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PORTFOLIO

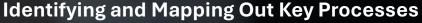
The following is a summary of work relating to the federal client — Social Security Agency (SSA) Enterprise Project Management Office (EPMO) and SSA Office of Communications (OCOMM), Communications Planning and Analytics Team (CPAT)

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.





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.



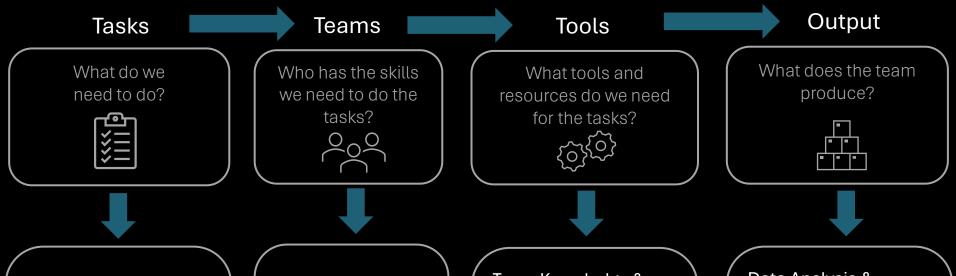
Creating Mechanisms for Continuous Improvement

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.



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 EngineOptimization
- Data Visualization Best Practices
- Website Optimizat<u>ion</u>

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

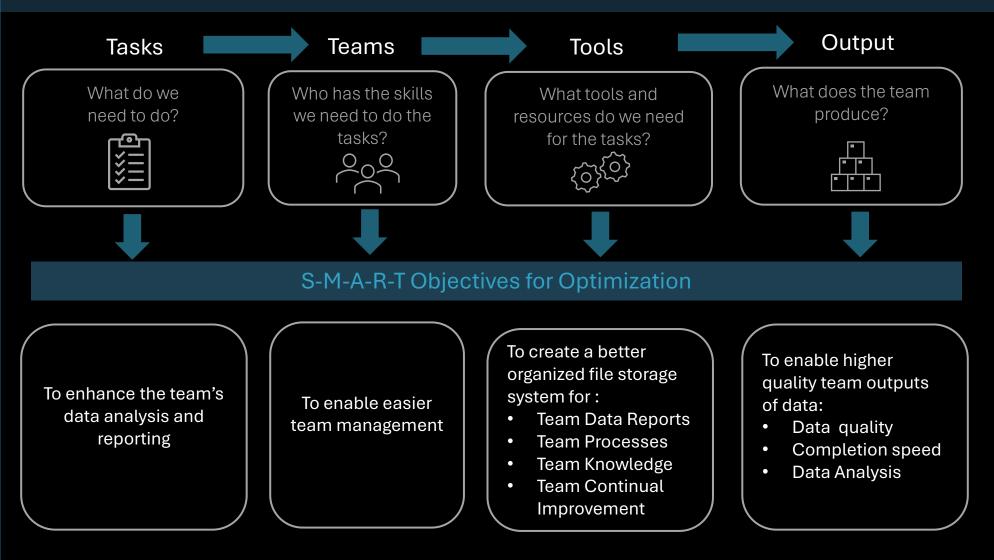
Announcements

SSA Paid Media

Business Process Optimization

Establishing Clear Objectives

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



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 monthto-month overview of the
team's output, allowing
for greater quality control
prior to submission in a
slide format to
leadership.



SOLUTION: Custom
Team Data Management
Matrix Providing a
comprehensive monthto-month overview of
the team's output,.



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



Confluence

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 userfriendly tool, YouTube Studio, led to the discovery that this tools can be used by the team.



What do we need to do?



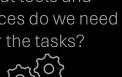
Who has the skills we need to do the tasks?



What tools and resources do we need for the tasks?



What does the team produce?





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		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		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

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
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	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 Compaigns	Campaign – SSI	Campaign – Scam / Fraud	SSA YouTube Channel	Social Media Facebook/ Instagram	Website - SSA.GOV	Display Marketing Ads YouTube / Google	
IN	Report Owners -Tasked		1C	ıc	WN	KK / WN	KK/WN	WG / WN	WG / WN	Crosby / AJ / WG	Crosby / AJ	Crosby / KK / WN / WG	Crosby /	Owner: Crosby / WG
TARGETED DATA REPORTS											Monthly Social Media Reports Social Media (no cost - organic) - Reports			
TARGETED			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 Crosb y Marketing Reports	Search Engine Optimization Report MULTI-DATA SEO Report
	Report Cadence Monthly / Quarterly/Annually		W/M	w/m	M/Q/A	М			Q	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 Jeogle.com	Crosby Marketing Reports	Crosby Marketing Reports	SEMrush
	WAR Weekly Analytics Reports Projects / Initiatives /SEO/ Data Analytics MULTI-DATA WARs - Weekly Activity Reports Data Sources:	Ø	V	V	V	V	V	Ø	Ø	Ø	Ø	Ø	Ø	Ø
REP	MAR Monthly Analytics Reports MULTI DATA MAT Monthly Activity Reports													
TI-DA	Jira Reports MULTI-DATA JIRA Reports													
_	Granicus Reports MULTI-DATA Granicus- GovDelivery					N								
	Crosby Marketing Reports MULTI-DATA Crosby Marketing Reports									\square	Ø	Ø	Ø	

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.

