



Product Guide

Huddle up on Message Approval

The X's and O's of Sprout Social's Message Approval Workflow

Posting an unwanted message can be a disaster for your brand, but it's a problem that can be avoided. Whether you want to mitigate errant social posts, avoid grammatical errors or bolster an agency-to-client relationship, Message Approval provides a great collaborative opportunity for social publishing.

Sprout Social provides your team the Publishing tools to review, collaborate and provide feedback. With flexible, intuitive workflows and secure publishing governance, teams of all types and sizes can configure an approval system that fits their unique needs. For team members submitting messages for approval, customizable approval workflows are easily accessible, eliminating guesswork and ensuring all necessary stakeholders are included in the approval process at the right time.

Whether your objective is to ensure messaging stays on brand and compliant or you're looking to institute a system of manager or client review for social posts, Sprout's Publishing tools will help you determine a workflow that sets your team up for a winning publishing process.

Getting set up in Sprout

Arm your social team for success by inviting users, creating groups and applying permissions.

Invite users.

Group these users based on profile access.

Configure permission settings for users.

The diagram illustrates the process of setting up a new user in Sprout. It begins with the 'INVITE USERS' screen, where a user named 'Keenan' is being added. A dropdown menu shows various profile access options, with 'Can Reply' selected. This leads to a confirmation screen stating 'Keenan G. has been invited!'. Finally, the 'Additional administrative options' screen is shown, where permissions like 'GRANT MANAGER ACCESS', 'ALLOW TO INVITE OTHERS', 'ALLOW TO MANAGE MESSAGE STATUS', and 'ALLOW TO MANAGE TAGS' are configured. Below these, a section titled 'Everybody gets access to the Smart Inbox, Tasks and the Publishing calendar.' lists other features to share, including 'BASIC REPORTS', 'ENGAGEMENT REPORT', and 'TEAM REPORT', all of which are checked.

Users

Each team member has a designated role and different responsibilities within your social team. You can provide Sprout users with administrative access, assign them to certain profiles and groups, and set precise publishing and workflow permissions. Invite users at any time as your organizational and social business needs grow.

Groups






Groups are a way to organize your social profiles based on how your business operates. You can grant team members access to specific profiles, depending on their responsibilities, then organize those profiles into groups. If you have multiple locations, work with a variety of customers or have different profiles with different purposes, organizing profiles into groups and assigning user-level access will ensure there are no crossed wires or incorrect postings.

The screenshot displays the Sprout Social user interface. At the top, a dark navigation bar contains icons for Messages, Tasks, Feeds, Publishing, Listening, Reports, and Bots. Below this, a light gray header bar shows '+ invite new team members' and '+ connect social profiles' buttons, along with a 'SAVE CHANGES' button. The main content area is divided into three sections: 'YOUR COMPANY' (showing 'Sprout Coffee Co.' with 'Manage Groups & Profiles' link), 'YOUR TEAM' (listing team members: Jen J., Nate T., Tiffany B., Sundee M., Keenan G.), and 'COMPANY PERMISSIONS' (listing permissions like 'Manage profiles & permissions', 'Invite other users', etc.). A 'CREATE NEW GROUP' modal is open, showing a 'Name of Group' input field and a description: 'Groups help you organize profiles and team members for your company. You can create a group with a new or existing profile.' Below this, there are two tabs: 'FROM NEW PROFILE' and 'FROM EXISTING'. Under 'FROM NEW PROFILE', there are two radio buttons: 'Twitter Profile' (selected) and 'Facebook Page'. A 'PROCEED' button is at the bottom right of the modal.



User Settings & Permissions

Sprout's advanced publishing governance relies on user-based permissions at the profile level. Admins have the flexibility to assign each user specific publishing abilities on a per-profile basis. In addition, the **approve others** modifier enables certain team members to provide feedback and approve/reject messages. You can manage these permissions as you invite each team member, or by selecting a team member in **users & social profiles**.



Publishing Permission Settings include:

-  **No Access**
User cannot see a profile or its activity anywhere in the Sprout app.
-  **Read Only**
User can see profile activity but cannot post messages from the profile.
-  **Needs Approval**
User can see profile activity and submit posts for approval.
-  **Can Reply**
User can see profile activity and reply to inbound messages in the Smart Inbox; however, user must submit posts from Compose for approval.
-  **Full Publishing**
User can view all profile activity and publish without restriction.



