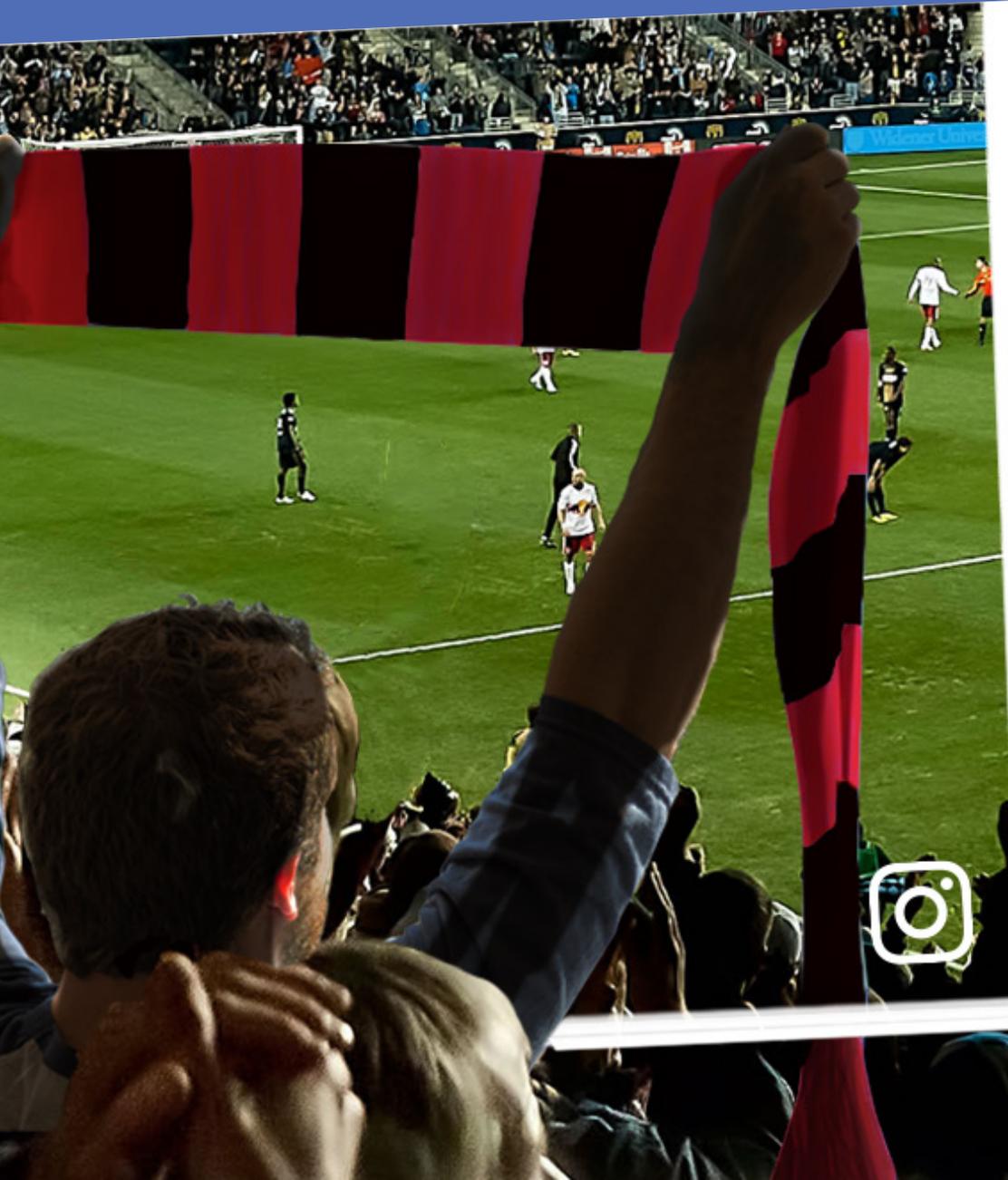


✓ Social Marketing Checklist



Shop the Look



SHOP

What to Look for in a Social Media Marketing Platform

Marketers today are working harder than ever to guide customers through a journey with a brand. As this path is increasingly nonlinear— thanks to the rise of social and digital channels— teams that touch social on behalf of the brand must be agile, supporting every phase of the customer journey, and capitalizing on every opportunity to progress customers to more valuable stages of the relationship. Every interaction must maximize impact and, through a trusted social marketing partner, translate this impact into a lifetime relationship. As organizations increase their investment in social, marketing teams need efficient ways to decode an array of social data, and easily share insights with other departments.

