA |
| **Website** | Salesforce.com |
| **Founded** | 1999 |
| **Presence** | NASDAQ: CRM |

**3 year TCO for this solution falls into pricing tier 7, between $250,000 and $500,000**




Pricing provided by vendor

## OVERVIEW

- Social Studio is a powerful solution fueled by Salesforce's savvy acquisitions in the marketing automation and social media management marketspace. The product has rapidly matured and is adept at both marketing and customer service use cases.

## STRENGTHS

- Salesforce continues to excel as one of the best SMMP vendors in terms of balancing inbound analytics and outbound engagement. The recent addition of Salesforce Einstein to the platform bolsters deep learning capabilities and enhances the product's value proposition to those that want a tool for robust customer intelligence.
- Salesforce's integration of Marketing Cloud, with its Sales and Service Clouds, also creates a good 360-degree customer view.

## CHALLENGES

- Salesforce's broad and deep feature set comes at a premium: the solution is priced materially higher than many other vendors. Before you consider Marketing Cloud, it's important to evaluate which social media capabilities you want to develop: if you only need basic response workflows or dashboard-level analytics, purchasing Marketing Cloud runs the risk of overbuying.
- In part due to its price point and market focus, Marketing Cloud is more suited to enterprise use cases than SMB use cases.

# Salesforce

| Product | | | | Vendor | | | | |
|---|---|---|---|---|---|---|---|---|
| Overall | Usability | Afford. | Arch. | Overall | Viability | Focus | Reach | Sales |

| Use | Social Listening & Analytics | Social Publishing & Campaign Management | Social Customer Care |
|---|---|---|---|
| Scenario Performance | *Champion* | *Leader* | *Champion* |
| Value Index | 52.4<br>*5 out of 6* | 63.3<br>*5 out of 6* | 51.3<br>*6 out of 6* |

| Features | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Social Media Channel Integration - Inbound | Social Media Channel Integration - Outbound | Social Response Management | Social Moderation and Workflow Management | Campaign Execution | Social Post Archival | Trend Analysis | Sentiment Analysis | Contextual Analysis | Social Asset Management | Post Time Optimization | Dashboards and Visualization |

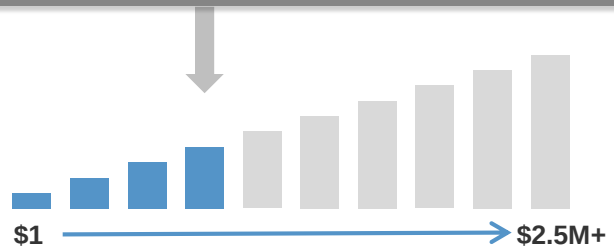
### *Info-Tech Recommends*

Social Studio in Salesforce Marketing Cloud remains a leading solution. Organizations that need to blend processes across the enterprise that rely on social listening, deep analytics, and customer engagement should have the product on their shortlist. However, companies with more basic needs may be off-put by the solution's price point.

# Sendible offers multiple social media management capabilities for SMBs and agencies

| | |
|---|---|
| **Product** | Sendible |
| **Employees** | 27 |
| **Headquarters** | London, UK |
| **Website** | Sendible.com |
| **Founded** | 2009 |
| **Presence** | Privately held |

**3 year TCO for this solution falls into pricing tier 4, between $25,000 and $50,000**




Pricing derived from public information

## OVERVIEW

- Founded in 2009, Sendible is a rising player in the SMMP market. Sendible is primarily focused on the SMB space. A growing segment of its client base is digital marketing agencies and franchise companies.

## STRENGTHS

- Sendible's user interface is very intuitive and user friendly.
- The product offers the ability to manage multiple social accounts simultaneously as well as schedule posts to multiple groups on different social networks, making Sendible a strong choice for social engagement and customer care.
- Its affordability is strong given its feature set, making it an attractive option for organizations that are budget conscious.

## CHALLENGES

- Sendible remains a smaller vendor in the market – its list of channel partners lags behind larger incumbents.
- Sendible's contextual and visual content analytics are lacking vis-à-vis more analytics-centric vendors.

# Sendible

| Product | | | | Vendor | | | | |
|---|---|---|---|---|---|---|---|---|
| **Overall** | Usability | Afford. | Arch. | **Overall** | Viability | Focus | Reach | Sales |

| Use | Social Publishing & Campaign Management | Social Customer Care |
|---|---|---|
| Scenario Performance | *Player* **6** *out of 6* | *Player* **4** *out of 6* |
| Value Index | **100** *1 out of 6* (VENDOR LANDSCAPE AWARD – BEST OVERALL VALUE – INFO-TECH) | **94.8** *2 out of 6* |

| Features | |
|---|---|
| Social Media Channel Integration - Inbound | |
| Social Media Channel Integration - Outbound | |
| Social Response Management | |
| Social Moderation and Workflow Management | |
| Campaign Execution | |
| Social Post Archival | |
| Trend Analysis | |
| Sentiment Analysis | |
| Contextual Analysis | |
| Social Asset Management | |
| Post Time Optimization | |
| Dashboards and Visualization | |

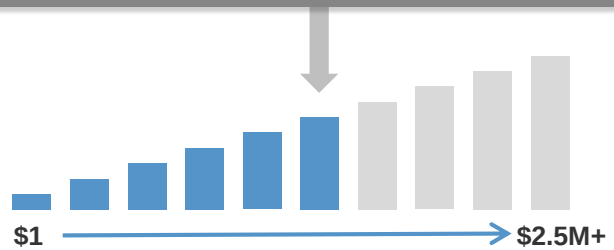
## *Info-Tech Recommends*

Sendible offers a viable solution for small and mid-market companies, as well as social agencies with a focus on customer engagement for marketing and customer service use cases. However, organizations that need deep social analytics may want to look elsewhere.

# Sprinklr

| | |
|---|---|
| **Product** | Sprinklr |
| **Employees** | 1,100 |
| **Headquarters** | New York, NY |
| **Website** | Sprinklr.com |
| **Founded** | 2009 |
| **Presence** | Privately held |

**3 year TCO for this solution falls into pricing tier 6, between $100,000 and $250,000**




Pricing derived from public information

## OVERVIEW

- Sprinklr has risen rapidly as a best-of-breed player in the social media management market. It markets a solution geared towards multiple use cases, from customer intelligence and analytics to service-centric response management.

## STRENGTHS

- Sprinklr's breadth of capabilities are impressive: the vendor has maintained a strong focus on social-specific functionality. As a result of this market focus, they have invested prudently in advanced social analytics and moderation workflow capabilities.
- Sprinklr's user experience design and data visualization capabilities are top-notch, making it a solution that's easy for end users and decision makers to get up and running with quickly.

## CHALLENGES

- Relative to other players in the market, the breadth and scope of Sprinklr's integrations with other customer experience management solutions is limited.
- Based on its feature set and price point, Sprinklr is best suited for mid-to-large organizations. SMBs run the risk of an overbuy situation.

# Sprinklr

| Product | | | | Vendor | | | | |
|---|---|---|---|---|---|---|---|---|
| **Overall** | Usability | Afford. | Arch. | **Overall** | Viability | Focus | Reach | Sales |

| Use | Social Listening & Analytics | Social Publishing & Campaign Management | Social Customer Care |
|---|---|---|---|
| Scenario Performance | *Player* | *Player* | *Leader* |
| | **4** *out of 6* | **5** *out of 6* | VENDOR LANDSCAPE AWARD LEADER INFO-TECH RESEARCH GROUP |
| Value Index | **79.4** *3 out of 6* | **85.2** *4 out of 6* | **78.1** *4 out of 6* |

| Features | Social Media Channel Integration - Inbound | Social Media Channel Integration - Outbound | Social Response Management | Social Moderation and Workflow Management | Campaign Execution | Social Post Archival | Trend Analysis | Sentiment Analysis | Contextual Analysis | Social Asset Management | Post Time Optimization | Dashboards and Visualization |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |

## *Info-Tech Recommends*

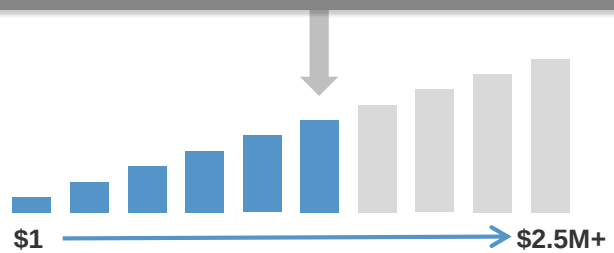
Sprinklr is a strong choice for small and mid-market organizations offering breadth of social media management capabilities that covers social analytics, engagement, and customer service.

# Sprout Social provides small-to-medium enterprises with robust social response capabilities at a reasonable price

| | |
|---|---|
| **Product** | Sprout Social |
| **Employees** | 200+ |
| **Headquarters** | Chicago, IL |
| **Website** | Sproutsocial.com |
| **Founded** | 2010 |
| **Presence** | Privately held |

sproutsocial

**3 year TCO for this solution falls into pricing tier 6, between $100,000 and $250,000**




Pricing derived from public information

## OVERVIEW

- Sprout Social has built out its enterprise capabilities over the last several years. It offers strong feature sets for account management, social monitoring and analytics, and customer care – it particularly excels at the latter.

## STRENGTHS

- Sprout's unified inbox and response management features are some of the most intuitive we've seen. This makes it a natural option for providing customer service via social channels.
- Sprout Social is priced competitively in relation to other vendors.
- The product provides strong social asset management capabilities where users can set content permissions and expiration dates, and limit access.

## CHALLENGES

- Deep contextual analysis is lacking: the solution clearly falls more to the engagement side of the spectrum, and is particularly suited for social customer service.
- Sprout Social has a limited number of technology partners for integrations with applications such as CRM and marketing automation software.
- It still has a predominantly North American market focus.

# Sprout Social

| Product | | | | Vendor | | | | |
|---|---|---|---|---|---|---|---|---|
| **Overall** | Usability | Afford. | Arch. | **Overall** | Viability | Focus | Reach | Sales |

*Use*

| Social Listening & Analytics | Social Publishing & Campaign Management |
|---|---|

*Scenario Performance*

| Social Listening & Analytics | Social Publishing & Campaign Management |
|---|---|
| *Player* | *Player* |
| **6** *out of 6* | **4** *out of 6* |

*Value Index*

| Social Listening & Analytics | Social Publishing & Campaign Management |
|---|---|
| **78.1** *4 out of 6* | **86.3** *3 out of 6* |

*Features*

| Social Media Channel Integration - Inbound | Social Media Channel Integration - Outbound | Social Response Management | Social Moderation and Workflow Management | Campaign Execution | Social Post Archival | Trend Analysis | Sentiment Analysis | Contextual Analysis | Social Asset Management | Post Time Optimization | Dashboards and Visualization |
|---|---|---|---|---|---|---|---|---|---|---|---|

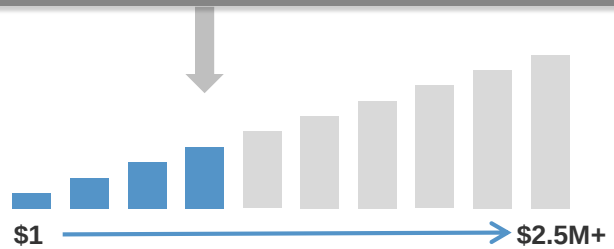
## *Info-Tech Recommends*

Sprout Social's easy-to-understand benchmarking and dashboards, paired with strong response management, make it a great choice for mid-sized enterprises concerned with social engagement. However, organizations that want to do deep social analytics will need to augment the solution.

# Sysomos' prime feature is its hardy analytics built atop a plethora of inbound social channels

| | |
|---|---|
| **Product** | Sysomos MAP and Heartbeat |
| **Employees** | 200+ |
| **Headquarters** | Toronto, ON |
| **Website** | Sysomos.com |
| **Founded** | 2007 |
| **Presence** | Privately held |

**3 year TCO for this solution falls into pricing tier 4, between $25,000 and $50,000**




Pricing derived from public information

## OVERVIEW

- Sysomos began life as a project at the University of Toronto prior to its acquisition by Marketwire in 2010.
- It split from Marketwire in 2015 and redesigned its product to focus on social monitoring, analysis, and engagement.

## STRENGTHS

- MAP and Heartbeat offer extensive contextual and sentiment analytics, consolidating findings through a spam-filtering process that parses out a lot of the "noise" inherent in social media data.
- The solution provides an unlimited number of profiles, enabling more opportunities for collaboration.
- It provides workflow summaries, documenting the actions of staff and providing an audit trail through the entire process.

## CHALLENGES

- Sysomos has introduced a publishing tool for social campaigns. However, its outbound capabilities continue to lag, and there are currently no tools for asset management.
- Sysomos' application integration stack is limited relative to other vendors.

