## LESSON 1: SOCIAL CUSTOMER SERVICE STRATEGY

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LESSON 1: SOCIAL CUSTOMER SERVICE STRATEGY
We thought we would first start with an amazing quote... what I think is an amazing quote, and that's from Jeff Bezos. As we all know, Amazon has done exceptionally well when it comes to customer service. So hearing it from Jeff Bezos himself, he says, “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.”

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

Obviously, they have amazing systems in place. They have an amazing platform. They do very well on their pricing. We know that 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. And 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. And we all know about the smile in their logo. I think there’s some simple, little messaging there going on as well that might relate back to this part of the strategy. You will definitely see that throughout the way they communicate with their customers.

Social channels. I think you all know of the big ones obviously, in the U.S., in the UK, and a lot of the western world. You see Facebook. You see Twitter. And LinkedIn, even, is now being used as a big channel for engaging with customers. I actually see LinkedIn more as a way of prospecting with customers. I got reached out about CHANEL watches the other day on LinkedIn. They sent me a message saying that they were launching in London, and inviting me to check out their new store that was based here in Covent Garden. I thought that was quite interesting. They weren’t necessarily looking for a dialog but I could’ve actually engaged in a dialog with them if I wanted to. And I thought that was quite an innovative use of a new social media channel. I mean, new in the sense that customers are using... companies are using it... in a new sense.

But 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 that customers play in being able to engage with a company. And companies see the value because it puts a human face onto the company. If I can message from my phone to a company service rep through Facebook or through Twitter, suddenly I feel like I have a direct contact with that company where otherwise I might have to sit on the phone and wait for 20 minutes. So that feels very impersonal, obviously. As you could see that there’s different players in different markets.

So depending on where your business operates, you’re going to have to consider this. That’s really the point of the slide, is to say “You know, it’s not just Facebook and Twitter around the world. There’s a lot of other different platforms.” I won’t even begin to try and say the Russian ones. You can go and practice in front of the mirror if you want to give it a shot, but I didn’t even dare do that. And China actually is a very interesting example. I think there’s some very exciting things happening out of China. As we all know, WeChat has effectively done an amazing job of innovating in this particular capacity. I’d say, you ask anyone from China whether WeChat is their preferred way of engaging with a company, I would be very surprised if you didn’t hear a ‘yes’ from them. I mean it is a massive, massive way for people to engage with companies in a social way, especially on customer service related things. In fact, you can order whole things now on WeChat. You can just place an order. You
can buy flights on WeChat just by chatting with a customer rep. So, obviously, this is creating a lot of disruption and a lot of change in the marketplace.

So, let’s quickly spend a minute talking about the challenges that companies face as a result of these new channels. And all these things, as you know, are relatively new. So I think companies are grappling with a couple key issues. One is that obviously there’s a risk of what we call amplification of dissatisfaction. As you know, you’ve probably seen some viral things on the internet, on Facebook, on Twitter, where someone’s had a bad customer service experience or just a bad experience, in general, with a company and it goes viral. Their food has cockroaches in it. Let’s not think about that one for too long. There was a really famous case in the U.S. with United Airlines where a guy actually looked out the window and saw some baggage handlers chucking his guitar kind of across the tarmac. And he made a funny video about this, which you might have seen. It’s worth taking a quick look because it was very well done, which obviously helped it to go viral, but that obviously posed a huge challenge for United because now, there are millions of people looking at this video effectively making fun of them.

So, we’ll talk a little bit about how you can mitigate that and how you might set yourself up to respond to that as part of this new world that we all have to deal with from a company perspective.

The second is control over the pace of the conversation, right. So this is something that you essentially relinquish when you start using social media as a way of delivering customer service. And the important thing here is that you’re set up well to be able to handle not only the volume, but also if there’s a crisis, there’s going to be a big spike, so the sort of ebbs and flows. And that you resource effectively and appropriately to be able to handle a new customer service channel if you decide, as a company, that you’re going to go ahead and use these to engage with customers which... I mean the point of this is to encourage you to do that in a way and to really consider that, because it is becoming such a critical channel as we discussed.

Third, you might have experiences. I certainly have. I have high expectations when I’m engaging in a customer service interaction. And that high expectation doesn’t change for social channels. In fact, that probably amplifies as well, which is I expect a very quick resolution. I don’t want to have to sit on a message to a customer service channel for days and days. Like, I start getting antsy. I actually get a little bit nervous about whether it’s made it to them, whether they’re resolving it. There’s some very simple tools these days to kind of deal with this. But for the most part, it is a challenge that companies are facing.

And then, the last is really an expectation for exceptional service. I think because of the fact that it’s so easy to engage with customers on social channels, customers have actually started expecting more because all companies are getting on these platforms and are delivering better and better service. I certainly feel that the service that I have experienced when I deal with companies that are on social channels is better, but as a result, my expectations for companies that are using it go up, if that makes sense.

So, let’s jump into some of the content here which is around actually thinking about social customer service in the context of your business, and let’s get into the practical content. So there’s effectively three models for how your company could own customer service within the business. I’m sure you’re aware of the fact that marketing has been a typical owner of social media channels because the social media up until roughly now, more or less, has been all about promoting your marketing campaigns, promoting your products, pushing messages out. There’s been some interaction off the back of that but it hasn’t really been thought of in the context of a customer service channel in the way that we would a call center. It’s just been in a different category. And, as a result, digital as a
channel has largely been owned by the marketing department. Contact centers have often owned the customer service channels because a lot of it has been by phone, as we all know, or by writing, or sort of more traditional forms of communication, even email, which is not necessarily a social media channel.

But in today’s context, you can own them in either of those two categories or you can co-own them. And actually that’s a big, big shift today as we’re seeing a lot more co-ownership across the business. There’s a lot of great tools. I’m sure you have heard of Slack. Slack is a phenomenal communication tool that a lot of companies are using but it allows people to communicate very quickly and resolve things internally. That’s something that startups typically use. Bigger companies have proprietary tools that they use to handle this kind of cross department collaboration. And it is something that’s becoming a bigger focus in companies.

**Social Commerce**

Let’s talk a little bit about how you might prioritize sort of the different benefits of customer service when it comes to the commercial value you can get out of them. It’s not just a way of communicating with your customers on specific customer issues that they’re facing, but there are commercial benefits of using customer... using social channels for customer service. And it’s very important to consider these especially when you’re thinking of the sort of business plan or the business case of using social channels for customer service in your business. So there’s three main ones that I have thought of.

There’s a lot more out there, but the three I wanted to highlight today are, one, recommending products. Obviously, if you’re engaging with customers on a social channel and you’re engaging in a dialog, you can be much more conversational with customers and recommend products that might suit them better. You might be able to up-sell them in a way when it comes to products, but you can work in conjunction with the customer to make sure that you help them select the right products for them and in the process you’re delivering great customer service.

The second is around upgrading packages. So, how do you actually get someone to up-sell from where they are today to something that might be a little bit more valuable to you as a business and valuable to the customer? So it does fit very closely with that first one, but it is slightly different in nature from a commercial perspective, because obviously you’re expanding the pie that you...the business that you do with customers through the second one.

And the third is around rewarding loyalty. We all know about loyalty programs but in the context of social customer service you can create a dialog with the customer to create advocacy, to create connection with your business, and your product and service and to reward them for being very actively involved in your business and caring about you. So you can care about them in return. And loyalty works in lots of ways but in a very simple way and as a simple example you might be familiar with is just offering a ‘thank you’ gift to a customer who’s gotten in touch with you and been patient in dealing through and working through a resolution with you. So that might be a coupon for an extra little add-on product. You know, so in the watch business that I work on, we sometimes give people a free strap just to say thank you for being patient as we resolved an issue in their business, with their product rather.

And let’s think about stepping back one minute, and let’s think about consumers and the consumer data behind this. We thought it’d be interesting to highlight some interesting data that Microsoft has published about how important customer service is on social channels. And there’s effectively sort of three metrics here, going from left to right, and looking across different geographies. And, effectively,
what you’ll see on the left side, just focusing on the first column, the question is that they pose to consumers is “Have you ever used social media to ask a customer service question?”

I would be surprised if most of you didn’t say yes. Statistically, it’s about a third of people in the United States and the United Kingdom. As you can see, just throwing in two other countries, we just chose two randomly here, one is Brazil, where the number is very high. So there are certain countries where they index particularly high. And I think if you’re not on social customer service channels in Brazil, you’re missing on massive opportunities there. But we’re not... you know, we’re half that in the U.S. and the UK but still not far behind in the grand scheme of things. And in Japan, you can see that it’s a different service culture. They’re much more traditional in a way, or there’s other preferred ways of communicating. And you can see that on the other two metrics, we’re getting more specifics.

So have you ever used social media to praise a brand? And there you can see that, again it’s about 50% in the U.S., 40% in the UK, 62%, still very high, in Brazil. So these are the positives of social media as a way of engaging with customers...is that you can get a lot of praise.

But on the ‘complain’ side it’s equally almost just as high. It’s a little bit lower I think. The great thing is customers tend to use social media to praise versus to complain. They’re both high but you can see that there’s great value in terms of allowing customers to praise a brand. So if you’re there and you’re delivering great service and you’re engaging with your customers, I think there’s massive opportunity here.

Social Customer Service Strategy

Let’s talk about, very tactically, about what are the key components of a strategy that you might be building or thinking about when it comes to a successful social customer service. So, from a strategic perspective, we tend to build things up from potentially the ground up. And, it’s important to...we’ve outlined nine different steps.

And, it’s important to think about each one of these in the context of building a strategy all the way from high-level, what it is that we want to accomplish, all the way down to the specific business case before you actually launch a customer service strategy or a customer service channel. So, let me just walk through these steps in brief, and we’ll dig into it in a little bit more detail as we get through the presentation.

So, at very high level, one of the most important when you set any strategy, but especially when we’re talking about social customer service strategy, is, what’s the vision and mission that you are trying to achieve as a business? And, this is really important because it’s a guiding force to your business in general. But, also in terms of the way that you want to communicate with your customers, in the way that you want to service them.

So, how important is customer service? For example, in the context of a business, how important is the way that you communicate with the 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.

Two is, take a look at what are the channels available? So, obviously, there are a lot of options. It’s very, very difficult to engage customers on every single channel; but, this is very dependent on the geographies, as we already discussed. If you are very heavy in China, obviously, you should look at WeChat. If you’re very heavy in Brazil, you might want to look at the ones that are big in Brazil. Same in other geographies. You need to consider the different channels that are available. Where are the
customers? And, particularly, where are customers interested in engaging you as a business? Because, it’s not just what is big in that country but it’s also where are your customers within the context of a different social media channels.

