Digital Communication Modernization 2021-2024

Social Media Management
End of Project Review

Peraton Team – 09.20.2021

Project Goals and Objectives

The overall goal for this project is to evaluate select program business processes and provide tool solutions recommendations for social media content management.

Objectives included:
- Project visioning and strategic planning
- Process analysis to identify and evaluate current social media content management processes across the agency
- Product analysis to identify and evaluate potential social media content management tool solutions across the agency
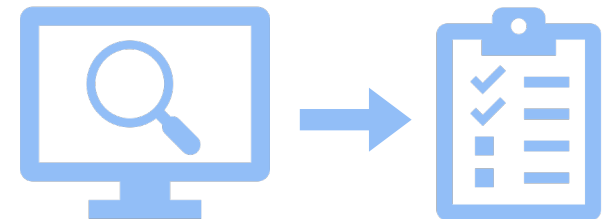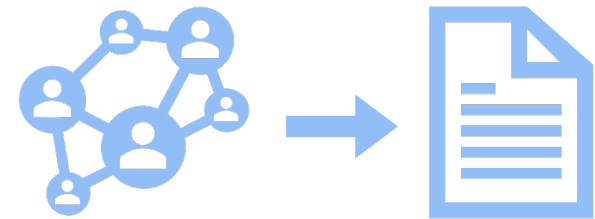
Process Analysis
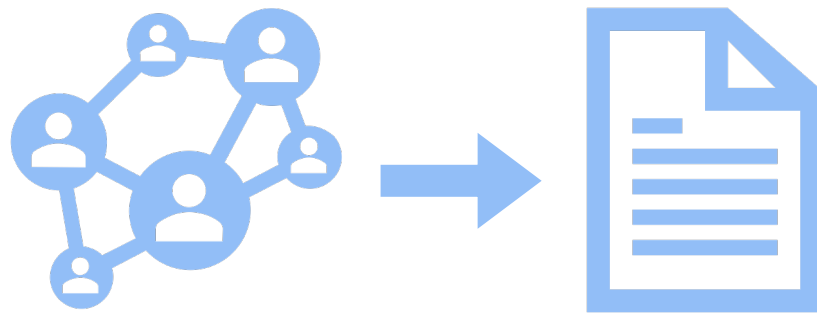
Process Analysis: Explore

Interviewed the following CIO contacts:

DMB
- Jay Dwight
- Michelle Williams

CPR
- ER Ethan Roker
- Sally Everlane

NCIRD
- EG Erin Gotzer
- AD Alycia Dannon
- KB Karrington Ballen

CGH
- Erik Friedman
- Shelley Krimtom
- Brittane Thomas

NCICP
- Catherine Stellar
- Amy Reel

NCEZID
- Iman Lemmon
- Meaghan Dessek

NCCDPHP
- HK Kelly Handline
- Catherine Johnson
- Suzanne Hatfeld
- David Flagton
- Tonya O'Reilly
- Nicole Evans
- Catherine Brailer