# Sysomos

| Product | | | | Vendor | | | | |
|---|---|---|---|---|---|---|---|---|
| **Overall** | Usability | Afford. | Arch. | **Overall** | Viability | Focus | Reach | Sales |

| Use | Social Listening & Analytics | Social Customer Care |
|---|---|---|
| Scenario Performance | *Leader* | *Player* |
| Value Index | 100 *1 out of 6* | 100 *1 out of 6* |

VENDOR LANDSCAPE AWARD LEADER INFO-TECH

5 *out of 6*

VENDOR LANDSCAPE AWARD BEST OVERALL VALUE INFO-TECH

| Features | |
|---|---|
| Social Media Channel Integration - Inbound | |
| Social Media Channel Integration - Outbound | |
| Social Response Management | |
| Social Moderation and Workflow Management | |
| Campaign Execution | |
| Social Post Archival | |
| Trend Analysis | |
| Sentiment Analysis | |
| Contextual Analysis | |
| Social Asset Management | |
| Post Time Optimization | |
| Dashboards and Visualization | |

## *Info-Tech Recommends*

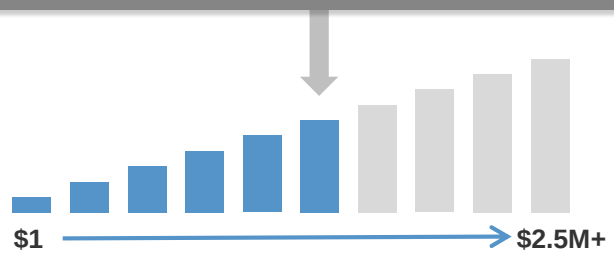
Sysomos' broad array of good features has made it a frequent challenger to Marketing Cloud on analytics-centric SMMP evaluation shortlists. Enterprise-scale customers specifically interested in social listening and analytics, rather than customer engagement and campaign execution, will definitely want to take a look.

# Viralheat offers a clean analysis of an organization's social media activity and has beefed up response workflows

| | |
|---|---|
| **Product** | Viralheat |
| **Employees** | 1,200 |
| **Headquarters** | Chicago, IL |
| **Website** | Cision.com |
| **Founded** | 2015 |
| **Presence** | Privately held |

CISION

**3 year TCO for this solution falls into pricing tier 6, between $100,000 and $250,000**




Pricing derived from public information

## OVERVIEW

- Viralheat has been in the social media market since 2009. It provides tools for analytics and in-band social engagement.
- The company was acquired by Cision in 2015, a Chicago-based public relations technology company.

## STRENGTHS

- Viralheat offers robust workflow management capabilities for social response and is particularly useful for customer service.
- The product has strong post time optimization capability through its ViralPost scheduling feature.
- Cision's acquisition of Viralheat makes the product a great choice for third-party social media management, namely public relations and digital marketing agencies.

## CHALLENGES

- Viralheat remains a smaller vendor in the market – its list of channel partners lags behind larger incumbents.
- Contextual and sentiment analysis are lacking relative to other vendors.

# Cision (Viralheat)

| Product | | | | Vendor | | | | |
|---|---|---|---|---|---|---|---|---|
| **Overall** | Usability | Afford. | Arch. | **Overall** | Viability | Focus | Reach | Sales |

*Use*

**Social Customer Care**

*Scenario Performance*

*Player*

**6**

*out of 6*

*Value Index*

**74**

*5 out of 6*

***Info-Tech Recommends***

Cision has upped its game in terms of social workflow and response management and it monitors an above-average number of services. It is a steadfast tool for brands that are primarily interested in outbound customer engagement for marketing and customer service use cases.

*Features*

| Social Media Channel Integration - Inbound | Social Media Channel Integration - Outbound | Social Response Management | Social Moderation and Workflow Management | Campaign Execution | Social Post Archival | Trend Analysis | Sentiment Analysis | Contextual Analysis | Social Asset Management | Post Time Optimization | Dashboards and Visualization |
|---|---|---|---|---|---|---|---|---|---|---|---|

# Use the *SMMP Vendor Shortlist Tool* to customize the vendor analysis for your organization

*SMMP Vendor Shortlist & Detailed Feature Analysis Tool*

## Instructions

### 1. Eliminate misaligned vendors with knock-out criteria

Use the *SMMP Vendor Shortlist & Detailed Feature Analysis Tool* to eliminate vendors based on specific knock-out criteria on tab 2, Knock-Out Criteria.

### 2. Create your own evaluation framework

Tailor the vendor evaluation to include your own product and vendor considerations on tab 3, Weightings.

Identify the significance of advanced features for your own procurement on a scale of **Mandatory, Optional,** and **Not Required** on tab 4, Detailed Feature Analysis.

### 3. Review the results of your customized evaluation

Review your custom vendor shortlist on tab 5, Results.

This evaluation uses both *functional* and *architectural* considerations to eliminate vendors.

### Knock-Out Criteria

COTS vs. Open Source
Deployment Models

| Vendor Shortlist | | | | | | |
|---|---|---|---|---|---|---|
| Vendor | Rank | Performance Against Knock-Out Criteria | Product Score | Vendor Score | Feature Score | Value Index Score |
| Opentext | 1 | Passed | 15.00 | 14.00 | 9.58 | 64.97 |
| IBM | 2 | Passed | 14.00 | 14.00 | 9.17 | 64.87 |
| Pega | 3 | Passed | 15.00 | 13.00 | 10.83 | Pricing not Available |
| Appian | 4 | Passed | 14.00 | 13.00 | 9.17 | Pricing not Available |
| BPLogix | 5 | Passed | 13.00 | 13.00 | 7.08 | 96.39 |
| Agiloft | 6 | Passed | 11.00 | 14.00 | 4.58 | 82.92 |
| Interneer | 7 | Passed | 12.00 | 13.00 | 7.08 | 95.19 |
| AgilePoint | 8 | Passed | 12.00 | 13.00 | 7.92 | 100.00 |
| TIBCO | | Failed | | | | |
| SoftwareAG | | Failed | | | | |
| Oracle | | Failed | | | | |

*Sample Vendor Shortlist from tab 5, Results*

### Interpreting the Results

Your custom shortlist will rank vendors that passed the initial knock-out criteria based on their overall score.

The shortlist will provide broken-down scoring, as well as a custom value index based on the framework set in the tool.

# Phase 2, Step 2: Select your SMMP solution

**2.1**

Analyze and shortlist vendors in the space

**2.2**

**Select your SMMP solution**

**This step will walk you through the following activities:**

- Prioritize your solution requirements.
- Create an RFP to submit to vendors.
- Solicit and review vendor proposals.
- Conduct onsite vendor demonstrations.
- Select the right solution.

**This step involves the following participants:**

- Core Project Team
- Procurement Manager
- Representative Stakeholders from Digital Marketing, Sales, and IT

## Outcomes of this step

- SMMP Selection Strategy

# Determine your SMMP procurement strategy

## Critical Points and Checks in Your Procurement

- Follow your own organization's procurement procedures to ensure that you adhere to your organization's policies.
- Based on your organization's policies, identify if you are going to conduct a private or public RFP process.
  - If your RFP will contain sensitive information, use a private RFP process that is directed to specific vendors in order to protect the proprietary practices of your business.

**Info-Tech Insight**

If you are still not sure of a vendor's capabilities, we recommend sending an RFI before proceeding with an RFP.

**INFO-TECH OPPORTUNITY**

If your organization lacks a clear procurement process, refer to Info-Tech's *Optimize IT Procurement* research to help construct a formal process for selecting application technology.

**Info-Tech's 15-Step Procurement Process**

Use Info-Tech's procurement process to ensure that your SMMP selection is properly planned and executed.

1. Initiate procurement.
2. Select procurement manager.
3. Prepare for procurement; check that prerequisites are met.
4. Select appropriate procurement vehicle.
5. Assemble procurement teams.
6. Create procurement project plan.
7. **Identify and notify vendors about procurement.**
8. **Configure procurement process.**
9. **Gather requirements.**
10. **Prioritize requirements.**
11. **Build the procurement documentation package.**
12. **Issue the procurement.**
13. **Evaluate proposals.**
14. **Recommend a vendor.**
15. **Present to management.**

Much of your procurement process should already be outlined from your charter and initial project structuring. **In this stage of the process, focus on the successful completion of steps 7-15.**

# Prioritize your solution requirements based on your business, architecture, and performance needs

*Completed in Section 3*

## 1. Identify Your Requirements

Use the findings being collected in the Requirements Workbook and related materials to define clear requirements around your organization's desired SMMP.

## 2. Prioritize Your Requirements

- Identify the significance of each requirement for your solution evaluation.
- Identify features and requirements as *mandatory*, *important*, or *optional.*
- **Control the number of mandatory requirements you document.** Too many mandatory requirements could create an unrealistic framework for evaluating solutions.

## 3. Create a Requirements Package

- Consolidate your identified requirements into one list, removing redundancies and conflicts.
- Categorize the requirements based on their priority and nature.

**INPUT**

- Requirements Workbook and requirements gathering findings

**OUTPUT**

- Full documentation of requirements for the RFP and solution evaluation process

*Use this requirements package as you evaluate vendors and create your RFP for shortlisted vendors.*

**Info-Tech Insight**

No solution will meet 100% of your requirements. Control the number of mandatory requirements you place in your procurement process to ensure that vendors that are the best fit for your organization are not eliminated unnecessarily.

# Create an RFP to submit to vendors

*Request for Proposal Template*

## Activity: Interpreting the Results

Leverage Info-Tech's *SMMP RFP Template* to convey your desired suite requirements to vendors and outline the proposal and procurement steps set by your organization.

### Build Your RFP

1. Outline the organization's procurement instructions for vendors (Sections 1, 3, and 5).
2. Input the requirements package created in Activity 5.2 into your RFP (Section 4).
3. Create a scenario overview to provide vendors an opportunity to give an estimated price.

### Approval Process

Each organization has a unique procurement process; follow your own organization's process as you submit your RFPs to vendors.

4. Ensure compliance with your organization's standards and gain approval for submitting your RFP.

**Info-Tech RFP Table of Contents**

1. Statement of Work
2. General Information
3. Proposal Preparation Instructions
4. Scope of Work, Specifications, and Requirements
5. Vendor Qualifications and References
6. Budget and Estimated Pricing
7. Vendor Certification

### INPUT

- Requirements package
- Organization's procurement procedures

### OUTPUT

- RFP

### Materials

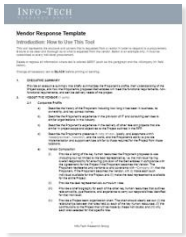
- Whiteboard and markers

### Participants

- Project manager
- Core project team

# Standardize the potential responses from vendors and streamline your evaluation with a response template

## *Vendor Response Template*


INFO-TECH
RESEARCH GROUP

Vendor Response Template

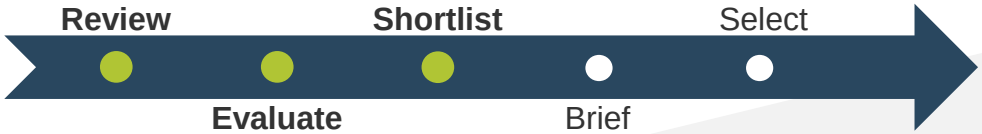
Introduction: How to Use This Tool

Adjust the scope and content of the *Vendor Response Template* to fit your SMMP procurement process and vendor requirements.

| Section | Why is this section important? |
|---|---|
| **About the Vendor** | This is where the vendor will describe itself and prove its organizational viability. |
| **Understanding of the Challenge** | Demonstrates that understanding of the problem is the first step in being able to provide a solution. |
| **Methodology** | Shows that there is a proven methodology to approach and solve the challenge. |
| **Proposed Solution** | Describes how the vendor will address the challenge. This is a very important section as it articulates what you will receive from the vendor as a solution. |
| **Project Management, Plan, and Timeline** | Provides an overview of the project management methodology, phases of the project, what will be delivered, and when. |
| **Vendor Qualifications** | Provides evidence of prior experience with delivering similar projects for similar clients. |
| **References** | Provides contact information for individuals/organizations for which the vendor has worked and who can vouch for the experience and success of working with this vendor. |
| **Value Added Services** | Remember, this could lead to a long-term relationship. It's not only about what you need now, but also what you may need in the future. |
| **Requirements** | Confirmation from the vendor as to which requirements it can meet and how it will meet them. |

# Evaluate the RFPs you receive within a clear scoring process

*SMMP RFP Evaluation and Scoring Tool*




**Activity**

Build a fair evaluation framework that evaluates vendor solutions against a set criteria rather than relative comparisons.

## INSTRUCTIONS

1. Have members of the SMMP evaluation team review the RFP responses given by vendors.
2. Input vendor solution information into the *SMMP RFP Evaluation and Scoring Tool*.
3. Analyze the vendors against your identified evaluation framework.
4. Identify vendors with whom you wish to arrange vendor briefings.
5. Contact vendors and arranging briefings.

**How to use this tool**

- Review the feature list and select where each feature is mandatory, desirable, or not applicable.
- Select if each feature has been met by the vendor RFP response.
- Enter the costing information provided by each vendor.
- Determine the relative importance of the features, architecture, and support.

**Tool Output**

- Costing
- Overall score
- Evaluation notes and comments

# Vendor product demonstration

## *Demo Script Template*

**Demo**

Invite vendors to come onsite to demonstrate the product and to answer questions. Use a demo script to help identify how a vendor's solution will fit your organization's particular business capability needs.

### Make sure the solution will work for your business

Provide the vendor with some usage patterns for the SMMP tool in preparation for the vendor demo.

Provide the following information to vendors in your script:

- Usage for different groups.
- SMMP usage and [business analytics] usage.
- The requirements for administration.