So, then, the third is what technology solutions are offered that might allow you as a business to develop customer service through your channels? There’s a lot of different third-party solutions out there. There’s a lot of proprietary technology solutions that could be built either with your business or to be delivered on a proprietary level for your business. It’s a very complicated space. We’re going to spend a little more time digging into this shortly. But, it’s something that you will need to in business, especially important to engage with other stakeholders in your business, especially on the technology side. And, we’ll talk about that as well.

Then, off the back of that integrating that technology with your system, how would you go about doing that? Again, we’re still at the strategic level, but, you need to start thinking about these issues. You need to start thinking about resourcing. Now, you know what channels you’re going to be in, you know what type of technology solutions you need, how they’re going to be integrated into your business. So, now what resources do you need off the back of that to be able to deliver against your vision and mission statement for your business from a customer service perspective?

Then, let’s talk about brand alignment. This is more around how do you make sure that you are aligning the way you’re communicating with your customers in these different channels with your brand? Again, we’ll talk about this in a little bit more detail, but you need to be thinking about how do you train your staff to make sure that they are speaking the right language, and that they actually reflect your business, your business’ sort of motto and tone of voice.

And then, metrics and reporting. So, this is all about thinking about how do you make sure that there’s a feedback loop into your business so that you know that your customer service channels are on social media, are working for you, that you’re constantly doing better, you’re constantly improving, and you’re able to make business decisions off the back of that?

Activation plans and timelines. Here, we’re talking more about making sure you have, in writing, something that you can socialize across the business, a plan and a timeline for how you’re going to go about doing this. If you are the person driving this, you need to know, and with a lot of detail, what the plan is for how you are going to go about making this a reality. This is as much about documentation as this is about anything else.

And, finally, very similar in nature, is the ROI and business case for this. So, putting that in writing, the timeline, the activation plan, that’s all going to be part that obviously, but more specifically, the ROI case for this is going to be incredibly important in your business. And, if you are in a position of responsibility for getting something like this going in your business, you should definitely have a good grasp of what is a business case, what’s the ROI. That’s the most convincing way you’re going to get senior management in your company to listen to you.

And, one more way of looking at this is, I’ll just cover this very briefly, but effectively there is another way you can think about this, which is, at a very high-level, you need to discover what it is that your business really needs when it comes to how to engage with customers on social media channels. You need to develop a plan for how to go about making that a reality, why you need to ratify that with your business, and, this is as much internal as it is external, but you need to, effectively, test some of your assumptions.
You might want to look at where customers are and collect data on the use of social media. Start looking at whether they're posing questions or they're looking to engage with you on a social channel. Collect that data and put a case together, and then, socialize that within your business. Get feedback and input. Make sure there's agreement and alignment. Figure out the implementation plan for that, because that's going to be, obviously, that's where you create the detailed timeline that we talked about before and then iterate on that.

And, make sure that it's... once you've gotten a lot of feedback, you've done the implementation plan, you're constantly thinking about: How do I make this better? You can do that over and over again. There's a point when you need to ask yourself whether you have enough data to make a decision. Once your business case is really solid, you have to kind of go for it. Obviously, this is not a... it's a moving target. There's new channels that are coming out. Customers are changing their behavior. But, the reason why we've made this into a circle is probably because you have to constantly be iterating what your strategy is, what your approach is. Because, as we all know, digital channels are changing very, very quickly. The way that customers are engaging are also changing very, very quickly. The types of tools that are available, for example, I mentioned Facebook, is putting investment money behind the way that they allow companies to engage with customers. So, you need to be on top of these changes and you need to make sure that your business, across the board, is being set up to be able to handle those and make the most of them; because, otherwise, you're leaving money on the table.

**Collaborative Strategy Development**

So, how do we think about this from a stakeholder engagement level? As I mentioned before, this is absolutely critical to making sure that your plan is going to come into effect, and to make sure that your company is going to be using or leveraging social channels in the right way. So, on a high-level, we'll just focus at the very top, and kind of move around this briefly, is around engaging and interacting with less with your organization when it comes to developing your plan.

How is it? This is sort of toward the tail of the chart that you're just looking at. We're talking about sort of socializing it, at creating your implementation plan, and then iterating that, you want to be working with people across your organization, different stakeholders within the business, engaging them, interact with them on your plan. Of the tail end of that, you need to be thinking about what are the issues that have come up? What is it that they're asking you to clarify, and then go off to do that. Figure out how to clarify those problems and those issues and coming up with a solution or an answer that you can then kind of socialize again with your business. Those two things are kind of interacting with each other quite often. Then, since you've identified some issues, and you've come up with some issues that you need clarified, and hopefully, you've done some homework off the back of that of that.

In the interim, as part of the process, you now have some resolutions to those issues that you can kind of package up as part of your business plan, ideally. And, one of the key actions that you're going to take, and this is as much as getting ahead of the ball or anything, obviously, in any implementation plan, you should have a very clear sense of what are some of the key issues that might pop up in this organization.

For example, we have only ever serviced customers from traditional channels, through traditional channels in the past, and we haven't even used social media for marketing purposes; so, we have a huge gap to fill and all our resources are currently allocated to, specifically, to offline channels. How are we going to close the gap? Because there's a big, red flag there which is to say we need to be keeping a very careful eye on this process.
Or, another issue might be, we’re on very old systems. It’s very hard for us to integrate this new technology without problems. We need to look at this very carefully and have a plan in place for resolving this; and, the idea here is that you are going to identify these issues and come up with a plan. The outcomes and dialogues here is really just to say, now that you have... you've listened to this all out, you've been very clearly articulating what those issues all are and how you’re going to resolve this, you should have an outcome of that process that allows you to have a dialogue with your business.

And, work through these issues as they come up or have that conversation ahead of time. It’s hard to predict everything, but the earlier you get ahead of these things, the more likely you are to get everyone involved in the journey to come along with you in a way that’s very productive for your business.

We’re going to quickly talk about the key stakeholders in your business that would be involved in strategy creation. You’ve come up with this great plan, you’ve done all this iterating, you’ve strategized with your business, so, who are the people that we’re even have to socialize it with? We’ve kind of jumped around these things without taking a step back and saying these are the types of people that you talk to. And, the idea here, just to give you an overview of who we think the typical stakeholders are in the business. So, obviously, social media teams are the go to when it comes to expertise on social media channels.

But, how do we necessarily use them from a customer service perspective? But, they certainly have moderated it to some extent, or they’ve seen customer responses. If you tweet out and customers are tweeting back at you, you have a good sense of what customers are saying or what they’re asking for, how they’re engaging in channels, what channels are popular. This is going to be key, key stakeholder, probably the most important. In the companies that I’ve been involved in, the people that are involved in social media have a very strategic role to play when it comes to customer interaction these days, and they play a big, big role in coming up with these plans. So, if you’re the one that’s helping bring these together, maybe you are a social media professional of some sort and you are in the marketing side because that’s the way the business decided to work this out, then you are already in that position to be able to learn a lot from your business.

So, two is, obviously, customer service. You know, if you have a customer service department, a call center, or some sort of customer team, they’re obviously going to be at the forefront of knowing how to resolve certain issues. There’s probably a process already in place that you can learn a lot from, you can borrow, or that you can iterate to make them ready for the digital channels, for social channels.

Customer experience teams. So, these are people who are thinking a lot more about what is the customer experience from start to finish. They have a view of the customer experience, not just when it comes to customer service, but when it comes to shopping all the way through the customer service. And, potentially, trying to upsell them later, or trying to engage them with your business long term. They are very, very important to have the holistic view of the customer. Marketing.

So, social media and marketing often overlap these days. Marketing teams might, as a social media team, might be within a marketing team, more likely than not. However, the marketing team, broadly speaking, is a very, very important stakeholder in the sense that they are using these channels regularly or they’re creating content for the channels. And, if anything, they might be able to help you get the word out about the fact that these channels are now available. I’m sure they would love to have knowledge around what it is that is being done to engage the customers on end on social
channels. Anything to be able to convince customers that you guys are at the frontier of your industry is going to be beneficial from the marketing perspective.

PR. Social media and PR do sit together a lot nowadays. Sometimes PR is outsourced to a PR agency, and a lot of these can be outsourced, obviously. PR is just one of these things that comes at the top of mind that comes out as being done by a lot of agencies because there’s a lot of expertise around knowing the different people within the different media organizations to talk to. The PR is becoming very strategic for me because of the fact that social media has created a lot of opportunities for how to engage with customers. There’s a big, sort of, I would call it battle, dare I say, between social media functions, marketing functions, PR functions, to own the communications strategy. And so, those three in particular, are going to be very critical for me from a strategic perspective.

Legal. Legal, you always need to know who are the legal persons in your business because you guys can get into serious trouble as a business if you’re not doing things according to the latest laws and regulations. You need to know what the limits are of what you can or can’t say, or do with your customers. Just make sure that you have some sort of legal input into this process. Obviously, it would be irresponsible not to do that.

IT. We talk about the fact that IT is going to be critical to getting input from because you’re going to have to integrate tools and systems into the organization’s existing IT network to be able to deliver against this, particularly in bigger organizations and smaller organizations. When I worked in Starbucks, for example, we do this all ourselves. We do this in a very, very lean way. We’re using APIs. We’re going to talk about what those are in a minute if you are unfamiliar with that term. But, you can effectively get your different IT systems or your different technology platforms to communicate with each other, largely because of cloud-based computing. So, that’s, at least in some of the start-ups I’ve worked in, we’ve been able to do a lot of the integration ourselves because the new tools that are being built are being built with modern interfaces that allows you to easily plug data together and allow them to communicate.

And, there’s so much amazing stuff you can do now very quickly and very affordably. And, then, you know, your partners. So, agencies, maybe it’s PR agency, maybe it’s marketing agency, it could be any of these things that we already talked about. Your vendors, maybe they already have some of these solutions, or maybe they’re already thinking of these things. Just, you might want to think about engaging your partners outside of your organizations as well, as part of the strategy creation.

Okay, so that is a lot about what are the different parts of setting your customer service strategy, and who are the stakeholders involved in setting those strategies. And, what I thought I’d do is spend a little bit of time, very briefly, talking about those different teams that you might work with, and what some of their key responsibilities are. Because, it’s easy to talk about the fact that marketing is important, PR is important. But, for you to understand practically what you might engage them with, it’s good to know the responsibilities.

