PORTFOLIO

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The following is a summary of work relating to the federal client — Social Security Agency (SSA) Enterprise Project Management Office (EPMO) and SSA Office of Communications (OCOMM), Communications Planning and Analytics Team (CPAT)

2024-2025

Business Process Optimization

To provide effective Business Optimization support to our SSA client offices, I applied a Design Thinking and human-centered approach to evaluate needs, define pain points, generate ideas, test the solutions, and ensure improvement.

Identifying and Mapping Out Key Processes

Determining processes critical to workflow success that directly impact customer experiences, visualizing all steps using process mapping, including inputs, outputs, and decision points, and identifying stakeholders involved in each step and their roles.

Pinpointing Inefficiencies

Discovering bottlenecks, redundancies, and areas where the process could be improved.

Establishing Clear Objectives

Defining specific, measurable, achievable, relevant, and time-bound (SMART) goals for the optimization efforts.

Designing Improved Processes

Aiming to eliminate inefficiencies and improve efficiency.

Implementing Changes and Effective Communications

Putting the redesigned processes into action, ensuring proper training and communication with all teams.

Monitoring and Measuring Performance

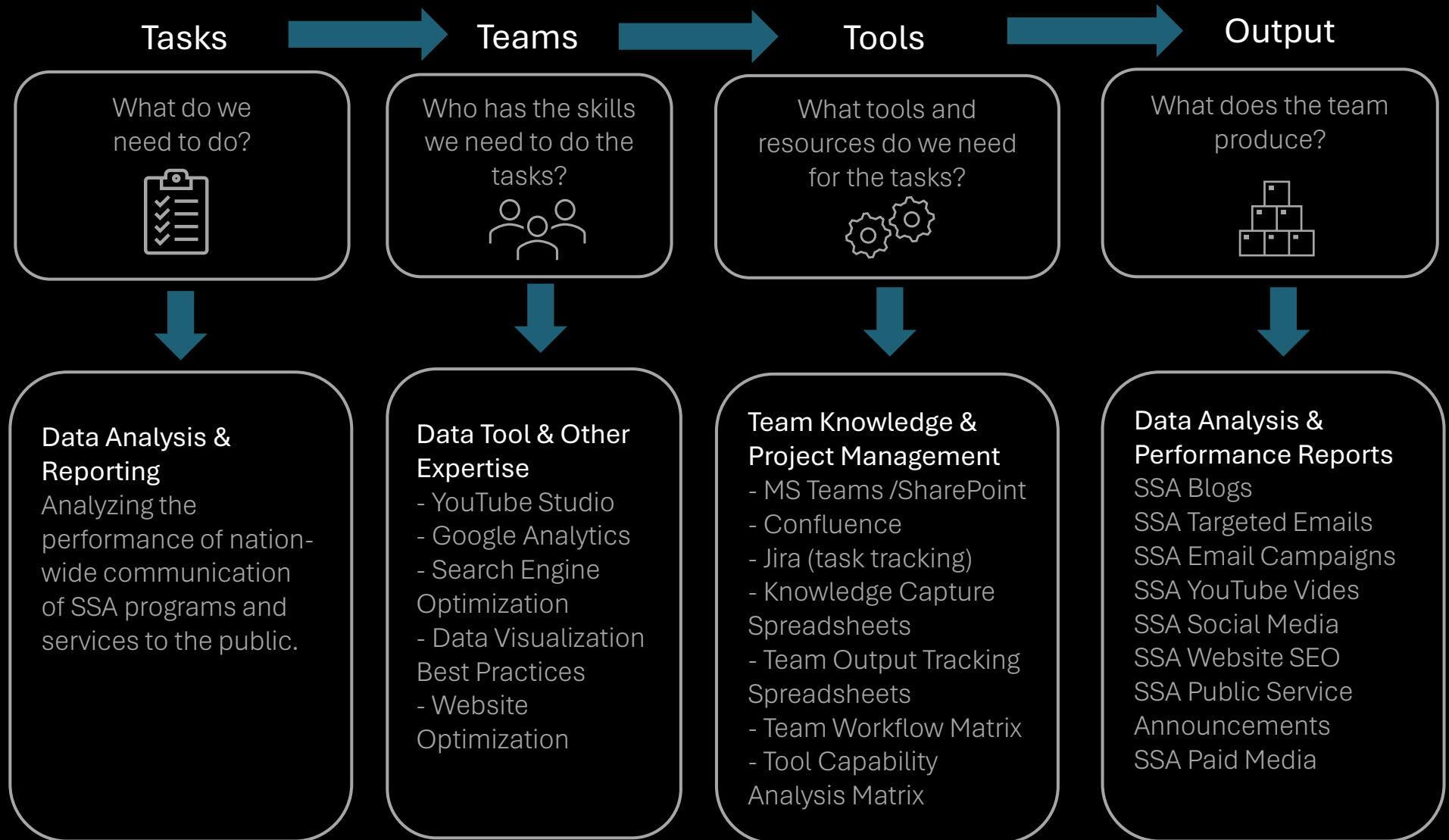Tracking key performance indicators (KPIs) to assess the effectiveness of the optimized processes.