Required settings for Approval Workflow include:

-  **Approve Others**
User can approve, reject and comment on messages.
-  **Full Publishing**
User can approve a message on the final step of the workflow.

Email notifications (within business settings) include:

-  **Enable Message Approval Email Notifications**
Approvers will receive an email as soon as the message reaches the step that requires their approval.
-  **Enable Message Approval (tagged in internal comments email notifications)**
User receives an email when tagged in an internal comment.

Mobile Push Notification settings include:

-  **Enable Approval Notifications**
User receives a push notification when added as a message approver.
-  **Enable Approval Notifications (tagged in internal comments)**
User receives a push notification when tagged in an internal comment.

Creating Approval Workflows

Every team has its own unique processes. With Sprout's Approval Workflows Settings, internal marketing teams and agencies can create fully customizable workflows for multiple approvers and dependencies to review and approve outgoing content at the group level. From Approval Workflow Settings, you can build and manage approval workflows. The workflows will then be accessible from Compose for anyone with Publishing permissions.

MESSAGES

TASKS

FEEDS

PUBLISHING

LISTENING

REPORTS

BOTS

Sprout Coffee Co.
Jen J.

Account

Personal

Account Settings

Billing & Plan

Security

Users & Social Profiles

Global Features

Asset Library

Tagging

Workflow Approvals

Inbox

Inbox Settings

Customer Feedback

VIP Lists

Publishing

Publishing Settings

Sprout Queue

Reporting

Reporting Settings

Scheduled Delivery

Approval Workflows for Chicago

Approval workflows allow you to create step-by-step approval processes within Sprout. You can create simple workflows with a single step and user, or complex workflows containing multiple steps with several users approving each step. [Learn more in the Help Center](#)

Create New Workflow

Default	Workflow Name	Last Edited	Steps	Actions	Enabled
<input type="radio"/>	Jen's Workflow	Dec, 30, 2018	2		<input checked="" type="checkbox"/>
<input type="radio"/>	Keenan's Workflow	Dec, 21, 2018	1		<input checked="" type="checkbox"/>
<input type="radio"/>	Nate's Workflow	Dec, 21, 2018	1		<input checked="" type="checkbox"/>

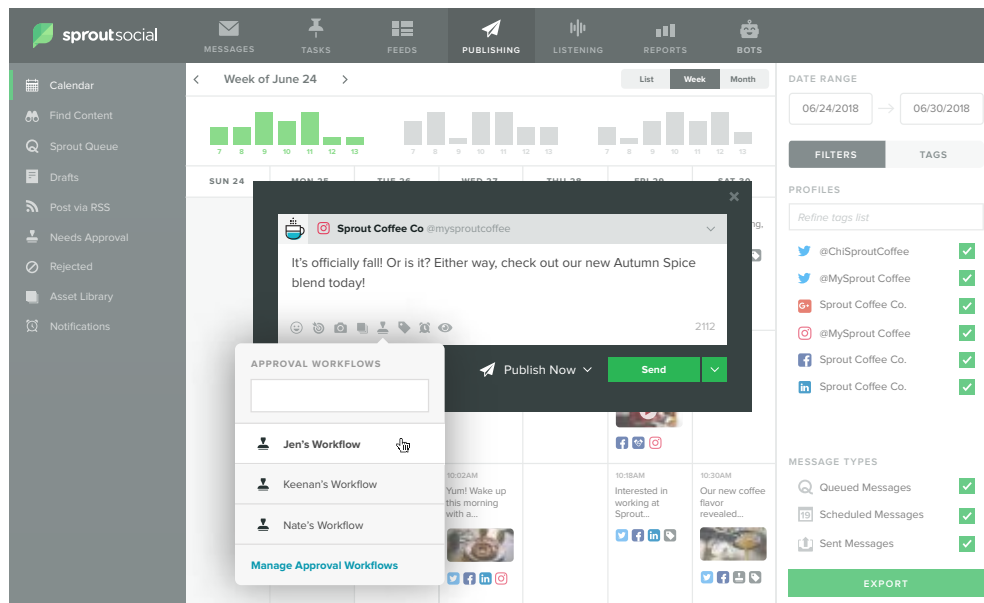
Submit for Approval from Compose

Whether content development happens internally or in collaboration with an agency, it's critical to implement a message approval workflow that facilitates team publishing and ensures consistent, on-brand messaging.