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RESEARCH GROUP

**SMMP Vendor Demo Script**

**Introduction: How to Use This Template**

This demonstration script template helps you provide vendors with a consistent set of instructions, ensuring an objective comparison of product features. Modify this script to fit individual needs and requirements.

Delete all information where text is colored **GREY** (such as this paragraph). Fill in or delete all form fields shaded in GREY (such as the "Insert Enterprise Name Here" field below). Form shading is not visible in printouts.

**Table of Contents**


Introduction ..... 1
Scenario 1 – Customer Service Agent Desktop ..... 1
Scenario 2 – Brand Manager/Marketing Coordinator ..... 2
Scenario 3 – Account Representatives and Sales Managers ..... 4
Scenario 4 – Senior Business Manager ..... 4
Scenario 5 – IT Managers ..... 5


*SMMP Demo Script Template*

### How to challenge the vendors in the demo

- Change visualization/presentation.
- Change the underlying data.
- Add additional datasets to the artifacts.
- Collaboration capabilities.
- Perform an investigation in terms of finding BI objects and identifying previous changes, and examine the audit trail.

### INFO-TECH ACTIVITY

1. Create a demo script that will be sent to vendors that outlines SMMP usage patterns from your organization.
2. Construct the demo script with your SMMP evaluation team, providing both prompts for the vendor to display the capabilities and some sample data for the vendor to model.

**INPUT**

- Requirements package
- Use-case results

**OUTPUT**

- Onsite demo

# Use vendor RFPs and demos to select the SMMP that best fits your organization's needs

*Suite Evaluation and Scoring Tool:* Tab 5, Overall Score

Don't just choose the vendor who gave the best presentation. Instead, select the vendor who meets your functional requirements and organizational needs.

| Category | Weight | Vendor 1 | Vendor 2 | Vendor 3 | Vendor 4 |
|---|---|---|---|---|---|
| *SMMP Features* | 60% | 75% | 80% | 80% | 90% |
| *Architecture* | 25% | 55% | 60% | 90% | 90% |
| *Support* | 15% | 10% | 70% | 60% | 95% |
| ***Total Score*** | 100% | 60% | 74% | 80% | 91% |

Use your objective evaluation to select a vendor to **recommend to management for procurement.**

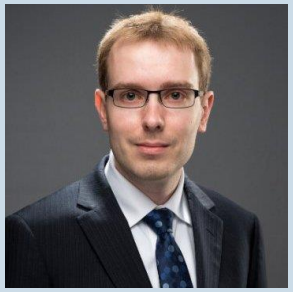
## Don't automatically decide to go with the highest score; validate that the vendor is someone you can envision working with for the long term.

- Select a vendor based not only on their evaluation performance, but also on your belief that you could form a lasting and supportive relationship with them.
- Integration needs are dynamic, not static. Find an SMMP tool and vendor that have strong capabilities and will fit with the application and integration plans of the business.
- In many cases, you will require professional services together with your SMMP purchase to make sure you have some guidance in the initial development and your own staff are trained properly.

Following the identification of your selected suite, submit your recommendation to the organization's management or evaluation team for final approval.

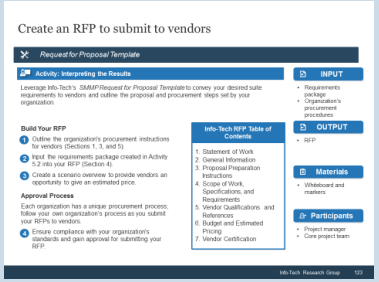
# If you want additional support, have our analysts guide you through this phase as part of an Info-Tech workshop

## Book a workshop with our Info-Tech analysts:



- To accelerate this project, engage your IT team in an Info-Tech workshop with an Info-Tech analyst team.
- Info-Tech analysts will join you and your team onsite at your location or welcome you to Info-Tech's historic Toronto office to participate in an innovative onsite workshop.
- Contact your account manager (www.infotech.com/account), or email Workshops@InfoTech.com for more information.

## The following are sample activities that will be conducted by Info-Tech analysts with your team:



Create an RFP to submit to vendors

*Request for Proposal Template*

**Activity: Interpreting the Results**

Leverage Info-Tech's *SMMP Request for Proposal Template* to convey your desired suite requirements to vendors and outline the proposal and procurement steps set by your organization.

**Build Your RFP**

1. Outline the organization's procurement instructions for vendors (Sections 1, 3, and 5).
2. Input the requirements package created in Activity 5.2 into your RFP (Section 4).
3. Create a scenario overview to provide vendors an opportunity to give an estimated price.

**Approval Process**

Each organization has a unique procurement process; follow your own organization's process as you submit your RFPs to vendors.

4. Ensure compliance with your organization's standards and gain approval for submitting your RFP.

**Info-Tech RFP Table of Contents**

1. Statement of Work
2. General Information
3. Proposal Preparation Instructions
4. Scope of Work, Specifications, and Requirements
5. Vendor Qualifications and References
6. Budget and Estimated Pricing
7. Vendor Certification

**INPUT**
- Requirements package
- Organization's procurement procedures

**OUTPUT**
- RFP

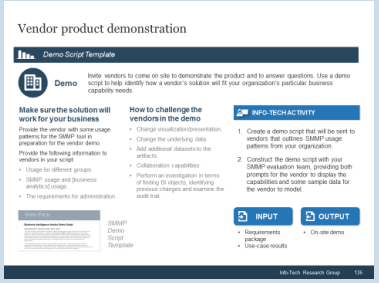
**Materials**
- Whiteboard and markers

**Participants**
- Project manager
- Core project team

Info-Tech Research Group 123

### Create an RFP for SMMP procurement

Our Info-Tech analyst will walk you through the RFP preparation to ensure the SMMP requirements are articulated clearly to vendors in this space.



Vendor product demonstration

*Demo Script Template*

**Demo**

Invite vendors to come on site to demonstrate the product and to answer questions. Use a demo script to help identify how a vendor's solution will fit your organization's particular business capability needs.

**Make sure the solution will work for your business**

Provide the vendor with some usage patterns for the SMMP tool in preparation for the vendor demo.

Provide the following information to vendors in your script:

- Usage for different groups
- SMMP usage and [business analytics] usage
- The requirements for administration

**How to challenge the vendors in the demo**

- Change visualization/presentation
- Change the underlying data
- Add additional datasets to the artifacts
- Collaboration capabilities
- Perform an investigation in terms of finding BI objects, identifying previous changes and examine the audit trail

**INFO-TECH ACTIVITY**

1. Create a demo script that will be sent to vendors that outlines SMMP usage patterns from your organization.
2. Construct the demo script with your SMMP evaluation team, providing both prompts for the vendor to display the capabilities and some sample data for the vendor to model.

Info-Tech

*SMMP Demo Script Template*

**INPUT**
- Requirements package
- Use-case results

**OUTPUT**
- On-site demo

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### Create SMMP demo scripts

An analyst will walk you through the demo script preparation to guide the SMMP product demonstrations and briefings offered by vendors. The analyst will ensure the demo script addresses key requirements documented earlier in the process.

# PHASE 3

## Review Implementation Considerations

Select and Implement a Social Media Management Platform

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Info-Tech's products and services combine actionable insight and relevant advice with
ready-to-use tools and templates that cover the full spectrum of IT concerns.
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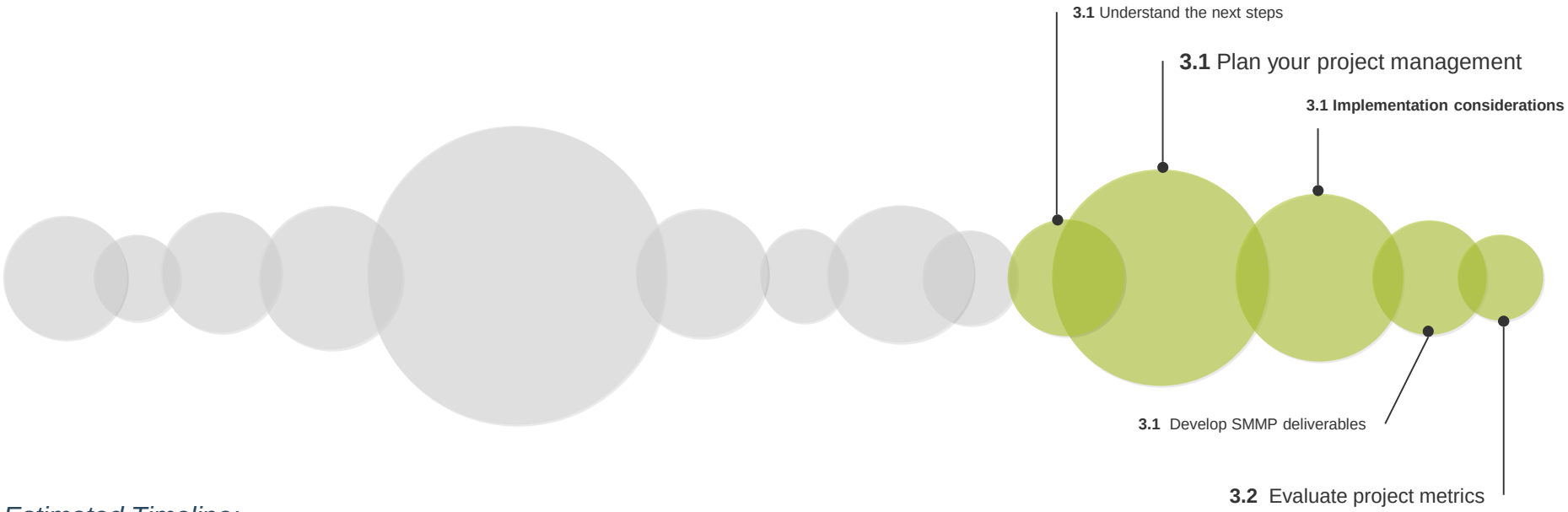
# Phase 3: Review implementation considerations




*Estimated Timeline:*

**Info-Tech Insight**

Even a solution that is a perfect fit for an organization will fail to generate value if it is not properly implemented or measured. Conduct the necessary planning before implementing your SMMP.

**Major Milestones Reached**

- Plan for implementation and expected go-live date

**Key Activities Completed**

- SMMP Implementation Plan
- Governance Plan
- Change Control Methods

**Outcome from This Phase**

Plans for implementing the selected SMMP tool.

# Phase 3 outline

**Call 1-888-670-8889** or email GuidedImplementations@InfoTech.com for more information.

Complete these steps on your own, or call us to complete a guided implementation. A guided implementation is a series of 2-3 advisory calls that help you execute each phase of a project. They are included in most advisory memberships.

## Guided Implementation 3: Review Implementation Considerations

**Proposed Time to Completion: 2 weeks**

### Step 3.1: Establish best practices for SMMP implementation

**Start with an analyst kick-off call:**

- Determine the right governance structure to overlook the SMMP implementation.
- Identify integrations with other applications.
- Establish an ongoing maintenance plan.
- Assess the different deployment models.

**Then complete these activities…**

- Establish a governance structure for social media.
- Specify data linkages with CRM.
- Identify risks and mitigation strategies
- Determine the right deployment model for your organization.

**With these tools & templates:**

*Social Media Steering Committee*

### Step 3.2: Assess the measured value from the project

**Review findings with analyst:**

- Determine the key performance indicators for each department using the SMMP
- Identify key performance indicators for business units using an SMMP

**Then complete these activities…**

- Identify key performance indicators for business units using an SMMP

## Phase 3 Results & Insights:

- Implementation Plan
- SMMP KPIs

# Phase 3, Step 1: Establish best practices for SMMP implementation

**3.1**

**Establish best practices for SMMP implementation**

**3.2**

Assess the measured value from the project

**This step will walk you through the following activities:**

- Establish a governance structure for social media management.
- Specify the data linkages you will need between your CRM platform and SMMP.

**This step involves the following participants:**

- Core Project Team

## Outcomes of this step

- Social Media Steering Committee Charter
- SMMP data migration Inventory
- Determination of the deployment model that works best for your organization
- Deployment Model

# Follow these steps for effective SMMP implementation

## What to Consider

- Creating an overall social media strategy is the critical first step in implementing an SMMP.
- Selecting an SMMP involves gathering business requirements, then translating those requirements into specific selection criteria. Know exactly what your business needs are to ensure the right SMMP is selected.
- Implement the platform with an eye toward creating business value: establish points of integration with the existing CRM solution, establish ongoing maintenance policies, select the right deployment model, and train end users around role-based objectives.

| | |
|---|---|
| **Plan** | ✓ Develop a strategy for customer interaction<br>✓ Develop a formal strategy for social media<br>✓ Determine business requirements |
| **Create RFP** | ✓ Translate into functional requirements<br>✓ Determine evaluation criteria |
| **Evaluate** | ✓ Evaluate vendors against criteria<br>✓ Shortlist vendors<br>✓ Perform in-depth vendor review |
| **Implement** | ✓ Integrate with existing CRM ecosystem (if applicable)<br>✓ Establish ongoing maintenance policies<br>✓ Map deployment to organizational models<br>✓ Train end-users and establish acceptable use policies<br>✓ Designate an SMMP subject matter expert |

# Before deploying the SMMP, ensure the right social media governance structures are in place to oversee implementation

**An SMMP is a tool, not a substitute, for adequate cross-departmental social media oversight. You must coordinate efforts across constituent stakeholders.**

- Successful organizations have permanent governance structures in place for managing social media. For example, mature companies leverage **Social Media Steering Committees (SMSCs)** to coordinate the social media initiatives of different business units and departments. Large organizations with highly complex needs may even make use of a physical command center.
- Compared to traditional apps projects (like CRM or ERP), social media programs tend to start as grassroots initiatives. Marketing and Public Relations departments are the most likely to spearhead the initial push, often selecting their own tools without IT involvement or oversight. This causes application fragmentation and a proliferation of shadow IT.
- This organic adoption contrasts with the top-down approach many IT leaders are accustomed to. Bottom-up growth can ensure rapid response to social media opportunities, but it also leads to insufficient coordination. **A conscious effort should be made to mature your social media strategy beyond this disorganized initial state.**
- IT can help be a “cat herder” to shepherd departments into shared initiatives.