Creating Mechanisms for Continuous Improvement

Regularly reviewing and refining processes based on performance data and feedback to ensure ongoing optimization.

Business Process Optimization

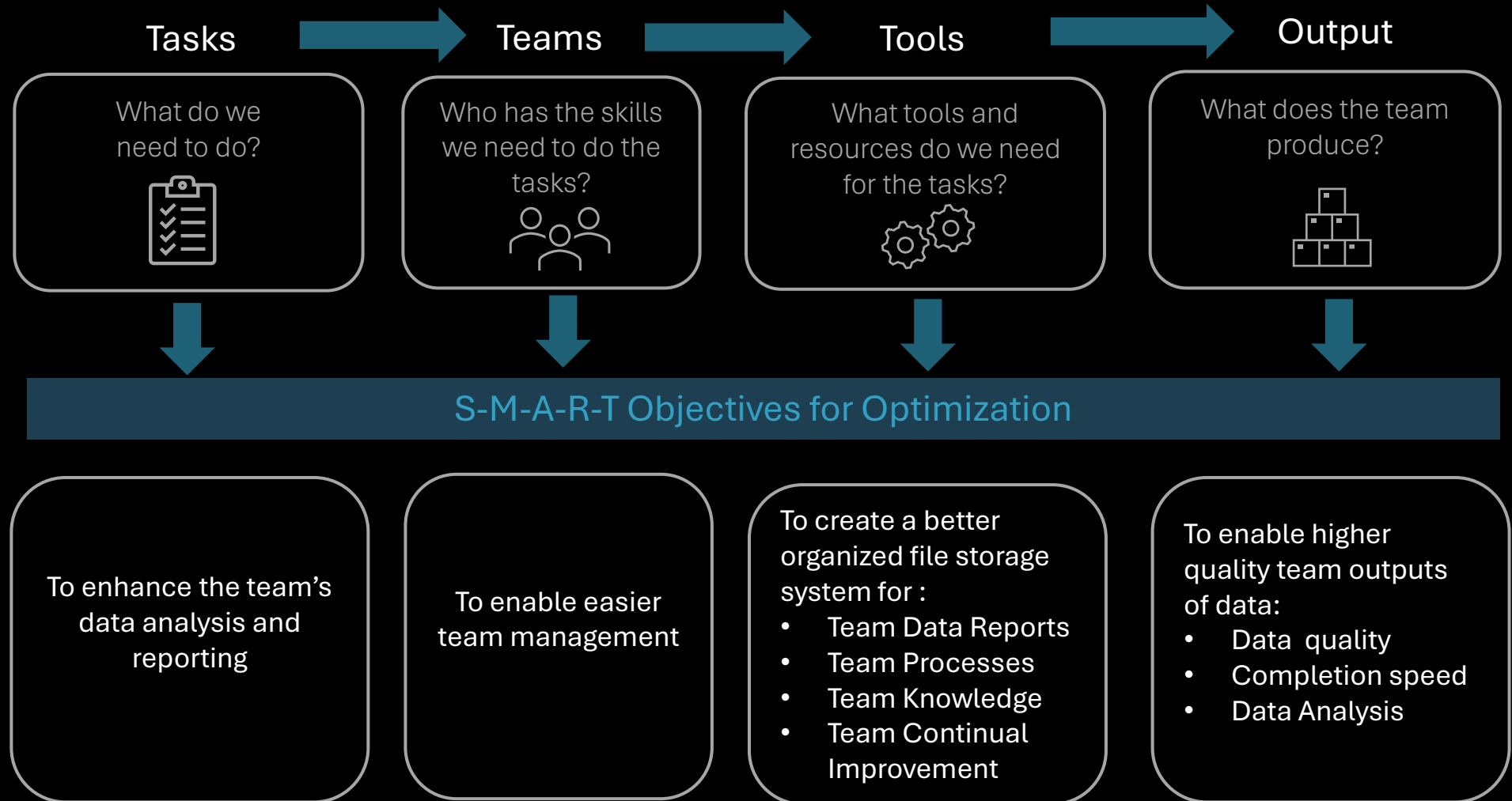## Identifying and Mapping Out Key Processes

