

GUIDE

Evaluation Guide:

Enterprise Social Relationship
Platforms



A Guide to Evaluating Enterprise Social Relationship Platforms

For any organization that uses social media, it's no longer practical to operate without a social relationship platform (SRP). A centralized platform can serve the publishing and data needs of numerous stakeholders in separate departments.

SRPs allow for all departments and business units, including marketing, PR, sales, customer service, and HR, to turn social media activity into sustained business improvements and financial results.

To get the greatest possible value from your selection, it's important to assess SRPs based on the long-term needs of your organization. The following checklist will help guide your evaluation process and ensure you make a confident investment.

The 10 Essential Capabilities of an Enterprise Social Relationship Platform

1. Social Media Management
2. Engagement
3. Integrations
4. Collaboration
5. Compliance
6. Security & Governance
7. Scalability
8. Global Support
9. Analytics & Reporting
10. Education & Training



1. Social Media Management

An SRP helps you manage your organization's online interactions. It streamlines the way you monitor and engage on social networks, as well as optimizes workflows within your organization's departments and teams. To effectively manage and engage on social media, organizations need the following capabilities of an SRP:

- A single platform to support global and regional social networks and contributors
- View and manage content across social networks
- Scheduling capabilities that allow for effective publishing across multiple social networks and profiles
- A system capable of organizing individuals, teams, and departments to best suit their contributing efforts
- A calendar view of outgoing content with author attribution for unified tracking and management
- Search streams and customized lists for filtering and easy monitoring

“Social has really changed the way in which we communicate with fans. It has changed the way we hear fan feedback. It has changed the way in which we understand what they want and what fans need from our product, from our content, from the league in general. It has really become a great two-way communication tool for us.”

Steve McArdle, Senior VP Digital, NHL

- Identify and delete problem posts from social networks
- Access to conversation histories and internal communications
- Import large amounts of content using .csv files
- Locate and amplify content found on web to specific social networks
- A robust mobile application to complement web use

2. Engagement

Engaging on social media takes organization, planning, and efficient workflows. To enable your organization to engage on social in a way that drives business results you will need the following capabilities of an SRP:

- A single platform to publish content to multiple social networks
- The ability to target specific and customized audiences on various social networks (using attributes such as gender, education, age, job title, and seniority)

“We love to listen and to interact with our Virgin customers, and we want to use social media to tap into conversations that our advocates are having, so we can best improve our products and service offerings for them.”

Daniel Richards, Digital Director, The Virgin Group

- An integrated internal communication tool to pull in external social messages for discussion or promotion
- Identify top influencers by Klout score (the leading measure of social influence)
- Assignment capabilities to ensure that teams can engage with internal teams/groups, with external agencies, as well as with audiences across social networks
- Publishing workflows to enable controlled and accurate responses to inquiries across social networks

3. Integrations

Social media is an active space with new apps launching every day. Your organization will need an SRP that has the ability to integrate with the latest and greatest applications, as well as your existing systems and programs such as CRM, Marketing Automation, Customer Service, and Content Discovery. To ensure your existing and future business applications integrate with your enterprise ecosystem, look for the following capabilities:

- Tight-knit integrations with partner networks, including certified partnership programs (Facebook's Preferred Market Developer, Twitter's Certified Products, and LinkedIn's Social Media Management Program)
- A comprehensive and ever-expanding app directory (a collection of extensions and applications that extend the capabilities of the SRP)
- Open API/SDK to allow custom build-in and build-out capabilities
- International social network support to tap into niche global social networks



4. Collaboration

Large enterprise organizations have a complex matrix of departments, external contractors, and agencies. To facilitate collaboration between all contributing parties, your SRP should have the following functionalities:

- Onboard multiple contributors to monitor or publish to the appropriate social networks with permissions
- Assignment capabilities to ensure that teams can engage with one another internally, with external agencies, as well as with audiences across social networks

“The average enterprise-class company owns 178 social accounts, while 13 departments—including marketing, human resources, field sales, and legal—are actively engaged in social media.”

Jermiah Owyang, Altimeter Group

- Workflows that allow individuals to deliver messages to specific individuals, teams, or departments
- Ability to engage with your audience in a diverse set of languages, time zones, and geographies
- Internal communication tool to pull in external social messages for discussion or promotion

5. Compliance

Organizations that are using social media as a vehicle for communication face a wide array of legal risks, especially within regulated industries such as finance and health care. To avoid compliance violations, your organization must have internal policies and archiving systems. Keep your organization compliant by choosing an SRP with the following functionalities:

- Automatic archiving: a permanent record of every online communication to meet compliance requirements
- Incorporate compliance officers into the approval queue through workflows and granular permissions
- Record who posts which messages through which social network
- Pre-approve social media content before publishing to ensure messaging is accurate and on-brand
- Policy management: establish specific policies to meet FINRA, HIPAA, and PCI standards
- Automated content moderation: ensures all content conforms to your predetermined compliance policies

