



Digital
Marketing
Institute

SOCIAL CUSTOMER SERVICE

Study Notes

Social Customer Service

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LESSON 1: SOCIAL CUSTOMER SERVICE STRATEGY

SOCIAL CUSTOMER SERVICE

Social media as a customer service channel

Amazon has done exceptionally well when it comes to customer service. Jeff Bezos, founder of Amazon, has said: “We see our customers as invited guests to a party, and we are the hosts. It’s our job every day to make every important aspect of the customer experience a little bit better.”

He’s saying that effectively he’s inviting his customers to a party, and he’s trying to throw a party as part of his service, as part of the value that he’s delivering to his customers. That’s a really interesting mindset shift that is probably one of the sort of fundamental reasons behind Amazon’s success.

Obviously, Amazon have amazing systems in place. They have an amazing platform. They do very well on their pricing. They’re tough bargainers and they manage to get very good prices for their customers. That’s all part of their strategy. But at the end of the day, those things are aspects of a business that can be quite easily replicated. What they’ve been able to do is add a service layer on top of that, that makes Amazon a preferred place for people to go.

Outstanding social customer service involves:

- Making service a priority
- Being accessible to customers
- Consistently following up with customers
- Using a range of social tools

Social channels leveraged for customer service

In the US, the UK, and a lot of the western world, Facebook, Twitter, and LinkedIn are commonly leveraged for customer service. Facebook, in particular, has been at the forefront of this. They have been investing quite heavily in getting companies to use Facebook as a platform for engaging with customers. They’ve realized the value for customers in being able to engage directly with a company. And companies see the value too, because it puts a human face on the business.

It’s not just Facebook, LinkedIn, and Twitter: there are different players in different markets. For example, Qzone, WeChat, and Ren Ren in China; and Vkontakte and Odnoklassniki in Russia.

Challenges

Companies face challenges with social media customer service, including:

- **Risk of rapid amplification of dissatisfaction.** You’ve probably seen on the internet, Facebook, or Twitter, where someone’s had a bad experience in general with a company and it goes viral. There was a really famous case in the U.S. with United Airlines, where a man looked out the window and saw some baggage handlers throwing his guitar across the tarmac. He made a funny video about it, which was very well made, and it went viral. That obviously posed a huge challenge for United Airlines because now, there were millions of people looking at this video effectively making fun of them.
- **Customer control over pace of conversation.** This is something that you essentially relinquish when you start using social media as a way of delivering customer service. It is the customer who determines when, where, and how they want to interact with you.

- **High expectations for in-the-moment resolution.** People have high expectations when they are engaging in a customer service interaction. They expect the company to respond within a few minutes of them posting an issue.
- **Expectation for exceptional service.** Customers expect the company to go over and above to satisfy their needs and resolve their complaints.

Models of ownership

There are three models for how your company could own customer service within the business:

- **Marketing-owned.** This has occurred as social media has been seen as a marketing activity – despite recognizing that it's also a tool for customer service, many organizations still keep this function in the marketing department.
- **Contact-center-owned.** Some organizations have moved this aspect of service into a contact center where, traditionally, the customer complaints team was based.
- **Co-owned.** Some companies adopt a hybrid approach instead, where marketing and the contact center work together to solve problems quickly.

SOCIAL COMMERCE

Gaining commercial value

One of the big advantages of social customer services is the ability for organizations to gain incremental commercial value from them. There are a variety of techniques that organizations can use, such as:

- **Recommending products.** If you're engaging in dialog with customers on a social channel, you can recommend the right products for them, while also delivering great customer service.
- **Upgrading packages.** Customer service can spot if a product is under-servicing a customer (if, for instance, their needs have increased) and offer them a more suitable package.
- **Rewarding loyalty and advocacy.** Through social media, organizations can find out who their best advocates are and reward them, as well as publicly presenting offers for their best customers.

Rise of social customer service

Microsoft has published some data about how important customer service is on social channels. It suggests that a third of consumers in the US and UK have used social media as a tool for customer services.

In addition, many consumers have reported positive experiences with a brand on social media, as well as complained about them.

SOCIAL CUSTOMER SERVICE STRATEGY

Key components

The key components of a successful social customer service strategy are:

- **Vision and mission statements.** Determine exactly how to treat your customers and ensure a high standard of delivery. So, how important is customer service to your business? How important is the way that you communicate with customers, the kind of emotions that you portray, the kind of language that you use? You don't necessarily have to get that specific at this point; but it's good to just ground yourself in that broad mission and vision statement of the business.
- **Channel availability and prioritization.** Ensure you are interacting with customers through the right channel – one that is convenient for them and enables the right resolution to be possible. Obviously, there are a lot of options. Consider the channels that are available in your region. If you are very heavy in China, for example, you should look at WeChat. And consider the channels that your customers are using. Particularly, where are they interested in engaging with you as a business?
- **Technology solutions.** What technology solutions might allow you as a business to develop customer service through your channels? There are a lot of different solutions available.
- **System integrations.** Determine how best to talk to customers across platforms and also join up systems to ensure you have a holistic picture.
- **Resourcing.** Accurately forecast and staff up to ensure that service levels are being met at all times.
- **Brand alignment.** Be consistent with the brand and how customers expect the company to talk to them.
- **Metrics and reporting.** Ensure that accurate tracking mechanisms are in place. This is all about ensuring that there's a feedback loop back into your business, so that you know that your customer service channels are on social media, they're working for you, you're constantly improving, and you're able to make business decisions off the back of that.
- **Activation plan and timeline.** Determine robust timescales for your social customer service plan. If you are the person driving it, you need to know, in detail, how you are going to achieve your goals and make your plan a reality.
- **ROI and business case.** Create a realistic business case for the need for social customer services. If you are trying to introduce it in your business, you should definitely be able to make a business case for it, and know the expected ROI. It's a good way to get senior management in your company to listen to you.