Conducted team-wide deep-dives and daily outreach to clarify processes critical to workflow success and delivery of data analytics output to SSA-OCOMM.

Tasks → Teams → Tools → Output

Tasks
What do we need to do?

Teams
Who has the skills we need to do the tasks?

Tools
What tools and resources do we need for the tasks?

Output
What does the team produce?

Data Analysis & Reporting
Analyzing the performance of nation-wide communication of SSA programs and services to the public.

Data Tool & Other Expertise
- YouTube Studio
- Google Analytics
- Search Engine Optimization
- Data Visualization Best Practices
- Website Optimization

Team Knowledge & Project Management
- MS Teams /SharePoint
- Confluence
- Jira (task tracking)
- Knowledge Capture Spreadsheets
- Team Output Tracking Spreadsheets
- Team Workflow Matrix
- Tool Capability Analysis Matrix

Data Analysis & Performance Reports
SSA Blogs
SSA Targeted Emails
SSA Email Campaigns
SSA YouTube Vides
SSA Social Media
SSA Website SEO
SSA Public Service Announcements
SSA Paid Media

Business Process Optimization

Establishing Clear Objectives

Identified key S-M-A-R-T objectives for the team workflow and output optimization.

Tasks → **Teams** → **Tools** → **Output**

Tasks	Teams	Tools	Output
What do we need to do?	Who has the skills we need to do the tasks?	What tools and resources do we need for the tasks?	What does the team produce?

S-M-A-R-T Objectives for Optimization

To enhance the team's data analysis and reporting	To enable easier team management	To create a better organized file storage system for : • Team Data Reports • Team Processes • Team Knowledge • Team Continual Improvement	To enable higher quality team outputs of data: • Data quality • Completion speed • Data Analysis

Productivity Optimization

Pinpointing Inefficiencies

The monthly data slide summaries for SSA-OCOMM leadership showing SSA outreach performance were time-consuming to create and assure accuracy due to their graphics format.

Devising Solutions & Improving Processes

Creating a custom Team Data Management Matrix to provide a comprehensive month-to-month overview of the team's output, allowing for greater quality control prior to submission in a slide format to leadership.