So, very briefly, social media, very obvious to you, probably, I think it’s something a lot of consumers are now very familiar with, and business as well, we’ve seen how social media teams behave and how they engage with customers. But, beyond just delivering social media campaigns, they also have key responsibilities around insights, insight generation, and they’re often best practices.

There’s a lot of knowledge and insight that can come out of that team. So, it’s great to tap into that, if that may be important to you. The customer service team, they might know a lot about resourcing – how much does it take to, how many people do you need to be able to deliver customer service,
and to how many customers could you realistically deliver that service to per person? So, this will give you some real sense of what is the resourcing that you'll need as part of your plan when you're putting it together – really, really important.

We 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, or maybe get their feedback on the process that you're building for your customer service on social media platforms.

The customer experience company. So, what is the overall customer experience for your company? What's the framework that they use for that customer service? And, you can go to them to make sure that you are aligned or get them to help you create a plan for your customer service that is aligned with the overall customer experience framework. Some of them might be just as simple as setting the context of how social channels would fit with that overall customer experience framework.

But, they might also help you think about what are the main touch points or what are the main use cases that you will need those social channels for. For example, they might know that, if you are in a retail business, they will know the value of stores, and how you might be able to use social media to drive and in store business, and how you can engage with customers to drive them to the stores. And, there might actually be technology solutions, and bring that customer touch points to service staffs within the stores, so you can have a seamless customer service interaction. For data purposes, as well, you might get some insights by having a holistic view and seeing what kind of knowledge would be important about the customer experience. So, very, very important from my perspective.

Marketing, obviously, they have the best sense of what brand definition is and making sure that what you're doing from a customer's perspective is aligned with the overall brand message is. The way that you articulate the business, what are the things that you can say to customers or not say to customers when they ask about, maybe certain features, what are the features that marketing has identified that you should highlight, that kind of thing is very, very important to get feedback on.

PR, they are the experts in dealing with crises. When something goes wrong in the press, they are the ones that are handling it, obviously. When something goes terribly wrong from the customer's perspective, which usually blows up or could blow up in the press, they know how to handle those crises. So, it's pretty, really good to get an input from that perspective. But also, probably, what is the communication strategy overall?

Legal, we've talked about this very briefly. But, from a compliance perspective, incredibly important to talk to and they have a good sense of regulatory requirements overall for your industry. And, IT, the evolution of business tools, they have a good sense for that stock evolution. They can help you in terms of optimizing the way that your business uses those tools or the way that those tools are optimized for your business, two ways of thinking about it. IT integration, as I briefly mentioned, super, super important. You need their input in making sure that their integration can happen smoothly.

And, this last bit, which is about security, the last thing we've mentioned in the slide, that has become a huge, huge topic. If you are in any business that has some sense of customer information, for example, financial services is dealing with this, day in and day out now. And, in fact, they're being quite secretive to some extent. There's a lot of shadow around how much security they really have in place and whether there have been breaches on it. But, they just haven't disclosed because our faith in financial services, think about retail banks in particular, is largely based on the fact that we assume our digital identity with them and our data with them is secure, and, our banking is secure because
they have a lot of money hiding at the back of it and our personal vault, for the large part, for most of us, sits within our primary bank of choice.

So, security is becoming hugely, hugely important, and actually getting everyone’s input into that is quite important now. Legal can help you identify what bits of data you can and cannot transact on social media, for example. But, you need to be thinking about this innovatively as well, because you don’t want to allow too many regulatory issues and too many security concerns stop you. But, you have to factor those in, and make sure that you’re not compromising your business, obviously. So, very, very important to get that aligned. But, to also be looking for ways that you can innovate to draw very tough balance this way.

Okay, so we’ve talked about a lot of things when it comes to strategy. One of the things we’ve covered is around making sure that you’re setting goals for your customer service strategy your customer service channel within your business. And there’s a very interesting framework that I thought I’d briefly talk about called SMART, which stands for Specific, Measurable, Actionable, Relevant and Time-based. What this is saying, what this framework says, is that when you are setting objectives, and in this context objectives for what your social customer service channel is going to deliver, you should make sure that when you define those objectives cover these five different areas. That you can talk about your objective in the context of these five things. So you want to make sure that, that objective is Specific, is Measurable, is Actionable, has Relevance to your business and it’s Time-based.

So if you’re thinking about, for example, how you might be looking to communicate with your customers through a specific channel like Facebook and what objectives you might have for communicating with those customers, you’re going to want to think about how that objective within that specific channel fits these five criteria. Go through this list and make sure that those objectives you’ve set check off on all these things. If your objective is too broad you’re not going to meet the requirements of SMART objective settings of SMART criteria. If it’s too specific you can get too carried away with that, but I’d say err on the side of being specific. So an objective might be to deliver quick customer service to clients and always respond to their queries within a day. So there’s a measurable component of that, which is that you can respond to them within a day, that’s measurable absolutely. It’s very specific because you’re talking about response time, you’re talking about a specific channel in this case as well.

And they are certainly relevant, they are certainly time-based aspect of this you can measure it, you can look at the timeliness of it the relevant to have it, and it’s actionable. Because you know that you can put a system in place or a way of measuring that in place and actually review that objective on a regular basis. And that’s the idea that you can track your progress as an organization. So you’re going to want to do this across different aspects of your social media strategy; when you’re setting objectives, think about SMART.

That’s something you can apply more broadly to your career as well. When you set objectives for yourself as an individual, in your business, in your position, and you’re viewing your own performance, you’re setting objectives for how you are going to perform within your job. I think SMART is a phenomenal framework for making sure that you’re quoting SMART objectives in place as part of your personal career plan. But that’s a completely separate topic.
Customer Experience Framework

So getting back to customer service strategy there’s one other bit that I thought would be good to highlight, which is around the customer journey. And I think 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.

So at a very high level you need sort of the timelines around what a customer journey looks like. How long does a typical customer shop for your product or service? What are the steps that they go through? How is it that they actually move through the different parts of your purchasing sort of funnel, so to speak. What are typical customer profiles? Typically, it’s more than one, typically there’s lots of different profiles of customers. But I’d say marketing can be very helpful in this regard. Because they have got a lot of customer profiling and they will tell you we have five key customers or we have three key customers. And they can give you profiles of what those customers look like. And they probably know what their pain points are, what are some of the typical questions or issues that they might have. That’s probably some information they have. And if not then turn to the social media teams either within marketing or maybe the PR team’s handling that.

Like I said you have to think about who’s doing those things within the context your business, but someone else in your organization has some sort of pulse on what different customers are asking for. And likewise, those same people in organization can help you with the pain points and highlighting those for you, so you can start addressing those within the context of your customer journey and your strategy in particular off the back of that.

And then for things that are a little bit harder to identify from a numerical perspective that you haven’t necessarily quantified as an organization, I would highly encourage you to go look for supporting evidence for those. If someone hasn’t looked at what customers are saying on social media you can actually go off and do that yourself, it’s very easy. The great thing about this is that the information is transparent. So go look at it yourself. Go see what you’re saying and create that evidence embed that within the journey that you’re identifying and within the plan for how you are going to put together this strategy. So something to really think about when you’re putting together your customer service strategy on social channels.

One thing that complicates this significantly is that there are a lot of different touch points out there. Now in very, very high terms there is pre-purchase, there’s purchase, and there’s post-purchase. Broadly speaking those are the three different major stages that a customer will be in. They will be in one of those three stages. And you can start thinking about what are the key issues in each of these. I won’t go through all of these dots in detail. But you will probably want to think about in a little bit more detail how you might be engaging with customers throughout these different brand touch points. It’s something your marketing team has already thought about most likely.

I thought an interesting example to throw out there is Direct Line. For those of you who don’t know Direct Line they are one of the leading UK insurance companies. And they are very, very digitally savvy. They do a lot on digital channels and they were actually voted the number one company for customer service on digital channels. And social media, in particular, is something that they’ve adopted very aggressively. And if you contact Direct Line about an issue they will respond very, very quickly, they’ve implemented incredibly innovative tools, for example, live chat. It’s becoming more common now but they were early adopters of this. And you can go and have a conversation about almost any aspect of your business engagement with Direct Line or your interests and some sort of Direct Line business and have a very quick resolution. And so they index very, very high on a lot of the key metrics that are used more broadly by the industry or industry in general to assess how fast
forward looking a company is when it comes to their use digital channels. So a good example to look at which we’ll cover in more detail in another module.

Implementation Plan

Just very briefly want to mention that from an implementation perspective, it’s really good think about your roadmap and your plan for how you going to do your social channel but in a phased approach. So you don’t necessarily want to just have one plan you’re going to stick to and go forward with. As I mentioned before there’s a sort of cycle from all the way from starting to develop your plan, all the way to iterating it and fitting that back into the development, if you remember that circular chart we looked at earlier. So here’s just saying, make sure that there’s a phased approach to your implementation roadmap for how you use social channels to drive customer interaction.

And if you have a phased approach I think there’s sort of three big benefits One is because you’re going to do things in a phased way so, for example, you might test the waters in Facebook just to see what kind of customer interaction you get. You can overcome internal resistance to changes within your company because you’ll collect information data and you’ll prove the business case itself. You can prove an ROI by showing that you’ve tested it, in one channel it worked and it worked in one geography, for example, and maybe that lesson is already there. Maybe one country, if you’re in a multinational company, has already been doing this kind of thing – lessons learned.

So this is saying you can get a lot of really rich lessons by doing a phased approach. Sort of similar to what I was saying where you might test it on Facebook. You can actually then take those lessons that you get from that test and broadcast that out. And that helps overcome the resistance. Those two are very related obviously.

And the third is... I wrote here solid foundation, but what I’m actually saying is by having a phased approach you can make sure that you’ve tested out and have some solid fundamentals for what your plan is. And you’re not just rushing into a huge approach, you have to try things out and make sure that you’re building the right fundamental business, that your assumptions are tested and approved and have been proven. And if you can do that effectively you’re going to have much more buy in and you’re going to feel much more confident as an organization to keep moving forward. You keep building your plan for how to use social channels.

Earlier we talked about some the challenges that social media channels pose for businesses when it comes to customer service. You’ll remember I mentioned that there’s an application of customer sort of voice. And complaints can spiral out of control – I gave you the United example of that. Customers are expecting faster response times, obviously. So, in order to mitigate that, there is essentially three key things that I think you as a business owner should start thinking about communicating with customers.