The smartest brands aren't just using social to acquire new customers, they're using it to create lifetime customer value by driving awareness, developing deeper relationships, and building brand loyalty to ultimately boost revenue. This level of brand love can only be achieved with the right processes, technology, and strategy in place, bringing people together across the organization—from care, sales, and marketing—and synchronizing across the entire customer journey. But, with more people comes more risk. Enterprise organizations need a solution that reduces and manages this risk with security and compliance controls, while also protecting brand equity. As CMOs become responsible for a larger slice of their organizations' technology budgets, marketers must also prove the value of every investment beyond traditional marketing metrics—including their own adoption of the platform.

The most valuable Social Marketing platform should go beyond social media management, providing you the tools you need to tell the ROI story by connecting social interactions to conversions, influencers to the right target audiences, and audience data to sponsorship value. And it should boast engagement capabilities critical to not just maintaining, but growing brand love, making social customers your happiest customers.

We've developed the following checklist to help you identify your brand's priorities for a social media marketing software partner—and make a more informed choice about the technology partner you bring on board to elevate and streamline your marketing efforts.

Your Checklist:

1. One Platform–Built For Scale
2. Global Support, Education, & Strategy Consulting
3. Comprehensive Campaign Management
4. Integrated Content Development
5. Smart Publishing
6. Social Response Management
7. Trend Identification & Crisis Tracking
8. Audience Insights
9. Configurable Analytics & Reporting
10. Compliance, Security, & Governance

Looking for additional
recommendations for social on-air?
> [Here's what success looks like](#)



One Platform - Built For Scale

Whether you want to activate a team of 10 marketers or 1,000, the ideal platform scales across the needs of your business and empowers your team to put out the very best your brand can offer—while complementing and integrating with your existing technology investments.

Look for a solution that supports:

- Customized Configuration.** Map workflows and configure the software to match your actual organizational structure, including: different brands, regions, departments, teams—and even external partners, like your agency
- Flexibility.** Offer a pricing model that fits the needs of your social marketing presence, priced by teams and accounts—with unlimited access to content and data
- Authentication.** Authenticate all owned social media accounts, across every major social network
- User Management.** Provide governance reporting and administrative controls, allowing employees access to the parts of the platform they need to simplify their user experience, and streamlining change management
- Integrations.** Integrate with and provide APIs for your existing software purchases, like omni-channel planning in Opal, best-in-breed listening in Synthesio or Netbase, and CRM providers like Salesforce
- Approval Workflows.** Establish custom, multi-stage approval workflows to ensure only approved content is published, including a designated approvals workspace and notifications
- Visibility.** Enable organization-wide visibility with a global calendar that shows what other brands, divisions, or regions have planned
- Distribution.** Distribute individual messages and entire campaigns across multiple teams to drive brand consistency and alignment

2.

Global Support, Education & Strategy Consulting

Many vendors provide basic platform training, but the partnership stops there. A true strategic partner will guide and support you beyond onboarding to help manage your people, processes, and ongoing marketing initiatives, ensuring you attain your goals.

Look for a solution that supports:

- Personalized Training.** Provide complete platform training, certification, and continuing education through onsite and online instructor-led courses
- Account Planning.** Offer a dedicated customer success team for ongoing advocacy and account planning, as well as best practices guidance and usage optimization
- Customization.** Tailor platform configuration to meet your unique needs
- Global Support.** Deliver 24/7 support, along with onsite event support as needed
- Community Management.** Provide community management and moderation services for live events, as well as ongoing social communities
- Solutions Consulting.** Design and execute breakthrough social curation and other digital experiences for major events and campaigns
- Strategic Services.** Provide consultative services on social strategy, customer care strategy, digital content strategy, and more

3.

Comprehensive Campaign Management

Successful social teams must constantly plan and deploy the most relevant content for different audiences across any number of social channels.

Look for a solution that supports:

- Scheduling.** Schedule posts in advance across multiple accounts, channels, and dates
- Unified Planning.** Centralize evergreen, seasonal, and tentpole campaigns for simultaneous planning
- Production Workflows.** Categorize posts by production stages: draft, awaiting approval, pending publication & more
- Brand Compliance.** Ensure brand consistency by establishing campaign-specific objectives, message tone, and creative vision
- Collaboration.** Enable cross-team collaboration through mobile notifications, in-app chat, unscheduled drafts, and task creation and assignment within or outside of an approval process
- Auto-Importing.** Automatically import messages and social ads from your accounts to gain a holistic view of your campaigns and content performance
- Relevant Insights.** Provide timely insights on campaign-specific hashtags and keywords via real-time and historical trending content to inform campaign planning
- Project Management.** View everything associated to your campaign plans, including scheduled content, status of content, content awaiting approval and results
- Plan Optimization.** Track your content mix across key themes and social accounts for each campaign
- Custom Channels.** Schedule custom events and placeholders for omni-channel planning and visibility
- Dynamic Content.** Create and launch dynamic campaign components such as polls, games, or contests

4.