Tasks → **Teams** → **Tools** → **Output**

- **Tasks:** What do we need to do?
- **Teams:** Who has the skills we need to do the tasks?
- **Tools:** What tools and resources do we need for the tasks?
- **Output:** What does the team produce?
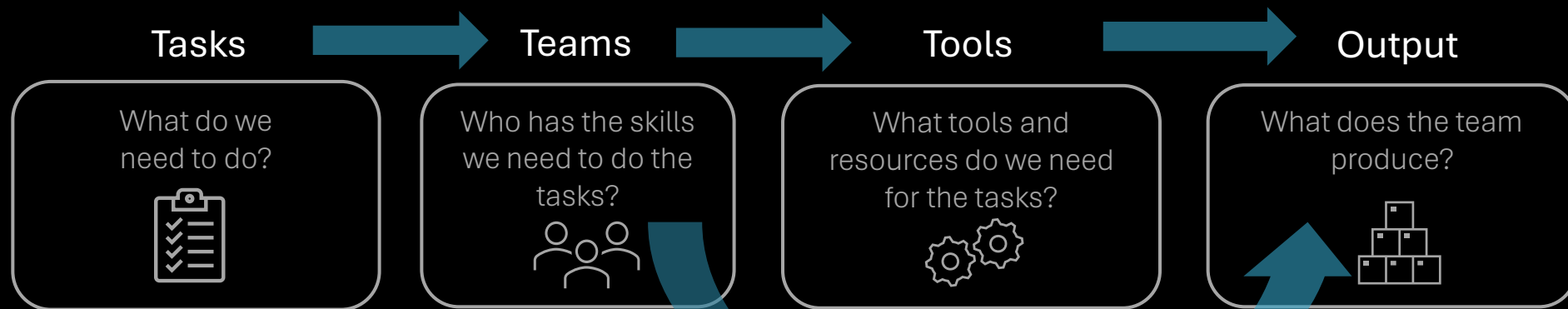
SOLUTION: Custom Team Data Management Matrix Providing a comprehensive month-to-month overview of the team's output,.

OCOMM Monthly Impact Report - October 2024 - *Data Overview September 2024*

Optimizing Tool Utility

Challenge

How to find a comprehensive solution to the lack of clarity and searchability for the team's reports, processes, content, organizational information and data?

Devising Solutions & Improving Processes

Developed a new Team Records & Knowledge Management System by implementing and aligning tool capabilities for maximum utilization of Microsoft Teams, Confluence, and Jira.

Microsoft Teams
- File Organization
- File Naming Convention
- Team Training
- Team Collaboration
- Project Management

Confluence
- Process Capture
- Process Change
- Knowledge Articles

Jira
- Assignments
- Team Reporting
- Team Management

Data Management Optimization

Pinpointing Inefficiencies

Identified a pain-point where the team had difficulty gathering data from software tools for which they had little expertise, effecting quantity and quality of data, and time spent looking for it.

Devising Solutions & Improving Processes

Detailed analysis of data gathering capabilities of a readily accessible and user-friendly tool, YouTube Studio, led to the discovery that this tools can be used by the team.

Tasks → Teams → Tools → Output

Tasks
What do we need to do?

Teams
Who has the skills we need to do the tasks?

Tools
What tools and resources do we need for the tasks?

Output
What does the team produce?

SOLUTION: Comprehensive YouTube KPI & SEO Matrix enabling the capture of additional data points using YouTube Studio Dashboards to optimize data reporting.

January 1-31, 2025	Keyword Research and Ranking							Video Optimization Analysis					Engagement Metrics								
Video Name - Top 5	Keyword	Search volume	Keyword Difficulty	Current Video Rank	Previous week Video Rank	Trend	Opportunity or action	CTR - Click Through Rate	Title Optimization Score	Description Optimization	Tag Relevance	Suggested Improvements	Avg. Watch Time	Views	Likes	Subscribers	Impressions	Impressions CTR	Shares	Comments (turned off)	Engagement Rate (%)
All Videos Data																					
How To: Transition Your my Social Security Account Retirement Application Process																					
Social Security Benefits Increase in 2025																					
How To: Get a Social Security Benefit Verification Letter																					
How To: Change Your Address When Receiving Social Security Benefits																					

Workflow Optimization

Pinpointing Inefficiencies

The team had no comprehensive overview of all their workflows and outputs, and where the resulting files could be located, making it a time-consuming process for leadership to get a summary of what the team does, or as new team members came to the team as support .