One is communicating operating hours and opening hours with your customers. I’ve noticed on Facebook you can actually list the hours by which you as a company are going to respond to messages. So make sure those are on there, make sure that’s communicated, make sure there are other places where you communicate that. Wherever a customer might be sort of entering that communication channel have some way of communicating those hours with the customer. So that they don’t sit around waiting for a response starting out of hours.

Response times, again, something you want to communicate. What can the customer expect in terms of response times? We try to respond to customers within one day like I mentioned before that’s a very SMART objective. If you have that in place customers just know when to actually expect
your response. And that’s separate from resourcing because resourcing you’re going to have to think about the ebb and flows and try to keep that response time consistent throughout the course of the ebb and flow. Obviously if your response time is a whole day, gives you a bit of breathing room to spread out the responses even though customers might be making a lot of inquiries, or a lot of requests, or a lot of complaints say from 6 to 9pm when they’re done with work and they’re settling in at home. And they have a bit of downtime to take care of personal things. But if you’re closed after say 7 or 8pm and you have a 24-hour policy your team in the morning can take care of that. Just something to consider: how important is that response time and what are your goals in terms of that response time?

And in terms of service, this is sort of standard legal stuff, the legal team should help you on that. But what are the sort of general terms for what you can actually commit to the customer, and what you can expect from the customer as well when it comes to that communication through your social channels?

And you can also talk about metrics more on internal basis that you would be looking to when it comes to building your business case. So we’ve talked about the metrics that you might communicate with your customers, what are the metrics you’re going to communicate with your internal stakeholders within your company. So one is... we kind of mentioned this briefly but what’s the value at stake here right this is part of your business plan? How much value can you deliver to the business by having these new customer service channels? Calculate the ROI as best you can have some sort of model in place to look at what uptake you might expect in terms of product purchases if you’re there answering customer inquiries and you can either up sell them or sell them new products, sell them a product that they might not consider otherwise there’s value there.

There’s very real tangible value and you can point to that value. There’s less tangible value, like, for example, if a customer is complaining about something and you just respond to that quickly, it’s a little bit harder sometimes to calculate the value of that. But there is value. I mean customer churn might go down, for example. And you can build into some assumptions and you can actually revisit those assumptions later and make sure that your calculation is roughly right. And if it wasn’t right then make it right.

You might be surprised to find that you were a bit conservative with some of your metrics. It’s always better to be conservative because if you can make an ROI case and a value case using conservative metrics then certainly once things do go well the business case just gets even stronger. And the other thing is I think it’s important to identify the competitive advantages within your business as part of your business case. This is, let’s say a specific metric per se, but there are conversations and socializing that you should do within your business to understand what it is that you guys can deliver your customer service team for example can help you on this. Your marketing and social media teams. What is it that you guys do well as a business? Especially when it comes to customer interaction, and how can you potentially leverage that to deliver something quite unique to the customer on social channels.

Finally, just kind of stepping back before we wrap it all up. There’s sort of three big parts of the business I think at a very high level that you have to think about from a collaboration perspective. And these three things are mostly just factors that you need to navigate. One is technology. Clearly when you’re talking about digital social media channels and using them for customer service there is a huge technology implication for the business. So I want you to think about that very, very carefully as you’re going through this. What’s the technology bid you have to focus on that.
Culture, we talked about the mission, the vision of the business, what's the overall objectives from a cultural perspective? What is it that you as a business can deliver or want to deliver or have they... and we talked a little about a competitive advantage that fits into culture as well to some extent is how do you do business differently and uniquely. And internally how do you prioritize customers, for example, within that? And maybe that culture needs to shift slightly, maybe this is something that, as overall company strategy, you're trying to shift that culture to be more customers-oriented. Well, you can consider that in your plan and make this a part of that plan. Perhaps that's a selling opportunity internally to bring this to the forefront.

And processes, these are also 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 again that change that needs to happen? So that's going to be a collaborative process within your business across these three big categories.
LESSON 2: MANAGING SOCIAL CUSTOMER SERVICE
Social Customer Service Models

When it comes to a customer service model internally, and the resourcing, one of the things that you can think about is whether to have a blended model or not. I think there's some great advantages of having a blended model. And when I say blended, I mean having a team that is looking both at offline or traditional customer service channels and some of the new social ones. If you have a blended team that's addressing customer service across channels including the new ones, you get greater utilization rates. Obviously, if everyone across your team has the capacity to deal with inquiries coming in from across your different channels you can just be much more efficient about how you use that personnel.

Reduced downtime. It's quite similar in a way, a slightly different point in the sense that you will be online longer, because if one team is maxed out on the social side and the other team is not, you might have downtime on the social channels if they're separate teams. When you combine them you can balance that workload and make sure that the downtime doesn't happen as often. Being channel agnostic I think it's quite important because you can keep one of communication with customers across your channels, and your service agents also have a better sense for how to deal with customers in different environments. And there's definitely learnings and a cross pollination of ideas that a customer service agent might have by observing customers in different channels. And simplified resource allocation. Sort of the last point I wanted to make, which is to say you can be a lot more efficient about allocating your resource if it's just one resourcing pool.

Obviously, that builds into the other points that I already made today. If you have a designated model, there are some advantages to that as well. A designated team, just as social channels is what we're talking about here. One is there might be an improved agent experience, which is to say you can focus training on your agents for social channels to make sure that you have the right capabilities there. And you can set your processes in place to make sure that those agents have the right processes specifically catering to social channels. And there's a lot less confusion around the different channels because your agents will just be specialists, let's call it, social channel. So you can actually deliver a little bit better service potentially. Not necessarily true if you invest quite a bit in training but that comes at a cost.

Agent efficiency. So they can get better and better at dealing with inquiries if they're focused on social channels. We talked a little bit before about the advantage of a blended model, where there's efficiency by being able to balance stuff across the two. Here when we're talking about efficiency it's much more about getting up the learning curve and being able to handle inquiries within the context of social media much more efficiently. How you weigh those two things, it's an exercise of judgment and analysis. So that's something that you need to figure out.

And agent selectivity, what I'm saying here is that you as someone who's managing this process might be able to choose agents who are really well suited for very fast quick real-time communication with customers. And so you might choose agents that are just fit for social is what we're trying to say here, okay? You might find that there's certain talent that shines when it comes to written communication for example, or can think very quickly about what a customer's needs might be. So that's another consideration to make. There's two ways of doing this in terms of how you build or acquire this capability as a business. You can obviously use agents internally or you can outsource this service and work with outsourced agents.

Quick pros and cons on this. It's quite similar to the pros and cons of any outsourcing or in-sourcing consideration. When it comes to using an internal team I'd say the number one thing is that they have
stronger brand alignment. There’s absolutely no doubt that there will be faster, better communication with your team internally if they are embedded within your organization. There are some outsourcing models now where the team actually sits within your building, your headquarters with your marketing team, and that alleviates a lot of this.

So there are models out there that are hybrid of these, effectively, but just dividing it for some sake of simplicity, but something to be considering. But for most businesses, brand alignment is critical, especially if you are a high-end consumer brand, let’s say, that brand alignment is particularly important. It gets more and more important typically as the strength of your brand becomes more important as you go upscale in a market.

Reduced agent turnover. So if you’re internally, you have more control over this, is effectively what I’m saying here. I can’t promise the turnover is necessarily lower internally but presumably, you can start learning about how do you retain agents. They might feel more sense of ownership and involvement in the business if you are hiring them internally because they’re embedded within your business. And then agent empowerment. I think this helps with turnover but you can set the rules. You can set the boundaries. Again, this is entirely up to you as a business to help define what that empowerment looks like. But you have control over this again.

So very broadly, internally, you have control over all these factors. On the outsourcing side, you can get more scalability largely because you can keep outsourcing more and more as your needs go up. Typically, you get cost savings. This is a very broad generalization but I’d say it’s typically true. There’s pros and cons to that but the big pro is that you save money as a business typically when you outsource. And part of that is because you can compare vendors. So you’re not just going to look at one vendor, per se, you’re going to look at a couple, and, you know, get different quotes, and you get a sense for the tradeoffs across those and try to optimize for the costs that your business incurs.

Coverage, they might be able to increase or decrease the agents working on your business in a much more flexible way. There might be two businesses, for example that they work in where one has a big surge in the morning hours and your business is a surge in the evening hours, let’s just say, hypothetically. They can increase their coverage and, on the same tune, efficiency goes up in response to that.

Contact Types

So you’re thinking about your social media strategy from a customer service perspective. And there’s a lot of different types of contacts that you could get into your social channels. And I think it’s important to dissect those types of contacts into a couple different categories.

Here are four main ones that I’ve articulated. One is what’s the complexity of the types of inbound contacts you can get? What’s the customer data security considerations that you need to be thinking about for any type of contact? What’s the sensitivity of the issue? How personal is it? How much does the customers sort of personal information factor into that from a sensitivity perspective? And how sensitive is it in terms of you internally as a business and your priorities in terms of dealing with customers? And the last one is the contractual limitations of what you can and can’t do and say to customers in different channels. And this is mostly around data is what it comes down to.

So number two and number four are quite related. All I’m trying to say is that I think it’s very important when you’re thinking about your social channels when it comes to customer service is to think about and consider the different types of contacts that you might get, and start dissecting those according to these four different things.
So try to map that out. You can essentially create charts for the types of contacts you would get very, very high-level and broad terms. But this will be, I think, quite important as you keep developing a plan and I’ll show you in a minute how that might factor in.

**Workflows**

When it comes to another big factor to assess any type of contact it’s basically on the importance of that contact.

So kind of expanding on the sensitivity point a little bit. Obviously, any sort of issue you can be, of low points, medium, high, or could be absolutely critical. And for every possible contact type that might come through, in other words, a query some sort of customer question or complaint. How might any one of those stack up against these four things? So do that according to very broad categories that might come in. A query about the price of something, a query about where to buy a product. A complaint about the quality of the product or a manufacturing issue. A query about a return. So all these different things can be effectively mapped out according to the four things I just mentioned, and according to how important that issue is to the business.

So when it comes to creating a customer service strategy and an operational plan off the back of that, I mentioned earlier when we’re talking about the strategy, that it’s good to learn from this process. So on the operational side, you can do that right by putting the right tools in place to learn from them. More than tools, it’s processes. I mean, most tools now have some sort of data collection built into them, but make sure that there’s a process in place within your business to be learning from the experience that you have in dealing with your customers.

