

CHECKLIST

How to Compare Social Software Platforms.

Introduction

Solving social use cases today requires a variety of key capabilities. Amidst all the fancy pictures and hopeful promises, what technology capabilities do brands need to enable their success?

Whether brands focus today in one key area (such as publishing across multiple channels), or more complex (such as integrating owned and earned) this checklist covers the breadth of social needs. It is organized into sections to identify with your critical goals. But, each section's capabilities should actually be inter-connected in the platform—built from one code base—to have all of social in one place.

No matter what requirements are burning today, they will only continue to grow. Social use cases are becoming more advanced and spreading throughout the organization. When you invest in a social platform, it should easily scale as your needs and social maturity advance.

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I. Content Planning & Publishing

Organize and distribute relevant content for the most impactful audience, time, and channel.

Publishing

- Instantly draft, schedule, and publish content to over 20 social channels, including Facebook, Twitter, LinkedIn, Sina Weibo, and VK
- Publish a post to multiple social channels at once or at different scheduled times
- Publish content to specific audience profiles
- Categorize messages with structured content labels
- Auto-tag outbound messages according to content properties
- Employ built-in link shortening such as bit.ly, awe.sm, po.st, and spr.ly
- Automate publishing from pre-approved RSS feeds
- Target with extensive Facebook and Twitter criteria, including geo-targeting and geo-limiting capabilities
- Collaborate as well as standardize workflow and tasks for efficient content production and approvals

Calendar Planning

- Comprehensively view campaigns, tasks, events, and messages by channel, date, or status
- View past, present and future messages by drafts, approvals, scheduled, and/or sent classifications
- Filter content by social channel(s), account(s), campaign(s), contributor(s), message type, or custom options
- Suggest new content for a specific date or campaign
- Share the calendar with other users or export to iCal, excel, or pdf
- View multichannel marketing campaign planning in one place (i.e. social, advertising, PR, web, email)

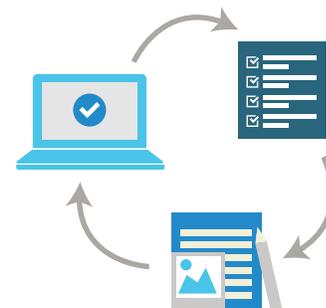
Content Planning

- Align teams on campaign goals and guidelines by creating and sharing briefs
- Suggest new content between peers, corporate teams and business units

- Research and track current trends, events, weather, sports events, and more from a single view to inspire real-time content
- Discover user-generated content, top contributors and assets with the highest engagement, likes/favorites, reuse and reach
- Request customer approvals on user-generated content and track that status
- Recommend top-performing organic content to be turned into ads
- Group assets, content and relevant social content to serve as inspiration for teams planning or creating content for a campaign
- Collaborate across teams on new suggested content

Content Management

- Store photos, videos, links, posts, text, documents and files
- Search an organized library of digital assets in a folder, grid or list view
- Measure the performance of an asset overall, including nested regional variations
- Edit images on the fly with the ability to crop, add filters, and captions
- Source assets from stock photography, like Getty Images, Shutterstock, and Giphy
- Program embargo and expiration dates
- Surface popular assets with their corresponding usage, labels and metrics
- Share well-performing content with other teams or agencies
- Create vanity URLs



II. Moderation

Easily moderate high volumes of daily conversations and personalize engaging messages.

Moderation

- Monitor and filter incoming social conversations through moderation dashboards
- Color code inbound messages for visual categorization
- Filter inbound messages by keyword, status, sentiment, channel, or priority level
- Automatically tag, route, and assign inbound messages based on sentiment, influence and keywords
- Triage messages and expedite turnaround times with sophisticated rules and macros
- Process messages in bulk, even across channels and accounts
- Instantly access user profiles and conversations for contextual engagement
- Email, translate or archive any message
- Establish selective email alerts for messages

Real-time Response Collaboration

- Assign messages to team members for response
- Communicate through internal notes on any message or piece of content
- Share monitoring dashboards with other team members
- View and update one single profile of each customer, along with historical conversations and internal notes, for consistent customer communication

Case Management

- Group multiple inbound messages into designated and trackable cases
- Automatically assign unique IDs to each case
- Add collaborators to cases with the ability to share internal comments
- Track the status of each case

Reporting and SLAs

- Track, measure, and optimize team's goals and SLAs
- Drill into conversations directly from reporting
- Filter by response time, resolution, queue processing time, user reporting and more



V. Audiences & Onsite Engagement

Deeply understand, support, and activate social audiences and deliver rich onsite experiences.

