



SOCIAL MEDIA MARKETING

Solution Evaluation and Selection Guide

A Practical Guide for Discovering, Evaluating, and
Buying the Social Media Marketing Solution That's
Right for Your Organization

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Introduction: The Social Technology Imperative

A recent survey by the Association of National Advertisers showed that 90 percent of US marketers are now using social networks for their efforts. Just five years ago, the figure was only 20 percent.

That is not just an unbelievable growth trend for social media usage – it is a seismic shift in marketing and business. Social media has rapidly evolved from largely being on the fringe of marketing and communications to quite literally functioning right at the core.

Social media marketing (SMM) is the emerging business function that uses social channels and networks to engage consumers and customers.

Given the explosive growth and use of social networks globally – for example, more than 4 million businesses are active on Facebook, which is approaching 1 billion users – sophisticated technology is now at the heart of SMM. To maximize your marketing effectiveness on social media, the use of a robust SMM technology platform is now a strategic and operational imperative.

What is the right technology solution for your company's needs? How do you go about finding, evaluating, and buying that solution?

This guide will help you answer those questions in a practical, easy to follow way.

Who Should Use This Guide?

If you serve in any of the following executive or operational roles, this guide was developed specifically for you:

- Chief Marketing Officers/Chief Revenue Officers
- Business Unit Heads/General Managers
- Directors of Marketing/Directors of Advertising and Brand
- Chief Communications Officer/VP-Director of Communications and PR
- Director of Social Media/Community Relations Director
- Director of Demand Generation/Marketing
- Director of Digital Marketing/Communications
- Social Media Marketing Manager
- Creative Director
- Agency executives with social media responsibility

Social Media Marketing: Technology for Marketing Offense

A wide range of social technologies has emerged to address various aspects of social media management.

For example, "Social Community Management" enables organizations to create and manage online communities (of customers, prospects, partners, etc.), typically hosted as a part of the company's website. Another category, "Social Enterprise Management," lets organizations create private social networks for their employees to collaborate and share information. "Social Monitoring (or Listening) Platforms" let organizations monitor what is being said about them online, including across social networks.

Despite the hyperbole from some vendors in the marketplace, there is no single "uber" solution with functionality that addresses all things social.

This guide focuses on "Social Media Marketing" (SMM) technology. In contrast to the "defensive" and passive nature of Social Monitoring software, SMM solutions focus on "offensive" marketing capabilities that drive consumer engagement, action, and results.

SMM efforts tend to be focused on the following key goals:

- Increasing exposure/awareness/visibility
- Driving traffic (e.g., to websites)
- Generating leads/driving customer acquisition
- Providing marketplace insight
- Increasing sales conversions
- Building brands

Every company's goals and priorities are different, which means you will need to evaluate solutions and vendors based on your specific situation. This guide gives you the tools to do that. It specifies the capabilities and features required for an effective SMM solution and lays out a process to guide you to selecting the best solution for your specific needs.

SMM Functions & Capabilities

There are many and varied SMM technology solutions offered by the range of vendors serving the market. Following are the most important functions and key capabilities that you will want to look for in your SMM platform of choice:

- **Page Management** – Combination of tools and apps that enable marketers to develop and publish highly engaging content on multiple social properties and networks (e.g., your Facebook brand page, YouTube brand channel, etc.). Should have real-time page performance tracking and analytics.