Devising Solutions & Improving Processes

Capturing information in team-wide deep dives to understand their tasks and training them on the new procedures for maintenance of the team workflow matrix.

SOLUTION: Team Workflow & Output Matrix Providing a comprehensive overview of what the team does, and where the resulting products / output files could be located.

		0	1	2	3	4	5a	5b	5c	6	7	8	9	10
TARGETED DATA REPORTS	Communications Channel *Content Delivery Networks (CDNs)*	SSA Surveys	Comparing analytics for different Emails	Public Service Announcements	SSA Blog	SSA Email Subscriptions *(GovDelivery - Granicus)*	Campaign – *Targeted Email Campaigns*	Campaign – SSI	Campaign – *Scam / Fraud*	SSA YouTube Channel	Social Media *Facebook/ Instagram*	Website - SSA.GOV	Display Marketing Ads *YouTube / Google*	
	Report Owners -Tasked		JC	JC	WN	KK / WN	KK / WN	WG / WN	WG / WN	Crosby / AJ / WG	Crosby / AJ	Crosby / KK / WN / WG	Crosby /	Owner: Crosby / WG
											Monthly Social Media Reports · Social Media (no cost - organic) - Reports			
			Comparative Emails Reports 1_EMAIL Marketing - Comparative Emails Reports_JC	PSA Reports 2_PSA Reports - Public Service Announcements_JC	SSA Blog Reports 3_SSA Blog Reports_WN	SSA Email Subscription Reports 4_EMAIL SUBSCRIPTION Reports	Targeted Email Campaigns Report 5_CAMPAIGN Targeted Email Reports	SSI Campaign Reports 5_CAMPAIGN SSI Reports	SSA-Office of Inspector General (OIG) Quarterly Scam Report 5_CAMPAIGN OIG Quarterly Scam Reports	Crosby Marketing Reports MULTI-DATA_Crosby Marketing Reports	Social Media Reports 7_SOCIAL MEDIA Reports	Crosby Marketing Reports MULTI-DATA_Crosby Marketing Reports	Crosby Marketing Reports MULTI-DATA_Crosby Marketing Reports	Search Engine Optimization Report MULTI-DATA SEO Report
	Report Cadence *Monthly / Quarterly/Annually*		W / M	W / M	M / Q / A	M				Q	Q	Q	Q	
	Data Sources / Tools used		GovDelivery website	Goodwill		GovDelivery / Granicus Reports ?				Online Video Reports 6_ONLINE VIDEO Reports - YouTube	Google Analytics / Looker Studio Looker Studio Connect to Data [google.com]	Crosby Marketing Reports	Crosby Marketing Reports	SEMrush
MULTI-DATA REPORTS	WAR Weekly Analytics Reports Projects /Initiatives /SEO/ Data Analytics MULTI-DATA_WARs - Weekly Activity Reports Data Sources:	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑
	MAR Monthly Analytics Reports MULTI DATA_MAT Monthly Activity Reports													
	Jira Reports MULTI-DATA JIRA Reports													
	Granicus Reports MULTI-DATA_Granicus-GovDelivery					☑								
	Crosby Marketing Reports MULTI-DATA_Crosby Marketing Reports									☑	☑	☑	☑	

Workflow Optimization

Pinpointing Inefficiencies

Assignments may require time-consuming clarifications via email exchanges or in meetings and messages.

Devising Solutions & Improving Processes

Developing the Assignment & Workflow Matrix as a template guiding and facilitating clear capture of task descriptions, clarifications to questions, understanding of dependencies, and links to deliverables.

Pinpointing Inefficiencies

Management had indicated some difficulties in assigning tasks due to a lack of clear understanding of team member skills and often had to repeatedly clarify the information.

Devising Solutions & Improving Processes

Team Member Skills Matrix Introduced an ongoing process of human resource skillset capture that aligns team training, knowledge, and abilities with tools needed to support workflow output.