Audience Management

- Uniquely label different audience segments and influencers
- Aggregate consumer data, interests and past interactions into one unified profile
- Attach profile icons to visually identify consumer segments
- Tag profiles with information based on a customer's social interaction with the brand
- View message sentiment to easily identify promoters and detractors
- View the full engagement history that audiences have with the brand
- Group social profiles into specific audience segments and custom audiences
- Process customer databases to automatically update custom audiences
- Identify, translate or filter over 65 languages to engage with global audiences
- Automatically add users to audience segments based on any criteria

Advocacy

- Implement a complete advocate influencer program
- Identify and recruit specific groups of highly engaged fans
- Measure advocacy campaign impact, feedback, and recommendations in real-time

Influencer Management

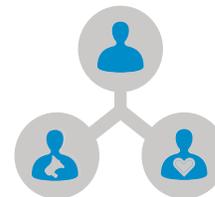
- Identify new influencers based on listening
- Add depth to influencer profiles based on what audiences say to their networks
- Learn context of influencers and fans from sentiment, intent, emotion and mood

CRM Integration

- Integrate with CRM Platforms such as Salesforce
- Integrate with marketing automation tools such as Marketo

Reporting

- Create customized, visual reporting and analytics dashboards across various segments
- Utilize Message Scorecards to quickly evaluate Engagement, Reach, and Activity across various messages



IV. Paid Advertising

Manage campaigns cohesively and optimize advertising budgets.

Link Value Between Paid, Owned, and Earned Media

- Automatically turn organic posts to ads based on performance
- Instantly target customer segments, including custom audience lists, for native ads
- View dark or unpublished post comments on monitoring dashboards
- Adjust ads, creative, and initiatives on the fly
- Map a customer's entire journey on and offline to identify conversion areas
- Plan spend based on an integrated marketing strategy, boosting scheduled content from a shared global calendar

Create and Target Paid Ads

- Create Twitter paid promotions: promoted posts, promoted tweets, and promoted accounts
- Target advanced Twitter ads based on demographic, location, device, etc.
- Create Facebook paid promotions: boosted posts
- Target advanced Facebook ads based on custom audiences, lookalike audiences, FBX and retargeting, and partner categories
- Identify and target specific times and days of the week most likely to drive results
- Process first party data to automatically update custom audiences
- Build ad creative variations to test responses
- Easily attach ad creative and targeting lists from a central asset manager
- Clone ads between campaigns and ad sets
- Bulk import, export, and update for improved high volume ad management

Automate Manual Work to Stretch Budgets Further

- Manage budgets centrally across social networks, accounts, users, and forums
- Trigger paid amplification when organic posts reach a certain engagement threshold

- Automatically optimize or amplify content based on a flexible set of rules in real time
- Send notifications, adjust budgets, pause or delete ads and more based on any number of conditions, including impressions, click through rates, cost per click, etc..

Collaboration, Workflow, and Governance

- Apply campaign naming convention settings to eliminate user error and maintain consistency
- Manage permissions for individuals and groups, including access to ad accounts to manage and organize spend
- View, review, or comment on campaigns via desktop and mobile
- Manage flexible approval workflows for both internal and agency users
- Track account activity with comprehensive audit trails

Reporting and Insights

- Leverage global data from across your social accounts, combined with real-time ad performance reporting
- Enable clients and agency partners to login and review results
- Allow teams to collaborate and discuss ad performance from within the platform
- Align the structure for targeting and categorizing custom social audiences with a legacy database, CRM systems, and marketing automation tools
- Analyze how paid media effects brand metrics vs. competitors
- Create a holistic view of customers and manage customer experiences
- Automatically trigger custom reports to specific teams, users, and agency partners



III. Listening & Visualization

Activate social chatter into real-time insight and bring customer conversations to life.

Monitor External Conversations

- Preview and refine search queries before they run
- Visualize the volume and trend of keyword mentions over the past 24 hours, week, month, or even years
- Compare the trend volume of competitive mentions vs your brand
- Review the distribution of search mentions by channel
- Fine tune sentiment analysis across search terms and channels
- Quickly surface top keywords and trends through topic clusters and word clouds
- View the distribution of mentions across the world and language
- Learn top influencers for your brand or a competitive brand
- Compare owned mentions versus earned mentions in one screen

Actionable intelligence

- Bring listening data into moderation dashboards to track progress toward listening initiatives
- Enhance audience profiles from listening data
- Immediately route critical listening insights to other teams for resolution or action

Social Curation

- Engage consumers with visualizations of the most compelling social content, including user generated content
- Utilize 20+ sources, including social channels and blogs, to power visualizations
- Organize visualizations into customized "playlists"

Trend Discovery

- Identify trending content by audience segment (brand, demographic, profile, language, interest, etc.)
- Discover trends within certain content areas (hashtags, keywords, sources, etc.)

- Set rules and alerts to identify a topic before it becomes big (crisis, relevant trends, etc.)