- **Messaging Management** – Comprehensive tools to automate the scheduling and posting of messaging across various social sites. Manages filtering and flagging (e.g., to remove profanity), and includes real-time message tracking and analytics.
- **Promotion Management** – Provides the ability to create, quickly deploy, track and measure promotional applications across multiple social sites, including Facebook, Twitter, LinkedIn, YouTube, Google+ and Pinterest. Look for pre-built templates that support a wide variety of promotion campaign types, including contests, coupons, sweepstakes, pick a favorite, quizzes, etc.
- **Social Advertising Management** – Enables marketers to manage the full range of advertising functions for multiple social networks, including planning, purchasing, optimization and automated testing of creative content. Real-time ad performance tracking and analytics are again a key part of the equation.
- **Social Data Management** – This is a potentially game-changing capability in the world of social media marketing. New “big data” capabilities now being introduced can capture social audience data in a unified repository, allowing marketers to target messaging, customize promotions, and analyze and segment consumers based on demographics and interests.
- **Mobile Support** – As consumers and business customers increasingly access brand information through mobile devices, the SMM platform must provide native support for mobile content and the full range of devices. This includes auto-optimized templates that enable marketers to design content once and deploy to any device.
- **Analytics** – At the heart of each of these SMM solutions there should be a robust analytical capability that includes dashboards and reports that provide multi-level detail, as well as referral and conversion tracking. Crucially, these analytics enable marketers to conduct industry benchmarking, which is vital to measuring ROI.
- **Global Deployment Support** – If your organization operates internationally, you will need a solution that enables global deployments, including support for multiple languages, geo-targeting of messages and content, and the ability to set region-based permissions.
- **Social Network Support** – The SMM solutions you will be evaluating should support the major social networks, including Facebook, Twitter, YouTube, LinkedIn, Google+ and Pinterest. The best vendors will continue to add new social networks as they gain favor and broad usage in the marketplace.
- **Security, Compliance, and Accountability** – Equally important compared to the above outlined marketing and analytics capabilities are critical functions that ensure security, compliance and accountability of your SMM efforts. Look for core functionality that includes access controls, role-based permissions and customizable workflows. In terms of security and compliance, the platform should provide a fully secure data environment, including data encryption and an audit trail.
- **Usability** – It’s highly likely that your team members who will be using the SMM solution will not be engineers, so the technology should be easy to learn and use. Deployment should be fast and simple, and your agencies and other external partners should be able to customize content using the SMM platform.
- **Platform and Infrastructure** – Basic requirements of the SMM platform include SaaS/cloud architecture, high scalability and availability and multi-language support. The provider should be making frequent updates to ensure that the platform stays current with rapidly changing social networks.
- **Services and Support** – Customer service and support are crucial to the success of any SMM solution. The provider should have a proven methodology and process for quickly on-boarding and training customers, including technical support offered via web, phone and email. In addition, the vendor should offer comprehensive consultative services, including experts who will help you get the most out of the SMM platform.

SPECIAL NOTE: Importance of Service and Support

Social Media Marketing is a new and rapidly evolving practice. To get the most out of your new SMM solution, you are going to need some assistance, especially in the early days. Consequently, it’s critically important to carefully examine the service and support offered by the various SMM vendors you are evaluating.

Even as many of the major functions and capabilities of today’s leading SMM offerings are very similar, the service element can vary wildly from vendor to vendor. It pays to take extra time in the evaluation process to determine what kind of service the vendor “really” offers, and what you are getting with your particular package. Naturally, a “premium” package will usually offer more customer support. That can be a worthwhile investment.

Don’t hesitate to ask vendors for references to ascertain what the service and support experience is actually all about. To the extent possible, it is extremely useful to find your own independent reference of someone who has used that particular SMM platform.

SMM Solution Checklist



Must Have	Does the Solution Offer:	Vendor 1	Vendor 2	Vendor 3
PAGE MANAGEMENT				
	<input type="checkbox"/> Comprehensive page design and publishing tools			
	<input type="checkbox"/> Publishing to multiple social properties and networks			
	<input type="checkbox"/> Pre-built, customizable page templates			
	<input type="checkbox"/> Ability to create custom templates that can be shared across the enterprise			
	<input type="checkbox"/> Ability to lock down template components to ensure consistent branding			
	<input type="checkbox"/> Flexibility to build fully custom pages from scratch			
	<input type="checkbox"/> Plug-ins for apps and pre-built engagement content (e.g., fan-gated contests, polls, quizzes, etc.)			
	<input type="checkbox"/> Real-time page performance tracking and analytics			
MESSAGING MANAGEMENT				
	<input type="checkbox"/> Comprehensive messaging management tools			
	<input type="checkbox"/> Cascading permissions and workflow for message handling and publishing			
	<input type="checkbox"/> Message scheduling and automated posting			
	<input type="checkbox"/> Publishing of messages to multiple social properties and networks			
	<input type="checkbox"/> Unified social message inbox			
	<input type="checkbox"/> Keyword filtering and flagging (e.g., for profanity)			
	<input type="checkbox"/> Real-time message tracking and analytics			
PROMOTION MANAGEMENT				
	<input type="checkbox"/> Comprehensive promotion publishing and management tools			
	<input type="checkbox"/> Pre-built promotion campaign templates optimized to drive entry and engagement			
	<input type="checkbox"/> Support for wide variety of promotion types (e.g., contests, coupons, sweepstakes, pick a favorite, quizzes, trivia, etc.)			
	<input type="checkbox"/> Real-time promotion tracking and analytics			
SOCIAL ADVERTISING MANAGEMENT				
	<input type="checkbox"/> Social advertising planning, purchasing, management, and optimization			
	<input type="checkbox"/> Automated multivariate testing of advertising creative content (i.e., thousands of ad variations)			
	<input type="checkbox"/> Ability to optimize ad cost, clicks, and post-click engagement			
	<input type="checkbox"/> Advertising across multiple social networks			
	<input type="checkbox"/> Real-time ad performance tracking and analytics, including post-click engagement activity			
SOCIAL DATA MANAGEMENT				
	<input type="checkbox"/> Capture and aggregation of consumer social data in a unified repository			
	<input type="checkbox"/> Retrieval of complete history of consumer interactions on brand Facebook wall			
	<input type="checkbox"/> Custom segmentation of social audience data			
	<input type="checkbox"/> Analysis of consumer interests			
	<input type="checkbox"/> Targeting based on consumer interests			
MOBILE SUPPORT				
	<input type="checkbox"/> Native support for mobile content and devices			
	<input type="checkbox"/> Auto-optimized content for any display (design content once and deploy to any device)			