Put feedback mechanisms in place. Make sure that the customers can be surveyed. I would survey the customers quite regularly. In fact, there’s a great thing that we developed, a great tool we developed at Bain before I joined but I implemented it quite often, which is called Net Promoter Score, and it’s a key question that you can ask customers to see how likely they are to recommend your product or service to a family member or a friend. And some of the best businesses I’ve seen ask me what my Net Promoter Score is after every single customer interaction. I’ve noticed my mobile phone provider does this almost every time I have any interaction with them. And that allows them to figure out are they accurately responding to my inquiry, are they resolving that in a timely manner, are they doing a good job of pointing me in the right direction, am I still a loyal customer.

So factor that in, and Net Promoter Score is probably one of the most important metrics that you can point to, but you need to ask yourself as a business what else do we want to learn from our customers off the back of any sort of customer interaction. Then fix and listen to that, right? Resolve those issues and make sure that you retain some sort of record of that, an aggregate in terms of reporting for future reference.

And then, finally, share that with internal stakeholders, but put the right processes in place to do that on a regular basis. It’s just something you should be considering as you’re putting together your operations for dealing with social customer service, is that there is a mechanism built into it where you are sharing. So who are the people that you’re going to share with? Maybe there’s an email that goes out every Friday evening or Monday morning to the key stakeholders in the organization with learnings and the metrics around customer service. Every one of the businesses is going to be curious to hear what customers are saying, so great opportunity to share that.

Another quick topic to talk about is the two different models that exist in terms of dealing with or having agents that are dealing with the customer directly, and consistently versus picking up inquiries
as they come in. So you can set up a customer service channel so that the same agent is always working with the same customer. And one of the benefits of using same agent with dealing with a customer through resolution is that you can build in capacity on that agent to allow them to respond to queries from customers a little bit faster. In fact, what I mean is not necessarily responding from the moment a query comes in, but certainly getting to a resolution faster because they’re going to be working through with the customer. And it’s up to you to figure out what capacity you build in with your agents to make sure that they are managing their workload or you’re helping manage their workload in the right way.

But if you’re customer-focused you can focus each agent on a number of customers that roughly corresponds their capacity and you can be much more accurate about planning. And obviously from a customer perspective, that experience is usually vastly improved. Because they will be experiencing customer service from the same agent which just adds much more personality to the business. I’m sure you’ve been on the receiving end of that where you’ve bounced around between agents and had a very bad experience and conversely had the same person dealing with your inquiries throughout and made for a better experience.

I contacted Apple recently because I had an issue with my Macbook error and I noticed that over the course of three or four different interactions, I was constantly dealing with the same agent. And if there’s one company that does a great job of customer service, it’s obviously Apple, we all know that. And I think that’s absolutely a factor in why their customer service is so high. From an agent perspective, it’s also motivating to see the journey and experience a resolution with one customer. I’m sure you feel satisfied when you help someone solve a problem, and I think your agents will feel the same way if they’re working through start to end with one customer.

So something to be thinking about as well. Workflows are a very important part of thinking through the processes that you’ll put in place for the operation of your customer service channel. But a workflow specifically helps an agent figure out how to go about resolving specific issues, and how to move an issue through to resolution. So we’re not going to spend a lot of time on specific workflows and how they look. You can see a chart of what workflow looks like here, but it’s very easy to just Google what workflows look like. There’s probably some templates out there specifically around customer service. But I’ll just quickly highlight the key benefits of having a workflow in place.

One is you get efficiency because it’s very clear how an agent is supposed to work through the customer service interaction that they’re going to have with customers. You get more control over your business as a result because you’ve put processes in place to be able to handle inquiries of a certain nature. You’re probably going to improve your customer service. If there’s consistency to how you’re delivering your service and there’s a process in place you can probably get better customer service as a result. And then flexibility. The one caveat I will say is I think there’s ways of training your customer service staff to not necessarily have to stick to specific rules that they have to follow but are trained to be able to do this stuff quite instinctively. And you might use the workflows in training. But I think it’s very challenging if you force your agents to follow a diagram whenever they’re dealing with a customer. You’re obviously not going to get very smooth customer interaction and you might not always get the right resolution.

So there’s a very delicate balance here between making sure that you’ve thought through everything as a business. And maybe you’re just using the workflows for internal planning purposes and being prescriptive to your agents. So think about those two things and how that might fit within your business.
Okay, quick shift here, which is to talk a little bit about how you might put checks and balances in place to ensure that your customer service is consistent and of high value in delivering what the customer expects. So there’s effectively two models here that most companies use. One is using a peer-to-peer approval method, which is to say that your peers will review what kind of customer interactions you’re having with the customers that you’re assigned to. And in this model you get quite good efficiency because you’ve got a big team of agents that you can kind of spread that work across. You get a lot of scalability actually because a lot of people would be involved in this across your agent pool. They would probably feel a bit more bonded with each other in the sense that they’re all helping out with each other’s work.

I think you have to be careful about how you frame this. Obviously it’s not just checking on other people, but if everyone’s checking on everyone else, suddenly there’s a peer-based aspect of it that’s not very intimidating. It actually can create a great culture within your company. So I like this model a lot, but there’s some limitations, obviously, but we’ll quickly talk about the advantages of a supervisor-based model.

So the obvious solution here is that a supervisor is making sure that the quality control is high. And you don’t necessarily have to do one or the other. There are blended approaches. But in a supervisor model only you have very high quality control assuming that your supervisors are good. But supposedly your supervisors have a lot of experience, and I’ve done this in this environment or other environments for a long time. And they know what the quality looks like. And they can actually set the bar for quality. So that can help a lot. And they can have a really good sense of what the agent performance is if they’re involved in kind of managing their customer interactions or observing their customer interactions, which then also feeds into coaching.

So there’s a great coaching opportunity off the back of that. I think it’s easy to paint a black and white picture here but the reality is probably somewhere in between. It’s good to have agents learning from each other, observing each other’s work. You might need a clear approval process in place where you need another agent to review something. And maybe it’s only for very sensitive customer interactions. Again something you can consider in your workflow, something to think about.

As we know and we’ve discussed already, with customer service on social channels there’s the risks that we talked about earlier, around things amplifying, things sort of spiraling out of control. All I want to say is just make sure you have a very proactive level of customer service. If you look at the statistics, I think the first one I’ll just read out for you, which is that 88% of consumers are less likely to buy from companies that are ignoring social complaints. This tells you how important the channel is. 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 just be able to anticipate your customers a little bit better when you are interacting with them.

**Process Automation**

So there are these things called “autoresponders,” where it’s quite straightforward, they basically generate a response to customers in an automated way. But bots actually are a bit broader than that now, because there are tools that are being built that effectively mimic human interaction. For the first time, a team actually developed a bot that was so good that customers couldn’t actually tell the difference between the fact that it was a bot and a human. And they did an A/B test, and statistically they both ended up at the same level, which was a big milestone in terms of artificial intelligence. So, I think this is going to be a big, big area in the future.
When you’re engaging with customers on social channels, there might already be some that are using bots that you don’t even know. But that will be increasingly the case in the future, that you’ll be able to engage with customers and have a human interaction, but on the other end it’s artificial intelligence. A great opportunity for companies, obviously, because they can then scale their responses, and they can also use their resources to focus on delivering the unique value in a customer interaction, the trickier, harder, tougher issues that they might face. Or spend that resources on other things across your business.

But real quick, the advantages here are, obviously the speed of response, the scalability, and the cost savings that you get with having bots. The disadvantages are we might not be 100% there when it comes to customer experience, and then solving all the problems. So the customer might be quite frustrated if they’re trying to deal with a bot that just doesn’t quite get their inquiry. Something you can test and something you can figure out for yourself, you might want to try it in very specific ways. I think the way that companies are often doing it now is focusing on a specific area of the customer service to try a bot, and monitor the metrics very carefully to see how customers are perceiving that. You might be limiting your functionality as a result. But that can be okay if you’re still supplementing it with your normal human interaction.

Then, the accuracy of your responses, and the lack of sort of personalization and the human side of it, the human touch aspect of human interaction might be missing. But again, that is changing very dramatically. I think this list of disadvantages is starting to shrink quite quickly. But we’re not quite there yet, so think about those in the context of your strategy around using bots or not.

Automation can mean a lot more than just bots, obviously. Automation can actually mean how you collect data, how you generate responses that a customer service rep might use to deal with the customer interaction. Sometimes you can actually autogenerate responses that a customer service agent then checks. I’ve actually used this from a sales perspective. I use a plug-in for Salesforce that allowed me to generate a sales template that I could then edit. And I originally wrote that, obviously, and it wasn’t necessarily done with any artificial intelligence. There were no algorithms or anything like that running off the back of it. But it was a very simple form of this. You could imagine with customer service centers, you could do that, but with some real intelligence built into it, some algorithms, some artificial intelligence to help facilitate the human interaction, if that makes sense. I think that’s probably the way that we’re going to go in the short term. Think about your customer service platform and the automation that you can get off the back of that, and this is where interacting with your technology team is going to be absolutely critical.

There’s different classifications of automation. I think you’re going to want to just be very clear about what those different areas are in your business where you might want to apply automation. From a customer perspective, I think it’s very important to classify the types of inbound inquiries that are coming in and make sure that automation is addressing certain ones. The great sort of upside of this is that you can reduce a lot of noise. Using automation, you can focus in on some of the more actionable bits of customer interaction that you’re having, inquiries that are coming in.

The last point just to make on this, this is sort of a smattering of my final thoughts on automation, is that you want to make sure that you are continuously enhancing your logic and your algorithms if you are implementing an automated solution. If you’re using a vendor for that, there’s no doubt that that’s going to be part of it, but I would make that a big part of the agenda. Make sure that there’s learnings that you can kind of iterate off the back of it. This is a whole complicated area in and of itself. We certainly don’t have enough time to go into it in depth, so just some quick highlights to be thinking about if you do go down that path.
The next topic I wanted to briefly talk about is the playbook for how you might set about the customer service sort of rules within your organization. A playbook is something, it's sort of like a bible that you might have put together that your customer service team can use when they are dealing with customers, or when they're going through training. I think there's other benefits. So I'll quickly mention those.

One is, if you have a playbook, you can get different stakeholders aligned that might have input into what the customer journey might look like. So your marketing team or your customer experience team will want to know, how is the customer service team on social channels dealing with different types of inquiries? So that playbook should address those types of things. It's sort of a combination of your workflow and your work planning into much more sort of specifics of how a customer service rep might be dealing with customers.

You can again look up “playbooks for customer service teams” online. I'm sure you can find a lot of rich information out there on the web. We don't have time to go into what a playbook exactly looks like and what the components of that are. That's a whole module in and of itself. But do take a look around online, and you will find some rich content around what a playbook could look like and to help you start thinking about whether you want to put one together, which I would strongly recommend you do in some shape or form. Certainly, anyone in your customer service team will have some sense of how to put a playbook together. They might already have one that you can leverage and start tweaking for the customer service side of things.