Command Center

- Visualize the brand's social presence (such as external mentions, key metrics, all messages flowing into and throughout the organization) on any digital screen
- Display key topics, customer segment interests, and other trending subjectsVisualize key topics, customer segment interests, and other trending subjects
- Customize visual dashboards for each department (product, social, PR, marketing, execs, etc.) to track social selling, customer care SLAs, and goal alignment

Reporting

- Build both personal and shared listening dashboards
- View time series-based changes in earned and owned mentions, volumes, and topics
- View time series-based changes in audience gender, topics, geography, and language
- Understand sentiment scoring in mentions across topics, sources, geographies, and languages
- Continuously drill down into any listening data point to analyze dozens of metrics
- Enable clients and agency partners to login and review reporting results



VI. Reporting & Analytics

Gain holistic and detailed insight on all brand social activities, and benchmark performance against competitors.

Comprehensive Insights

- Share data and analytics across the entire platform
- Publish, engage, measure, listen and buy media from a single integrated platform
- Set flexible rules tied to social performance indicators that impact goals for each unique team or user
- Detect sentiment, intent, spam, influence, engagement, and relevance
- Discover and track custom data attributes, key social campaigns, actionable content, and audience segments to understand data from every angle
- Analyze data at multiple levels, including campaigns, competitive brand groups, and social account groups
- Collect important data behind shortened links, including custom URLs
- Integrate data on published messages with platforms like Google Analytics, CoreMetrics, or Omniture
- Drill down through infinite layers of data points in each report to trace data back to its source

Benchmarking

- Rank brand performance against competition on metrics such as likes, mentions, comments, and shares
- Visualize contributions of individual social accounts or teams to overall brand performance with internal benchmarking
- See the channels, media types, and content topics that drive engagement in your space
- Compare social activity based on ratios that adjust for audience size
- See top posts by brand, competitor, and channel
- Compare competitors' response times against your own goals
- Understand competitors' strengths and weaknesses for customer service responsiveness, content performance, audience growth and reach, and engagement metrics

Shared Reporting

- Centralize reporting across all channels, branded social media accounts, earned engagements, and paid ad results
- Indicate the best times, days, and content attributes for account engagement
- Use a custom report builder with more than 1000 metrics, custom metric creation, and a library of visualizations
- Create and share global templates for your entire team to standardize reporting across the company
- Track, measure, and optimize team's responsiveness against desired operational goals around all messages and campaigns
- Enable clients and agency partners to login and review reporting results
- Utilize message scorecards to quickly evaluate Engagement, Reach, and Activity across various messages
- Export reporting insights into PDF, Excel, or PNG format



VII. Additional

Security and Governance

- Bolster security efforts with advanced options, such as SAML integration, two-factor authentication, source IP monitoring, encryption of specific application data, IP white listing, and on-demand or automated message encryption
- AICPA Service Organization Control SOC 1 Type II and SOC 2 Type II certifications to ensure adequate controls in financial reporting, security, availability, processing integrity, confidentiality and privacy
- EU and Switzerland Safe Harbor certifications
- Utilize hierarchical enterprise and business unit structure for security and governance framework implementation
- Implement fine-grained role-based and account-based access and permissions
- Archive inbound and outbound content
- Utilize automated rules to establish routing protocols, approval flows, and ultimately policy compliance
- Review full audit trails on social profiles and interactions to closely monitor brand-customer relationships

Mobile

- Support for multiple devices - iOS (iPhone and iPad), Android, Windows Phone, Blackberry
- Upload media directly from devices into Social Asset Manager
- Publish and engage with messages and content
- Manage workflow (approvals, assignments, queues, etc.)

- Tag inbound/outbound messages and view profile tags

- Access monitoring dashboards and planning calendars

Global Scale & Internationalization

- Monitor, translate, and perform text analytics in over 70 languages (covering 95% of the world's population)
- Multi-language support (65 languages)
- Interface languages: English, Arabic, Chinese (Simplified Mandarin), French, German, Italian, Japanese, Portuguese, Russian, Spanish
- Multiple global channels, such as RenRen, Weibo, and VK
- Simplified global user provisioning through distributed functionality: similar users (based on role, geography, or department) assembled into a common user profile for bulk actions and permissions
- Support availability in local offices

Social Channel API Integrations

- Bazaarvoice, Facebook, Flickr, Foursquare, Google+, Instagram, Jive, LinkedIn, Lithium, Pinterest, Renren, Sina Weibo, SlideShare, Tencent Weibo, Tumblr, Twitter, VK, WeChat, WordPress, YouTube, and Zimbra

Technology Integrations

- Specialized integration with a variety of products: CRM, paid solutions, web analytics, link shorteners, listening solutions, archival solutions, data warehouses, internal systems, marketing automation, content planning solutions, and user-generated content platforms