From the Compose Window:

- Create your message
- Select targeting options, attach images or video, add locations or tags—all of these settings will be applied to the message when submitted for approval
- Choose an Approval Workflow
- Select draft, queue or schedule a date/time
- Submit your message

The approver(s) will receive email, mobile (if enabled) and in-app notifications when your message is submitted. If a message is submitted for approval as a draft, the approver will be responsible for adding it to the Queue or scheduling a date and time during review.



Approve, collaborate or reject a message

After messages are submitted, approvers will find an easy-to-use interface for approving, providing feedback or rejecting messages within the Publishing tab.

Needs Approval

The needs approval section contains all of the messages waiting to be reviewed. Filters are available such as message type, only messages assigned to the specific user and messages from specific authors.

- **Approvers** can view the Approval Activity feed, as well as edit, reject or approve any message in this list.
- **Authors** can view Approval Activity, as well as view, edit or delete messages they have submitted.

Collaborate

Within the Approval Activity Feed of any message awaiting approval, approvers and authors can collaborate on providing feedback by creating and tagging specific users in the internal comments. Instead of rejecting a message that requires edits, approvers can leave specific comments to provide coaching, build an audit trail and avoid re-starting a workflow.

Rejected

Rejecting a message will prompt you to add an optional note that will be included in the email notification to the author. All rejected messages move to the Rejected tab, where they can be edited and re-submitted for approval.

Approval Activity

Clicking the Approval Activity icon in the Needs Approval or Rejected stream will open a feed that shows approval history and comments for that message, which remain until the message is approved. Authors and approvers can collaborate within this feed to view approval history, comment, edit content and notify approvers to approve or reject messages.

Collaborators will always be able to see which step of the approval process the message is currently on, the upcoming steps and the total approvals required at each step. If an approver is out of office or unable to approve a message, any approver with Full Publishing Permissions assigned to the specific message can intervene to skip the step and keep the feedback loop moving.

As an approver, you have the ability to not only edit the content of the message but also reject or approve right from Compose, Needs Approval or Approval Activity. Keep in mind that a message that was submitted as a draft must be changed to a queued or scheduled message before it can be approved.

The screenshot shows the Sprout Social 'Approval Activity' interface. At the top is a dark navigation bar with icons for Messages, Tasks, Feeds, Publishing, Listening, Reports, and Bots. Below this is a header for 'Approval Activity' with an 'ESC' button. On the left is a sidebar with 'Approval Activity' selected, along with 'Message Updates' and 'Internal Comments'. The main content area displays a draft message from 'Sprout Coffee Co.' with the text 'Light coffee actually has more caffeine than dark coffee!'. Below the message is a section for 'Jen J. • Copywriter' with a 'Leave an Internal Comment' text box and a 'Submit' button. On the right is a vertical list of approval steps: '1. Copywriter' (with 'Approve' and 'Add Comment' buttons), '2. Photo & Video', '3. Tags & Targeting', '4. Client Approval', and '5. Final Review'. The status '0 of 1 required approvals' is shown below the first step.

Review (Content Calendar)