As I mentioned, it's a great asset for training and onboarding. It's obviously a go-to reference on sort of the way, and the policies and procedures, for how to deal with customers. It can be used for arbitration of disputes, so if everyone's broadly agreed on how you're going to respond to different disputes, different resolutions. So, a customer wants their money back, for example, because of a very specific kind of issue, the product arrived late and they're upset about it, and they ended up having to do something else in the short term to close the gap between when they needed the product and when they actually received it. So depending on what market you're in, your customers might be very time-sensitive. So what's the sort of way you're going to handle that kind of dispute? Then, just internally, be able to explain to other bits of the organization. This fits into number one, actually, to a large extent.

But what's sort of the way that you can communicate to the rest of the organization around how your customer service team is working? So that's very useful for stakeholder alignment, obviously.

**Crisis Management**

From a crisis resolution perspective, I think there's... we mentioned earlier, at the very beginning, that this is a whole topic in and of itself and you need to be ready for crisis because it is inevitable and it's happened to some big companies. And if you have a plan in place, you can be prepared to handle that in a way that is going to make your business look quite a bit better than if you handle it poorly. I think every business should aspire to being ready to go if there is some sort of disaster.

You could argue for example, someone like BP, they had a big Deepwater Horizon spill, and they just did not have a response in place. I mean, certainly they didn't have a response in terms of what to do when that disaster unfolded. It took months, and months, and months to come up with a resolution. And, it took lots and lots of money, in terms of consultants that they had to pay very high fees for in order to be able to come up with a solution. And then certainly from a public relations perspective,
they had absolutely no plan in place for how to deal with something of that scale. They have dealt with crises in the past and they had a customer service team, but this was a completely different level.

I think it’s hard to be prepared for something that much of an outlier, obviously, and it’s easy to be a harsh judge looking back at it, but it is a good lesson to just do everything you can to have a foot forward. This is hard to do and it takes discipline because there’s not necessarily immediate payoff, and there’s not necessarily any payoff for a year or two, or ever, hopefully, if you’re in a very good business that has all its processes very sort of nailed down and is super consistent. But inevitably it will, and if you are prepared, it just makes you look very, very good in front of customers, and internally, too, if you are in a position of ownership.

So, what are the kind of indicators of a social media crisis? I think that’s the first thing to be thinking about, and you can start mapping this out. But what are the types of social media blunders that you might see? Okay, some of those things tend to go viral, or your customers might have a complaint that goes viral, could be one of the two things. If you’ve generated the blunder, you can have a sort of different level of response. I would be ready for some situation where social media gets hacked into, for example, or by accident, someone posts the wrong thing on your social media accounts or responds to the customer in the wrong way. You need to have a plan in place for all those things.

With the viral customer complaints, it’s very hard to predict how that might happen, but generally speaking, it’s good to start thinking about if something does go viral, and maybe you can dissect it into basic areas of complaints that might arise. How would you respond? How would you respond to that and who would need to be involved in that? There might be backlashes to your campaign. You know, you have a new campaign running and, for whatever reason, you didn’t properly anticipate the perception to customers. There’s definitely been campaigns out there that people thought were sexist in nature, and the company didn’t see it that way. They missed that entirely. They just, you know, either weren’t thinking clearly, or, for some reason, they missed a certain aspect of a culture’s perception.

Now, what’s very common, actually, is to have backlashes when a company is trying to get into a different market and they just don’t understand the dynamics in that market very effectively. So have a plan in place for that. Okay? So if any of these cause significant damage to the brand, you need to be ready to address those and just make sure you have a plan in place for dealing with that. Okay, and on a similar note to the war plan that we had, that we were talking about before, and the workflow that a customer agent might go through, you can have a flow chart for dealing with a crisis as well. Again, something that I would advise you to dig into on your own if it’s relevant, we’re not going to go into it in too much detail today.

But here’s just an example of what that could look like from a very high level. I’m not expecting you to read all the details on this slide, but go look it up if you’re going to start putting a crisis plan together.

What does that workflow look like if there is a crisis? Because you want to be ready to go. And as Benjamin Franklin famously said, “By failing to prepare, you are preparing to fail.”

In fact, one interesting sort of side note on this quote is that you could read this as a lesson to practice the fire drill. So assume that one of these things goes wrong, what is it you’re going to do? And start simulating, and having some drills. There’s a reason why we have fire drills. So you can actually do the same with crisis management or when it comes to social media. And the risks are high, you know, with a call center, the crisis management is not as big a factor typically because it’s not getting broadcast into the world. Social media typically is. So how could you make sure that you
reduce the risk of it? Because another way of looking at this is not just how do you respond, but how you reduce it. Make sure that agents have some sort of moderating component to their workflows.

We talked a little bit about peer to peer review of client interaction. That is a very, very important part of this, I think, is to make sure that agent responses are moderated somehow. When it comes to system access, you’re going to be implementing new technologies, new tools in your organization to deal with, to be able to deliver customer service though social channels. Make sure the right controls are in place. Access is critical, but you have to do it in a way that makes sure that you’re clear about who is within the system and who is not, who can post things, who can’t. There have been some situations where an agency happened to have control of a social media platform because the client had given them access to do monitoring or to look at data and what the performance was and then something slipped and someone posted something by accident. And that’s because the controls were not put in place effectively. So, something to really be thinking about.

And then have a good review process in place so that you’re constantly getting better and better at dealing with customer complaints. And so that when there is a crisis, you kind of moved up the learning curve to be much more effective at dealing with those. Okay?

Some quick techniques to point out, and these are sort of ways that you might go about dealing with a crisis. One is rapid responses, focusing all your efforts on being quick about your response. Demonstrating transparency, so it’s good to keep customers in the loop. How many of you have sat on an airplane and half an hour goes by and you’re still on the tarmac and you’re wondering, “Why haven’t we left?” Well, we all like transparency and the same is true when there’s a crisis going on with the companies that we’re purchasing from or that we have a problem with.

I recently bought a watch and had to send it in for repair right away because there was a problem with the mechanism. It was a mechanical watch that just wasn’t… the balancing wheel wasn’t turning. I sent it in and after about three weeks, I hadn’t heard a single thing. Was my watch lost in transit because I had to send it back to the U.S.? Were they even repairing it, had it arrived? These are questions that were going through my head, and transparency would have been good. And that’s not even a crisis, you know, that’s just me dealing with a customer service complaint.

So imagine if that’s on a much larger scale. So err on the side of transparency. A unified company position is really important because there’s lots of ways of communicating with customers now. There can be a press release, marketing can do a campaign, your customer service channels can talk to customers. There needs to be a consensus about what the company position is. And you need to stick to the right procedures, kind of working along those charted on the outside.

On the bottom you’ll see, we talk about reserving a team mobilization, a reserve team mobilization. And what we mean by this is you might want to have, maybe it’s through an outsourced vendor, or it’s an extra team on hand to just be able to mobilize them if there is a response. I think airlines have to be thinking about this a lot. If there are massive delays, flights, which seems to happen to me a lot in the U.S. for some reason, there have to be teams in place ready to go and be able to speak to customers about rebooking them on flights. Otherwise, customers are going to get stranded and that’s just going to be a service nightmare.

And the last thing is making sure that there’s an escalation process in place and there’s the right mechanisms for engaging senior leaders. So know which issues need to be brought up to senior leadership, and how to get them involved in a crisis and obviously they will be… they will have a stake
in this and knowing what the right way to work with senior leadership and get their input into a crisis is really important.

And then the last thing on this is really just making sure that you audit your performance if there is a crisis. Having thought through the crisis, what is the thing that...or worked through a crisis, what are the things that you did well, things that didn’t go well? Learning from that, you have to review that process.

There’s a very complicated chart here showing you how that might look like, something, again, that you need to develop for yourself. We’re not going to go through a complicated example in this session. But it’s something that you want to be thinking about, is how would I audit that? You can already start thinking about what data you might capture, for example. And if you don’t have a way, if you haven’t thought through it ahead of time, then certainly after the crisis, go through the data, collect the information about how it went, look at how many customer inquiries went unanswered, for example. Look at how many people are complaining on social media. These are things that you’re going to want to be looking at as a business.
LESSON 3: SOCIAL CUSTOMER SERVICE METRICS AND PERFORMANCE
Social Customer Service Metrics

When it comes to social customer service metrics, this is the KPIs bit that I was just mentioning. So, let’s talk about how you might look at your metrics when it comes to the types of customer engagements that you’re having. I think there’s two broad lessons that you can learn. One is operational optimization. How can you improve your operation off the back of your customer service engagements? And the second is around business intelligence. What can you actually learn about your customers? What can you learn about your own business, as a result of some of the engagements that you are having, or the conversation you’re having with your customers?

When it comes to KPIs, there’s two real big ones on response time that are typically unused. One is the average response time. That’s the average amount of time that’s elapsed between customer message and agent reply.

And then the second is first response time, which as you can imagine, quite straightforward, it’s the amount of time that elapses between the initial customer messaging you and the agent replying to each conversation, key metrics when it comes to dealing with customer service inquiries.

Customer Satisfaction

Another two sets of metrics that I think are very, very important to get into a little more about is the time to resolution, and the messages that are required to resolution. So, time to resolution is quite straightforward. How long does it take before any particular issue is resolved? You’ve probably gotten an email at some point from a company that says, “This issue has now been resolved.” And it kind of puts a final stamp to say, this is over and done with. You might disagree with that, hopefully not, hopefully the agent has answered your question. On a call center I’ve often heard at the very end, I’ve heard them say, “Have I helped you resolve this issue?” And they’re looking for a yes, no, so that they can kind of put it to rest. And if I say no, they will typically keep going until I say yes. So, it’s a very important metric, is to keep that window open until the customer feels like they have been responded to, and that their issue is resolved. But you want to measure that, because you don’t want that to go on too long. Obviously, it’s costing you money the longer it takes to resolve something, because you’re paying your customer service staff, and you’re losing the goodwill of your customer. So, they are going to... goodwill with your customers... so they’re going to be less inclined to maybe repeat purchase, or less inclined to purchase in general.