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Date Initiated	Team Members Tasked	Manager / Lead	Status	Assignment Name, Overview, Timeline, Goals, Guidance, Process & How To	Specific Tasks and Sub-Tasks	Feedback, Clarifications, Questions	Dependencies What is needed to complete task?	Tools / Knowledge & Training Used for task	Data for Reports and other Deliverables	Deliverable Location Folder
		John Whitney		NAME: SEO Measurement OVERVIEW: We would like you to undertake managing the YouTube SEO Report moving forward. Let's give you a until 3/1 to get up to speed. We can meet next week and discuss how to manage this. It's not a huge lift, but it is something that we need to tackle. The bulk of the work has been done. TIMELINE: • February will be our test run, with my approval. It doesn't need to be complete, however, we will use that result as an opportunity to close any holes in reporting that we may see. • March will begin the regular YouTube SEO reporting. Wayne Nichols will be your validator. GOALS: • Ultimately, we're looking the Dashboard and SEMBush to do the heavy lifting. From the analytics point we're just asking: Based on what these tools report, were we successful? • Once we've done this, it will be a simple 20-minute look-up weekly, with a report at the end of the month that should take no more than 15 minutes to write.	Align completed work with our future needs. Clean up draft dashboards. Ready SEMRush measurement Outline Process Do the work Report	Is there a future needs inventory / iss? Clean up Draft dashboards location "ready" Is there an existing SOP? Where is the existing work that has been done? Is there an existing Report format or should I create a new one? What are the categories in the report that tell us that we are successful?	Future needs inventory Credentials and access to data tools Previous YouTube SEO Reports Existing work for reference Existing report for reference	CPA Team Information / Guidance YouTube Dashboard YouTube SEO Report Best Practices Comparative Capabilities — Looker Studio - GA- SEM Rush Tool Looker Studio - link YouTube Dashboard > YouTube SEO Aegregated KPIs YouTube Dashboard - YouTube Studio SEM Rush https://www.semrush.com/ Google Analytics GA4 NOTES / TERMINOLOGY: Impressions refer to the number of times a piece of content appears on a user's screen, regardless of whether they interacted with it. Views indicate the number of times a user actively engaged with the content by clicking on it or watching it, signifying a higher level of Interest and	SSA YouTube Channel Business Questions: How many people see SSA videos appearing, how many click on them? How long do they watch? Which videos do they watch more than others? What is the change in performance data for each video based on any additions of key words or new custom thumbnails? What kind of feedback do viewers give us in comments? 1. Views 2. Impressions 3. CTR% 4. Current subscribers 5. +/- from last 28 days 6. Top videos 7. Watch Times 8. Average View Duration for each video	TEAM Assignments & Workflow Management
			01/14/25	GUIDANCE, PROCESS & HOW TO: Steps to take / Process: Put some time on my calendar later next week (at least an hour.) Invite Wayne Nichols and ### Wayne Nichols and ### Wayne Nichols and ### Have the documentation for the approved KPI and Measurement work we did together with DMC. I will refine the SEO plan for you at that time.				Interaction. Click-through rate (CTR) Clicks divided by Impressions: CTR is a metric that measures the percentage of people who click on a specific link, ad, or call-to-action compared to the total number of people who see it, essentially showing how often people click on something after viewing it; it is calculated by dividing the number of clicks by the number of impressions and is often used to evaluate the effectiveness of	9. Comments / Feedback	
			01/17/25	☐ In the meantime - keeping me, @Herndon, Simone and Katy on the thread. ☐ Please Connect with DMC to get the credentials for YouTube administration as analysts. You are				online marketing campaigns. YouTube Search Engine Optimization		