CSELS
- Katheryn Wiedmon
- Lowery Jackson

NCCBDDD
- LB Laura Zauderer Baldwins
- Patricia Swade

NCEH
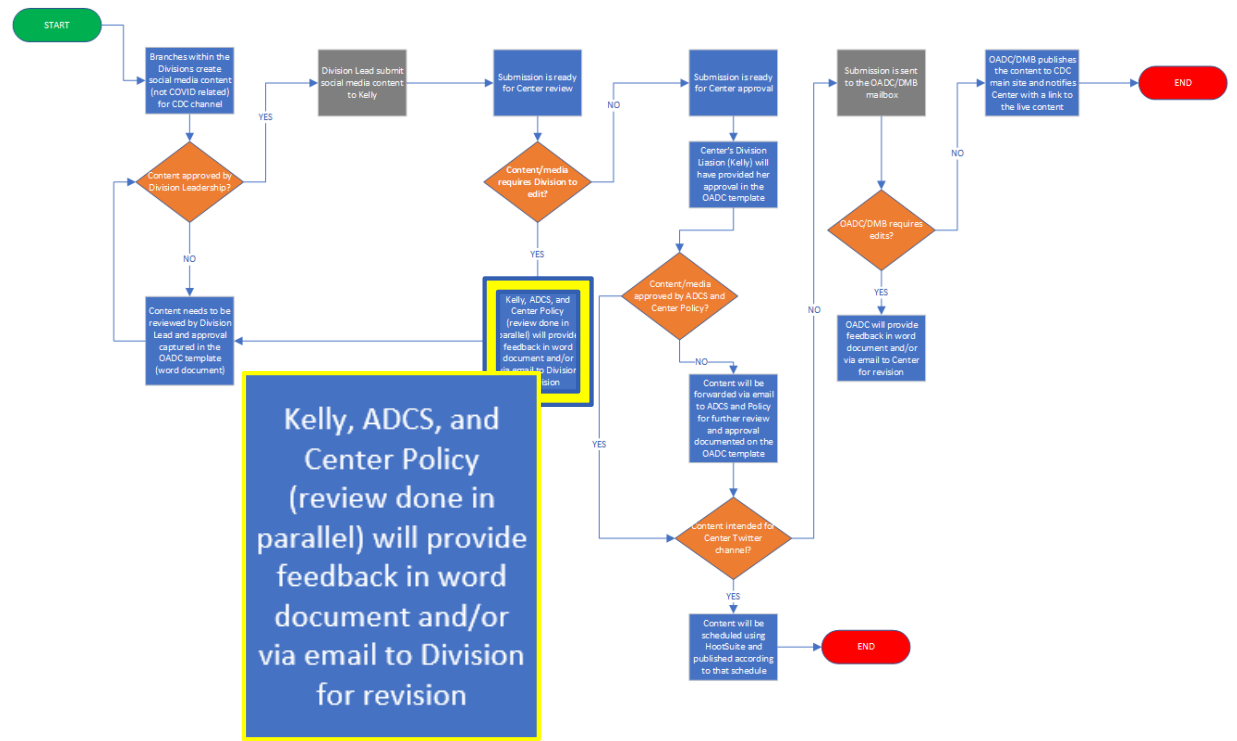- Germaine Villas

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Process Analysis: Analyze

Sample Process Flow: NCCDPHP

Process Analysis: Compare

High Level Process

Programs are following the same baseline social media process:

Programs to Internal Channel Social Media

Divisions and/or HCSO creates content	Content submitted to HCSO for review/approval	HCSO reviews content	HCSO approves content	HCSO publishes to internal channels
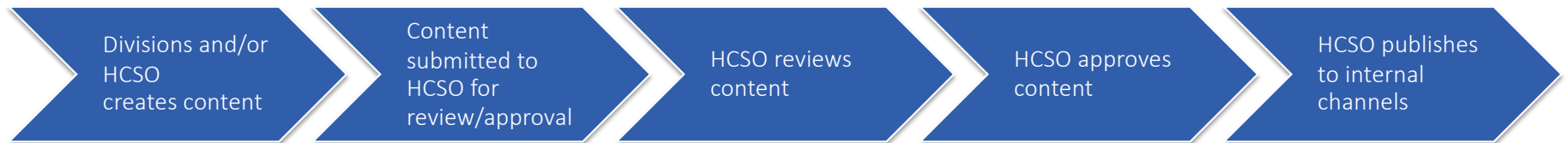
Programs to CDC Main Channel Social Media

CIO submits approved content to DMB for review/approval	CIO receives editorial suggestions from DMB	CIO receives approval from DMB	CIO receives link from DMB to the live content

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Process Analysis: Compare

Approval Stages

Programs have differences in the number of review and approvals necessary for publishing

Program	Division Leadership	Cross-Center Clearance	Center Liaison	Division Liaison	Center	ADCS	Center Policy	Center Director	Translation
CPR	X	X			X	X			
CGH	X	X			X				
NCICP	X	X		X	X				
CSELS	X	X			X				
NCCBDDD	X	X			X			X	X
NCIRD	X	X			X				
NCEH	X	X			X				
NCEZID	X	X			X				
NCCDPHP	X	X	X		X	X	X		

Process Analysis: Compare

Common Pain Points/Needs

- Inability to collaborate more across the agency ahead of events or campaigns
- Lack of visibility into other Center's processes or approach to content creation
- Limited sharing of best practices among programs
- Out of date audience analysis
- Prefer characteristic guidelines from DMB for social media content
- Manually creating metric reports is time and resource consuming
- Lack of visibility into how submissions are tracked throughout the process
- Limited number of licenses available presents a bottleneck
- Cross clearance presents delays in the process

Process Analysis: Recommendations

Improve Collaboration

- Increase visibility to agency wide content planning strategies.
- Provide an efficient review and approval process.
- Expand integration with existing and future systems.