Phases of creating a social customer service strategy

The phases of creating a social customer care strategy are:

- **Discovery.** Where the organization determines there is an issue – for example, a customer leaving a comment on Twitter about a poor experience
- **Development.** The company determines the extent of the issue through further investigation
- **Ratification.** Double-checks that it has identified the problem accurately and if it has identified the root cause
- **Implementation.** Creates an action plan to solve the issue and puts the plan in motion
- **Iteration.** Constant monitoring and repeat of the action to ensure the issue is not repeated

You have to constantly iterate what your strategy is, what your approach is. Because digital channels are changing very, very quickly. The way that customers are engaging are also changing very, very quickly. So, you need to be on top of these changes and you need to make sure that your business, across the board, is set up to handle them and make the most of them. Otherwise, you're leaving money on the table.

COLLABORATIVE STRATEGY DEVELOPMENT

Cross-departmental collaboration

It is important to hold stakeholder workshops in the strategy development process, as they are an effective way to ensure extensive cross-department collaboration on strategy development. Furthermore, it is important to gain insights from around the business by using techniques such as one-to-one stakeholder interviews in order to deep-dive into key elements of strategy.

The stages of the stakeholder engagement cycle are:

- **Engagement and interaction.** Speaking to other stakeholders to gain insights as to where various parties think that the strategy should go.
- **Issues identification and clarification.** Identify the key issues that should be addressed.
- **Resolutions and key actions.** How these can be resolved or implemented.
- **Outcomes and dialogue.** Determine the outcomes and communicate these to the right stakeholders.

Key stakeholders involved in strategy creation

The key stakeholders involved in strategy creation are:

- **Social media.** This team will have the most experience of the different platforms and how best to utilize them in a customer service context. This is going to be a key stakeholder, possibly the most important. Social media teams have a strategic role to play when it comes to customer interaction these days, and they play a big role in coming up with customer service plans.
- **Customer service.** This team will have expertise in dealing with customer complaints and the processes that are usually followed. If you have a customer service department, a call center, or some sort of customer team, they're going to know how to resolve certain issues. There's probably a process already in place that you can learn from, you can borrow, or that you can iterate to make it ready for social channels.
- **Customer experience.** A holistic understanding of the customer journey will be this team's main accountability. These people think about the customer experience from start to finish.
- **Marketing.** The marketing team will be able to help with messaging and positioning. Social media and marketing often overlap these days. The marketing team is a very important stakeholder, in the sense that they are using social channels regularly or they're creating content for the channels.
- **PR.** The PR team determines how best to go to market and talk about the approach. PR is often outsourced to a PR agency.
- **Legal.** The legal team determines the regulations in your area. You can get into serious trouble as a business if you're not doing things according to the latest laws and regulations.
- **IT.** The IT team consider the system implications, including various team permissions and access to social media platforms. This is a critical team to get input from, because you're going to have to integrate tools and systems into the organization's existing IT network in order to deliver your strategy.
- **Partners.** Agencies, vendors, and so on are key players to help determine how best to create your strategy.

Team responsibilities

It is very important for different departments and teams to understand how they can contribute to strategy creation and what their responsibilities are:

- **Social media.** The social media team has key responsibilities around social media insights and best practices.
- **Customer service.** The customer service team are likely to know a lot about resourcing – such as the number of people you need to deliver customer service, and the number of customers you could realistically deliver that service to, per person. This team can give you a real sense of the level of resourcing you'll need to deliver your plan. They will also know about the process of delivering customer service. So, you're going to want to talk to them about the processes they use today, and get their feedback on the process that you're building for your customer service on social media platforms.
- **Customer experience.** Your customer experience team can help you create a plan for your customer service that is aligned with the organization's company-wide customer experience framework.
- **Marketing.** This team ensures that the way that social customer service is designed is in line with the brand and meets the messaging standards of the organization.
- **PR.** The PR team are the experts in dealing with crises. When something goes terribly wrong from the customer's perspective, which could blow up in the press, they have procedures in place to handle the crisis.
- **Legal.** The legal team is concerned with operational compliance with the industry legal and regulatory requirements, and ensures that the organization meets the required standards.
- **IT.** The IT team determines the best way to technologically deliver the solution to both customers and employees. They can help you in terms of optimizing the way that your business uses tools or the way that those tools are optimized for your business.

SMART criteria

It's important to set goals for your customer service strategy. When you are setting your goals, make sure that they follow the SMART criteria and are:

- **Specific**
- **Measurable**
- **Attainable**
- **Relevant**
- **Time-bound**

CUSTOMER EXPERIENCE FRAMEWORK

Customer journey mapping

One of the most critical components of setting a customer service strategy is making sure that you've identified what a typical customer journey looks like.

- **Timeline.** You need to determine the exact time it takes for a customer to complete a specific journey with you, and assess the ease and efficiency of that journey.
- **Customer steps.** Map out each of the steps that a customer takes when interacting with you. How is it that they actually move through the different parts of your purchase funnel?

- **Customer profile.** Determine the different types of customers that interact with you regularly and how their journeys differ from one another.
- **Pain points and highlights.** Map out some of the friction points that exist and the key highlights in the journey.
- **Supporting evidence.** Make the journey tangible by gathering evidence to highlight what a customer goes through to the rest of the organization.

Aligning customer service experience with brand experience

It's important to align the social customer service experience with the broader brand experience to ensure that the customer gets a seamless service throughout their interaction with the company. It's critical, therefore, that a set of tone brand guidelines are adhered to during the social customer service process.