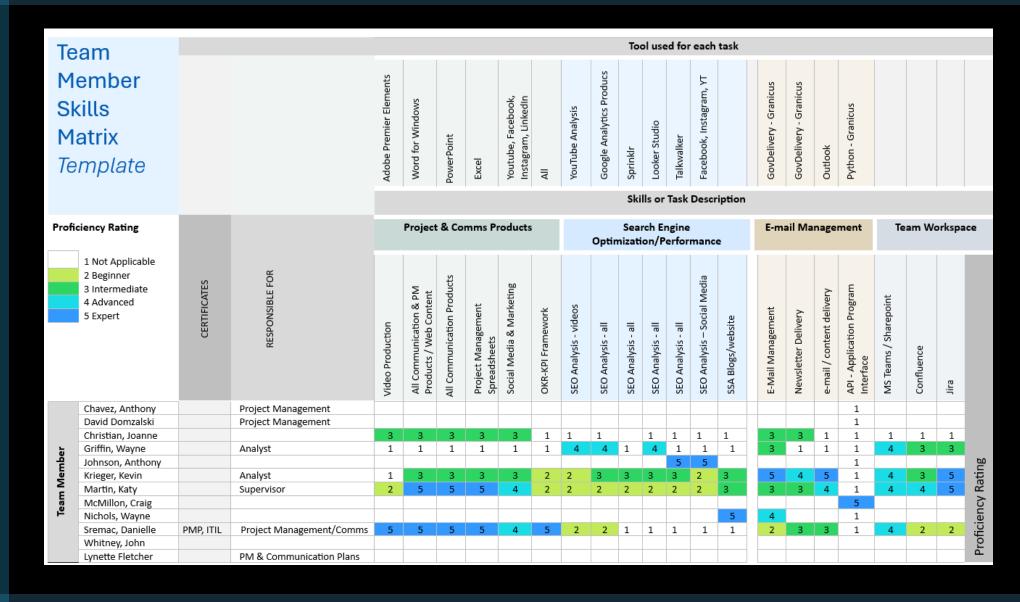
Resource Management Optimization

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.



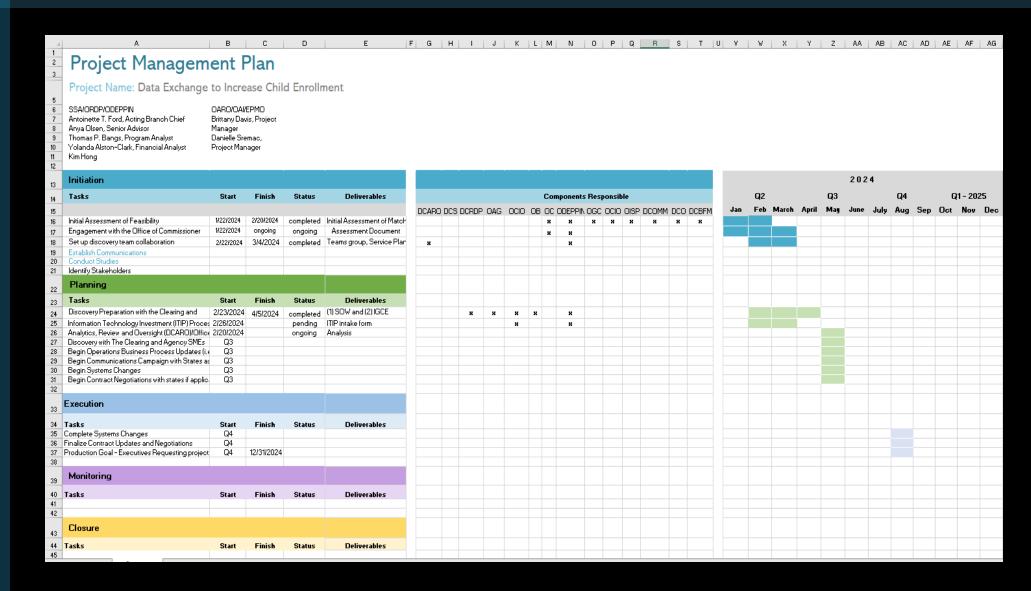
Project Management Process Optimization

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 MissionCritical 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	SSA-OCOMM-OSDC	SSA-OCOMM-OSDC-CPA									
	Social Security Administration - Office of	Office of Strategic and Digital	Communications Planning & Analytics Team									
	Communications	Communications										
	Mission-Critical Work	Mission-Critical Work	Mission-Critical Wo	rk Accomplishments FY24-FY25								
	Oversees all internal and external SSA communications.	Develops, implements, and evaluates the agency's communication strategies by (1) managing social media programs, (2)	Communication Planning	Data Services & Analytics								
		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								
ations	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.		American Indians and Alaska Natives (AIAN) Baby Names Boby Names Boby Wage Reporting Enhancements 1099/10425 Enterprise Scheduling System (ESS) Enumeration ids4 (online CDR) Marketing My Social Security (online services) My Social Security Overseas My Systems Account Transition (aka ROME) Overpayments Protecting Personal Information-OPI Video Scam Awareness 14. Sharing Our Story	SSA Blog - Social Security Matters Social media (paid) Social media (unpaid) including Facebook, Twitter, Instagram YouTube etc. Digital Paid Media (Performance) Digital Paid Media (Spending) Email Marketing TV Public Service Announcements (PSAs) Podcast Episodes - "SSA Talks" Internal Communications - (via email) VouTube Analytics - (Top Videos and Performance)								
External Communications	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.		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. VIEC Mobile Check-in Express 23. Withholding Rate Change — 10%									
	Government and advocacy relationships: Maintains relationships with national organizations, advocacy groups, other Federal agencies, State and local governments, and the White House.											
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 multiformat 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.