Streamline Scheduling

- Manage and post to a variety of social media channels.
- Incorporate web and other online content.
- Organize media content across multiple programs.

Improve Engagement
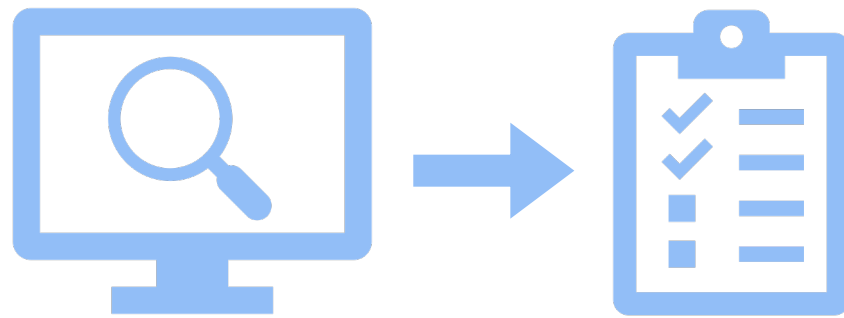
- Simplify follow-up with social media mentions, comments, and messages.
- Monitor social media strategies with in-depth analytics and reports.

Ensure Compliance

- Stay up-to-date with social media guidelines.
- Following Freedom of Information Act (FOIA) guidelines
- Meeting CDC security requirements.

Product Analysis

Product Analysis: Explore

External Research

Which social media management tools are:

- Top rated tools for 2021
- Able to handle large team collaboration
- Best for Instagram posting
- Open to Integration

Requested tools:

- Sprinklr CXM
- SocialOomph
- Sprout Social Collaboration Feature

Internal Research

- Reviewed MVP requirements documentation
- Attended Demos of Sprout Social and MVP Tools
- Participated process analysis interviews
- Products with Federal-compatible TOC agreements

Product Analysis: Analyze

Narrowed Focus

5 Social Media Management tools were selected based on high rankings and features that support collaboration, scheduling, publishing, and analytics.

Conducted Competitive Analyses

Answer the "what" and "how" each tool manages the following features.

- Organization and user permissions
- Collaboration and approval workflows
- Creating and scheduling posts
- Managing media
- Analytics

Hootsuite™

Open to customizations with Its public API plus FedRAMP certified.

ZOHO SOCIAL

Streamline content across several social media channels.

agorapulse

A feature-rich tool that helps manage multiple agencies.

Loomly

Supports large team collaboration and a variety of online content.

ContentCal

A complete online planning calendar at the heart of your workflow.

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Product Analysis: Examine

Hootsuite™

+ Strengths

Meets Security Compliance
- FedRAMP certified

Open Integration
- Connect to 3ʳᵈ party tools or customize your own tool with their public API.

Supports Large Team Collaboration
- Create custom team user and management permissions.
- Option to configure a 3-stage approval process.

Valuable Post / Media Features
- Set a time expiration date for media assets.
- Upload SRT files.

– Weaknesses

Expensive for Large Teams
- Business subscription starts at $599 per month for 5 users and 35 social accounts.

Lacking Updated Features
- UI is outdated and workflows are clunky.
- Relies on 3rd party tools to fill in feature gaps.

Planner (Calendar) is Limited
- Advanced Analytics is an add-on feature.
- Doesn't show posts created directly in social channels.
- Can't export calendar (planner) only individual post types (scheduled, require approval, rejected, etc.).
- Can only filter by social channels.
- You can't publish a scheduled post now.