Must Have	Does the Solution Offer:	Vendor 1	Vendor 2	Vendor 3
ANALYTICS				
	<input type="checkbox"/> Comprehensive social media marketing analytics dashboards and reports			
	<input type="checkbox"/> Multi-level detail: By activity, campaign, property, etc.			
	<input type="checkbox"/> Industry benchmarking			
	<input type="checkbox"/> Referral tracking			
	<input type="checkbox"/> Conversion tracking			
GLOBAL DEPLOYMENT SUPPORT				
	<input type="checkbox"/> Ability to auto-target languages based on social network user's settings			
	<input type="checkbox"/> Geo-targeting of messages and pages			
	<input type="checkbox"/> Region-based restrictions (i.e., limit messages, pages to specific regions, countries, or markets)			
	<input type="checkbox"/> Multi-language support			
SOCIAL NETWORK SUPPORT				
	<input type="checkbox"/> Support for all leading social networks, including Facebook, Twitter, YouTube, LinkedIn, Google+, and Pinterest			
SECURITY, COMPLIANCE, AND ACCOUNTABILITY				
	<input type="checkbox"/> Access controls			
	<input type="checkbox"/> Role-based permissions			
	<input type="checkbox"/> Customizable workflows for approvals and alerts			
	<input type="checkbox"/> Audit trail			
	<input type="checkbox"/> Data encryption			
	<input type="checkbox"/> Secure data environment			
USABILITY				
	<input type="checkbox"/> Ease of use: Provides flexibility to support users with little specialized skills (as well as advanced user requirements for building fully custom content)			
	<input type="checkbox"/> Customization: Allows agencies and other external partners to easily customize content			
	<input type="checkbox"/> Rapid deployment to drive near-term benefits			
PLATFORM AND INFRASTRUCTURE				
	<input type="checkbox"/> Secure SaaS architecture			
	<input type="checkbox"/> Frequent updates to keep pace with changes in social networks			
	<input type="checkbox"/> High scalability (supporting unlimited users and social properties)			
	<input type="checkbox"/> High availability			
	<input type="checkbox"/> Integration: Meets your specific integration requirements			
SERVICES AND SUPPORT				
	<input type="checkbox"/> Comprehensive training and e-learning options			
	<input type="checkbox"/> Proven methodology and process for onboarding, training, and results-driven deployment			
	<input type="checkbox"/> Online knowledge base			
	<input type="checkbox"/> Internet, phone, and email technical support			
	<input type="checkbox"/> Dedicated strategic support: e.g., On-going campaign concepts; Messaging and content best practices			
	<input type="checkbox"/> Social analytics reporting and analysis			
	<input type="checkbox"/> Quarterly account reviews			
	<input type="checkbox"/> Access to ongoing and relevant thought leadership materials and webinars			
	TOTAL			

How to Use the Solution Checklist

The Solution Checklist provides a comprehensive framework and list of features for evaluating potential SMM solutions. In scoring solutions, use a scale such as 0 to 3: A score of 0 means the feature is missing entirely; 1 = partially meets the requirement; 2 = adequately meets the requirement; and 3 = fully meets or exceeds the requirement. Tally the individual line scores to get an overall lead candidate.