Team Member Skills Matrix Template

Tool used for each task

| | | Adobe Premier Elements | Word for Windows | PowerPoint | Excel | Youtube, Facebook, Instagram, LinkedIn | All | YouTube Analysis | Google Analytics Producs | Sprinklr | Looker Studio | Talkwalker | Facebook, Instagram, YT | GovDelivery - Granicus | GovDelivery - Granicus | Outlook | Python - Granicus |

Skills or Task Description

| | | **Project & Comms Products** | | | | | | **Search Engine Optimization/Performance** | | | | | | **E-mail Management** | | | **Team Workspace** |

Proficiency Rating
- 1 Not Applicable
- 2 Beginner
- 3 Intermediate
- 4 Advanced
- 5 Expert

Team Member	CERTIFICATES	RESPONSIBLE FOR	Video Production	All Communication & PM Products / Web Content	All Communication Products	Project Management Spreadsheets	Social Media & Marketing	OKR-KPI Framework	SEO Analysis - videos	SEO Analysis - all	SEO Analysis - all	SEO Analysis - all	SEO Analysis - all	SEO Analysis – Social Media	SSA Blogs/website	E-Mail Management	Newsletter Delivery	e-mail / content delivery	API - Application Program Interface	MS Teams / Sharepoint	Confluence	Jira
Chavez, Anthony		Project Management																	1			
David Domzalski		Project Management																	1			
Christian, Joanne			3	3	3	3	3	1	1	1		1	1	1	1	3	3	1	1	1	1	1
Griffin, Wayne		Analyst	1	1	1	1	1	1	4	4	1	4	1	1	1	3	1	1	1	4	3	3
Johnson, Anthony											5	5							1			
Krieger, Kevin		Analyst	1	3	3	3	3	2	2	3	3	3	3	2	3	5	4	5	1	4	3	5
Martin, Katy		Supervisor	2	5	5	5	4	2	2	2	2	2	2	2	3	3	3	4	1	4	4	5
McMillon, Craig																			5			
Nichols, Wayne														5		4			1			
Sremac, Danielle	PMP, ITIL	Project Management/Comms	5	5	5	5	4	5	2	2	1	1	1	1	1	2	3	3	1	4	2	2
Whitney, John																						
Lynette Fletcher		PM & Communication Plans																				

Proficiency Rating

Project Management Process Optimization

Challenge

How to improve the Project Management process for SSA-EPMO's Discovery Project to maximize efficiency, streamline workflows and eliminate redundancies.

Solution

Customized Project Management Spreadsheet enabling a big-picture understanding of complex discovery project elements, over a 6-month period.

Readiness Optimization

Challenge

The goal was to enable the SSA-OCOMM and CPAT team to always be in a state of preparedness to successfully implement new initiatives, reporting, or changes.

SOLUTION: CPA Team Workflow Alignment with SSA-OCOMM Mission-Critical Work Analyzing all external and internal mission-critical work of SSA-OCOMM and utilizing AI tools to reword for clarity, in preparation for an anticipated agency audit.