Product Analysis: Examine

ZOHO SOCIAL

+ Strengths

Valuable Post / Media Features
- Can export individual posts and stats as PDF or PNG and send an Email.
- Free Client Roles?
- Can tailor posts for every channel without duplicating (beta).
- Allows bulk scheduling via CSV.

– Weaknesses

Lacking Post / Media Features
- Can't share a post across brands (groups).
- No tagging or labeling media.
- Can only view file size and name.
- Can't select an image to create a post.
- No hashtags suggestions.
- Awkward pre-defined time slots.

Limited User Permissions
- Can't invite members to multiple brands with one invite.
- No multistage approval process.
- Can't assign a member to respond to post DMs or comments.

Minimal Calendar
- No list view.
- Unable export calendars.
- Can only view schedule and unscheduled posts.

Product Analysis: Examine

agorapulse

+ Strengths

Expanded Integration

- Tray.io - Integrates SaaS applications or services with their universal connectors. Quickly configure them to connect to any API, database, webhook, and more. Examples: Microsoft Teams, Active Directory, SharePoint, Office 365, OneDrive.

Supports Large Team Collaboration

- Unlimited "guest" access to shared calendars.
- Guests can accept, reject, and add comments to posts that area assigned to them.
- View multiple groups in calendar view.

Valuable Post / Media Features

- Option to schedule multiple dates, and times for a post.
- Create hashtag groups to reuse.

- Ability to group media into Folders and Subfolders.
- Select a thumbnail from a video or upload an image.

– Weaknesses

Lacking Post / Media Features

- You can't export calendar as CSV or PDF. Note, may not be necessary if it's used as a master calendar.
- No information on previous post in the media library.
- Does not support Pinterest.
- Unable to change the social channel for saved posts before publishing.

Product Analysis: Examine

Loomly

+ Strengths

Supports Large Team Collaboration
- Competitive pricing starting at $249 per month for 26 users and 50 social media profiles.
- Zapier integration helps automate workflows (Microsoft Teams, Outlook, WordPress etc.).
- Batch collaboration - let teams know when an entire calendar is ready for review.
- Create custom workflows and user permissions.

Variety of Channels
- Standard social media channels plus YouTube, Tumblr, Reddit, WeChat, Web, Blogs, Newsletter and media publications.

Valuable Post / Media Features
- One click to fine tune every post's channels.
- Informative post optimization tips
- Create hashtag collections or select from trending and suggested #s.

Informative Calendar (List View)
- Approve multiple posts or add a new collaborator to multiple posts at once with bulk actions.
- Inline actions - Change Status, Assign, Comment, Duplicate post to same or another calendar, and Delete

– Weaknesses

Lacking Post / Media Features
- Native posts aren't visible in calendars
- Does not support bulk scheduling.
- Unable retweet a Twitter post.
- Can't export post links.
- Audience engagement feature has a barebones UI.

Product Analysis: Examine

ContentCal

+ Strengths

Variety of Channels

- Facebook Groups, Twitter profiles, Instagram Pages profiles, LinkedIn Pages, LinkedIn Showcase Pages, Pinterest, Facebook groups,
- Planning channels – Plan content YouTube, Web, Blogs, Email campaigns, Newsletters, etc. May be able to post with Zapier integration.

Supports Large Team Collaboration

- Competitive pricing starting at $96 per month for 10 users and 90 social accounts.
- Create custom workflows and user permissions.
- Option to configure a 3-stage approval process.
- The National Health Service (NHS) is a client, so they have experience working with a large government agency.

Valuable Post / Media Features

- Easy to find and reuse previous posts.
- Able to export calendars as a CSV.
- Options to pause all content.
- Create custom Snippets (phrases) to reuse.
- Option to create a post and send to Facebook Drafts so you can access native only features.

– Weaknesses

Additional Costs for Some Features

- Advanced Analytics is an add-on feature.
- Engage (social inbox) is an add-on feature

Lacking Post / Media Features

- Doesn't suggest optimal post times and dates.
- You can only create hashtags and tags in calendar setup.
- Does not show history of status changes, just comments.
- Native posts aren't visible in calendars.