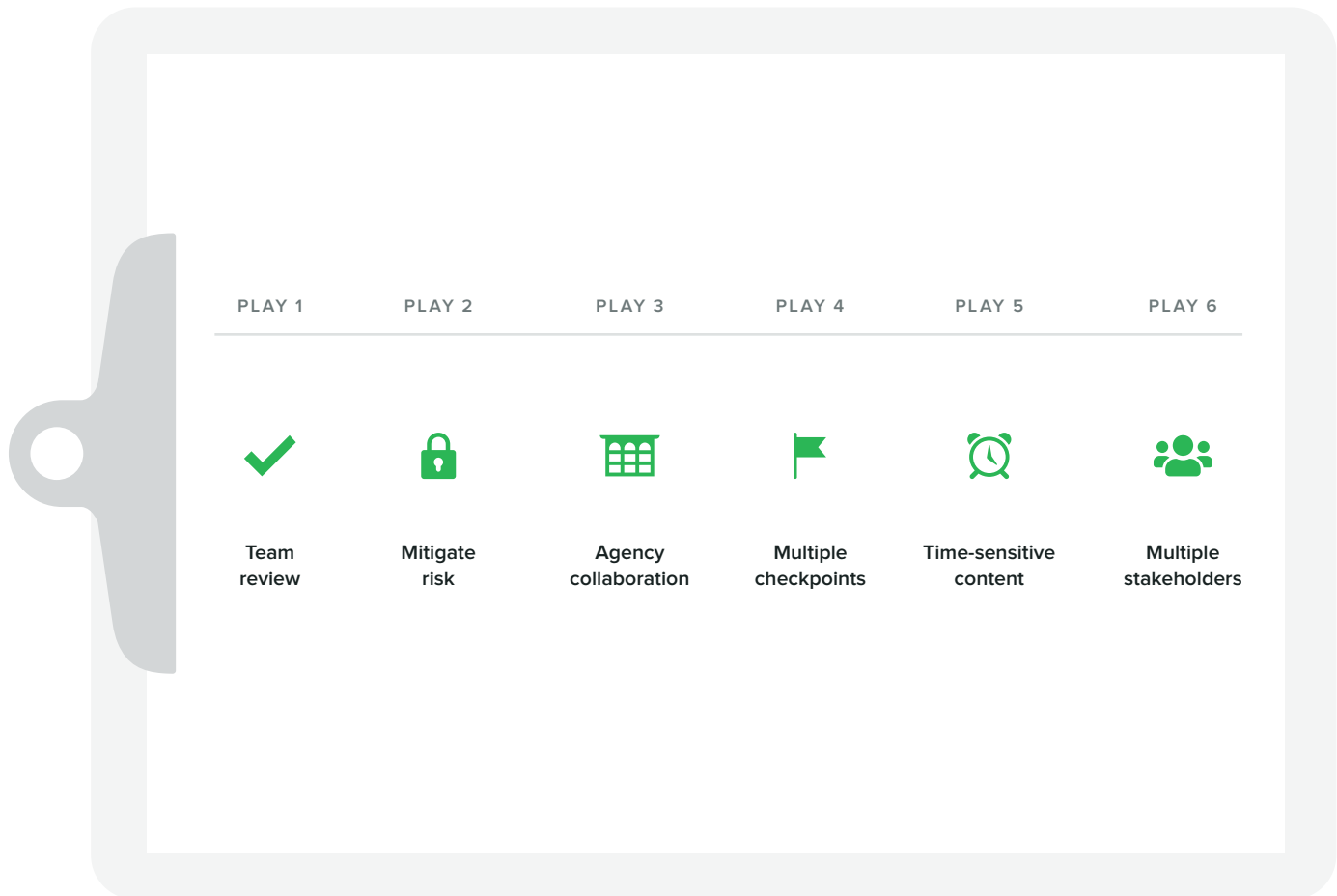
Once a message is approved, you can see how it fits in with your overall social publishing plan on your Publishing Calendar. Message approvers can make final edits and adjust message details as needed.

The screenshot displays the Sprout Social Publishing Calendar interface. The top navigation bar includes icons for Messages, Tasks, Feeds, Publishing, Listening, Reports, and Bots. The left sidebar lists various functions: Calendar, Find Content, Sprout Queue, Drafts, Post via RSS, Needs Approval, Rejected, Asset Library, and Notifications. The main calendar view shows a week starting from Sunday, June 24th, to Saturday, June 30th. Each day's slot contains a message card with a preview image, text, and social media icons. A tooltip with an 'Approve' button is visible over a message on Wednesday, June 27th. The right sidebar features a Date Range selector (02/3/2018 to 02/9/2018), Filters and Tags tabs, a Profiles list with checkboxes for various accounts, and a Message Types section with checkboxes for Queued, Scheduled, and Sent Messages. An 'EXPORT' button is located at the bottom right of the sidebar.

Choose your play

Every team has different wants and needs for their message approval process.

Sprout's message approval workflow allows your team to be flexible and add approvers to review content as their review is needed.





PLAY 1

Team review

How can teams seamlessly collaborate on different social tasks?