Info-Tech **Best Practice**

Before implementing the SMMP, go through the appropriate organizational governance structures to ensure they have input into the deployment. If a social media steering committee is not already in place, rolling out an SMMP is a great opportunity to get one going. See our research on social media program execution for more details.

# Establish a governance structure for social media management

## 3.1.1 60 minutes

1. Describe the unique role that the governance team will play in social media management.
2. Describe the overall purpose statement of the governance team.
3. Define the roles and responsibilities of the governance team.
4. Document the outcome in the *Social Media Steering Committee Charter.*

### INPUT

- Project stakeholders
- SMMP mandate

### OUTPUT

- Social Media Governance Structure

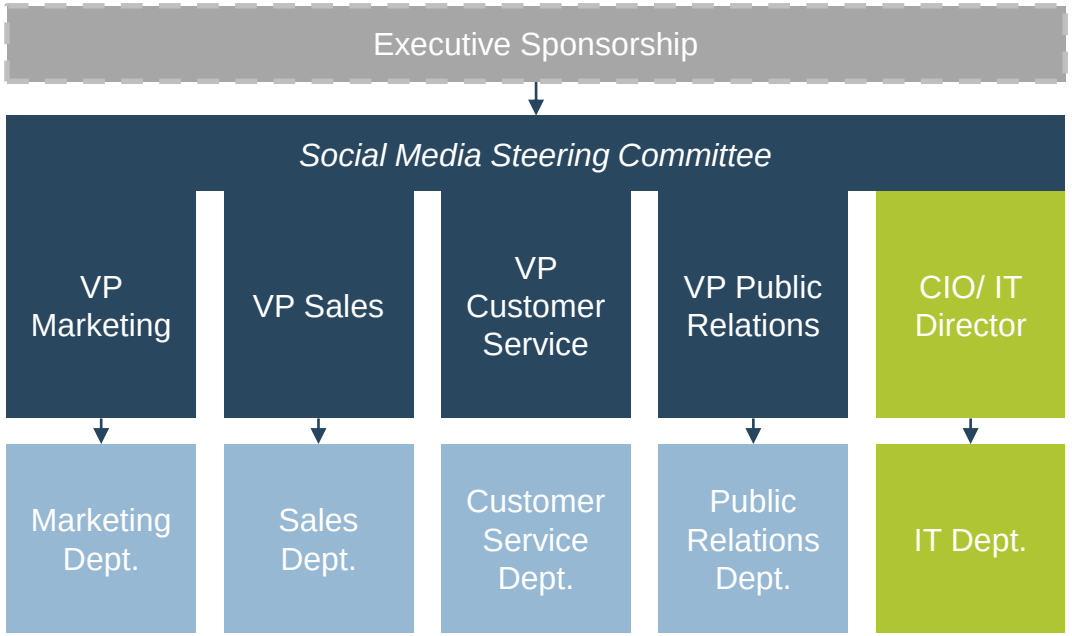
### Materials

- Whiteboard
- Markers

### Participants

- Project Manager
- Core project team

## EXAMPLE



# Use Info-Tech's *Social Media Steering Committee Charter Template* to define roles and ensure value delivery

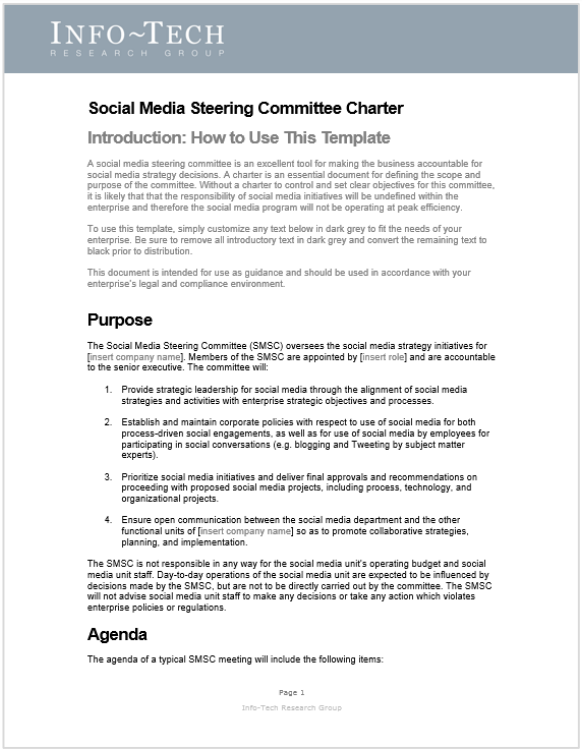
3.1

Leaders must ensure that the SMSC has **a formal mandate with clear objectives, strong executive participation, and a commitment to meeting regularly.** Create an SMSC Charter to formalize the committee governance capabilities.

**Developing a Social Media Steering Committee Charter:**

- Outline the committee's structure, composition, and responsibilities using the Info-Tech *Social Media Steering Committee Charter Template*.
- This template also outlines the key tasks and responsibilities for the committee:
  - Providing strategic leadership for social media
  - Leading SMMP procurement efforts
  - Providing process integration
  - Governing social media initiatives
  - Ensuring open communications between departments with ownership of social media processes
- Keep the completed charter on file and available to all committee members. Remember to periodically update the document as organizational priorities shift to ensure the charter remains relevant.

INFO-TECH **DELIVERABLE**



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**Social Media Steering Committee Charter**

**Introduction: How to Use This Template**

A social media steering committee is an excellent tool for making the business accountable for social media strategy decisions. A charter is an essential document for defining the scope and purpose of the committee. Without a charter to control and set clear objectives for this committee, it is likely that that the responsibility of social media initiatives will be undefined within the enterprise and therefore the social media program will not be operating at peak efficiency.

To use this template, simply customize any text below in dark grey to fit the needs of your enterprise. Be sure to remove all introductory text in dark grey and convert the remaining text to black prior to distribution.

This document is intended for use as guidance and should be used in accordance with your enterprise's legal and compliance environment.

**Purpose**

The Social Media Steering Committee (SMSC) oversees the social media strategy initiatives for [insert company name]. Members of the SMSC are appointed by [insert role] and are accountable to the senior executive. The committee will:

1. Provide strategic leadership for social media through the alignment of social media strategies and activities with enterprise strategic objectives and processes.
2. Establish and maintain corporate policies with respect to use of social media for both process-driven social engagements, as well as for use of social media by employees for participating in social conversations (e.g. blogging and Tweeting by subject matter experts).
3. Prioritize social media initiatives and deliver final approvals and recommendations on proceeding with proposed social media projects, including process, technology, and organizational projects.
4. Ensure open communication between the social media department and the other functional units of [insert company name] so as to promote collaborative strategies, planning, and implementation.

The SMSC is not responsible in any way for the social media unit's operating budget and social media unit staff. Day-to-day operations of the social media unit are expected to be influenced by decisions made by the SMSC, but are not to be directly carried out by the committee. The SMSC will not advise social media unit staff to make any decisions or take any action which violates enterprise policies or regulations.

**Agenda**

The agenda of a typical SMSC meeting will include the following items:

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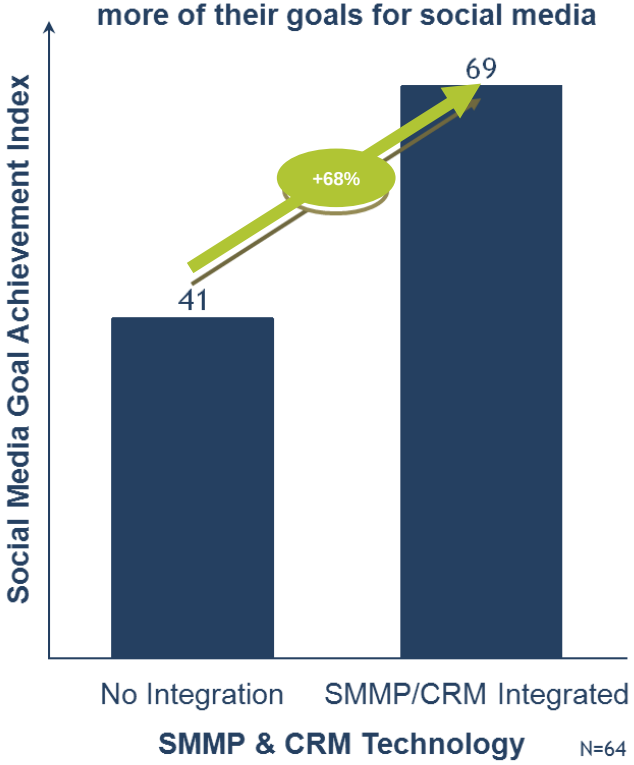
# Integrate your social media management platform with CRM to strengthen the realization of social media goals

- Linking social media to existing customer relationship management solutions can improve information accuracy, reduce manual effort and provide more in-depth customer insights.
  - ✓ Organizations Info-Tech surveyed, and who integrated their solutions, achieved more goals as a result.
- Several major CRM vendors are now offering products that integrate with popular social networking services (either natively or by providing support for third-party add-ons).
  - ✓ For example, Salesforce.com now allows for native integration with Twitter, while an add-on available for Oracle gathers real-time information about prospects by pulling their extended information from publicly available LinkedIn profiles.
- Some CRM vendors are acquiring established SMMPs outright.
  - ✓ For example, Salesforce.com acquired Radian6 for their clients that have advanced social media requirements.

**Organizations that integrated their SMMP and CRM technology realized more of their goals for social media**



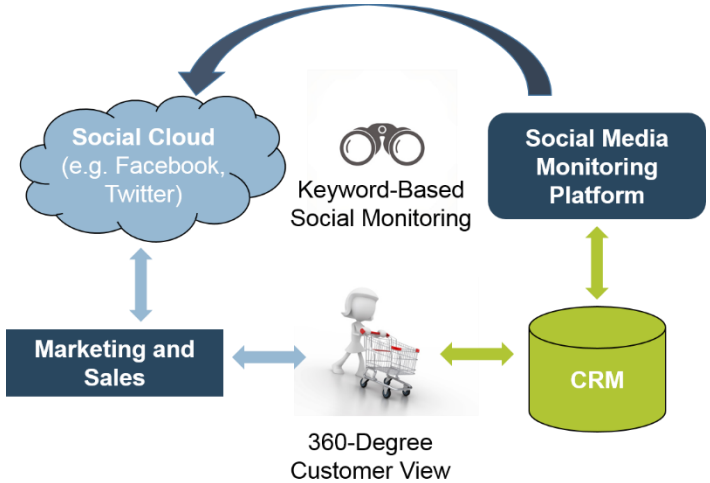

Source: Info-Tech Research Group Survey

**Info-Tech Best Practice**

CRM vendors still lag in out-of-the-box social features, making a separate SMMP purchase a given. For companies that have not formally integrated social media with CRM, IT should develop the business case in conjunction with the applicable business-side partner (e.g. Marketing, Sales, Service, PR, etc.).

# Establish points of integration between SMMPs and CRM suites to gain a 360 degree view of the customer

- Social media is a valuable tool from a standalone perspective, but its power is *considerably* magnified when it's paired with the **CRM suite.**
- Many SMMPs offer native integration with CRM platforms. **IT should identify and enable these connectors to strengthen the business value of the platform.**




*An example of how an SMMP linked via CRM can provide proactive service while contributing to sales and marketing.*

- New channels do not mean they stand alone and do not need to be integrated into the rest of the customer interaction architecture.
- Challenge SMMP vendors to demonstrate integration experience with CRM vendors *and* multimedia queue vendors.
- Manual integration – adding resolved social inquiries yourself to a CRM system after closure – cannot scale given the rapid increase in customer inquiries originating in the social cloud. Integration with interaction management workflows is most desirable.

> *"These tools are enabling sales, and they help us serve our customers better. And anything that does that, is a good investment on our part."*
>
> – Chip Meyers,
> Sales Operation Manager, Insource

**Info-Tech Best Practice**

SMMPs are a necessary single-channel evolutionary step, just like there used to be email-only and web chat-only customer service options in the late 1990s. But they are temporary. SMMPs will eventually be subsumed into the larger marketing automation ecosystem. Only a few best of breed will survive in 10 years.