Top 5 Social Media Risks Identified by Internal Auditors

- Brand and/or reputational damage
- Data security (company information)
- Regulatory and compliance violations
- Data leakage (employee personal information)
- Viruses and malware

6. Security & Governance

As an organization using social media, you need to protect your valuable social media assets and brand reputation. To ensure the greatest possible return, brand consistency, and security with your social media campaigns, look for the following functionality:

- OAuth 2.0: connect your social networks without seeing, storing or transferring your social network passwords
- Single Sign-On: maintain centralized controls and access to your SRP through employee directories
- Account provisioning: management of employees levels of access, permission and approval workflows

“As an energy company, we are highly attuned to security and preparedness. Using an account discovery (social account audit) helped to identify a number of accounts that were using PPL’s name and branding. Having an awareness of these accounts allowed us to consolidate where needed, make an effort to remove rogue accounts, and put internal processes in place regarding how accounts are set up on social media channels.”

Lissette Santana, Branding & Stakeholder Communications Manager, PPL

- A secure publishing environment that locks down your company’s social media profiles against publishing through unauthorized applications
- Pre-approve social media content before publishing to ensure messaging is accurate and on-brand
- Monitor, archive, and search social media content based on specific metadata fields
- Safeguard valuable social media assets with granular team permissions.
- Automated account discovery: automatic search for social media accounts affiliated with your brand
- Advanced social profile security: defend against the hijacking of your brand’s social media assets

7. Scalability

Organizations need a solution that will scale to the growing needs of each department, brand, and geography. To match your organizational growth with your social media growth, assess various SRP vendors to ensure they provide:

- A secure platform with the ability to support 10 to 500,000+ contributors
- The ability to deliver content across 50+ global and regional social networks
- The ability to support any organizational model, from a contained, centralized strategy to a decentralized, dispersed model.
- A platform that supports multiple languages for global users and localization efforts
- Customized workflows to suit the needs of each department
- Minimized set-up time and increased traction for widespread use through on-demand education
- Optional live training sessions and professional services

8. Global Support

Social media is active 24/7. Your organization will need an SRP that has a support system that can provide answers to any question or technical problem. To ensure your organization has the support it needs, look for a vendor with the following:

- One-on-one support through any channel
- Access to a knowledge base and support community
- Multiple languages supported
- 24-hour technical support
- Account management

Customers are increasingly relying on social media to confront companies directly with complaints, and nearly 78% believe this will become the next tier of customer service.

Zendesk, Complaining Ain't Easy Report

“Since Orange was active on social networks on our various territories, we have been challenged from inside our company. It forced us to evolve and change how we work. In the past, services and departments were working separately on their field, like marketing, customer service, communication, human resources. Now, these departments work together.”

Lionel Fumado, Social Media Manager, Orange

9. Analytics & Reporting

A challenge when using social media in business is to connect it back to revenue. Organizations will need an SRP capable of analyzing and reporting the various levels of social media engagement. To understand the value of their social ROI and achieve an in-depth look at engagement, look for the following:

- Integrations with existing web analytics tools
- The ability to analyze engagement across all platforms and social media accounts
- Customized reporting with export options for all social media measurement to .xls, .csv, and .pdf files
- Custom link shortener for measuring post-engagement statistics (including an option for a vanity URL)
- The ability to track conversions through any web analytics platform that supports custom parameters
- Automatic archiving: record engagement across social media channels with the option to export
- Tracking capabilities from beginning to end of assigned messaging
- Integrates data with existing business applications to drive strategy and influence decisions
- A social media command center: a customizable, enterprise-class data visualization tool

10. Education & Training

Today's rapidly changing social media landscape requires your organization to stay educated and agile. When choosing an SRP, look for a vendor that provides the following:

- On-demand social media and product education, training videos, and thought leadership webinars
- Team assessment opportunities through tests, exams, and worksheets
- Industry-recognized certification
- Customized training for the individual needs and requirements of your team and organization
- Situational simulation training to create and train your team on an efficient response plan, in the event of an increase in social media activity

“A situational simulation prepared our communications team for our recent company re-naming launch so that when it happened, our team was able to handle the response from our clients and the public effectively and efficiently.”

Jaime Stein, Senior Manager, Social Media, Tangerine

Hootsuite helped create and analyze reports. From these reports, MLS gained insight on the levels of social engagement, as well as the ROI of the social media strategy.

Major League Soccer Case Study

About Hootsuite Enterprise

Partner with Hootsuite to accelerate your social transformation



Hootsuite Enterprise empowers organizations to execute business strategies for the social media era. As the world's most widely used social relationship platform, Hootsuite Enterprise enables global businesses to scale social media activities across multiple teams, departments, and business units. Our versatile platform supports a thriving ecosystem of technology integrations, allowing businesses to extend social media into existing systems and programs.

We help organizations create deeper relationships with customers and draw meaningful insights from social media data. Innovating since day one, we continue to help businesses pioneer the social media landscape and accelerate their success through education and professional services.

Request a custom demo today by visiting enterprise.Hootsuite.com

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