The situation


Jim is in charge of writing social posts for AcmeBrand. Thayne responds to AcmeBrand's customers in the Smart Inbox and occasionally creates content. Sarah wants to give the final stamp of approval for outgoing content, but give Thayne the freedom to respond to incoming messages.


The teamwork

- Thayne is given the **Can Reply** permission to respond to messages in the Smart Inbox.
- Sarah creates a **Content Creation** workflow for Thayne and Jim to submit any outgoing content for approval.
- When Jim and Thayne submit content for Sarah's approval, she can go to Needs Approval and simply approve the message or provide commentary in the Approval Activity feed.
- In this workflow, Jim and Thayne can take on the content creation duties while Sarah can control the scheduling, timing and audience targeting.
- Sarah's commentary provides Jim and Thayne valuable opportunities to learn her preferences for ideal message content.

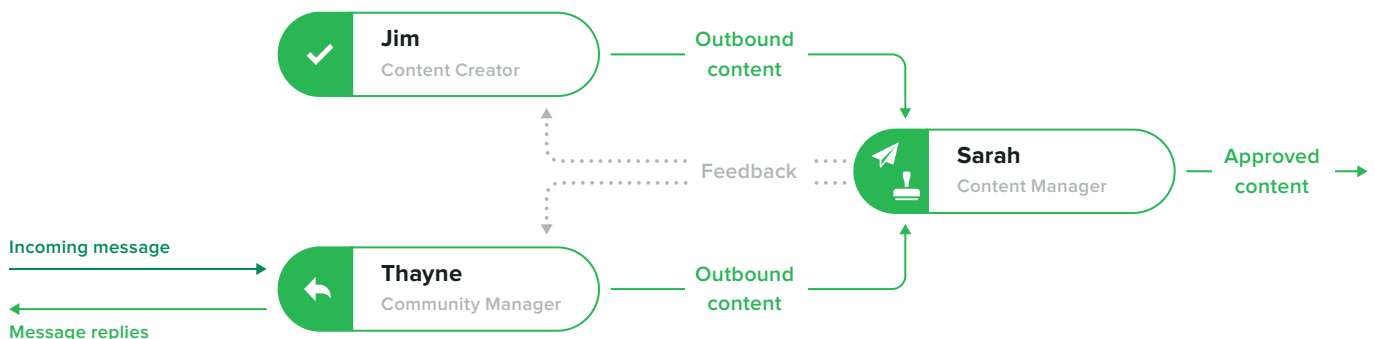
The players


Jim
Content Creator
Needs Approval


Thayne
Community Manager
Can Reply


Sarah
Content Manager
Full Publishing, Approve Others

The workflow





PLAY 2

Mitigate risk

Is your content meeting compliance standards?


The situation


The social team at Acme Bank & Insurance—an organization in a regulated industry—is required to have all its social posts reviewed by a member of its internal compliance / legal team before they can be published.

The teamwork

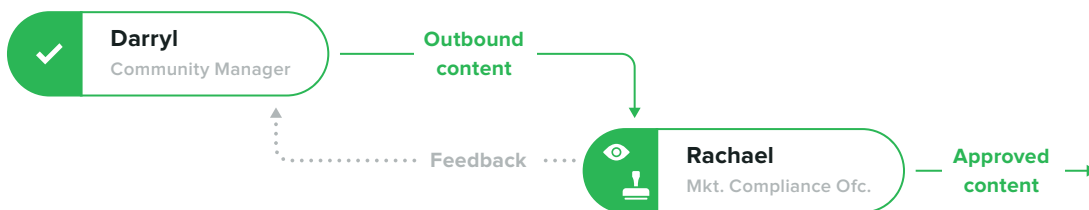
- All content from Darryl gets submitted to Rachael for final approval.
- Rachael either approves Darryl's messages, passing them through to the content calendar...
- Or, when necessary, Rachael uses commenting in Approval Activity to explain why messages were not compliant so that Darryl can make necessary adjustments.

The players


Darryl
Community Manager
Needs Approval


Rachael
Marketing Compliance Officer
Read Only, Approve Others

The workflow





PLAY 3

Agency collaboration

How do brands and agencies agree on finalized content?