# Specify the data linkages you will need between your CRM platform and SMMP

3.1.2 1 hour

1. Build a list of sources of information that you'll need to integrate with your CRM tool.
2. Identify:
   - A. Data Source
   - B. Integration Direction
   - C. Data Type and Use Case

| Data Source | Migration/Integration Direction | Data Type/Use Case |
|---|---|---|
| Social Platform | Bidirectional | Recent Social Posts |
| Customer Data Warehouse | Bidirectional | Contact Information, Cases, Tasks, Opportunities |

**INPUT**

- SMMP data sources

**OUTPUT**

- SMMP data migration inventory

**Materials**

- Whiteboard
- Markers

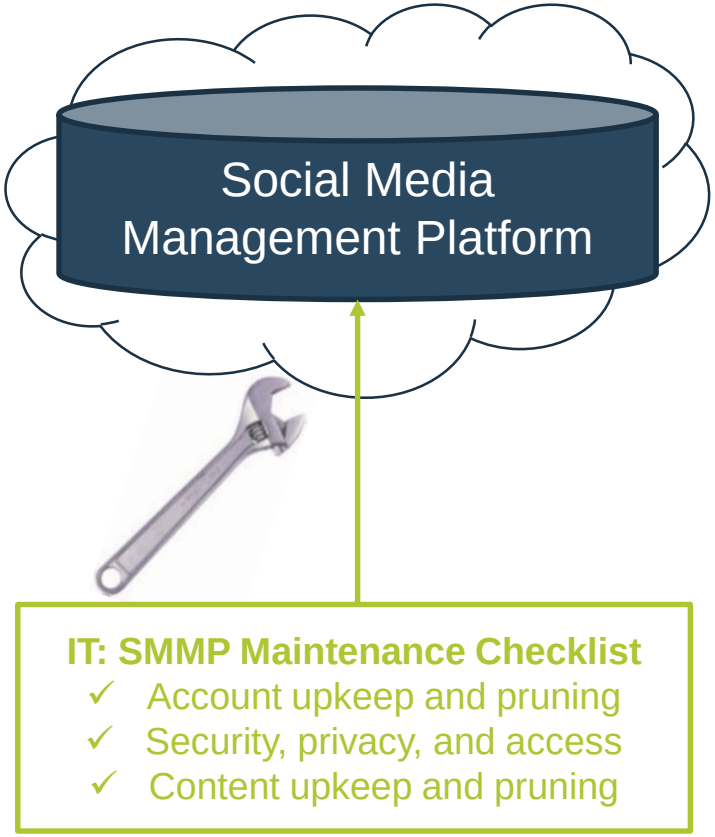
**Participants**

- Project Manager
- Core project team

# Establish a plan for ongoing platform maintenance

- Like other enterprise applications, the SMMP will require periodic upkeep. IT must develop and codify policies around ongoing platform maintenance.

- Platform maintenance should touch on the following areas:
  - **Account access and controls** – periodically, access privileges for employees no longer with the organization should be purged.
  - **Platform security** – cloud-based platforms will be automatically updated by the vendor to plug security holes, but on-premises solutions must be periodically updated to ensure that there are no gaps in security.
  - **Pruning of old or outdated material** – pages (e.g. Facebook Groups, Events, and Twitter feeds) that are no longer in use should be pruned. For example, a management console for an event that was held two years ago is unnecessary. Remove it from the platform (and the relevant service) to cut down on clutter (and reduce costs for "per-topic" priced platforms.)




**Info-Tech Best Practice**

Even cloud-based platforms like SMMPs require a certain degree of maintenance around account controls, security, and content pruning. IT should assist the business units in carrying out periodic maintenance.

# Social media is a powerful medium, but organizations must develop a prudent strategy for minimizing associated risks

Using an SMMP can help mitigate many of the risks associated with social media. Review the risk categories on the next several slides to determine which ones can be mitigated by effective utilization of a dedicated SMMP.

| Risk Category | Likelihood | Risk(s) | Suggested Mitigation Strategy |
|---|---|---|---|
| Privacy and Confidentiality | **High** | • Risk of inappropriate exchange of information between personal and business social networks (e.g. a personal account used for company business).<br>• Abuse of privacy and confidentiality laws. | ✓ Whenever possible, implement separate social network accounts for business, and train your employees to avoid using personal accounts at work.<br>✓ Have a policy in place for how to treat pre-existing accounts versus newly created ones for enterprise use.<br>✓ Use the “unified sign-on” capabilities of an SMMP to prevent employees from directly accessing the underlying social media services. |

# Good governance means being proactive in mitigating the legal and compliance risks of your social media program

| Risk Category | Likelihood | Risk(s) | Suggested Mitigation Strategy |
|---|---|---|---|
| Trademark and Intellectual Property | Medium | • Copyrighted information could inappropriately be used for promotional and other business purposes (e.g. using a private user's images in collateral). | ✓ Legal should conduct training to make sure the organization's social media representatives only use information in the public domain, nothing privileged or confidential. This is particularly sensitive for Marketing and PR. |
| Control over Brand Image and Inappropriate Content | Medium | • Employees on social media channels may post something inappropriate to the nature of your business.<br>• Employees can post something that compromises industry and/or ethical standards. | ✓ Use SMMP outbound filtering/post approval workflows to censor certain inappropriate keywords.<br>✓ Select the team carefully and ensure they are fully trained on both official company policy and social media etiquette.<br>✓ Ensure strong enforcement of Social Media AUPs: take a zero tolerance approach to flagrant abuses. |

# Security is a top-of-mind risk, though bandwidth is a low priority issue for most organizations

| Risk Category | Likelihood | Risk(s) | Suggested Mitigation Strategy |
|---|---|---|---|
| IT Security | **Medium** | Risk of employees downloading or being sent malware through social media services. Your clients are also exposed to this risk; this may undermine their trust of your brand. | ✓ Implement policies that outline appropriate precautions by employees, such as using effective passwords and not downloading unauthorized software.<br>✓ Use web-filtering and anti-malware software that incorporates social media as a threat vector. |
| Bandwidth | **Low** | Increase in bandwidth needs to support social media efforts, particularly when using video social media such as YouTube. | ✓ Plan for any bandwidth requirements with IT network staff.<br>✓ Most social media strategies shouldn't have a material impact on bandwidth. |

# Poaching of client lists and increased costs are unlikely to occur, but address as a worst case scenario

| Risk Category | Likelihood | Risk(s) | Suggested Mitigation Strategy |
|---|---|---|---|
| Competitors Poaching Client Lists | Low | The ability for a competitor to view lists of clients that have joined your organization's social media groups. | ✓ In a public social network, you cannot prevent this. Monitor your own brand as well as competitors'. If client secrecy must be maintained, then you should use a private social network (e.g. Jive, Lithium, private SharePoint site), not a public network. |
| Increased Cost of Servicing Customers | Low | Additional resources may be allocated to social media without seeing immediate ROI. | ✓ Augment existing customer service responsibilities with social media requests.<br>✓ If a dedicated resource is not available, dedicate a specific amount of time per employee to be spent addressing customer concerns via social media. |

# Determine your top social media risks and develop an appropriate mitigation strategy that incorporates an SMMP

3.1.3 20 minutes

1. Based on your unique business variables, which social media risk categories are most applicable to your organization? In what order?
2. Summarize the top risks below and identify mitigation steps (which often involve effective use of a dedicated SMMP).

| Rank | Risk Category | Mitigation Steps |
|---|---|---|
| High | Confidentiality | We have strong records retention requirements, so using a rules-based SMMP like SocialVolt is a must. |
| Medium | Brand Image | Ensure that only personnel who have undergone mandatory training can touch our social accounts via an SMMP. |
| Low | Competitors' Poaching Lists | Migrate our Business Services division contacts onto LinkedIn – maintain no Facebook presence for these clients. |

**INPUT**

- Risk assessment inventory

**OUTPUT**

- Top social media risks and mitigation plan

**Materials**

- Whiteboard
- Markers

**Participants**

- Project Manager
- Core project team

# Determine the workflows that will be supported using your social media management platform

Determine when, where, and how social media services should be used to augment existing workflows across (and between) the business process domains. Establish escalation rules and decide whether workflows will be reactive or proactively.

- Fine tune your efforts in each business process domain by matching social technologies to specific business workflows. This will clearly delineate where value is created by leveraging social media.
- Common business process domains that should be targeted include **marketing, sales, and customer service.** Public relations, human resources, and analyst relations are other areas to consider for social process support.
- For each business process domain, IT should assist with technology enablement and execution.

**Marketing**

**Sales**

**Customer Service**

**Public Relations**

**Human Resources**

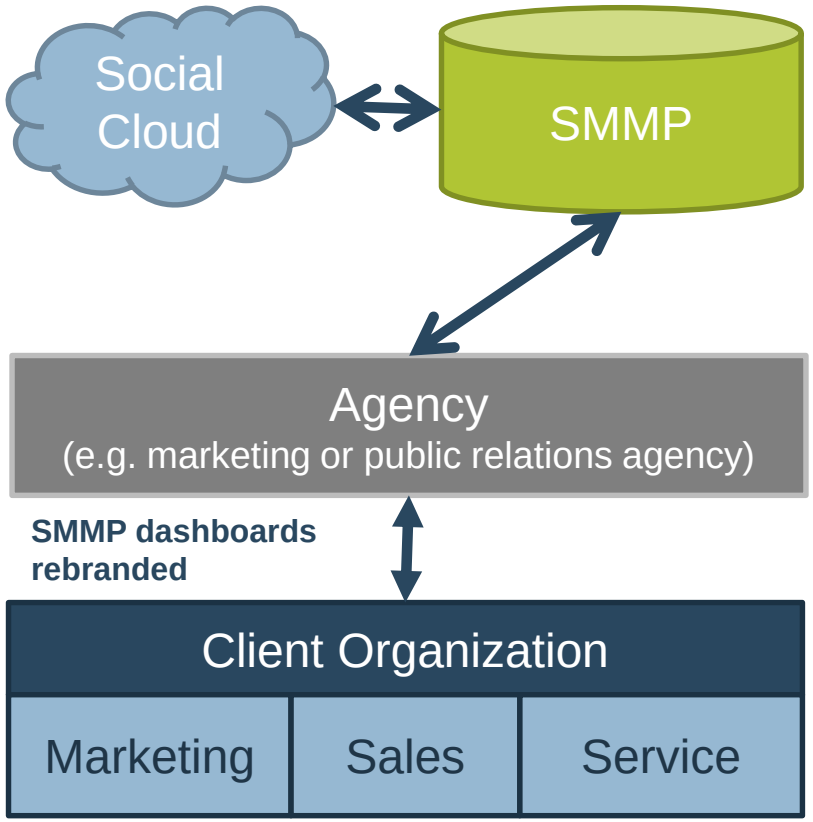
Info-Tech **Best Practice**

The social media governance team should have high-level supervision of process workflows. Ask to see reports from line managers on what steps they have taken to put process in place for reactive and proactive customer interactions, as well as escalations and channel switching. IT helps orchestrate these processes through knowledge and expertise with SMMP workflow capability.

# There are three primary models for SMMP deployment: the *agency model* uses the SMMP as a third-party offering

**There are three models for deploying an SMMP: agency, centralized, and distributed.**

## Agency Model

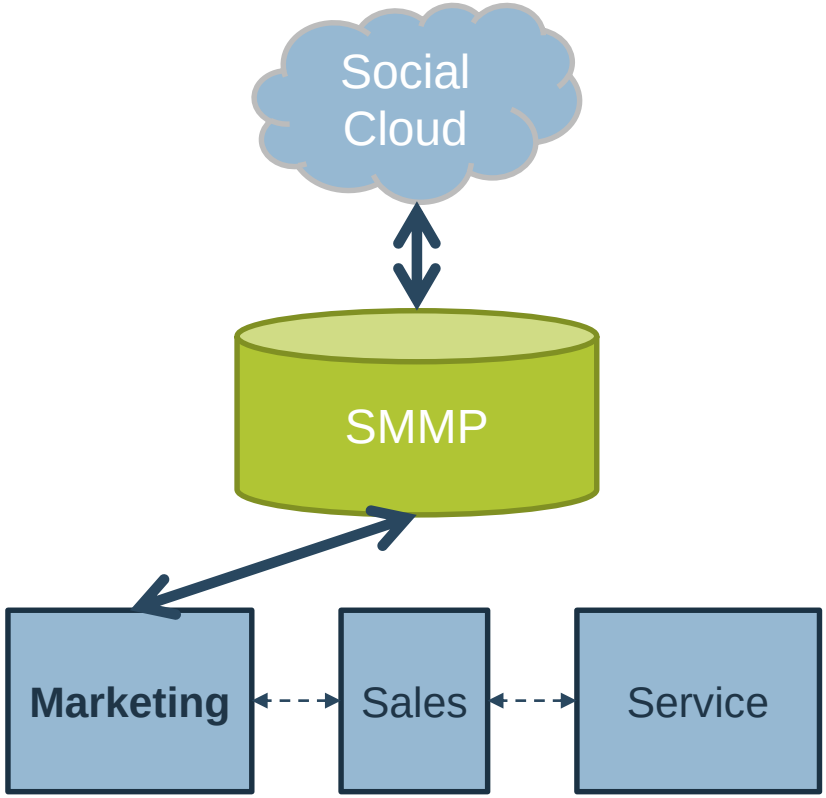



- In the **agency model** of SMMP deployment, the platform is managed on behalf of the organization by a third party – typically a marketing or public relations agency.
- The agency serves as the primary touch point for the client organization: the client requests the types of market research it wants done, or the campaigns it wants managed. The agency uses its own SMMP(s) to execute the requests. Often, the SMMP's results or dashboards will be rebranded by the agency.