Broadly speaking, there are three different stages that a customer will be in: pre-purchase, purchase, and post-purchase. Think about the key issues and how you might engage with customers at each stage.

Case study: Direct Line

Direct Line is one of the leading insurance companies in the UK. They are very digitally savvy. They have been voted the number one company for customer service on digital channels. Social media, in particular, is something that they've adopted very aggressively. If you contact Direct Line about an issue, they will respond very quickly. They've implemented incredibly innovative tools, for example, live chat. You can go and have a conversation about almost any aspect of your business engagement with Direct Line and have a very quick resolution. They index very highly on a lot of key metrics that are used by the industry to assess how forward-looking a company is when it comes to their use of digital channels.

IMPLEMENTATION PLAN

Benefits of a phased implementation roadmap

A phased implementation roadmap is necessary to embed social media into the customer journey and drive customers to social channels in a scalable way. A phased implementation roadmap offers several benefits:

- **Overcome resistance to change.** It helps to overcome resistance to change; it gives people an understanding and time to get used to what's coming.
- **Lessons learned.** It allows for lessons learned in early phases to be incorporated in systems installed in later phases; this enables the organization's learning process to be optimized and to ensure it learns from its past mistakes.
- **Solid foundation.** It establishes a solid foundation of available project-level data prior to rolling out enterprise-level information; and creates a way to ensure scalability for further rolls outs in the future.

Service through social channels

You can set customer expectations for service over social channels by communicating:

- **Operating hours.** You should communicate your operating hours and opening hours to your customers. This helps manage expectations about when a customer is able to get in touch with the organization.
- **Response times.** You should also communicate your response times to customers. This sets the expectation of how long the customer should expect to wait to receive a response.
- **Terms of service.** This outlines exactly what a customer should expect from a service. This is standard legal stuff, which your legal team can help you with.

Factors to inform an effective business case

It is fundamental to be able to articulate and clearly present the overall social customer service strategy to the organization in order to achieve internal alignment and adoption. This is because many individuals may have a traditional mindset and see no merit in setting up a specific operation in this area.

There are a number of factors that form an effective business case for establishing or expanding a social customer service operation:

- **Proving value.** Consider a tangible value for what the team could bring to your organization.
- **Calculating ROI.** Determine the level of return that the team could have.
- **Identifying competitive advantage.** Determine the advantage that the team could bring to your organization.

Milestones and timelines

It is important that all teams involved come together during the social customer service strategy execution stage in order to achieve pre-defined milestones and timelines – this will ensure the strategy is holistic and has the largest ability to be successful in the organization. However, make sure it's not a static document, but rather that the organization continually re-examines and updates the strategy to maintain relevance in the rapidly changing social media customer service landscape.

There are three big parts of the business that you have to think about from a collaboration perspective:

- **Technology.** When you're using digital social media channels for customer service, there is a huge technology implication for the business. Think about that very, very carefully.
- **Culture.** What are your overall objectives from a company-culture perspective? What is it that you as a business can deliver or want to deliver? How do you do business differently and uniquely? And how do you prioritize customers within that? Maybe your culture needs to shift slightly, to be more customer-oriented.
- **Process.** Processes are often a source of competitive advantage, but what is it that you do differently as a business? What is it that you're going to have to do differently?

NOTES

LESSON 2: MANAGING SOCIAL CUSTOMER SERVICE

SOCIAL CUSTOMER SERVICE MODELS

Blended

A blended social customer service agent model is one that has agents manage customer service interactions across social and non-social channels concurrently. That means having a team that is looking at offline or traditional customer service channels and some of the new social ones. A blended model has several advantages:

- **Greater agent utilization rates.** If you have a blended team that's addressing customer service across all channels, including the new ones, you get greater utilization rates. If everyone across your team has the capacity to deal with inquiries coming in from your different channels, you can be much more efficient about how you use your personnel.
- **Reduced downtime.** If you have separate teams, one team might be maxed out on the social side while the other team is not, resulting in downtime. When you combine both teams, you can balance the workload and make sure that downtime doesn't happen too often. It also helps to ensure that responses are quick and efficient.
- **Channel-agnostic.** Agents who are channel-agnostic can serve customers, regardless of the channel they are on. Observing customers in different environments can lead to increased learnings for agents, and a cross-pollination of ideas.
- **Simplified resource allocation.** A blended team makes it easier to resource up. You can be a lot more efficient about allocating resources when you have just one pool of people to choose from.

Designated

A designated social customer service agent model employs agents dedicated to managing customer service interactions on social media. The advantages of a designated model include:

- **Improved agent experience.** You can focus training on the social channels, to make sure that your agents have the right capabilities. You can also put processes in place that are tailored specifically to social customer service. There should be a lot less confusion around the different channels when your agents are specialists in those areas. You can potentially deliver better service; and customers can form better, more personal relationships with the agents serving them.
- **Increased agent efficiency.** Agents will get better at dealing with inquiries if they're focused on social channels, and will deal with them much more efficiently. They should be able to undertake a number of tasks at once.
- **Agent selectivity for social.** You can choose agents who are really well suited to fast, quick, real-time communication with customers, and who have specific skills relating to social.

Benefits of internal agents versus outsourced agents

You can obviously employ agents internally or you can outsource this service and work with outsourced agents.

The benefits of using **internal** social customer service agents include:

- **Stronger brand alignment.** When it comes to using an internal team, the number one thing is that they have stronger brand alignment. They understand the brand and what it stands

for. If you are a high-end consumer brand, let's say, brand alignment is particularly important. It typically gets more and more important as you go upscale in a market. You will have faster, better communication with your team if they are embedded within your organization.