Integrated Content Development

It's hard to cut through the noise and get insights on your own content performance and external trends. Multiply this out by tens—or even hundreds—of accounts and campaigns, it's nearly impossible without the right organizational tools and functionality. The most effective teams create content collaboratively across multiple roles, departments, and even geographies.

Look for a solution that supports:

- Content Management.** Offer complete management for all of your content with folders, campaign and content tags, themes and permissions
- Response Templates.** Provide easy access to standardized responses for common customer issues and questions
- Bulk Upload.** Bulk upload multiple sources of content
- Embargoes.** Embargo content to ensure assets used are always up-to-date
- Asset Optimization.** Optimize assets to each network's specific size requirements with image editing
- DAM Integration.** Leverage your existing DAM with an open architecture
- Content Usage Metrics.** Understand the usage levels of each asset
- Mobile Contributors.** Crowdsource content from across your organization, allowing teams in the field to capture and submit content, and even collect user consent, on the go
- Advanced Curation.** Curate user-generated content (UGC) and customize moderation rules to automatically approve or reject content
- User Consent.** Request usage consent from UGC authors in-app, including customization of consent request messaging
- User-generated Content.** Organize, distribute, and integrate UGC across any digital touchpoint to drive engagement
- Conversion.** Link content to any digital endpoint, including product pages, to drive conversions and revenue
- Tagging.** Customize content labels, both before publishing and retroactively, to enhance analytics and reporting

5.

Smart Publishing

Effective content publishing requires staying on top of multiple media types and image formats, as well as ever-changing audience expectations and consumption habits.

Look for a solution that supports:

- Social Advertising.** Reach more of your audience with a variety paid publishing options across channels
- Custom Targeting.** Create and save targeted audiences for organic and paid publishing efforts
- Post Preview.** Preview what the message will look like on each social network before the post goes live
- Content Distribution.** Distribute and track content across multiple social channels, regions, or departments simultaneously for localization and/or queued use
- Web Analytics.** Automate link-tagging through web analytics integrations (Google Analytics, Omniture, etc.) to measure social impact on non-social properties
- Paid Workflows.** Coordinate paid-content workflows with dark/unpublished posts
- Custom Link-Tagging.** Generate custom URLs via integrated link shorteners with integrations (Bit.ly, Po.st and BudURL)
- Crisis Control.** Quickly pause all publishing in the event of crises



Social Response Management

Done right, responding to your audience drives loyalty and affinity—but it requires efficient monitoring and context to provide personalized responses.

Look for a solution that supports:

- Monitoring.** Monitor public and private conversations on your owned channels and search social for keywords and hashtags that are important for your brand to engage with
- Interaction History.** View interaction history across multiple handles for a complete view of the customer
- Customizable Inbox.** Quickly prioritize responses with filterable attributes on status, author information, or topic
- Automatic Triage.** Triage inbound content more efficiently via multi-tiered escalation paths and clear status information—whether on desktop or mobile
- Influencer Management.** Identify and flag influencers interacting with your brand to help with response priority
- User Profiles.** Provide all publicly available social information within the dashboard for help tailoring an authentic, contextually relevant response
- Global Administration.** Rapidly ramp up response teams with the appropriate approvals and permissions in the event of a crisis, so the right people can access information and make decisions quickly*
- Social Care Metrics.** Report on various customer care-focused analytics including time to the first response, time to resolve the issue, and customer satisfaction on the interaction
- Mobile Users.** Support mobile publishing, approving, monitoring, listening, engaging, and social feed moderation through a native mobile application, keeping you connected even if you step away from your desktop

Looking for additional recommendations for Social Customer Care?

> [See the checklist](#)

7.

Trend Identification & Crisis Tracking

Social offers unparalleled insights into content, audience, and competitive trends, and provides the perspective and context your teams need to make decisions in times of crisis.

Look for a solution that supports:

- Trend Identification.** Surface the top trending content from multiple social media sources
- Monitoring.** Track multiple social channels for trends around an unlimited number of your own terms, phrases, hashtags, or locations
- Live Mode.** Visualize a conversation or crisis via minute-by-minute surfacing of top media, tweets, and influential accounts in a live, real-time dashboard
- Trend Discovery.** Monitor the keywords and topics trending within your own audience and industry
- Filtering.** Filter topics by location, terms, sentiment, language, and influencer status
- Notifications.** Create alerts for trending or over-performing topics and branded terms
- Competitive Tracking.** Monitor competition—and their audiences—across trending topics and hashtags to understand their content strategy and drive customer acquisition

8.