The solution you choose should meet as many of your “Must Have” requirements as possible and have a credible roadmap for delivering on any missing “Must Haves” in a reasonable time frame. The Solution Checklist is a useful tool, but your selection decision will be based on multiple factors, including Vendor Qualifications (see below), quality of service and support, references, and of course price and business terms.

Costs

Pricing Models

There are a number of pricing models that are now offered by SMM vendors. These range from “freemium” pricing models for very limited functionality, to monthly subscription packages that typically cover a fuller spectrum of SMM functions and capabilities:

- **“Freemium”** – There are some SMM services that are available free, but the functions and capabilities offered free are very limited at best. The whole idea behind “freemium” services is to give the customer a small taste, with the hope they will trade up to a paid subscription service. The reality is that for most companies, the “freemium” model will have little to zero utility. These free services just won’t do much to help you create, implement and manage business-building marketing and communications programs across social media channels.
- **Pay-Per-Campaign/As-You-Go** – With this pricing approach, users can purchase a one-time usage of SMM software, say for a promotion on Facebook. Or, they can pay for various services as they go, rather than signing a contract for an ongoing relationship. This would typically provide more functionality than the “freemium” model, but still fall far short of the robust and ongoing capabilities that today’s leading SMM solutions offer to marketers.

- **Annual Subscription** – The subscription model typically represents the “all inclusive” option. This is the primary pricing model used by the SMM industry and most SaaS/cloud-based software providers. This approach ultimately is the best deal for marketers, as it offers full functionality, the highest level of service and support, and regular technology updates.

Costs You Can Expect

Based on the industry standard annual subscription model, here is what you can expect to pay for a SMM solution. These costs are per brand and/or property (or business unit):

- **Typical Annual Fees:** Approximately \$30,000 to \$50,000 per year
- **Contracts:** The industry trend is toward negotiating multi-year contracts to get the most favorable terms and pricing
- **Discounted Rates:** In addition to the favorable pricing offered for multi-year contracts, most SMM vendors also provide discounts for multiple brand/property deployments

Other Potential Costs

As with any technology investment, there can sometimes be other costs associated with the purchase – hidden or otherwise. Some vendor business models are structured to generate significant revenue from their services offerings, and their technology tends to require specialists to use. You, the customer, end up paying recurring service fees as a result. Paying for specialized services might make sense in some cases, but if you are looking to minimize services costs, be sure to investigate those cost implications with any potential vendor. Areas to ask about include:

- Are there any fees associated with training on the system?
- What about consultant fees? Some technology providers offer consulting departments that help with strategy, management and systems integration. How much does the SMM vendor charge for these services, and what is the probability that you would use/need them?
- Sometimes there are project management fees associated with solutions installation or integration. You will want to clarify this in the negotiation.
- There can also be fees related to regular maintenance and upgrading of the technology platform. The key is to know exactly what you are getting with your SMM platform, and what you will be charged for. The last thing you want is to be surprised once you’ve signed a contract and begun working with the SMM solution.

Evaluating Vendors

Different Types of SMM Vendors

The following is an outline of the types of vendors that are now selling SMM and related solutions. You will want to narrow down your selection to focus on the specific category of SMM providers that best meets your organization's current and future needs:

- **Technology Platform Providers** – There is a big push right now for some of the larger technology players to offer SMM functionality often through acquisitions of pure-play vendors. Industry consolidation is inevitable. In some cases it can benefit customers, if the consolidation results in greater innovation and investment in the SMM technology. In other cases, it can detract from the solution, particularly if digital marketing is not the primary focus for the acquiring company. Readers of this guide should evaluate these providers on a case by case basis, and ask a few key questions: Does the parent company (acquirer) have a reputation for leading edge innovation, or is it an “old guard” vendor with a legacy technology architecture? Are digital marketing and social media part of their business DNA, or are they focused in a different area? Does the acquired SMM vendor have proven expertise in generating real results for their customers?
- **Niche SMM Solution Providers** – Given the trend toward consolidation in the industry and the entry of larger technology platform providers, readers of this guide need to carefully evaluate whether a niche vendor is the right choice for them. Continued innovation in SMM technology will require significant sustained investment. If you are considering a niche vendor, you'll need to assess whether it has sufficient market traction and resources to maintain long-term viability.
- **Social Media Monitoring/“Listening” Providers** – This group includes the companies that were founded largely to monitor and manage Twitter activities. Many have now added some SMM features. If you consider this type of vendor, you need to drill down into their offering to determine how their solutions match up with other providers.
- **Social Media Agencies/Consultants** – Naturally, the industry is awash with agencies and consultants who not only use the SMM technology platforms (typically from the providers mentioned above), but also provide consulting and creative services. For some companies, outsourcing SMM activities to an outside agency is a good way to go. However, most clients will want to implement their own in-house SMM capability, and then, if necessary, augment that function with consultative and creative support from outside firms.