- **Reduced agent turnover.** If you hire agents internally, it's easier to retain them. People tend to have a greater sense of ownership and involvement in the business when they are hired internally and are embedded within your business. Reduced agent turnover should result in more consistency of service for customers.
- **Greater agent empowerment.** You can also empower your agents to resolve customer issues quickly and effectively.

The benefits of using **outsourced** social customer service agents include:

- **Scalability.** On the outsourcing side, you can get more scalability because you can keep outsourcing more and more as your needs increase. You have the ability to scale up the operation quickly.
- **Cost-savings.** Generally, you get cost savings in the long run. You tend to save money as a business when you outsource.
- **Coverage.** Outsourcing companies may be able to increase or decrease the agents working on your business in a much more flexible way. They might work with two businesses, for example, where one has a big surge in the morning hours and the other has a surge in the evening hours. They can expand their coverage as required.
- **Efficiency.** Outsourced agents tend to generate greater efficiencies.

CONTACT TYPES

Factors to consider

Consider your different contact types and try to map them out. The factors that determine which contact types should be served over social channels – and which should not – are:

- **Issue complexity.** What's the complexity of the types of inbound contacts you can get? The general rule is that the more complex the issue, the less likely social channels will be a suitable medium.
- **Customer data security.** What are the customer data security considerations that you need to think about for any type of contact? If strong data security measures are required, it is unlikely that social media will be the best way to reach out.
- **Issue sensitivity.** What's the sensitivity of the issue? How personal is it? The more sensitive the issue, the less likely social media channels will be appropriate.
- **Contractual limitations.** What are the contractual limitations around what you can and can't say to customers on different channels? Depending on the contract, social media may not be an appropriate channel to discuss complaints.

WORKFLOWS

Escalation criteria

It is important to clearly define escalation criteria in order to manage issue severity. An issue can be of **low** importance, **medium** importance, or **high** importance to the business – or it could be absolutely **critical**. For every possible contact type that comes through, you need to categorize it accordingly.

For example, a query about the price of something, a query about where to buy a product, a complaint about the quality of a product or a manufacturing issue, a query about a return: all these different issues should be categorized according to how important they are to the business.

It's important to have clear processes in place so agents can easily handle incoming messages without confusion or delay. Develop an escalation map that provides:

- Clear guidelines explaining which messages agents can respond to.
- A comprehensive breakdown of the types of messages frontline agents cannot immediately respond to, and the team responsible for each type.
- A quick method of escalating messages – along with the full case history and context – to the relevant team.

Closing the loop

It is important to clearly define criteria for shifting conversations from public to private to ensure data security. Characteristics of closed-loop feedback include:

- **Experience.** Focus on the most important issues and customers. In order to follow up on customer feedback in a personal way, a manager needs to know who the customer is and how to contact him or her. Removing anonymity gives managers the information they need to provide customers with the kind of additional follow-up they want.
- **Feedback.** Put feedback mechanisms in place. Make sure that customers can be surveyed.
- **Fix and listen.** Resolve the issues, making sure that you retain a record of them, and learn and listen for future reference.
- **Share.** Feed into internal learning mechanisms. Put the right processes in place so you can do that on a regular basis. Maybe there's an email that goes out every Friday evening or Monday morning to key stakeholders in the organization with new learnings and the metrics around customer service. Everyone in the business will be curious to hear what customers are saying.

Agent consistency

You can set up a customer service channel so that the same agent is always working with the same customer. The benefits of keeping the same agents working with a customer through to issue resolution are:

- Facilitates faster resolution
- Improves the experience for both customer and agent

Agent consistency can increase the efficiency of the customer service function and can save time in having to get other agents up to speed with the details of the cases. This can be beneficial for both the consumer and the business.

Approval workflow

A workflow can help an agent figure out how to go about resolving specific issues, and how to move an issue through to resolution. The very best way to set your agents free securely is through an approval workflow. How you choose to moderate public responses, from quality control to full screening, will depend on your business and your agents' experience. But approving conversations just before they go live allows you to take a step back from on-the-ground interaction. If you really

want to offer the best social experience, this has to be between your agents and your customers. There's no room for micromanagement in social.

The benefits of implementing an approval workflow include:

- **Improved efficiency.** It's clear how the agent is supposed to work through customer service interactions.
- **Better business control.** You get more control over your business, because you've put processes in place to handle inquiries of a certain nature.
- **Improved customer service.** When there's consistency to how you're delivering your service, you get better customer service as a result.
- **Flexibility.** You may not want to force your agents to follow a workflow diagram every time they're dealing with a customer. There's a very delicate balance here. In some situations, the right response may be more instinctual.

Benefits of a peer approval workflow model

You can put checks and balances in place to ensure that your customer service is consistent and of high value in delivering what the customer expects. One model you can use is a peer approval workflow model, which means that an agent's peers will moderate his or her responses and review the interactions he or she has with customers. The advantages of this model include:

- **Increased efficiency.** Greater availability of agents to review other responses than supervisors, therefore increasing efficiency.
- **Greater scalability.** A larger number of agents available to moderate responses means that the customer service function has greater capacity to deal with customer issues.
- **Less intimidating for agents.** Can be more motivating for agents as they don't feel the pressure of being moderated by supervisors.

Benefits of a supervisor approval workflow model

A supervisor approval workflow model is where supervisors moderate responses of agents before publication.

The advantages are:

- **More effective quality control.** Fewer people moderating means increased consistency of responses.
- **Greater insight into agent performance.** Constant insights means management have a greater view of agent performance with which to review.
- **Coaching opportunity.** Opportunities to improve agent performance continually, as opposed to intermittently.

Proactive feedback

Make sure you have a very proactive level of customer service in your organization. Make the first move to help customers. If you look at statistics, 88% of consumers are less likely to buy from companies that are ignoring social complaints. If you're proactive about getting into your social channels and engaging with your customers, you can get great feedback. You can monitor user feedback more easily, and you'll be able to anticipate your customers' needs a little bit better when you are interacting with them.