The situation

AcmeBrand decides to hire Agency ABC to help with some light PR on social and to supplement its existing social marketing strategy. Agency ABC is in charge of helping mitigate PR issues in social conversations and drafting social posts, while AcmeBrand still has final say in any content published to its social platforms.

The teamwork

- With the **Can Reply** permission, Patrick helps Rebecca monitor AcmeBrand's social conversations in the Smart Inbox and reply when necessary.
- Kara and Patrick can draft content and work through Rebecca's feedback in Approval Activity until the content is approved.
- Rebecca gets the help she needs from her agency-side collaborators without any fear that she has lost control of AcmeBrand's messaging or brand voice.

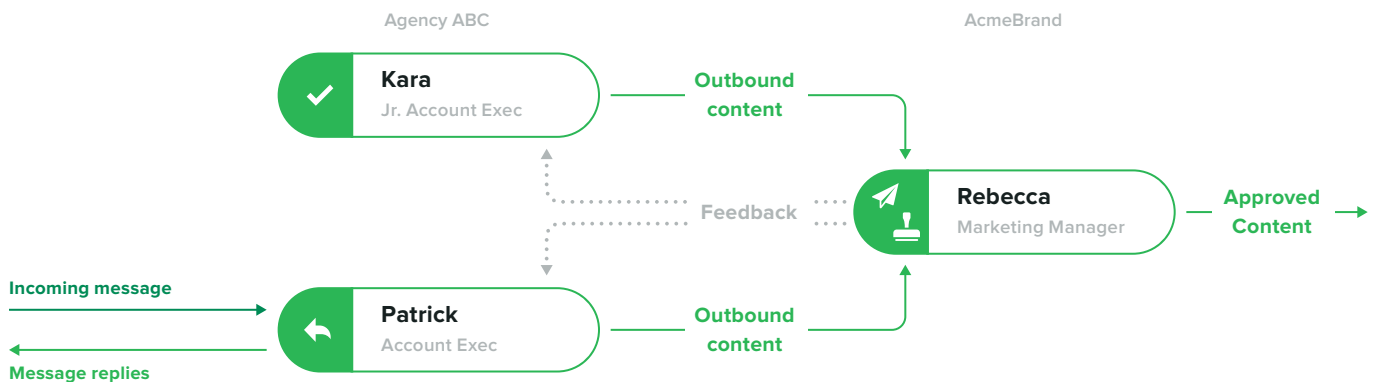
The players

✓
Kara
Jr. Account Exec, Agency ABC
Needs Approval

↩
Patrick
Account Exec, Agency ABC
Can Reply

✈️ 📌
Rebecca
Marketing Manager, AcmeBrand
Full Publishing, Approve Others

The workflow





PLAY 5

Time-sensitive content

How can teams quickly approve time-sensitive content?






The situation

Peter works as an intern and creates time-sensitive content related to relevant or trending hashtags, breaking industry news or live events. His teammates are often away from their desks or don't frequently check their email.