Product Analysis: Compare

Comparative Analysis of Requirements

Requirements were prioritized as Essential, Highly Preferred, Preferred, and Nice to Have. Note, Sprout Social and MVP were included for comparison.

Comparative Scores

MVP was not included in the ranking because it's in beta.

Total Possible Score – 386:

1. ContentCal – 347
2. Sprout Social – 329
3. Hootsuite – 328
4. Loomly – 312
5. Agora Pulse – 294
6. Zoho Social – 248

Requirement	Priority	Sprout Social	Hootsuite	Loomly	ContentCal
Content Management / Strategy					
View Drafts, Need Approval, Scheduled, Published posts on **calendar**	Essential	Yes	Yes	Yes	Yes
Integration with a master publishing **calendar** (TBD) that includes web content and potentially other content types such as mobile post notifications	Essential	No	Somewhat - open to customization.	Yes - possible master calendar because you can create content for standalone Online Channels (Newsletter or media publications) Offline Channel: (print magazine)	Yes - possible master calend... you can create content for ... Online Channels - email, blo... etc.
Filter **calendar** view by keywords, post status, profile/account, date range, etc.	Essential	Yes - Social Profiles, Date Range, Post Types, Tags	Somewhat - Social Accounts only	Yes - Date Range, Status, Format, Assignees, Channels, Labels	Yes - Tags, Post creators, so... date range, post with or wi... comments
View **calendar** by selected week, month, list	Preferred	Yes	Somewhat - No monthly, or list view	Somewhat - No weekly view	Yes
DMB and programs can view an agency-wide (CDC) social media **calendar** (with editing restricted per access rules)	Preferred	Yes - by adding team members (users) - no limit to # of users other than budget. Sprout Social's per user price is very high!	Yes - by adding team members (users) - no limit to # of users other than budget.	Yes - Can invite collaborators to view specific or all calendars. A user who joins several calendars on the same plan only	Yes
Workflow Support					
After program review and appro... workflow supports optional **han...** for publishing by DMB or agency					Yes - Google sheets. BUT th... programs can create posts ... ContactCal for DMB to appr... also a Contributions feature...
System allows **return of posts** to... reviewer or post author (DMB or... any point before publishing					Yes
For each post, system maintains ... of all user activities and commen...					Somewhat - Shows comme... resolved status. Does not sh... status changes
System supports exporting of pub... calendar (including core post co... and/or PDF					Yes - PDF
System supports exporting of pub...					Yes - Individual calendars

Category (# of Requirements)	Highest Score	Lowest Score
Content Management / Strategy (5)	ContentCal	Zoho Social & Agora Pulse
Workflow Support (12)	ContentCal	Zoho Social
Post Creation (21)	ContentCal	Zoho Social
Publishing (7)	Sprout Social	Zoho Social
Media Management (6)	ContentCal	Zoho Social
User Management and Integration (7)	Hootsuite	Zoho Social
Metrics / Reporting (5)	Sprout Social	Zoho Social

Product Analysis: Recommendations

Hootsuite™

Doesn't Live Up to Expectations

It checks a lot of boxes but it's expensive for large teams, requires 3rd party tools to fill in feature gaps and the user interface (UI) is out of date, clunky and buggy.

agorapulse

Not the Right Fit

The ability to have free unlimited "guest" access to shared calendars is its biggest advantage but it lacks the ability to customize workflows and user permissions.

ZOHO SOCIAL

Inadequate as a Stand-Alone Tool

Zoho Social probably got so many high rankings was because it was integrated with their other tools , Zoho CRM, Zoho Workspace, Zoho Campaigns, and Zoho One.

Loomly

Has Potential

Its accessibility, custom workflows, and social media features are worthy solutions for managing content across programs. In addition, Trajet's recent acquisition of Loomly may lead to more innovations.

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Product Analysis: Recommendations

ContentCal

Best All-In-One Solution for Managing Content Across Programs

Create, Approve, and Post Directly in ContentCal
- Competitive subscription plan allows more users and social media profiles.
- Customizable approval workflows and user permissions.
- Option to configure up to a 3-stage approval process.
- Expanded content planning for web, blogs, email, etc.