PROCESS AUTOMATION

Auto-responder bots on social channels

Auto-responder bots generate responses to customers in an automated way. They can effectively mimic human interaction. The advantages of using bots are:

- **Speed of response and service.** Customers get quick answers in real time.
- **Scalability.** You can build scale without the need for resources.
- **Cost-savings.** You generate greater efficiencies and reduce costs.

The disadvantages include:

- **Frustrating customer experience.** Customers may not feel that their questions are being answered accurately.
- **Limited functionality.** Does not cover all areas and cannot deal with complexity.
- **NLP inaccuracy.**
- **Lack of humanity and personalization.** Does not replace the humanistic elements of a person.

Social CRM

Automation can mean a lot more than just bots, obviously. Automation can actually mean how you generate responses that a customer service rep might use to deal with customer interactions. Sometimes you can actually auto-generate responses, which a customer service agent can then check or edit. Think about your customer service platform and the automation that you can introduce to expedite issue resolution. This is where interacting with your technology team is going to be absolutely critical.

Automated classifications

In order to gain a more efficient way of processing issues, it's a good idea to create automated classifications of the typical issues that may occur. This will enable the most appropriate agent to tackle the issue and do so in a timely manner.

Another major advantage of automated classifications is that it can reduce 'noise' and can flag highly-actionable content for agent processing, as it means that agents do not have to go through messages and decipher which are the most urgent.

However, a note of caution: it is important to continually make enhancements to automation logic and algorithms in order to reduce manual workload and optimize operational performance.

SOCIAL CUSTOMER SERVICE PLAYBOOK

Benefits

A social customer service playbook sets out the customer service rules within your organization. A playbook is like a bible that your customer service team can use when they are dealing with customers or when they are going through training. As with all process documents, it should be continually updated to ensure that it accurately reflects the continually changing social media technologies and operational processes. The benefits of a social customer service playbook are:

- **Stakeholder alignment.** If you have a playbook, you can get different stakeholders aligned who might have input into what the customer journey should look like. For example, your marketing team or your customer experience team will want to know how the customer service team on social channels is dealing with different types of inquiries.
- **Assists in training and on-boarding.** A playbook helps to get everyone up to speed with the approach.
- **Reference for policies and procedures.** It provides a complete understanding of what to do and what not to do.
- **Arbitration of process disputes.** It can act as a reference guide for disputes.
- **Internal explanation of the social customer care program.** It provides a way to describe the social customer service program and communicate it to the rest of the organization.

CRISIS MANAGEMENT

Indicators of a social media crisis

A social media crisis is an unexpected event that results in an extraordinarily high volume of negative conversation about the brand in a short time period. There are different types of crises. Some of them can be prepared for or addressed early. Others will spring up out of the blue with little or no warning.

So, what are the indicators of a social media crisis?

- **Social media blunders.** For example, your social media account could get hacked into, or someone might accidentally post the wrong thing on your account or respond to a customer in the wrong way. You need to have a plan in place for all those things.
- **Viral customer complaints.** If a complaint does go viral, you need to think about how you would respond to that and who would need to be involved.
- **Campaign backlashes.** There may be backlashes against your campaign. There have definitely been campaigns that people thought were sexist in nature, but the company didn't see it that way. It's very common for a company to experience backlashes when it is trying to move into a different market and it just doesn't understand the dynamics of that market very well. So have a plan in place for that.

Crisis flowchart

A crisis flowchart is essential in providing a systematic approach as to how different crisis situations should be dealt with. It specifies which person in the organization should be contacted in different crisis scenarios. This can help to provide consistency among customer service teams.

Crisis preparation

It is important to implement clear guidelines explaining which types of messages agents can respond to and which require crisis escalation procedures. Furthermore, it is important to conduct quarterly simulations and drills as part of crisis preparation. You need to be ready to act if and when you face a crisis. As Benjamin Franklin famously said, "By failing to prepare, you are preparing to fail."

An effective crisis management plan can be developed by following these tips:

- Create a holding message as quickly as possible when a potential social crisis emerges – customers look for a very quick reaction to issues over social media.

- When an issue escalates, draft responses to different types of customer messages for agents to use as template examples.
- Establish clear criteria for when a message has to be escalated to PR or Legal.
- Create a schedule outlining who exactly will be responsible for dealing with these escalating messages at any given time, to ensure that nothing falls through the cracks.

Reducing the risk of social media crises

Social media can act as an early warning system of a crisis for the organization, when properly monitored.

To reduce the risk of a social media crisis:

- **Moderate agent responses.** Make sure that agent responses are moderated somehow.
- **Control system access.** It's likely that you will be implementing new technologies and tools in your organization to help you deliver customer service through social channels. Make sure the right controls are in place. Access is critical, but you have to ensure that you are in control of who is within the system and who is not, who can post things and who cannot.
- **Implement a proactive review process.** Have a good review process in place, so that you're constantly getting better and better at dealing with customer complaints.

Techniques

To deal with a crisis effectively, you first need to determine the type of crisis you are dealing with. Then use the following techniques:

- **Rapid response.** Focus all your efforts on responding quickly.
- **Demonstrate transparency.** It's good to keep customers in the loop. We all like transparency, particularly when there's a crisis going on with the companies that we're purchasing from or that we're thinking about purchasing from.
- **Unified company position.** A unified company position is really important because there are lots of ways of communicating with customers now. There could be a press release, a marketing campaign, or your customer service channels could talk to customers. There needs to be a consensus about what the company position is.
- **Crisis procedure adherence.** You need to stick to the crisis procedures you have in place.
- **Reserve team mobilization.** You might want to have an extra team on hand that you can mobilize in the event of a crisis. Airlines use this approach a lot. If there are massive delays to flights, they have teams in place that are ready to go and speak to customers and rebook them on flights. Otherwise, customers are going to get stranded, which would be a service nightmare.
- **Senior leadership intervention.** Make sure that there's an escalation process in place, with the right mechanisms for engaging senior leaders. So be aware of issues that need to be brought to senior leadership, and know how and when to get them involved in a crisis.