SSA-OCOMM Social Security Administration – Office of Communications	SSA-OCOMM-OSDC Office of Strategic and Digital Communications	SSA-OCOMM-OSDC-CPA Communications Planning & Analytics Team	
Mission-Critical Work	**Mission-Critical Work**	**Mission-Critical Work Accomplishments FY24-FY25**	
		Communication Planning	**Data Services & Analytics**
Oversees all internal and external SSA communications.	Develops, implements, and evaluates the agency's communication strategies by (1) managing social media programs, (2) developing digital and print written content, (3) marketing products and services to the public, (4) outreaching to national groups and organizations, and (5) measuring effectiveness of communications activities.	Develops communications plans with agency components to achieve their project and customer outreach goals, including establishing brand strategies and standards for the agency.	Provides data services and analytics with specific media tools to track results for campaigns and other communications by monitoring performance indicators for SSA website, emails, podcasts, social media, Public Service Announcements (PSAs) and reviews, and providing recommendations for improvement.
		SSA Campaigns and Projects	**Monthly, Quarterly, Annual Performance Reports**
External Communications **SSA Communications and PI/PA activities:** Oversees all SSA communication and public information/public affairs (PI/PA) programs and produces content to provide timely information about Social Security programs. **Public and SSA Employees:** Promotes communications process between and among the public and SSA employees at all levels. **Non-English Community:** Coordinates the non-English communications activities within SSA. **Public Inquiry Response:** Responds to high priority correspondence and public inquiries. **Timely Information:** Produces PI/PA material designed to provide SSA's various audiences with timely information about Social Security programs, protections, rights and responsibilities and related issues. **Transparency:** Leads SSA in fostering transparency through citizen participation and collaboration. **Government and advocacy relationships:** Maintains relationships with national organizations, advocacy groups, other Federal agencies, State and local governments, and the White House.		1. American Indians and Alaska Natives (AIAN) 2. Baby Names 3. BSO W2 Wage Reporting 4. Enhancements 1099/1042S 5. Enterprise Scheduling System (ESS) 6. Enumeration 7. i454 (online CDR) Marketing 8. My Social Security (online services) 9. My Social Security Overseas 10. MySS Legacy Account Transition (aka ROME) 11. Overpayments 12. Protecting Personal Information- OPI Video 13. Scam Awareness 14. Sharing Our Story 15. Sharing Your Race & Ethnicity 16. SSA Mobile Wage Reporting 17. SSA Recruitment 18. Supplemental Security Income (SSI) 19. Survivor Benefits 20. Survivor Benefits-Veterans 21. Technician Experience Dashboard (TED) 22. VIPr Mobile Check-in Express 23. Withholding Rate Change – 10%	1. SSA Blog - Social Security Matters 2. Social media (paid) 3. Social media (unpaid) including Facebook, Twitter, Instagram, YouTube etc. 4. Digital Paid Media (Performance) 5. Digital Paid Media (Spending) 6. Email Marketing 7. TV Public Service Announcements (PSAs) 8. Podcast Episodes – "SSA Talks" 9. Internal Communications – (via email) 10. YouTube Analytics – (Top Videos and Performance)
Internal Communications **Planning / Advisory:** Provides guidance to SSA policies and assesses their potential impact on the public and SSA employees **Performance:** Maintains an evaluation program that measures efforts to meet communications needs of the public and SSA employees. **Assessments of Quality:** Utilizes state-of-the-art media, methods, and technology in product development and dissemination. **Employee Relations:** Supports headquarters and field employees directly or indirectly involved in SSA PI/PA activities nationwide.			

Data Optimization

Challenge

Ensuring data accuracy, aligning complex multi-format data structures with compliance, scale, monitoring, and other organizational needs.