Messages to resolution, you just want to be counting the number of messages that it takes to resolve, and the faster you can resolve issues, it also means you should be requiring fewer messages. Those two metrics go hand in hand. And I mentioned this earlier, so I won’t spend time on this again today in this slide, but we talked about measuring sentiment after each customer service interaction. I mentioned Net Promoter Score, something I really recommend you take a look at, make sure that you are getting customer feedback. In this particular example it’s very short and concise, I try to keep it quite simple so that your customers know that it’s going to be short. You train them to think that way, and they’re more inclined to give you feedback. So, don’t get too lengthy, but it’s good to have a couple questions after each interaction.

Categorization

Any conversation you can classify in terms of three broad, sort of, areas. One is, what is the business insight that I’m getting from this conversation? When a customer is revealing something about who they are, what they’re looking for, some sort of information about their purchase motivation, you
could put that into a business insight. Maybe it’s competitive information as well that they’re revealing for you.

Operational efficiency could be something more along the lines of complaining about your business. I mentioned my watch complaint earlier – I went three weeks without hearing a single word. So if I were to complain about that, there’d be a clear lesson there for the company that they have an operational efficiency issue. So they can classify that conversation as an operational efficiency issue.

And then optimization, which is much more around, how can we as a business become more efficient? And your customers can actually help give you hints in that way.

So, the two big benefits from that: it broadly aligns with how you would classify conversations, but you can classify the benefits in terms of the operational improvements you can get, and the business improvements that you can get, getting smarter about communicating with your clients, for example.

**Social Customer Service Reporting**

There are a couple of audiences that you would typically report to when it comes to the data and the insights that you’re getting out of this. So, you know that you’ve categorized your conversations, you’ve learned a lot from them. Who are you going to share that with?

One is team leads. So this is the leads, probably within your customer service organization, the contact center managers. So these are the people that are running the contacts, inter-departmental stakeholders – we mentioned some of those earlier – that they’re going to want to know, what are some of the insights that you’re getting? And then the senior executives, because this is going to help with decision making. So, I would absolutely think about those different stakeholders, and how you might report out to them off the back of those metrics.

**Social Media Management System**

Let’s get into the specifics around social media and management systems. So, these are systems that you would use in order to actually manage the interactions with customers, monitoring the types of social media engagement and conversations you’re having. It can pull in information from across your social platforms to give you information, and they are really important tools. It’s going to be very hard to manage all your social media platforms independently. And these are ways of managing all that content together, and also plugging into your internal systems, a lot of them have tools in place to allow you to plug it into other systems you have.

The importance comes from four main areas. One is, you can leverage the workflow that are already built into them. They’ve thought about this to some extent, and they know roughly what it takes to deliver good customer service on social media. So, think about that.

Two is around security. I would absolutely think about security in the context of these tools, but they are thinking about it quite extensively as well, so it’s going to help you in terms of using the different platforms in a secure way.

Three is, I mentioned this earlier, but there is a lot of automation built into these, they’re working on it, it’s going to be a huge source of differentiation across these tools, something that you can benefit from.
And the last is analytics, dashboards, getting information out of it, downloading data, being able to share that across your organization.

There’s a lot you can get from an automated perspective in terms of analytics. There’s probably two types of social media monitoring systems out there. One is an all-in-one system that’s going to do a lot of different... have a lot of different functionality, and the benefits are, you can just work with one vendor, you can have a much more basic cross-functional collaboration if you’re having one tool. So, you and your other... through collaborators internally in your organization are on one tool, and that’s quite helpful.

And the third, is that there’s a lower... typically a lower total cost of ownership. If you go with one tool, there’s probably economies of scale when it comes to purchasing power with that supplier. Not always true, but I’m talking in very broad terms here. Conversely, there’s best in breed solutions. So, best in breed solutions would be a management system that is oriented around one specific capacity that you needed. So 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 out there, they’ve actually broadened out quite a bit, but they do focus extensively on social media monitoring. That is one use case of a social media management system.

The three benefits here are expertise, obviously, they will be developing a system catered to a specific need, richer functionality, which is kind of related to that, good analytics capabilities, for example, that are fit for purpose. And, they can also help you develop things that are very aligned with your requirements of the space. So, there might be a shift in terms of the requirements you need for an analytics perspective.

Or let’s say automation, that’s one that I’ve mentioned a couple times now, is evolving quite rapidly. There might be specific requirements in that area that a focused player would be able to deliver. There’s also these things called automated content distribution systems, could be built into it. This is typically a way of getting content out to your customers in a quick way, to ensure that your customers have information at their disposal through forums, through blogs, etc., and it can really help you get information out there quite quickly across lots of channels. I’m not going to talk about it today, it’s something you can dig into on your own. But, effectively there are tools out there that just allow you to publish content much faster to a broad audience and really saves a lot of time internally.

Core requirements that you would look for in a SMMS. One is, viewing and managing customer profiles. So, make sure that you can actually manage the types of customers that might come through, and have individual customer data that you can manage. I mean I think that’s a very core requirement, it probably goes without saying. There’s another way, another functionality that is often useful, which is just being able to search social media for conversations. It’s a part of almost every social media monitoring system without a doubt, typically those can be customized, searches can be used to create an alert to of some sort, but make sure that you can have that search functionality.

We talked a little bit earlier about approving and moderating agent responses, this is partly to increase the quality of those responses, also to make sure that there aren’t... there isn’t some sort of disaster in the future or some sort of crisis, so make sure there’s some functionality built in on that end.

Messages, message functionality, conversation threading. Obviously part of the reason you’re doing this is so you can engage with your customers. Make sure that’s built into it, a conversation history retention, and make it easy to access so that you can look at what kind of interactions you’ve had.
with the customer in the past; lots of tools available for that specifically, but any broad system you're going to want to have some version of that.

And then overall user views. That goes without saying, but don't forget it, you're going to want to measure that in the context. There is a specific standard actually around IT systems that you could use and look for when you're assessing the options, so just keep this in mind, it's ISO 27001. Keep that in mind; it is a very well-known standard, something to evaluate it on.

And the last thing is, from a perspective of security for a social media management system is, we talked about this in a prior section, but make sure that there are key features embedded into it from a security perspective. Make sure that there's an automated log out so that someone doesn't walk by a computer and can kind of go in and start posting things. That is critical because your customers are all going to see it quite quickly. Make sure that you have a full audit trail of all your customer interactions, you might actually need that for legal reasons.

Data encryption within the system; someone can hack into it and see your customer interactions. Data security is just becoming a huge topic because it is compromising businesses. And just very granular permission access, so you can have certain people that just look at the analytics and just look at the data coming out of it, and other people can actually be posting, and you can control that to a large extent.

And there's different types of analytics that you can get out of a system. 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 real-time historical data, but up until real-time is what I mean. So, looking at information as and when it unfolds. I mean think about a crisis, a management situation, that is a critical capability right then and there. But when there's a new marketing campaign launching, a new product, you want to be monitoring things in real-time. Data export is quite obvious, but make sure that there is a way to export data, and you can use that for reporting, you can use that for analytics. There's going to be teams that are interested in that. Customer reports coming off the back of that, it could be through the data export or built internally into the team, ideally it's built in there so that it's easy to access.

And then the last bit is API. So, if you have other tools that you use for analytics and reporting, 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 APIs built into it.

**Systems Integration**

An integrated social customer service channel is quite important for the reasons that you get a very integrated view of your technology, and incorporating that into other aspects of your business allows you to do four main things.

One, is get a 360 view of your customer across any channel. This is where the APIs are quite important, if you've got other channels that you're interacting with.

Two, the accuracy and the expediency and synchronization of customer data. If you're integrated with other systems you're going to get that data synched up with other parts of your customer service tools.

We spoke dashboards, we've talked about the analytics side of it, but you can get bespoke the more integrated you are in other systems, typically speaking. This is in very broad terms, but the more data
you share, broadly speaking, the better, from an analytics and business intelligence perspective as well.

So that comes back into our number four there. Briefly talking about five phases of integration. One is make sure that there is a phase where you’re doing functional and technical discovery. Working with your IT department on this, in particular, or your technology leads. Two is just scoping requirements and scoping what can actually be delivered in terms of integration. Third is developing that integration, so making sure you put in place the... link up the APIs, for example, or, if there aren’t APIs, are there other tools you need to develop to be able to share data?

Testing and reworking that, so making sure there’s an iterative process to it. We talked about conversation history, but you want to have a very clear history of your integration process. Making sure that you’ve documented what you’re doing from an integration perspective, because if you don’t, you might lose track of that. It’s just good to be on top of all of that.

**Social Customer Service Vendors**

There’s a model where you have a designated account management person specifically to the SMMS vendor that you have a relationship with. The great thing here is that you can have one contact internally that’s dealing with the vendor, who’s responsible for that vendor. You have a much easier way of connecting with those vendors and if you have multiple vendors, that one person can be responsible for consolidating those vendor relationships and have one view across the vendors. Something to think about. Maybe having an account manager. Typically, their responsibilities would be obviously being the main point of contact as we talked about.

Two is communicating about product releases and the roadmap. This can be very useful when there’s a lot of innovation happening in the business, a lot of change. They can aggregate and deliver feedback from the vendors, or conversely, the other way around. They can provide expertise, relevance, up to leadership and they can help and form educational content when it comes to training. And they can do regular business reviews, so something you might expect from a typical account manager in that sense.

We said we’d talk about resourcing. So the last few slides here are about resourcing your customer service and I wanted to first start with what are the characteristics of a successful agent? If you’re at all involved in the selection process, maybe you’re taking people from an existing customer service team, maybe you’re hiring, I’d say this is a checklist that you should use just to broadly guide what type of people you’re looking for.

Make sure they are confident, make sure they are resilient, because they are going to have to deal with angry customers at times and you have to be resilient, you have to have a thick skin. Make sure they are articulate. It’s probably one of the most important ones but can very clearly articulate to a customer what is being done, what needs to be done, what the company’s stance is or the path to resolution.

Personable, obviously. So doing that in a friendly way. Not just articulate, but also have a connection.

Curious. Curiosity is part of the personable aspect which is showing some interest in the customer, or a lot of interest ideally.

And empathetic. Understanding the customers point of view and being able to see why they might be in the situation that they’re in, or happy, upset.
Agent Training

Three ways that you’d want to do training when you do on-board your agents. One is around social media generally, obviously. We’re certainly not going to get into what content you would deliver, but I would deliver a lot of content around social media and social media channels. Ideally you’re hiring people that have some experience there, but potentially not. If you have a grad scheme for example, I’m sure they’re using social media, but they’re not going to know all the different functionality of the tool. They might not necessarily know how a business engages in social media, so take that angle. Obviously, the processes that you’ve put in place, and third, the technology. You know, what is the tools that you have? What’s that social media managing system that you’ve decided to implement? And, you know, you’re going to have to train them up on that specifically.