Auditing performance post-crisis

A post-crisis review is important to evaluate the performance of your crisis management plan and make refinements where necessary.

A formal analysis of what was done right, what was done wrong, what could be done better next time, and how to improve various elements of crisis preparedness is another must-do activity for any crisis communications team.

Furthermore, it is important to retain a record of all communications surrounding the crisis, external and internal, in order to perform analysis toward improving crisis management procedures, as well as to facilitate any subsequent legal activity or audit.

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LESSON 3: SOCIAL CUSTOMER SERVICE METRICS AND PERFORMANCE

SOCIAL CUSTOMER SERVICE METRICS

Categories of metrics

Social customer service metrics fall into two broad categories:

- **Operational optimization.** Refining and iterating operational processes to ensure that they are fully optimized to increase quality and speed of customer service, whilst reducing costs.
- **Business intelligence.** Gathering useful qualitative and quantitative customer insights, which can be utilized to improve the value proposition the customer – for example, product offering, marketing, crisis resolution, or case studies.

Response times

There are two major KPIs on response times that are typically unused:

- **Average response time.** The average amount of time that elapses between each customer message and agent reply.
- **First response time.** The average amount of time that elapses between the initial customer message and agent reply in each conversation.

These are key metrics when it comes to dealing with customer service inquiries.

CUSTOMER SATISFACTION

Determining customer satisfaction

Response time metrics are key factors determining customer service satisfaction. Two key metrics to monitor are:

- **Time to resolution.** How long does it take before any particular issue is resolved? It is important to keep the resolution window open until the customer feels that they have been responded to and that the issue is resolved. But you don't want this to go on for too long. Obviously, the longer it takes to resolve something, the greater the cost, because you're paying your customer service staff and you're losing the goodwill of the customer. Customers will be less inclined to repeat purchase, or less inclined to purchase in general, if issues aren't resolved in a timely manner.
- **Messages to resolution.** How many messages does it take to resolve the issue? You should count the number of messages that it takes to resolve an issue. The faster you can resolve issues, the fewer messages that need to be sent.

Post-service survey

It's important to measure customer sentiment after each service interaction. This can help you gather insights about what customers feel about the service that you offer. Customers can be surveyed either directly over social media or via external surveys. Ask a couple of questions, but keep your surveys short and concise, to encourage people to give you feedback.

CATEGORIZATION

Effectively categorizing conversations

There are a number of key reasons why one would want to categorize social media conversations in an effective way:

- **Business insight.** It helps with generating business insights about what people are talking about. When a customer is revealing something about who they are, what they're looking for, what their purchase motivation is, you can transform that into a business insight.
- **Operational efficiency.** It helps to generate efficiencies within an organization, thereby reducing costs and resources. For example, if a customer complains about some aspect of your service, you could classify that conversation as an operational efficiency issue.
- **Optimization.** It helps to create the optimal process when dealing with customers and similar situations. Your customers can actually give you hints to help you become more efficient.

Categorizing conversations can help you make operational improvements and business improvements.

SOCIAL CUSTOMER SERVICE REPORTING

Reporting audiences

There are a number of audiences that you would typically report to, when it comes to the data and insights gleaned from customer service reports:

- Team leads
- Contact center managers
- Interdepartmental stakeholders
- Senior executives

Think about these different stakeholders, and how you might report out to them.

SOCIAL MEDIA MANAGEMENT SYSTEM

A social media management system (SMSS) is a system you can use to manage interactions with customers and monitor the different types of social media conversations you're having. They can pull in information from across your social platforms and help you manage your content.

They are important because:

- **Leverage workflows.** You can leverage the workflows that are already built into them.
- **Security.** They help you use the different platforms in a secure way.
- **Automation.** There is a lot of automation built into these tools, which you can benefit from.
- **Analytics.** You can make use of the analytics and dashboards that are available with these tools.

All-in-one SMSS

An all-in-one social media management system (SMSS) is a solution designed to meet the needs of all social media functions including marketing, engagement, customer service, listening, and PR.

The benefits of an all-in-one system are:

- Single vendor source
- Basic cross-function collaboration capabilities
- Lower total cost of ownership

Best-of-breed solution

A best-of-breed solution is a solution purpose-built for a specific social media function. For example, analytics: there might be a specific tool that gives you analytics off the back of your social media; there might be a tool that just does monitoring. Hootsuite is a very popular tool, which focuses extensively on social media monitoring.

The three benefits of a best-of-breed solution are:

- Domain expertise
- Richer functionality and analytics capabilities
- Development priorities aligned with evolving requirements of the space

Automated content distribution (ACD)

Automated content distribution (ACD) is a rules-based programmatic routing of content to users and user groups. This is typically a way of getting content out to customers quickly, across lots of channels. It allows you to publish content much faster to a broad audience and really save a lot of time internally.

ACD can be beneficial because it:

- Expedites the service operation
- Reduces agent collisions
- Prevents preferential selection of content

Core requirements of contact center SMMS

The core requirements of a contact center SMMS are:

- **Features for viewing and managing customer profiles.** These enable tailored responses whereby agents can provide relevant responses.
- **Features for searching social networks for relevant conversations and service issues.** These enable you to search how prevalent issues are and other resolutions.
- **Agent response moderation and approval workflows.** One platform for moderating and approving responses means there is likely to be an increase in efficiency.
- **Message grouping and conversation threading capabilities.** This provides a consistent customer service process that makes it easier for both the customer and agents.
- **Conversation history retention and ease of access.** This enables the company to analyze prevalent issues and how to avoid them.
- **Overall ease of use.** This provides one base for social customer service, allowing easier issue resolution and collaboration.