- **Pros:** The agency model is useful when large portions of marketing, service, or public relations are already being outsourced to a third-party provider. Going with an agency also splits the cost of more expensive SMMPs over multiple clients, and limits deployment costs.
- **Cons:** The client organization has no direct control over the platform; going with an agency is not cost effective for firms with in-house marketing or PR capabilities.
- **Advice:** Go with an agency-managed SMMP if you already use an agency for marketing or PR.

# Select the *centralized deployment model* when SMMP functionality rests in the hands of a single department

## Centralized Model



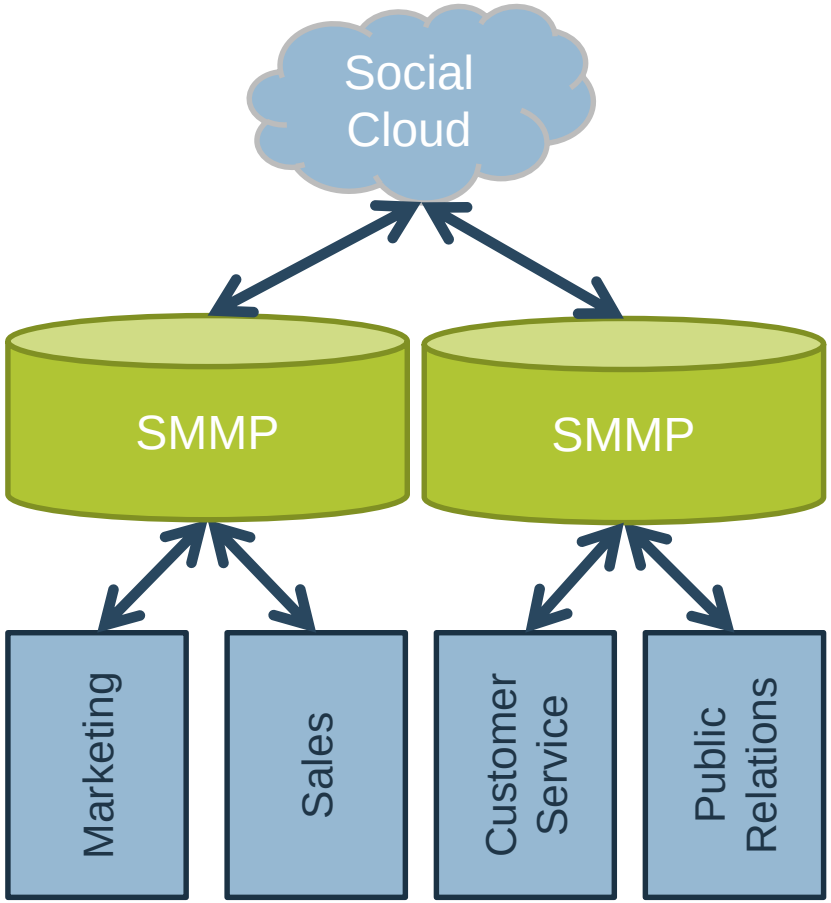

*In this example, marketing owns and manages a single SMMP*

- In the **centralized model,** a single SMMP workspace is owned and operated predominantly by a single business unit or department. Unlike the agency model, the SMMP functionality is utilized in-house.
- Information from the SMMP may occasionally be shared with other departments, but normally the platform is used almost exclusively by a single group in the company. Marketing or public relations are usually the groups that maintain ownership of the SMMP in the centralized model (with selection and deployment assistance from the IT department).

- **Pros:** The centralized model provides small organizations with an in-house, dedicated SMMP without having to go through an agency. Having a single group own and manage the SMMP is considerably more cost effective than having SMMPs licensed to multiple business units in a small company.
- **Cons:** If more and more departments start clamoring for control of SMMP resources, the centralized model will fail to meet the overall needs of the organization.
- **Advice:** Small-to-medium enterprises with mid-sized topic or brand portfolios should use the centralized model.

# Go with a *distributed deployment* if multiple business units require advanced SMMP functionality

## Distributed Model




- In the **distributed model**, multiple SMMPs (sometimes from different vendors) or multiple SMMP workspaces (from a single vendor) are deployed to several groups (e.g. multiple departments or brand portfolios) in the organization.

- **Pros:** The distributed model is highly effective in large organizations with multiple departments or brands that each are interested in SMMP functionality. Having separate workspaces for each business group enables customizing workspaces to satisfy different goals of the different business groups.
- **Cons:** The cost of deploying multiple SMMP workspaces can be prohibitive.
- **Advice:** Go with the distributed model if your organization is large and has multiple relevant departments or product marketing groups, with differing social media goals.

# Determine which deployment model works best for your organization

3.1.4 1 Hour

1. Assess and understand the three models of SMMP deployments: agency, centralized and distributed. Consider the pros and cons of each model.
2. Understand how your organization manages enterprise social media. Consider the follow questions:
   - What is the size of your organization?
   - Who owns the management of social media in your organization?
   - Is social media managed in-house or outsourced to an agency?
   - What are the number of departments that use and rely on social media?
3. Select the best deployment model for your organization.

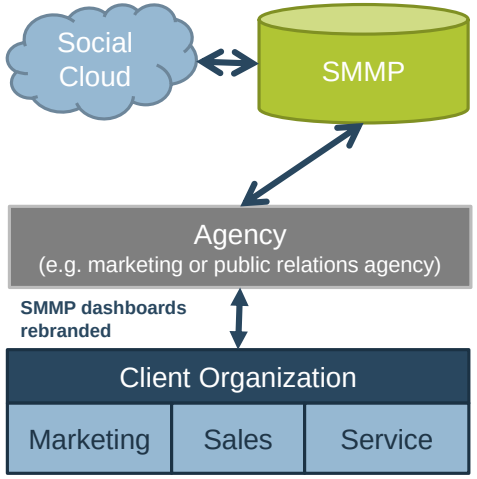
**INPUT**

- Deployment models

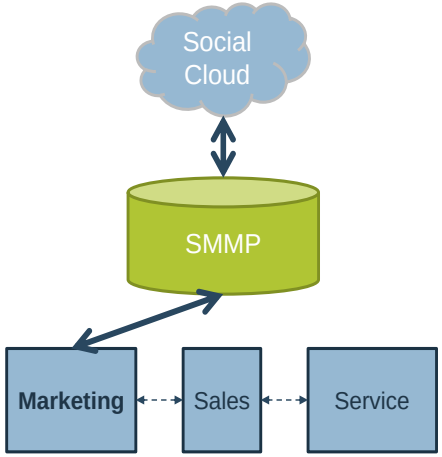
**OUTPUT**

- Best fit deployment model

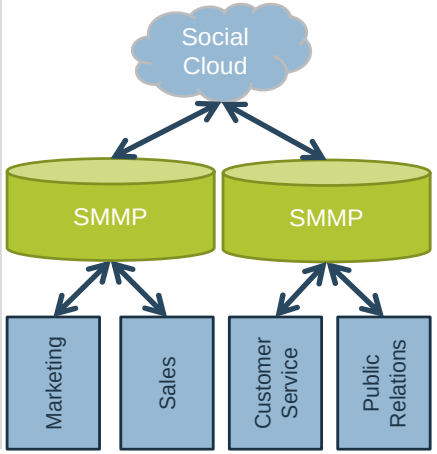
**Agency Model**




**Centralized Model**




**Distributed Model**




**Materials**

- Whiteboard
- Markers

**Participants**

- Project Manager
- Core project team

# Create an SMMP training matrix based on social media roles

IT must assist the business by creating and executing a **role-based training program.** An SMMP expert in IT should lead training sessions for targeted groups of end users, training them only on the functions they require to perform their jobs.

Use the table below to help identify which roles should be trained on which SMMP features.

| | PR Professionals | Marketing Brand, Product, and Channel Managers | Customer Service Reps and Manager | Product Development and Market Research | IT Application Support |
|---|---|---|---|---|---|
| Account Management | ● | ● | ● | ● | ● |
| Response and Engagement | ● | | ● | | ● |
| Social Analytics and Data Mining | | ● | | ● | ● |
| Marketing Campaign Execution | | ● | | | ● |
| Mobile Access | ● | ● | | | ● |
| Archiving | | | | | ● |
| CRM Integration | | | | | ● |

# Phase 3, Step 2: Track your metrics

**3.1** Implementation considerations

**3.2** **Evaluate your project metrics**

**This step will walk you through the following activities:**

- Identify metrics and KPIs for business units using a dedicated SMMP

**This step involves the following participants:**

- Core Project Team
- Representative Stakeholders from Digital Marketing, Sales, and IT

## Outcomes of this step

- Key Performance Indicators

# Know key performance indicators (KPIs) for each department that employs a dedicated social media management platform

## Marketing KPIs

### Share of Voice
How often a brand is mentioned, relative to other brands competing in a defined market.

### User Engagement
Quantity and quality of customer interactions with a brand or with each other, either on- or offline.

### Campaign Success
Tracking reception of campaigns and leads brought in as a result.

### Reach
Measurement of the size of market your brand advertisements and communications reach.

### Impressions
The number of exposures your content, ad, or social post has to people in your target audience.

### Cost per Point (CPP)
Cost to reach one percent of your organization's audience.

## Product Development KPIs

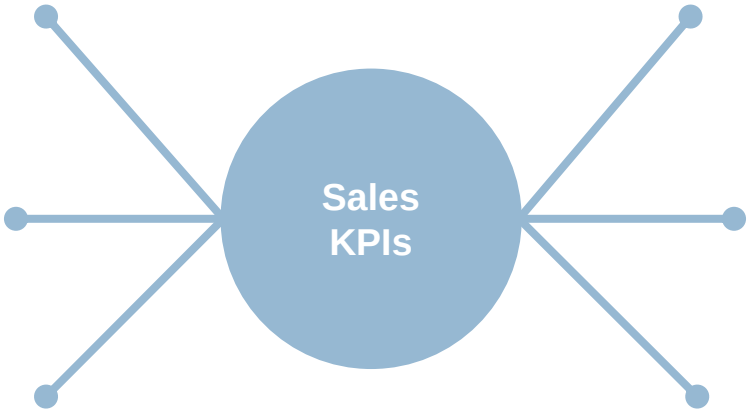
### Product Innovation
The quantity and quality of improvements, updates, and changes to existing products.

### Time-to-Market
Time that passes between idea generation and the product being available to consumers.

### New Product Launches
A ratio of completely new product types released to brand extensions and improvements.

### Cancelled Projects
Measure of quality of ideas generated and quality of idea assessment method.

# Use social media metrics to complement your existing departmental KPIs – not usurp them




### Cost per Lead
The average amount an organization spends to find leads.

### Conversion Rate
How many sales are made in relation to the number of leads.

### Quantity of Leads
How many sales leads are in the funnel at a given time.

### Average Cycle Time
Average length of time it takes leads to progress through the sales cycle.

### Revenue by Lead
Total revenue divided by total number of leads.

### Avg. Revenue per Rep
Total revenue divided by number of sales reps.

### Time to Resolution
Average amount of time it takes for customers to get a response they are satisfied with.

### First Contact Resolution
How often customer issues are resolved on the first contact.

### Contact Frequency
The number of repeated interactions from the same customers.

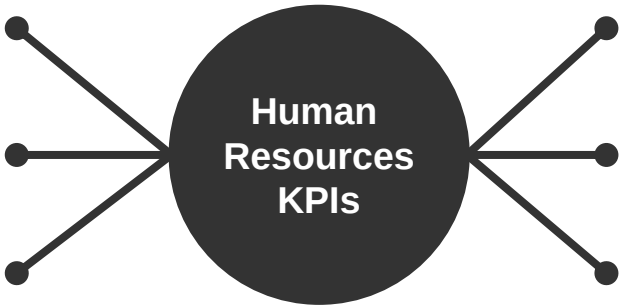
### Satisfaction Scores
Determined from customer feedback – either through surveys or gathered sporadically.