- **Marketing Automation Providers** – The marketing automation software companies have also started to jump into the SMM market, but with varying degrees of enthusiasm and success. Given the growing importance of the social media channel, they see the value of providing an end-to-end marketing and lead generation solution that includes SMM capabilities. Here again, it is important to understand what you are really getting from this type of vendor. For many of these marketing automation players, social media marketing is mainly just a new feature, not the primary focus of their business.

VENDOR QUALIFICATIONS

Social media is a highly dynamic and fast-changing space. Beyond their current product offerings, the vendors you are evaluating should have a demonstrated focus, commitment, and track record in social media marketing. Areas to evaluate include:

- **Experience:** How large is their base of paying SMM customers? How many campaigns has their platform run?
- **Focus:** Is SMM part of their core business? Or is their core business in an area unrelated to digital marketing?
- **Innovation:** Do they have a track record of SMM innovation?
- **Reputation:** Do they have a reputation of being responsive, easy to work with, and providing excellent service and support?
- **References:** Can they provide references and case studies of proven customer success?
- **Viability:** Do they have the resources and commitment to ensure long-term viability?
- **Vision:** Does the vendor have a compelling vision of where social media marketing is headed and a credible roadmap to get you there?

Vendor Evaluation and Selection Process

Following is a step-by-step approach for mapping out your vendor evaluation process and ultimately selecting the SMM solution that is right for your company. A typical timeline for completing this process end-to-end is 6-10 weeks:

Assess Requirements 1-2 weeks	<ul style="list-style-type: none"> Establish evaluation team from stakeholder groups (marketing, sales, etc.) Define business objectives for SMM system Create and prioritize software requirements checklist (refer to "Solution Checklist" provided in this guide)
Research 2-4 weeks	<ul style="list-style-type: none"> Search vendor websites (download vendor collateral, view demos) Read industry publications and reviews Attend social media conferences and trade shows Ask industry colleagues for recommendations Develop a short list of potential vendors (2-3)
Evaluate 2-3 weeks	<ul style="list-style-type: none"> Use your prioritized "Solution Checklist" as basis for evaluation framework (weight features per your specific requirements) Invite short-listed vendors to provide product presentation and demo Evaluate vendors based on your evaluation criteria (your weighted Solution Checklist and Vendor Qualifications)
Select 1 week	<ul style="list-style-type: none"> Select vendor that provides overall best performance against evaluation criteria Negotiate pricing and define on-boarding and deployment plan

Issuing a RFP: Pros & Cons

Some organizations may choose to develop and send out a "request for proposal" (RFP), asking vendors to provide responses to the RFP. In such a case, the "Vendor Qualifications" and "Solution Checklist" in this guide can serve as the main evaluation framework for your RFP. While some organizations require a RFP for software purchases as a matter of policy, there are pros and cons to the RFP process. The RFP can provide the appearance of an objective process, but it can also become unwieldy and very time consuming. If you do elect to send out an RFP, keep it concise and tightly focused to ensure that vendor responses are specific and on target.

About the Author



Patrick Di Chiro is a veteran marketing and media consultant based in the San Francisco Bay Area. He is the founder and CEO of THUNDER FACTORY / Di Chiro, a marketing and media consultancy that launched in 2000. Patrick advises global companies and start-ups alike in using digital technology, content and social media to build brands, drive revenue, and create new products and profitable businesses.

Prior to founding THUNDER FACTORY / Di Chiro, Patrick served as Chief Communications Officer of E*TRADE Financial, and before that, VP of Global Technology Marketing for Visa International. Earlier, he was a Global Partner at Ketchum, the top-5 public relations firm, and director of International Marketing and Communications for American Express Company.

As a long time advocate for digital and social media in the marketing mix, Patrick is a keen observer of the convergence of technology, culture, creativity and content. He believes that this growing convergence is vital to driving the innovation that is the life blood of marketing – and business overall. Patrick's email is Patrick@ThunderFactory.com.



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