This is just a quick note to say make sure that you are considering the ebb and flow of work throughout your calendar year when it comes to on-boarding agents. You have to think strategically about what is a quiet period 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. In this example, you definitely wouldn’t want to be doing that in January. That is a peak period here for whatever reason in this business. So June, July would be a great time to do it according to this. Look at what your natural cycle of work is and make sure that you’re doing it at a period when you can invest in your workforce rather than in your day-to-day work.

We mentioned earlier that you will want to have extra agents in case there’s a crisis. I think there’s three other reasons why you might want to train up a reserve of agents. One is if there’s volume volatility. Two, if there’s unforeseen absences. It’s inevitable with a team of agents that, a team of anything, but a team of agents, if there’s an absence it’s a big deal. They’re the ones responsible for dealing with customers so you want to make sure you’re ready for unforeseen absences. And then stop shortages in general. Just make sure that you have agents in place for that.
LESSON 4:
SOCIAL COMMUNITY MANAGEMENT
I mentioned the benefits that a P2P community might hold for you. Here we’re just providing a bit of a view of what are the different levels of customer interaction you can have. Obviously, on a basic level we’re all familiar with one-on-one support, call a number or you message someone and you actually get hands on support from someone. Partner channel support is you’re not necessarily owning the channel but you’re using a partner channel to deliver support. There’s still a lot of one-on-one interaction here obviously, but it’s facilitated through a third-party channel. I would absolutely put Facebook and Twitter on those third channels, for example.

Layer on top of that you could have a community support, which is what we’re going to talk about here. So what we mean by this is letting your customers do a lot of the solving of problems for each other, helping address issues, questions about products. I’m sure many of you have been to a forum and seen customers engaging with each other on products. In fact, sometimes this can be facilitated with bloggers, for example, coming in and writing a piece to a community about comparing your product with competitors, for example. But letting your customers do a lot of talking could be great, and 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, and letting that come to life and letting that shine, and facilitating that can be a very, very good component of your customer strategy on social channels.

So the reason we’re talking about this is really the benefits you can get off the back of it. And the last layer we’ll put on top of that is self-service support. And the reason why this is at the very top is because, one is it can be the most scalable by far. If most of your customers are self-serving themselves when it comes to inquiries, and complaints, and concerns, you can just handle a lot more volume – but you can also do it at a much lower cost. There’s virtually no cost on a variable basis to self-service support.

I don’t know if any of you have tried to get in touch with Google or Facebook about an issue. It’s all self-service. I’ve gone on Google Maps; I notice that a business was located in the wrong place. I can’t call a number and complain about it because there is no number. I have to click on sort of a little question mark open up basically a supports inquiry tickets and I just feed in that information directly to that. Completely self-service, there’s no interaction. And there’s no real way of getting that result quickly. They did send me an email, by the way afterwards, to let me know that it was updated, which was great. So you can actually build in the automated side as soon as that change happened, they emailed me.

Two main types of forums. One is a dedicated support forum and then the other is just leveraging existing social networks to create a vibrant peer to peer community. On the latter, it’s quite obvious. It’s on Facebook, or it’s on Twitter. Often I’d say this is used to communicate to customers about maybe new customer service benefits. We are now on Facebook answering questions. You can actually get that out there and your community might amplify that for you. They might repost it, re-share it, retweet it, whatever message you’re trying to get out there. You can engage with your existing customers obviously very, very well on today’s social media channels. So have people dedicated to working with your community on Facebook, talking to your fans, but specifically around customer service and how you’re dealing with things. Particularly important on a crisis when it comes to crisis management.

On the dedicated side though, you can actually create forums or you can leverage existing forums, but some companies have created dedicated communities essentially for their customers. Nikon, for
example, I'm a Nikon photographer and Nikon has a great forum page where I can see what other people are saying about their camera experiences. They might be looking for a specific feature and they just... you've seen these forums before probably, where someone will just ask a question and other people will just offer up a response just because they're Nikon fans. It's great. I use this all the time for finding specific features. So it's really helpful from a sales service perspective, and generated from the community. So I also feel like I can trust it quite well.

So two types of communities, probably good to think about what your strategy might be across both. When it comes to community management, there's three big phases that you want to think about when it comes to implementing a community management of some sort of peer to peer community. One is obviously building your community. You need to think about acquiring sort of the customers that are going to be on that community. Two is growing it, and the third is maintaining it.

When it comes to something like Facebook, the building is just a matter of getting Page likes, for example, getting a core group of people on there that are going to be reading it and engaging it. Typically, when it comes to something like a Facebook Page, most companies are always in growth mode, but there's obviously a point where you kind of max out on growth and you just want to maintain it. You want to get new content out there, generate new discussions.

Obviously we're verging on a bit of marketing here. But certainly when it comes to customer interaction, you can think about that in the same way. There is actually going to be some aspects of your community that just don’t go as smoothly as you might expect, and they're definitely challenges that you can face when it comes to engaging your community, especially if you're running your own community and your own forums. Your customers might feel unchallenged, they might feel unappreciated, they might feel overwhelmed or just exposed, in general. So think about what your customers might be feeling.

The whole point here is just to be empathetic with your customer and look for signs. We'll talk about metrics in a minute. And to get ahead of that, if you need to provide an incentive or show some appreciation, maybe it's worth doing that earlier and sort of get ahead of the curve.

A quick framework for how to resolve a dispute, because undoubtedly there's going to be some sort of dispute. You might have a customer asking a question and you'll have a couple different responses from other community members that don’t quite answer that and the customer might still be a bit annoyed, for example. I've seen this with a company called Zero, which is a big accounting software here in UK. It's all in the cloud. They work with a lot of small businesses. I saw a comment asking about a specific functionality this client was looking for, no one can answer. But then I saw a customer service rep say, “Unfortunately, we just don't have this. Here's what people have highlighted is the best solution right now, and we'll let you know as soon as that issue, as soon as this functionality has been built in.” So that's really nice way to try and resolve that sort of inquiry. And even better once that solution is actually there.

So one is acknowledge the issue, so have that direct communication just like I showed in an example, get in touch with them. Make sure to avoid confrontation. The worst customer service interactions I think I've seen are probably where a company is very defensive; it never comes across well. And if you're trying to be confrontational with a customer, it's going to come across to the wrong way. When it comes to feedback to your community members, to something called the feedback sandwich, which is quite a compliment, provide area for improvement and then provide another compliment. That's why it's called a sandwich. So, just a technique that your customer service reps could use if they're trying to engage with their community members directly.
Develop an action plan, monitor your community, and follow up. Just keep the process iterative, is basically what I’m saying here. And make sure there’s just a plan in place for resolving disputes.

Coming back to this chart, we talked about how community support stacks up in the overall sort of landscape of how you might build various different ways of communicating with your customers and providing customer support. And a lot of the value as we talked about earlier sits within the self-service support area and the community support. Because it’s scalable, it’s essentially free to you as a business once that content’s there; it just gets used over and over at no variable cost to you as a business. So, can you drive value up to those self-service areas without losing sort of rating with your customers when it comes to customer support? You don’t want to be 100% reliant on this if your customers demand some sort of peer to peer or one-on-one interaction, I should say. So think carefully about that.

Community support is just a very nice in between here, but also be thinking about self-service on top of that, of what that layer might look like. And the way that you might drive digital adoption of those self-service tools or peer-to-peer communities is, well first and foremost, for social media. These are customers that 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 on your peer to peer communities.

You might look at relevant digital properties. What are sort of other places where you can speak to potential customers, other forums that are out there, third party forums? And maybe get them engaged on your own forum. And then post-purchase, communicating with customers after they’ve bought, it’s a super critical way of engaging them in the community. It’s probably a great time to be pulling them in.

**Contributor Incentivizing**

Just some interesting factors around why customers might be motivated to participate. One is general altruism. They might just have an instinctive of interest in participating for no real particular reason other than they just want to do it, out of the goodness of their heart. I think there’s a lot of people on community forums that just like being on the forums. It’s just a part of their inherent nature. It might not necessarily be true altruism but it’s certainly just something that they enjoy doing for no particular reason.

Two is vanity altruism, which is maybe more out of their own interest is getting a reputation, being seen. They might be reward seekers, maybe you have some incentives out there that have been used to engage people on community forums. I think this is quite popular now, actually. You can use rewards to really get people engaged in your forum.

And then having a competitive edge. So maybe it’s just that you as a company have offered something to your customers when it comes to customer engagement that gives you a great competitive edge, and builds loyalty. This could also be sort of phrased as great customer loyalty, as a result of being more competitive.

How you might incentivize contributors to participate in your peer to peer communities? Gamification is one of those and it’s a hot topic now. We could spend a whole hour just on gamification, but think about other ways you could gamify your community. And you don’t have to necessarily build a whole new tool or a new thing just to gamify. You could provide games within the context of an existing forum. But think about what that might look like and how you can do that. Badges, profile customization, ways of engaging customers in your community, having unique brand experience, and maybe your community members get to see something first, get a sneak preview at a new
product. That’s a whole category in itself which reflects at the bottom. And I would say that ties very closely with newly brand experiences.

And beta testing; it’s a great way to test your new products, your new features. Your customers will like it. If they’re huge brand advocates, it’s sort of safe, in a way. You can engage with them to get feedback on new features.

**Social Customer Service Measurement**

I mentioned earlier the health of the community. You might see some signs where customers are feeling sort of a bit overused or they might feel sort of underappreciated. But let’s look at some KPIs for the community health. One, it’s obviously a sort of sign ups and engagement rates. Make sure that you’re tracking how much people are converting on to your community, and how much they are engaged with the community.

Two is question and response rates. Are there actually people participating in it? I think that goes without saying. And what sort of the utilization rate of the community until you get that to go up? So that will give you a sense of the community health.

On the effectiveness side, you want to look at the response times. Are people responding to stuff quickly? If a customer poses a question and it takes weeks to answer it, it’s not a very effective forum. So you need to do something to boost sort of interaction on that forum. Same with resolution rate, closely linked. And then, just generally, customer satisfaction. Make sure you routinely go back and check to make sure that you’re getting customer feedback, similar to what we talked about before with service.

You can also track the quality of contributor responses. So your contributors are hopefully, constantly responding to queries coming in. So make sure you review those routinely, have a live agent go through and moderate those, and spot check that. Quite simple steps, but add a little bit of a human touch one-on-one. Make sure your agent is kind of supervising it, maybe the team leader within your team.