# Social analytics don't operate alone; merge social data with traditional data to gain the deepest insights

**Employee Retention**
The level of effort an organization exerts to maintain its current staff.

**Employee Engagement**
Rating of employee satisfaction overall or with a given aspect of the workplace.

**Preferred Employer**
A company where candidates would rather work over other companies.




**Recruitment Cycle Time**
Average length of time required to recruit a new employee.

**Employee Productivity**
A comparison of employee inputs (time, effort, etc.) and outputs (work).

**Employee Referrals**
The ratio of employee referrals that complete the recruitment process.

> *There are conversations going on behind your back, and if you're not participating in them, then you're either not perpetuating the positive conversation or not diffusing the negative. And that's irresponsible in today's business world.*

– Lon Safko, *Social Media Bible*

# Identify key performance indicators for business units using an SMMP

3.2.1 30 minutes

For each listed department, identify the social media goals and departmental key performance indicators to measure the impact of the SMMP.

| Department | Social Media Goals | KPI |
|---|---|---|
| Marketing | • E.g. build a positive brand image | • Net increase in brand recognition |
| Product Development | • Launch a viral video campaign showcasing product attributes to drive increased YT traffic | • Net increase in unaided customer recall |
| Sales | • Enhance sales lead generation through social channels | • Net increase in sales lead generation in the social media sales funnel |
| Customer Service | • Produce more timely responses to customer enquiries and complaints | • Reduced time to resolution |
| HR | • Enhance social media recruitment channels | • Number of LinkedIn recruitment |

**INPUT**

- Social media goals

**OUTPUT**

- SMMP KPIs

**Materials**

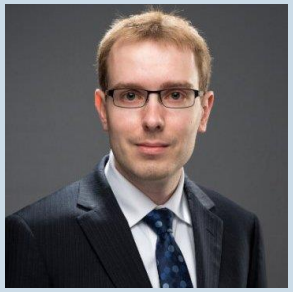
- Whiteboard
- Markers

**Participants**

- Representative stakeholders from different business units

# If you want additional support, have our analysts guide you through this phase as part of an Info-Tech workshop

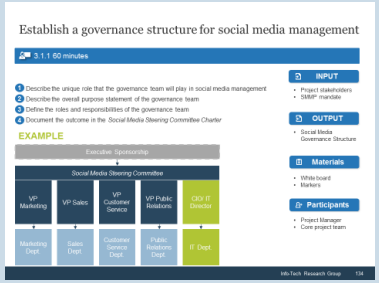
## Book a workshop with our Info-Tech analysts:



- To accelerate this project, engage your IT team in an Info-Tech workshop with an Info-Tech analyst team.
- Info-Tech analysts will join you and your team onsite at your location or welcome you to Info-Tech's historic Toronto office to participate in an innovative onsite workshop.
- Contact your account manager (www.infotech.com/account), or email Workshops@InfoTech.com for more information.

## The following are sample activities that will be conducted by Info-Tech analysts with your team:

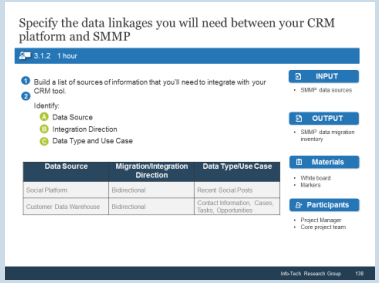
**3.1.1**




### Establish a governance structure for social media management

Our Info-Tech analyst will walk you through the exercise of developing roles and responsibilities to govern your social media program.

**3.1.2**




### Specify the data linkages you will need between your CRM and SMMP

The analyst will help you identify the points of integration between the SMMP and your CRM platform.

# If you want additional support, have our analysts guide you through this phase as part of an Info-Tech workshop

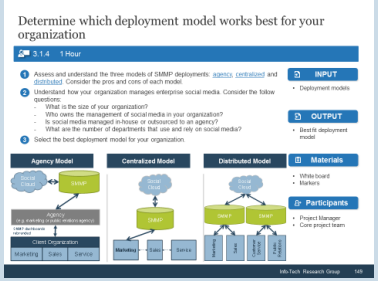
**Book a workshop with our Info-Tech analysts:**

**3.1.3**

## Determine your top social media risks

Our Info-Tech analyst will facilitate the discussion to identify the top risks associated with the SMMP and determine mitigation strategies for each risk.

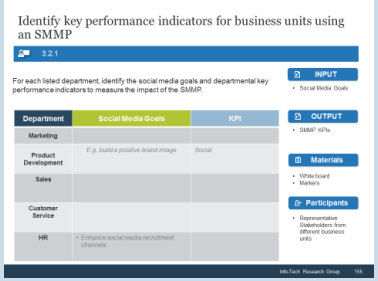
**3.1.4**




## Determine the best-fit deployment model

An analyst will demonstrate the different SMMP deployment models and assist in determining the most suitable model for your organization.

**3.2.1**




## Identify departmental KPIs

An analyst will work with different stakeholders to determine the top social media goals for each department.

# Appendices

# Work Cited

Ashja, Mojtaba, Akram Hadizadeh, and Hamid Bidram. “Comparative Study of Large Information Systems’ CSFs During Their Life Cycle.” *Information Systems Frontiers.* September 8, 2013.

UBM. “The State of Social Media Analytics.” January, 2016.

Jobvite. “2015 Recruiter Nation Survey.” September, 2015.

# Vendor Landscape Analysis Appendices

# Vendor Landscape Methodology: Overview

Info-Tech's Vendor Landscapes are research materials that review a particular IT market space, evaluating the strengths and abilities of both the products available in that space, as well as the vendors of those products. These materials are created by a team of dedicated analysts operating under the direction of a senior subject matter expert over a period of several weeks.

Evaluations weigh selected vendors and their products (collectively "solutions") on the following eight criteria to determine overall standing:

- Features: The presence of advanced and market-differentiating capabilities.
- User Interface: The intuitiveness, power, and integrated nature of administrative consoles and client software components.
- Affordability: The three-year total cost of ownership of the solution; flexibility of the pricing and discounting structure.
- Architecture: The degree of integration with the vendor's other tools, flexibility of deployment, and breadth of platform applicability.
- Viability: The stability of the company as measured by its history in the market, the size of its client base, and its percentage of growth.
- Focus: The commitment to both the market space, as well as to the various sized clients (small, mid-sized, and enterprise clients).
- Reach: The ability of the vendor to support its products on a global scale.
- Sales: The structure of the sales process and the measure of the size of the vendor's channel and industry partners.

Evaluated solutions within scenarios are visually represented by a Pathway to Success, based off a linear graph using above scoring methods:

- Use-case scenarios are decided upon based on analyst expertise and experience with Info-Tech clients.
- Use-case scenarios are defined through feature requirements, predetermined by analyst expertise.
- Placement within scenario rankings consists of features being evaluated against the other scoring criteria.

Info-Tech's Vendor Landscapes are researched and produced according to a strictly adhered to process that includes the following steps:

- Vendor/product selection
- Information gathering
- Vendor/product scoring
- Information presentation
- Fact checking
- Publication

This document outlines how each of these steps is conducted.

# Vendor Landscape Methodology: Vendor/Product Selection & Information Gathering

Info-Tech works closely with its client base to solicit guidance in terms of understanding the vendors with whom clients wish to work and the products that they wish evaluated; this demand pool forms the basis of the vendor selection process for Vendor Landscapes. Balancing this demand, Info-Tech also relies upon the deep subject matter expertise and market awareness of its Senior Analysts to ensure that appropriate solutions are included in the evaluation. As an aspect of that expertise and awareness, Info-Tech's analysts may, at their discretion, determine the specific capabilities that are required of the products under evaluation, and include in the Vendor Landscape only those solutions that meet all specified requirements.

Information on vendors and products is gathered in a number of ways via a number of channels.

Initially, a request package is submitted to vendors to solicit information on a broad range of topics. The request package includes:

- A detailed survey.
- A pricing scenario (see Vendor Landscape Methodology: Price Evaluation and Pricing Scenario, below).
- A request for reference clients.
- A request for a briefing and, where applicable, guided product demonstration.

These request packages are distributed approximately eight weeks prior to the initiation of the actual research project to allow vendors ample time to consolidate the required information and schedule appropriate resources.

During the course of the research project, briefings and demonstrations are scheduled (generally for one hour each session, though more time is scheduled as required) to allow the analyst team to discuss the information provided in the survey, validate vendor claims, and gain direct exposure to the evaluated products. Additionally, an end-user survey is circulated to Info-Tech's client base and vendor-supplied reference accounts are interviewed to solicit their feedback on their experiences with the evaluated solutions and with the vendors of those solutions.

These materials are supplemented by a thorough review of all product briefs, technical manuals, and publicly available marketing materials about the product, as well as about the vendor itself.

Refusal by a vendor to supply completed surveys or submit to participation in briefings and demonstrations does not eliminate a vendor from inclusion in the evaluation. Where analyst and client input has determined that a vendor belongs in a particular evaluation, it will be evaluated as best as possible based on publicly available materials only. As these materials are not as comprehensive as a survey, briefing, and demonstration, the possibility exists that the evaluation may not be as thorough or accurate. Since Info-Tech includes vendors regardless of vendor participation, it is always in the vendor's best interest to participate fully.

All information is recorded and catalogued, as required, to facilitate scoring and for future reference.

# Vendor Landscape Methodology: Scoring

Once all information has been gathered and evaluated for all vendors and products, the analyst team moves to scoring. All scoring is performed at the same time so as to ensure as much consistency as possible. Each criterion is scored on a ten-point scale, though the manner of scoring for criteria differs slightly:

- Features is scored via **Cumulative Scoring.**
- Affordability is scored via **Scalar Scoring.**
- All other criteria are scored via **Base5 Scoring.**

Cumulative Scoring is on a four-point scale. Zero points are awarded to features that are deemed absent or unsatisfactory, one point is assigned to features that are partially present, two points are assigned to features that require an extra purchase in the vendor's product portfolio or through a third party, three points are assigned to features that are fully present and native to the solution, and four points are assigned to the best-of-breed native feature. The assigned points are summed and normalized to a value out of ten. For example, if a particular Vendor Landscape evaluates eight specific features in the Feature Criteria, the summed score out of eight for each evaluated product would be multiplied by 1.25 to yield a value out of ten to represent in a Harvey Ball format.

In Scalar Scoring, a score of ten is assigned to the lowest cost solution, and a score of one is assigned to the highest cost solution. All other solutions are assigned a mathematically-determined score based on their proximity to / distance from these two endpoints. For example, in an evaluation of three solutions, where the middle cost solution is closer to the low end of the pricing scale it will receive a higher score, and where it is closer to the high end of the pricing scale it will receive a lower score; depending on proximity to the high or low price it is entirely possible that it could receive either ten points (if it is very close to the lowest price) or one point (if it is very close to the highest price). Where pricing cannot be determined (vendor does not supply price and public sources do not exist), a score of 0 is automatically assigned.

In Base5 scoring a number of sub-criteria are specified for each criterion (for example, Longevity, Market Presence, and Financials are sub-criteria of the Viability criterion), and each one is scored on the following scale:

5 - The product/vendor is exemplary in this area (nothing could be done to improve the status).
4 - The product/vendor is good in this area (small changes could be made that would move things to the next level).
3 - The product/vendor is adequate in this area (small changes would make it good, more significant changes required to be exemplary).
2 - The product/vendor is poor in this area (this is a notable weakness and significant work is required).
1 - The product/vendor fails in this area (this is a glaring oversight and a serious impediment to adoption).

The assigned points are summed and normalized to a value out of ten as explained in Cumulative Scoring above.

Scores out of ten, known as Raw scores, are transposed as is into Info-Tech's *Vendor Landscape Shortlist Tool,* which automatically determines Vendor Landscape positioning (see Vendor Landscape Methodology: Information Presentation – Vendor Landscape, below), Criteria Score (see Vendor Landscape Methodology: Information Presentation – Criteria Score, below), and Value Index (see Vendor Landscape Methodology: Information Presentation – Value Index, below).

# Vendor Landscape Methodology: Information Presentation – Criteria Scores (Harvey Balls)

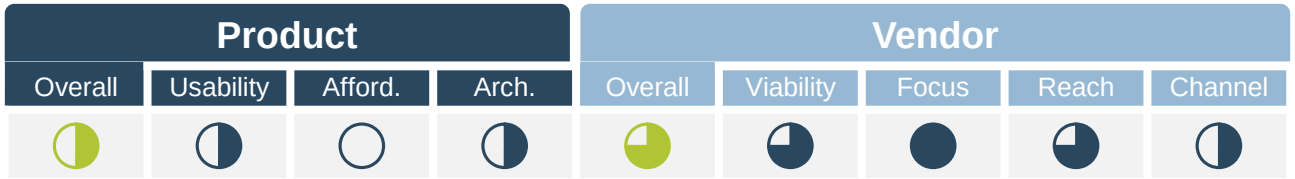
Info-Tech's criteria scores are visual representations of the absolute score assigned to each individual criterion, as well as of the calculated overall vendor and product scores. The visual representation used is Harvey Balls.

Harvey Balls are calculated as follows:

1. Raw scores are transposed into the Info-Tech *Vendor Landscape Shortlist Tool* (for information on how raw scores are determined, see Vendor Landscape Methodology: Scoring, above).
2. Each individual criterion raw score is multiplied by a pre-assigned weighting factor for the Vendor Landscape in question. Weighting factors are determined prior to the evaluation process, based on the expertise of the Senior or Lead Research Analyst, to eliminate any possibility of bias. Weighting factors are expressed as a percentage, such that the sum of the weighting factors for the vendor criteria (Viability, Strategy, Reach, Channel) is 100%, and the sum of the product criteria (Features, Usability, Affordability, Architecture) is 100%.
3. A sum-product of the weighted vendor criteria scores and of the weighted product criteria scores is calculated to yield an overall vendor score and an overall product score.
4. Both overall vendor score / overall product score, as well as individual criterion raw scores are converted from a scale of one to ten to Harvey Ball scores on a scale of zero to four, where exceptional performance results in a score of four and poor performance results in a score of zero.
5. Harvey Ball scores are converted to Harvey Balls as follows:
   - A score of four becomes a full Harvey Ball.
   - A score of three becomes a three-quarter full Harvey Ball.
   - A score of two becomes a half-full Harvey Ball.
   - A score of one becomes a one-quarter full Harvey Ball.
   - A score of zero becomes an empty Harvey Ball.
6. Harvey Balls are plotted by solution in a chart where rows represent individual solutions and columns represent overall vendor / overall product, as well as individual criteria. Solutions are ordered in the chart alphabetically by vendor name.