Strategic Mapping

Strategic communications and Search Engine Optimization SEO
Office of Strategic and Digital Communications - Communications Planning and Analytics Team

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	Strategic Planning																		
©	Strategic Objectives What goals are critical for our organization to achieve?	Improve and increase visibility of SSA YouTube content.																	
XX	Tactical Objectives What tactics help us achieve our goal?	Conduct thorough keyword research for video topics and titles	Optimize Video Titles with Target Keywords	Write Detailed, Keyword-Rich Video Descriptions.	Use Relevant Tags and Hashtags	5. Create Custom Eye-Captions and Catching Thumbnails Catching Thumbnails Catching C							hat too	nat tools do we use to					
+++++++++++++++++++++++++++++++++++++++	KPI Alignment with Tactics How does this KPI metric help us achieve our Tactic?	Identifies high- traffic keywords to target. Ensures content aligns with what users are searching for. Increases the likelihood of appearing in search results.	Improves search engine ranking. Increases visibility and click-through rates. Attracts relevant audience.	Provides context to YouTube's algorithm. Enhances discoverability through related searches. Encourages higher engagement and watch time.	Helps YouTube categorize the video. Increases chances of appearing in related video suggestions Enhances searchability through hashtags.	Increases CTR Attracts more viewers. Enhances brand recognition .	Makes videos accessible to a wider audience improves SEO through text content. Increases watch time and engagement.	Enhances user experience. Increases watch time through continuous viewing. Improves channel organization.	Signals to YouTube that content is valuable. Increases reach through social proof. Enhances communit y building.	Drives traffic from external sources. Increases video views and engagemen t. Enhances brand visibility.	Encourages viewers to watch more content. Increases overall watch time. Enhances user experience.	Looker Studio	YouTube Studio	Semrush	Google Analytics 4	Google Search Console	Google Trends	Talkwalker	Sprinklr
	CTR Click Through Rate											•							
	Video Views												$\overline{\mathbf{A}}$						
	Search Volume																		
	Keyword Difficulty																		
	Search Ranking Position																		
aa	Average Watch Time											$\overline{\mathbf{A}}$	$\overline{\mathbf{A}}$						
Ш	Engagement Rate											✓	\checkmark						
<u>~</u>	Impressions																		
¥ 2.2	Watch Time											\checkmark	\checkmark						
ato	Playlist Views											İ							
our T	Average Time in Playlist																		
ce Ir	Subscriber Growth											V	$\overline{\mathbf{A}}$						
man us ac	Referral Traffic																		\neg
Performance Indicators KPIs KPIs help us achieve our Tactics?	Percent of Video Watched												☑						
P N																			
Key What P	= limited capacility																		

Strategic communications and Search Engine Optimization SEC

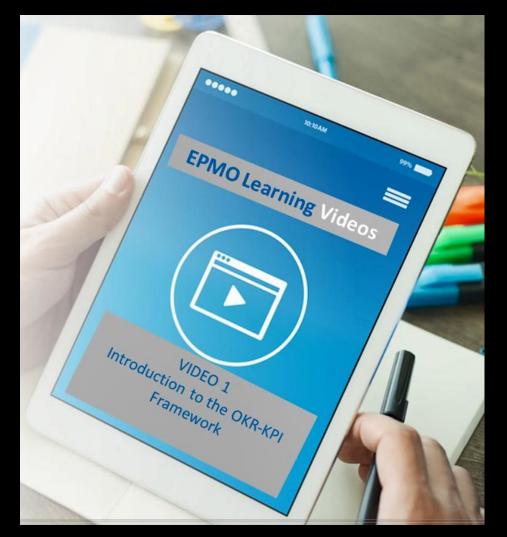
Optimizing Communications

Challenge

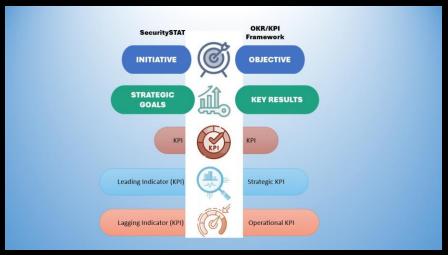
How to implement a new data-driven OKR-KPI focus throughout hundreds of SSA offices?

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 crossfunctional 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.