SOLUTION: Strategic Mapping for YouTube Data Optimization
Enables easier visual comprehension of strategic and tactical objectives and KPIs for the team's YouTube data monitoring.
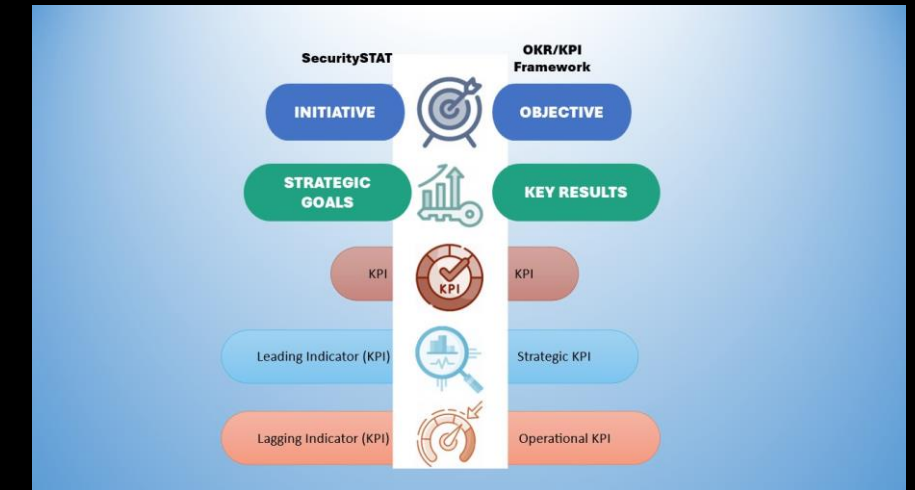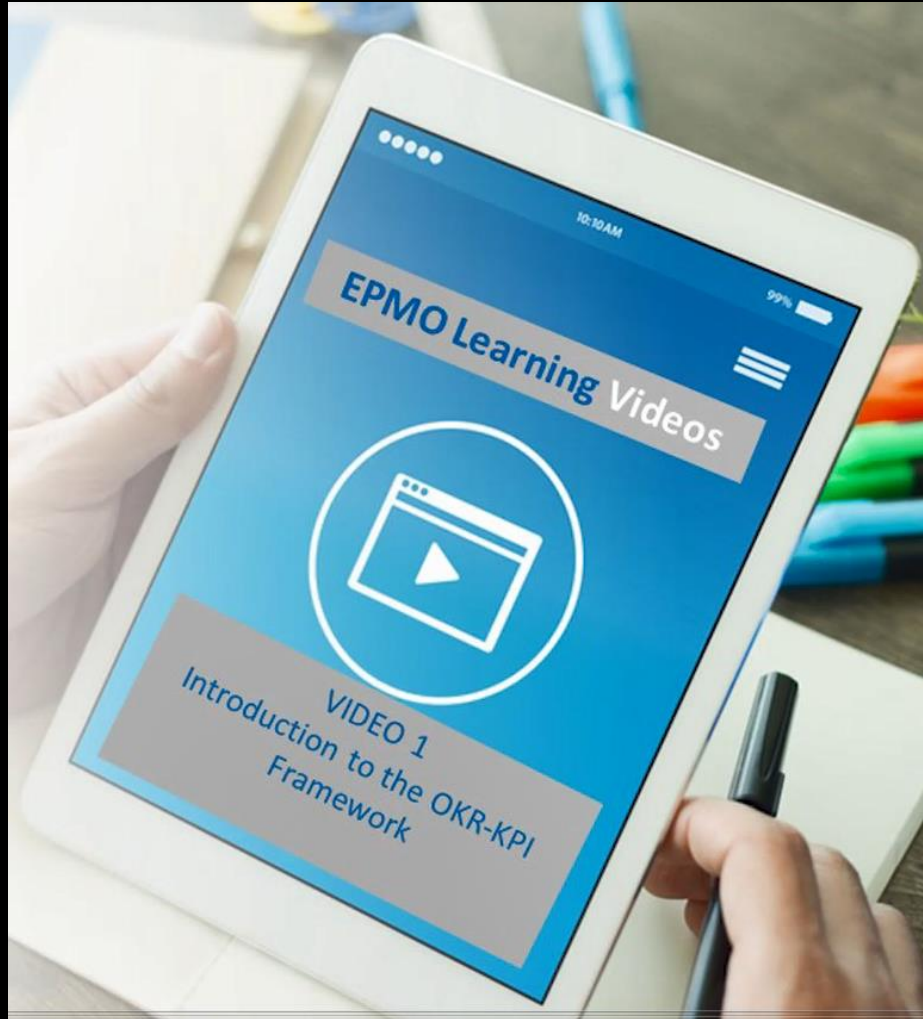
Optimizing Communications

Challenge

How to implement a new data-driven OKR-KPI focus throughout hundreds of SSA offices?

Devising Solutions & Improving Processes

Created a series of SSA Training Videos allowing large numbers of staff to understand and implement OKRs and KPIs in their work, enabling agency-wide engagement and process improvement.

Optimizing Visualization Tools

Challenge
How to enable cross-functional teams to better visualize the significant SAA Discovery Project?

Devising Solutions & Improving Processes
Created a series of roadmaps, process visuals, and mind mapping models accommodate differing team perspectives and help unify the approach.