Opportunities to Share Content
- Export calendars as CSV.
- Import content ideas from Google Sheets.
- Advanced Analytics enables you to generate customize and branded PPT or PDF reports.
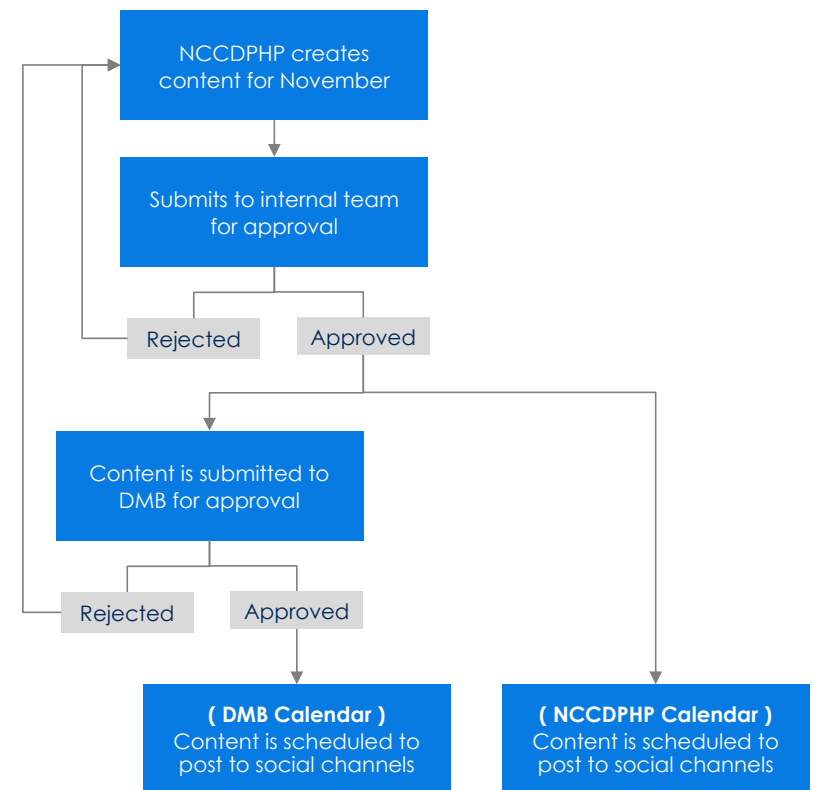
Product Analysis: Next Steps

Schedule Demos with Loomly and ContentCal

Focus on strengths and weaknesses when:

- Configuring collaboration and approval workflows
- Creating and scheduling posts to a variety of social media channels
- Managing media assets
- Customizing and sharing analytics

Explore an MVP + Sprout Social Solution

If the 3rd party solutions do not meet DMB and program team's needs, consider:

- Cost to improve and maintain MVP's creation, collaboration, and approval features
- Cost of DMB's Sprout Social subscription
- CSV bulk scheduling processes and feature limitations

Loomly

verses

ContentCal

verses
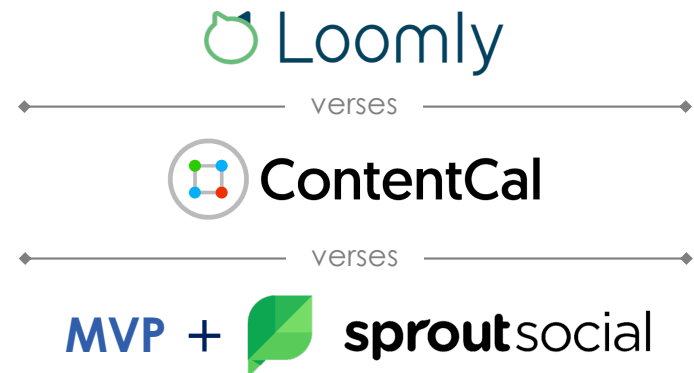
MVP + sproutsocial

	# of Users	Social Profiles	Advanced Analytics	Engage Feature	Cost per month (billed annually)
Loomly	26 *	50	Included	Included	$249
ContentCal	10 *	90	Add-On	Add-On	$96
Sprout Social	10 **	10	Add-On	Included	$2,500

* Additional users and social profiles available.   ** $250 per additional user

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