**Harvey Balls**

Overall Harvey Balls represent weighted aggregates.




Criteria Harvey Balls represent individual raw scores.

# Vendor Landscape Methodology: Use-Case Scoring

Within each Vendor Landscape a set of use-case scenarios are created by the analysts by considering the different outcomes and purposes related to the technology being evaluated. To generate the custom use-case vendor performances, the feature and Harvey Ball scoring performed in the Vendor Landscapes are set with custom weighting configurations.

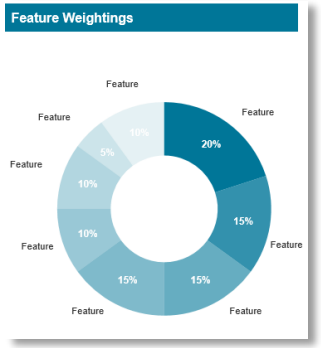
**Calculations**

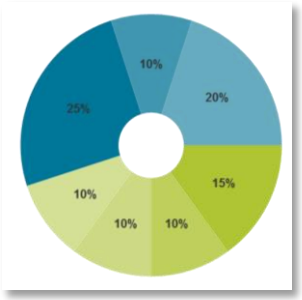
Each product has a vendor multiplier calculated based on its weighted performance, considering the different criteria scored in the Harvey Ball evaluations.

To calculate each vendor's performance, the advanced feature scores are multiplied against the weighting for the feature in the use-case scenario's configuration.

The weighted advanced feature score is then multiplied against the vendor multiplier.

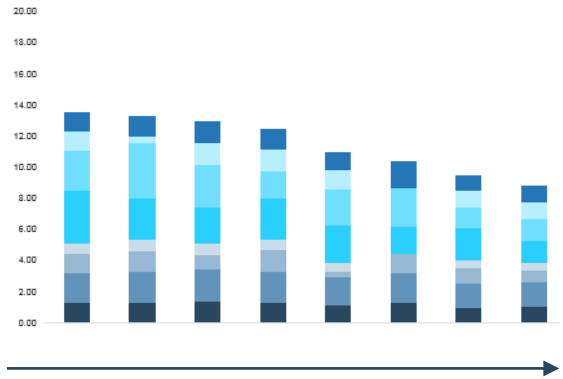
The sum of each vendor's total weighted advanced features is calculated. This sum is used to identify the vendor's qualification and relative rank within the use case.




**Each use case's feature weightings and vendor/product weighting configurations are displayed within the body of slide deck.**

## Use-Case Vendor Performance




Vendors who qualified for each use-case scenario are ranked from first to last in a weighted bar graph based on the features considered.

# Vendor Landscape Methodology: Information Presentation – Feature Ranks (Stoplights)

Advanced features are determined by analyst expertise, leveraging information gained from conversations with clients. Advanced features chosen as part of the evaluation are representative of what Info-Tech clients have indicated are of importance to their vendor solution. Advanced features are evaluated through a series of partial marks, dedicated to whether the solution performs all aspects of the Info-Tech definition of the feature and whether the feature is provided within the solution. Analysts hold the right to determine individual, unique scoring criteria for each evaluation. If a feature does not meet the criteria, Info-Tech holds the right to score the feature accordingly.

Use cases use features as a baseline of the inclusion and scoring criteria.

| Stoplight Legend | |
|---|---|
| ★ | Feature category is present: best in class. |
| ● | Feature category is present: strong. |
| ● | Feature category is present: average. |
| ● | Feature category is partially present: weak. |
| ● | Feature category is absent or near-absent. |

# Vendor Landscape Methodology: Information Presentation – Value Index

Info-Tech's Value Index is an indexed ranking of solution value per dollar as determined by the raw scores assigned to each criteria (for information on how raw scores are determined, see Vendor Landscape Methodology: Scoring, above).

Value scores are calculated as follows:

1. The TCO Affordability criterion is removed from the Affordability score and the remaining product score criteria (Features, Usability, Architecture). Affordability scoring is adjusted with the TCO weighting distributed in proportion to the use case's weighting for Affordability. Weighting is adjusted as to retain the same weightings relative to one another, while still summing to 100%.
2. An adjusted multiplier is determined for each vendor using the recalculated Affordability scoring.
3. The multiplier vendor score and vendor's weighted feature score (based on the use-case scenario's weightings), are summed. This sum is multiplied by the TCO raw score to yield an interim Value Score for each solution.
4. All interim Value Scores are then indexed to the highest performing solution by dividing each interim Value Score by the highest interim Value Score. This results in a Value Score of 100 for the top solution and an indexed Value Score relative to the 100 for each alternate solution.
5. Solutions are plotted according to Value Score, with the highest score plotted first, and all remaining scores plotted in descending numerical order.

Where pricing is not provided by the vendor and public sources of information cannot be found, an Affordability raw score of zero is assigned. Since multiplication by zero results in a product of zero, those solutions for which pricing cannot be determined receive a Value Score of zero. Since Info-Tech assigns a score of zero where pricing is not available, it is always in the vendor's best interest to provide accurate and up-to-date pricing. In the event that insufficient pricing is available to accurately calculate a Value Index, Info-Tech will omit it from the Vendor Landscape.

## Value Index

Vendors are arranged in order of Value Score. The Value Score each solution achieved is displayed, and so is the average score.

Those solutions that are ranked as Champions are differentiated for point of reference.

# Vendor Landscape Methodology: Information Presentation – Price Evaluation: Mid-Market

Info-Tech's Price Evaluation is a tiered representation of the three-year Total Cost of Ownership (TCO) of a proposed solution. Info-Tech uses this method of communicating pricing information to provide high-level budgetary guidance to its end-user clients while respecting the privacy of the vendors with whom it works. The solution TCO is calculated and then represented as belonging to one of ten pricing tiers.

Pricing tiers are as follows:

1. Between $1 and $2,500
2. Between $2,500 and $10,000
3. Between $10,000 and $25,000
4. Between $25,000 and $50,000
5. Between $50,000 and $100,000
6. Between $100,000 and $250,000
7. Between $250,000 and $500,000
8. Between $500,000 and $1,000,000
9. Between $1,000,000 and $2,500,000
10. Greater than $2,500,000

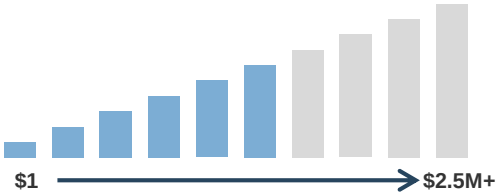
Where pricing is not provided, Info-Tech makes use of publicly available sources of information to determine a price. As these sources are not official price lists, the possibility exists that they may be inaccurate or outdated, and so the source of the pricing information is provided. Since Info-Tech publishes pricing information regardless of vendor participation, it is always in the vendor's best interest to supply accurate and up to date information.

Info-Tech's Price Evaluations are based on pre-defined pricing scenarios (see Product Pricing Scenario, below) to ensure a comparison that is as close as possible between evaluated solutions. Pricing scenarios describe a sample business and solicit guidance as to the appropriate product/service mix required to deliver the specified functionality, the list price for those tools/services, as well as three full years of maintenance and support.

## Price Evaluation

Call-out bubble indicates within which price tier the three-year TCO for the solution falls, provides the brackets of that price tier, and links to the graphical representation.

**3 year TCO for this solution falls into pricing tier 6, between $100,000 and $250,000**




Pricing solicited from public sources

Scale along the bottom indicates that the graphic as a whole represents a price scale with a range of $1 to $2.5M+, while the notation indicates whether the pricing was supplied by the vendor or derived from public sources.

# Vendor Landscape Methodology: Information Presentation – Vendor Awards

At the conclusion of all analyses, Info-Tech presents awards to exceptional solutions in three distinct categories. Award presentation is discretionary; not all awards are extended subsequent to each Vendor Landscape and it is entirely possible, though unlikely, that no awards may be presented.

Awards categories are as follows:

- **Champion Awards** are presented to the top performing solution in a particular use-case scenario. As a result, only one Champion Award is given for each use case, and the entire Vendor Landscape will have the same number of Champion Awards as the number of evaluated use cases.
- **Leader Awards** are presented to top performing solutions for each use-case scenario. Depending on the use-case scenario and the number of solutions being evaluated, a variable number of leader awards will be given. This number is at the discretion of the analysts, but is generally placed at two, and given to the solutions ranking second and third respectively for the use case.
- **Best Overall Value Awards** are presented to the solution for each use-case scenario that ranked the highest in the Info-Tech Value Index for each evaluated scenario (see Vendor Landscape Methodology: Information Presentation – Value Index, above). If insufficient pricing information is made available for the evaluated solutions, such that a Value Index cannot be calculated, no Best Overall Value Award will be presented. Only one Best Overall Value Award is available for each use-case scenario.

## Vendor Awards for Use-Case Performance

Info-Tech's **Champion Award** is presented to solutions that placed first in an use-case scenario within the Vendor Landscape.

Info-Tech **Leader Award** is given to solutions who placed in the top segment of a use-case scenario.

Info-Tech's **Best Overall Value Award** is presented to the solution within each use-case scenario with the highest Value Index score.

# Vendor Landscape Methodology: Fact Check & Publication

Info-Tech takes the factual accuracy of its Vendor Landscapes, and indeed of all of its published content, very seriously. To ensure the utmost accuracy in its Vendor Landscapes, we invite all vendors of evaluated solutions (whether the vendor elected to provide a survey and/or participate in a briefing or not) to participate in a process of fact check.

Once the research project is complete and the materials are deemed to be in a publication ready state, excerpts of the material specific to each vendor's solution are provided to the vendor. Info-Tech only provides material specific to the individual vendor's solution for review encompassing the following:

- All written review materials of the vendor and the vendor's product that comprise the evaluated solution.
- Info-Tech's Criteria Scores / Harvey Balls detailing the individual and overall vendor / product scores assigned.
- Info-Tech's Feature Rank / stoplights detailing the individual feature scores of the evaluated product.
- Info-Tech's Raw Pricing for the vendor either as received from the vendor or as collected from publicly available sources.
- Info-Tech's Scenario ranking for all considered scenarios for the evaluated solution.

Info-Tech does not provide the following:

- Info-Tech's Vendor Landscape placement of the evaluated solution.
- Info-Tech's Value Score for the evaluated solution.
- End-user feedback gathered during the research project.
- Info-Tech's overall recommendation in regard to the evaluated solution.

Info-Tech provides a one-week window for each vendor to provide written feedback. Feedback must be corroborated (be provided with supporting evidence), and where it does, feedback that addresses factual errors or omissions is adopted fully, while feedback that addresses opinions is taken under consideration. The assigned analyst team makes all appropriate edits and supplies an edited copy of the materials to the vendor within one week for final review.

Should a vendor still have concerns or objections at that time, they are invited to a conversation, initially via email, but as required and deemed appropriate by Info-Tech, subsequently via telephone, to ensure common understanding of the concerns. Where concerns relate to ongoing factual errors or omissions, they are corrected under the supervision of Info-Tech's Vendor Relations personnel. Where concerns relate to ongoing differences of opinion, they are again taken under consideration with neither explicit not implicit indication of adoption.

Publication of materials is scheduled to occur within the six weeks following the completion of the research project, but does not occur until the fact check process has come to conclusion, and under no circumstances are "pre-publication" copies of any materials made available to any client.

# Pricing Scenario

Info-Tech Research Group is providing each vendor with a common pricing scenario to enable normalized scoring of Affordability, calculation of Value Index rankings, and identification of the appropriate solution pricing tier as displayed on each vendor scorecard.

Vendors are asked to provide *list* costs for SMMP software licensing to address the needs of a reference organization described in the pricing scenario. Please price out the **lowest possible** 3-year total cost of ownership (TCO) including list prices for software and licensing fees to meet the requirements of the following scenario.

Three-year total acquisition costs will be normalized to produce the Affordability raw scores and calculate Value Index ratings for each solution.

*The pricing scenario:*

- **Enterprise Name:** Imperial Products Incorporated
- **Enterprise Size:** SMB
- **Enterprise Vertical:** Consumer packaged goods
- **Total Number of Sites:** Three office locations
- **Total Number of Employees:** 500
- **Total Number SMMP End Users:** 50
  - 20 dedicated CSRs who are handling all customer service issues routed to them
  - 5 PR managers who need the ability to monitor the social cloud
  - 24 brand portfolio managers – each portfolio has 5 products (25 total)
    - Each product has its own Facebook and Twitter presence
  - 1 HR manager (using social media for recruiting)
- **Total Number of IT Staff:** 20
- **Operating System Environment:** Windows 7
- **Functional Requirements and Additional Information:** Imperial Products Incorporated is a mid-sized consumer packaged goods firm operating in the United States. The organization is currently looking to adopt a platform for social media monitoring and management. Functional requirements include the ability to monitor *and* publish to Facebook, Twitter, YouTube, and blogs. The platform must have the ability to display volume trends, show follower demographics, and conduct sentiment analysis. It must also provide tools for interacting in-platform with social contacts, provide workflow management capabilities, and offer the ability to manage specific social properties (e.g. Facebook Pages). Additional features that are desirable are the ability to archive social interactions, and a dedicated mobile application for one of the major smartphone/tablet operating systems (iOS, Android etc.).