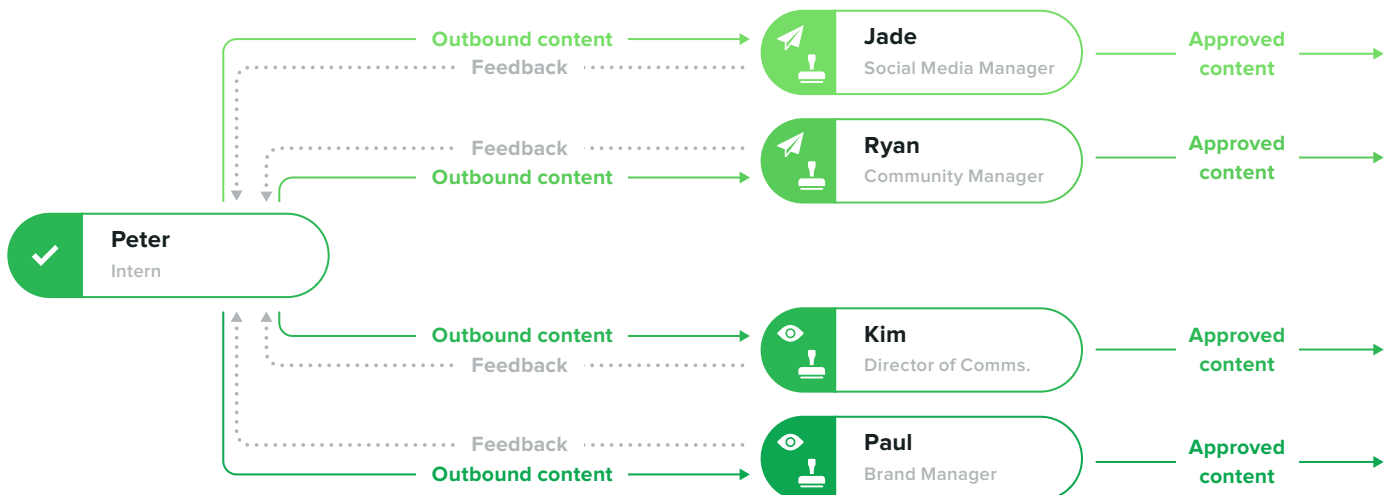
The teamwork

- Peter's teammates turn on Message Approval push notifications from Sprout's mobile app to make sure they can quickly approve content on the go.
- When creating content, Peter selects **Team Workflow** that includes Jade, Ryan, Kim and Paul.
- As Peter's teammates all receive notifications, the content can be quickly approved by whoever is available.
- Since no one on the team was available for this time-sensitive approval, Kim skipped the first step and approved to publish a timely response.

The players

				
Peter	Jade	Ryan	Kim	Paul
Intern	Social Media Manager	Community Manager	Director of Communications	Brand Manager
<i>Needs Approval</i>	<i>Full Publishing, Approve Others</i>	<i>Full Publishing, Approve Others</i>	<i>Read Only, Approve Others</i>	<i>Read Only, Approve Others</i>

The workflow





PLAY 6

Multiple stakeholders

How can teams quickly approve content with all required sign-offs?

The situation

Mariah, the Marketing Director of a banking institution, and her team are kicking off a new campaign titled **#MoneyRealTalk** geared young professionals about savings and retirement. She'll have to approve all of her team's content before passing along to Legal/Compliance and Public Relations for final review.

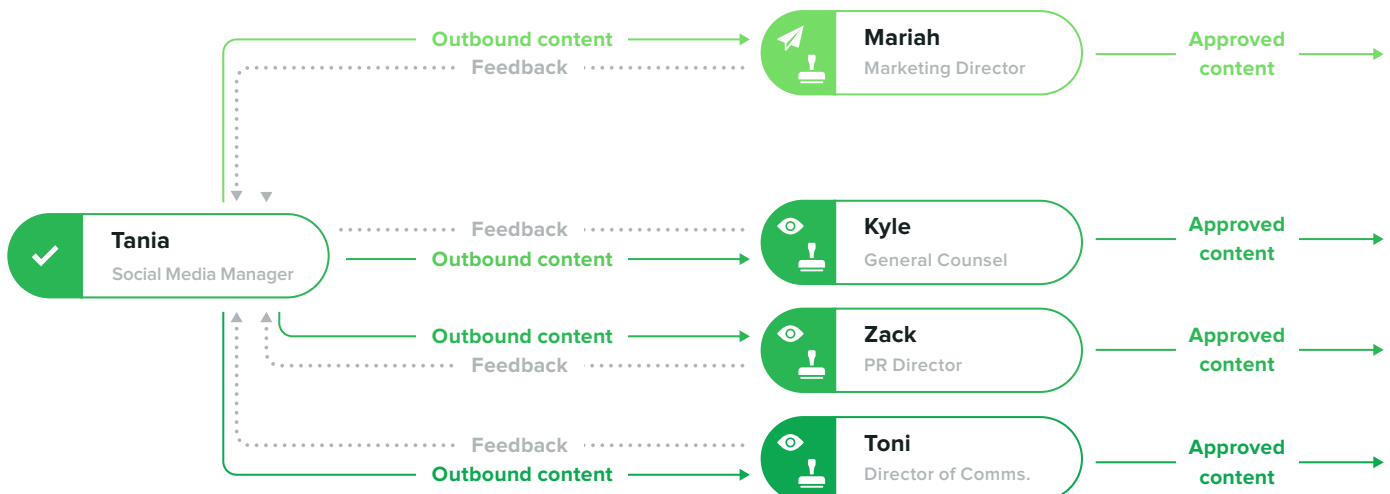
The teamwork

- Tania drafts a message and selects the **#MoneyRealTalk** Approval Workflow to begin the approval process.
- After manager review and approval, the message moves onto PR & Communications for all team members to approve.
- As the internal stakeholders receive notifications, the content can be quickly approved in the required order automatically and in a timely fashion.
- Tania's message will be scheduled after all necessary approvals have been completed.