ISO/IEC 27001

It is important to leverage internal IT expertise to evaluate the security capabilities of an SMMS. ISO/IEC 27001 is the best-known standard for providing requirements for an information security management system, as it provides a systematic approach to managing sensitive company information so that it remains secure.

Security

Make sure that key features are embedded into the SMMS from a security perspective, such as:

- Data encryption in-transit and at-rest
- Configurable password policy
- Automated logout
- Granular permissions and restricting system access
- Full audit trail

They all form a key part of best practice to prevent the risk of ‘data leakage,’ which is the unauthorized transfer of classified information outside of the organization. Data leakage has been identified as posing the greatest IT risks for SMEs (followed by cyber attacks).

Modes of analytics

There are different types of analytics that you can get out of a SMMS. This is something you’re going to want to work with your IT department on, but primarily you want to make sure that you can get:

- **Historical real-time data.** SMMS platforms allow real-time data to be presented and analyzed relating to previous events that have occurred as they happen.
- **Data export.** This enables data to be extracted from the platform and used elsewhere in order to conduct further analysis.
- **Custom reports.** The platform enables the creation of bespoke reports to suit the client need.
- **API.** If you have an API built in, you can take the data from your social media management system and use it in other platforms. So, make sure there’s API built into it.

SYSTEMS INTEGRATION

Reasons for integrating technology with other business systems

The four reasons for integrating a social customer service technology solution with other business systems are:

- **360° customer view from any channel interaction.** Ensures the organization maintains a consistent and holistic approach in every customer interaction
- **Accuracy and expediency in synchronization of customer data:** Enables quicker and better decision-making.
- **Bespoke dashboards.** Enables real-time insights into the most applicable metrics for your business.
- **Analytics and business intelligence.** Gain an unprecedented understanding of your customers.

Five phases of integration

The five phases involved in integrating your social customer service systems are:

- **Phase 1 - Functional and technical discovery.** Determining the exact system functionality and requirements for future use.
- **Phase 2 - Scoping.** Understanding the key components and requirements of the system, particularly relating to its compatibility with other software solutions in the suite. The aim is to generate a robust set of criteria that will ensure both the current and future requirements are met.
- **Phase 3 - Development.** Creating the system, ensuring that all the criteria are delivered as per specification.
- **Phase 4 - Testing and rework.** Making any iterations required to ensure the system delivers the requirements from the scoping exercise.
- **Phase 5 - Conversation history.** Maintaining a log of all key communications to ensure a robust information trail exists for auditing purposes.

SOCIAL CUSTOMER SERVICE VENDORS

SMMS vendor relationship

You could appoint a designated account management person specifically to manage the SMMS vendor that you have a relationship with. The great thing here is that you have one contact internally who is dealing with the vendor, and who is responsible for that vendor. You have a much easier way of connecting with that vendor. And if you have multiple vendors, that one person can be responsible for consolidating those vendor relationships and having one view across all vendors.

Functions of an SMSS account manager

The key functions of an SMMS account manager are:

- **Main point of contact.** The account manager should be readily available to respond to enquiries and resolve key issues.
- **Communication of product releases and roadmap.** The account manager ensures that the customer service team are up-to-date and fully informed about key strategic decisions. This can be very useful when there's a lot of innovation or change happening in the business.
- **Aggregate and deliver feedback.** The account manager can combine feedback from all users and generate holistic insights.
- **Provide expertise, relevant thought leadership, and educational content.**
- **Conduct regular business reviews.**

Characteristics of a successful agent

What are the characteristics of a successful agent?

- **Confident** – they are able to deal with customers in a positive way
- **Resilient** – they can deal effectively with angry customers
- **Articulate** – they are able to articulate very clearly to customers what is being done, what needs to be done, what the company's stance is, or what the path to resolution might be
- **Personable** – they are friendly, and able to make connections with customers
- **Curious** – they show a lot of interest in customers

- **Empathetic** – they can understand the customer’s point of view and why they might be happy or upset

AGENT TRAINING

Three core areas

When training agents, there are three core areas to focus on:

- **Social media.** It is important that agents are aware of social networks, how they are used for customer service, and how to conduct social listening. Ideally, you’re hiring people who have some experience in this area, but that’s not always the case. Although they are probably using social media, they might not necessarily know how a business engages with it, so take that angle.
- **Operational processes.** Agents should be able to understand the processes and workflows that you’ve put in place.
- **Technology.** Agents should understand the workings of SMMS and social customer care platforms. Provide training on the specific SMMS that you’ve decided to implement.

Onboarding periods

Make sure that you consider the ebb and flow of work throughout your calendar year when it comes to on-boarding agents. You have to think strategically about when you can do the on-boarding. It’s going to take resources internally; it’s going to take your attention away from your business. So look at your natural cycle of work and make sure that you’re doing onboarding at a time when you can invest in your workforce rather than in your day-to-day work.

- Leverage moderation and approval workflows during agent training and onboarding periods.
- Utilize KPIs and volume data to model workforce allocation and project future resource requirements.

Training reserves

It’s vital to train reserve agents in case there’s a crisis, and to mitigate against:

- Volume volatility
- Unforeseen absences
- Staff shortages

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LESSON 4:

SOCIAL

COMMUNITY

MANAGEMENT

P2P COMMUNITIES

Customer support funnel

P2P support communities are online groups of users organized to receive and provide assistance around specific topics of interest. They act as a vital source of information for other users in the event the information is not freely available via self-service support.