Audience Insights

To turn connections into not just customers, but loyal brand advocates, social teams must understand their target audiences to ensure they have the right message, to the right people, at the right time.

Look for a solution that supports:

- Audience Identification.** Identify target audience sub-segments and what they care about to increase message relevance and engagement
- Influencer Identification.** Identify influencers and advocates within your target audiences that are a good fit for your brand
- Content Optimization.** Know when to post and what type of content works best with your audience
- Audience Affinities.** Understand how your audience identifies with other brands and other products
- Sentiment.** Monitor sentiment around topics your audience cares about
- Brand Research.** Create virtual focus groups by examining social conversations, demographics, and psychographics of different audiences around specific keywords and phrases
- Brand Affinities.** Identify affinity overlap between your brand and other brands to maximize partnership, sponsorship and licensing opportunities and value
- Content Resonance.** Measure content performance with your desired audience segments

9.

Configurable Analytics & Reporting

Data is only as valuable as the context attributed to it. Whether you're tracking campaign success or reporting on a sponsorship opportunity, marketers must be able to measure campaign success in a way that translates to organizational business objectives.

Look for a solution that supports:

- Configurable Reports.** Customize reports and dashboards to keep tabs on the metrics that impact business goals
- Web Analytics.** Integrate with existing web analytics tools to display conversion data alongside key social engagement metrics, directly attributing social dollars to business dollars
- Platform Metrics.** Identify top content, contributors, engagement, activity, and best time of day to publish
- Performance Metrics.** Aggregate and compare performance metrics across different social networks and owned social accounts (i.e. impressions, volume, reach, and sentiment)
- Share of Voice.** Report on Share of Voice to track the social footprint of any campaign, sponsorship, or crisis
- Audience Trends.** Track fan growth and demographic trends within your follower base
- Competitive Benchmarking.** Benchmark performance against competitors' to gauge relative success and market share
- Social Sponsorship.** Increase sponsorship value with deeper insight into sponsored campaign success
- Sharing.** Easily share your reports and data via PDFs, .CSVs and a set of APIs, manually and automatically

Compliance, Security & Governance

Enterprise organizations, especially those in regulated industries, need to be able to ensure security and compliance both internally, amongst employees, and externally with customers.

Look for a solution that supports:

Compliance

- Archives all audit trails on every item and action taken, including all inbound and outbound activity
- Maintains an annual SOC2 audit and regularly submits to ongoing third-party security and penetration testing
- Has documented security policies and procedures and employee training

Governance

- Retains independent access to social activity without relying on social networks
- Has a robust permissions systems and role-based access controls for users
- Allows administrators to restrict application access using whitelisted IP addresses and ranges

Secure Login

- Supports federated identity via SAML 2 standard single sign-on
- Supports a variety of security features for local logins including complex passwords, password reuse, password expiration, IP whitelists, and session and inactivity timers

Encryption

- Supports encryption in transit via mandatory SSL using modern ciphers
- Encrypts your data at rest

Integration

- Leverages data API for integrating social archive information with data warehouses
- Automates daily exports via SFTP or SMTP

Additional Recommendations for Broadcast

Viewers' consumption habits have evolved from dedicated broadcast times to a hectic combination of live, episodic, and OTT. Still, you need to get that content in front of as many eyes as possible. Each type of content requires its own dedicated strategy to drive tune-in and engagement.

Look for a solution that supports:

- White Labeling.** Create branded visualizations of UGC in-app, on-site, on-set, and on-air to inspire ongoing participation and ultimately increase viewership
- Presenters.** Allow speakers, hosts, and moderators to interact with social content and control visualizations displayed on-air or on-set in real-time
- Green Screen.** Easily feature social content on-air or in a live stream with green screen-compatible lower-third visualizations
- Live Mode.** Provide a live watchboard of real-time, over-performing content to help you identify what the audience is most interested in at the moment
- Social Insights.** Inform broadcast content and identify story angles that resonate best with your audience by accessing real-time and historical social data
- Social Sponsorship.** Increase sponsorship value by tracking all users who interacted with a campaign via social for future retargeting
- Integrations.** Integrate and provide APIs for best-in-class broadcast visualization providers like Vizrt, and live-streaming providers like Grabyo

Spredfast is transforming the way companies connect with audiences. Spredfast's smart social software enables companies to build lasting relationships with today's digitally-connected consumer. Enterprise brands worldwide use the Spredfast Social Software Platform to manage, integrate and amplify social content across any digital touch point in real time.

With global reach, Spredfast customers manage over one billion social connections across 84 countries. More than 650 customers, including all five major broadcast networks and fifty percent of Interbrand's 2014 World's Best Brands have partnered with Spredfast to create first-class social experiences.

For more information, visit
www.spredfast.com