The players

Mariah	Tania	Kyle	Zack	Toni
Marketing Director	Social Media Manager	General Counsel	Public Relations Director	Director of Communications
Approve Others, Full Publishing	Needs Approval	Read Only, Approve Others	Read Only, Approve Others	Read Only, Approve Others

The workflow





PLAY 4

Multiple checkpoints

How do brands pass content through multiple approval rounds?

The situation

AcmeBrand would like to give multiple team members a chance to provide input on content before an executive grants final approval. Alex works with Danielle on a first round of review before content goes to Bree for her feedback and final approval.

The teamwork

- Danielle creates an **Internal Review** workflow including herself and Bree as approvers in succession.
- Once the message is drafted, Alex sends content to Danielle using the **Internal Review** workflow. Danielle reviews and provides feedback on the content.
- After Alex addresses the feedback, Danielle approves the updated message and Bree is notified to review, provide commentary or approve the final content.
- Using a multiple message approver workflow, AcmeBrand has the flexibility to ensure the content goes through multiple checkpoints from essential stakeholders.

The players



Alex

Content Specialist

Needs Approval



Danielle

Campaign Manager

Read Only, Approve Others

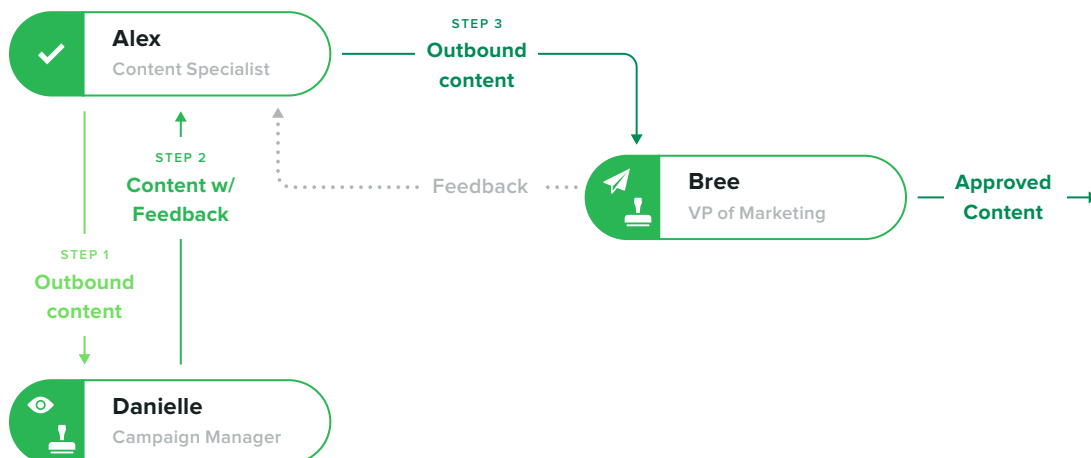


Bree

VP of Marketing

Full Publishing, Approve Others

The workflow





Teamwork for the win

Executing on a practical message approval strategy is important for brands to collaborate efficiently on social publishing. With Sprout Social you can easily review, collaborate, provide feedback, and approve messages for your social campaigns.

Now that you've put together a game plan, use your new workflow to ensure only your best messages get published.



About Sprout Social

Sprout Social offers social media management, analytics and advocacy solutions for leading brands and agencies, including GrubHub, Microsoft and Zendesk. Available via web browser, iOS and Android apps, Sprout's engagement platform enables brands to more effectively communicate on social channels, collaborate across teams and provide an exceptional customer experience.

Headquartered in Chicago, Sprout is a Twitter Official Partner, Facebook Marketing Partner, Instagram Partner Program Member and LinkedIn Company Page Partner.

Implement your message approval workflow with [Sprout Social](#).