The customer support funnel shows the different levels of customer interaction you can have:

- At the bottom of the funnel is **one-on-one support**. You call a number or you message someone, and you get hands-on support.
- Then comes **partner channel support**. Here, you don't necessarily own the channel, but you're using a partner channel to deliver support. There's still a lot of one-on-one interaction here, but it's facilitated through a third-party channel.
- In the layer on top of that, you have **community support**. This is the part of the funnel where P2P communities exist. Here, customers do a lot of problem-solving for each other, and help to address issues and answer questions about products. If you have a strong business with a strong brand and a strong product, you're going to have customers out there who are advocates; letting that come to life and shine can be a really good component of your customer strategy on social channels.
- The top layer in the customer support funnel is **self-service support**. The reason why this is at the very top is because it is the most scalable by far. If most of your customers are self-serving themselves when it comes to inquiries, complaints, and concerns, you can handle a lot more volume – but you can also do it at a much lower cost. There's virtually no cost for self-service support.

Types of P2P communities

The two primary types of P2P communities are:

- **Dedicated support forums.** Support forums aim to tackle specific issues or questions that may arise on a given subject. You can create new forums or you can leverage existing ones. Some companies have created dedicated forums essentially for their customers. Nikon, for example, has a great forum page where you can see what other people are saying about their camera experiences.
- **Direct, over existing social networks.** Tackling issues directly over existing social networks, like Facebook and Twitter, is a way to reach a significant number of people and gain a wide range of views and opinions from peers and others that may be a part of your social media network. For example, you could communicate to customers about new customer service benefits. Get your message out there, using emotive and personal language, and your community might amplify it for you. They might repost it, re-share it, retweet it. You can engage with your existing customers very well on social media channels. So have people to working with your community on Facebook, talking to your fans about customer service and how you're dealing with things.

Community management

The primary functions of community management are to:

- Build your community
- Grow your community
- Maintain your community

Typical causes of conflicts

When it comes to engaging your community, it's likely that you will encounter challenges, especially if you're running your own community and your own forums. Typical causes of conflicts among community contributors are:

- **Feeling overwhelmed:** Too much information
- **Feeling unchallenged:** Information or content is not at the right level
- **Feeling useless:** Contributor not feeling that they are able to contribute to the information
- **Feeling unappreciated:** Contributors feeling that they are not appreciated by others who engage with the content
- **Feeling unrewarded:** Intangible rewards
- **Feeling exposed:** Vulnerable based on comments they may have made

So always think about what your customers might be feeling.

Conflict resolution techniques

You can use conflict-resolution techniques to resolve disputes - because undoubtedly you will have to face a dispute at some point. For example, you might have a customer asking a question and getting a number of different responses from other community members that don't quite answer the question. The customer might get annoyed as a result.

Conflict-resolution techniques include:

- **Acknowledge the issue:** Accept that it exists and move to resolve it
- **Get in touch:** Reach out
- **Avoid confrontation:** Do not become aggressive
- **Use the feedback sandwich technique:** Provide corrective feedback that is 'sandwiched' between two layers of praise
- **Develop action plan:** Create a tangible action plan
- **Monitor:** Constantly evaluate the situation
- **Follow up:** Get in touch with key individuals

Support forums

Organizations can gain significant efficiencies and cost savings by encouraging customers to use the self-service support functionality before moving further down the service funnel. This often is useful for customers as they can also have their questions answered in a timely way without the need to speak with a physical individual.

Most effective customer touchpoints

The customer touchpoints that are most effective for driving user adoption are:

- **Social media.** These customers are already engaged online, they're already on channels like Facebook. So it's an obvious audience to go after when it comes to engaging them in your peer-to-peer communities. Your messaging can also be more emotive and personal.
- **Relevant digital properties:** Look at other places where you can speak to potential customers, such as third-party forums, and try to get them engaged on your own forum.
- **Post-purchase communications:** Once a purchase has been made, the customer is more likely to be open to communications of the organization as they have bought into the brand and product or service.

CONTRIBUTOR INCENTIVIZING

Key factors

Why might customers be motivated to contribute their experiences and thoughts to P2P communities?

- **General altruism.** They want to participate, and have no ulterior motives.
- **Vanity altruism.** They want to participate to be seen in a positive light.
- **Reward seeking.** They want to participate to gain a reward.
- **Competitive edge.** They want to participate to get ahead.

Alternative methods

Regional employee compensation laws can have legal and regulatory implications for offering substantive financial rewards to contributors. Therefore it is extremely important to think about other methods in which you can incentivize contributors in P2P support communities. These include:

- **Gamification**
- **Badges and profile customization**
- **Unique brand experiences**
- **Beta tests**
- **Sneak peeks**

SOCIAL CUSTOMER SERVICE MEASUREMENT

KPIs for community health and effectiveness

Regarding the health of the community, you might see some signs of customers feeling overused or underappreciated. KPIs for community health are:

- **Contributor signup and engagement rates.** Determine the level of satisfaction and active engagement of contributors.
- **Question and response rates.** Understand critical issues from users.
- **Customer utilization rate.** Determine how much a service is being used.

KPIs for community effectiveness are:

- **Response time.** How quickly an issue is being responded to.
- **Resolution rate.** How effectively are issues being resolved.
- **Customer satisfaction.** Levels of positive sentiment following brand interactions.

Tracking quality of contributor response

You can also track the quality of contributor responses. Your contributors are, hopefully, constantly responding to incoming queries. Make sure you review those responses routinely, have a live agent go through and moderate them, and spot check them. These are quite simple steps to take, but they add a human touch.

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