BUSINESS WHITE PAPER

BRIDGING THE GREAT DIVIDE:
Best Practices for Integrating Social Media and Customer Service for Bottom
Line Results

When it comes to social media, does your right hand know what your left hand's
doing? How to avoid a social media nightmare while boosting your bottom line.

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Introduction: Taking Social Media Beyond The Marketing Department

Call it catharsis, digital-age rage, or even Internet insanity.

With the megaphone of social media, even a few wayward comments — not to mention a scathing rant — can seriously damage your brand's reputation. And that sentiment has the capacity to travel at a velocity never before seen.

The problem: In far too many organizations, it's the marketing and corporate communications departments that drive social media engagement. While this arrangement has many benefits, a different set of tools and skills is usually required to successfully handle customer issues. When you factor in the possibility that data generated via social media could be lost — which could have potentially otherwise been used to inform and provide context for many discreet operations within the enterprise — then the issue becomes business critical.

What's needed is a new strategy — one that integrates social media operations with customer service to best address the myriad reasons why people use social channels to research, advocate, or attack your brand — and to leverage the information these people provide. Indeed, data integration can mean great promise to organizations that seize its opportunity — and enormous peril for those that don't.

The Customer Engagement Challenge

According to a recent survey from McKinsey & Company, nearly three-quarters of major enterprises today use social technologies, such as online forums, to improve customer service, and nearly 71 percent use these technology platforms to acquire new customers.

There's good reason that these statistics are so high. Social media has become a critical touch point for brand engagement — making Facebook, Twitter, Yelp, blogs, chat, SMS and other channels as relevant to consumers as a brand's Web site, contact center, sales representative, or store.

At the same time, consumers have also discovered that those same channels have shifted the balance of power into the hands of customers, giving them a very public platform to express their satisfaction — or dissatisfaction — with your brand, and how you handle that expression is critical.

There is often a great divide between the various departments that are engaged in social media throughout the enterprise — marketing, corporate communications, PR, investor relations , online sales, and the contact center — with each running their own siloed operations.

Marketing and corporate communications use social media for brand advocacy, marketing, and focus group activities, while the investor relations department uses social media to report earnings, human resources uses it for recruitment, and the legal department to protect brand assets.

But when issues arise, the following scenario is all too common: A frustrated customer searches online for answers to a question. If a solution can't be found, a call is placed to customer service. While a discussion with customer service will resolve most issues, some customers will find the interaction only aggravates matters, and a vocal minority of them will take to social media to air their grievances — and that number is growing fast.

According to Forrester Research, 16 percent of customers have already vented about negative customer service interactions through social channels, such as online customer reviews, blog posts, and Facebook status updates.

And, all too often, someone in the marketing department in the emerging role of social media manager or strategist jumps in to try to resolve the issue before it becomes a crisis for the brand, but these marketing teams lack the expertise only customer service agents can provide.

An unfortunate result is that it creates the unwanted perception that social media rants can deliver a more beneficial — and immediate — response than dealing with customer service and, indeed, that interacting with the folks in customer service can be avoided entirely.

What's more, the fact that the marketing department's social media manager or team doesn't have access to customer histories, and is not bound by an organization's customer service guidelines and service level agreements (SLAs), means that it may be providing inaccurate answers — thus potentially exposing the company to business and legal liabilities in the process.

And even when customer service agents are brought in to solve customer issues via social media, they often have no visibility into the conversation that's occurred to that point with the marketing department. This disconnect makes it hard to respond to customer needs, much less shape and enhance brand loyalty. And, frankly, it limits the potential for social media strategists to deliver true value from social media to the entire enterprise.

Indeed, it's the perfect recipe for a poor customer experience — and a quickly degenerating cycle of issue resolution nightmares as the enterprise rewards costumers for using social media as a complaint platform to get problems solved instead of going through more efficient and productive channels.

The good news? There's a better way.

Right Hand, Meet Left: Four Critical Steps for Social Media Integration

Today, 75 percent of organizations do not connect social media operations with customer service operations, according to Gartner Research. To be truly effective, organizations must create an integrated approach to social media that can have fundamentally powerful business benefits.

Through true integration, companies don't only gain the ability to listen to consumer sentiment about their brands, but they can prioritize these sentiments to determine the appropriate actions, engage with consumers as never before possible, and integrate the resulting interactions across marketing, customer service, and various other customer touch points to deliver a truly satisfying customer experience.

To realize this opportunity, a sequential set of development phases is required comprised of best practices that can help companies build unbreakable customer loyalty in the age of social media.

Figure 1. Genesys Social Engagement Model

1. Listen – Understand How Your Customer Base Discusses Your Brand

Go beyond social media monitoring to understand and influence consumer sentiment.

Today, there are various approaches to monitoring social media.

Some brands employ summer interns to conduct Google searches to determine if what's being said about the brand is worthy of escalation to management. Some brands use sophisticated monitoring services that track comments, trends, and geographies. Still others, like Dell and Gatorade, deploy entire social media "command centers" designed to track tens of thousands of daily social media posts spanning hundreds of thousands of sites around the globe.

But questions arise: Who is doing the listening, and are they truly qualified to assess the significance of what they hear? Who are they listening to? What are they listening for? And how will that information be analyzed and put to use?

The goal should be much more than just the monitoring and visualization of trends across the social sphere. This is not just about information; it's about knowledge and decision support. Some key approaches to consider:

> **Monitor what matters:** To be successful listeners, your brand must gain visibility into content communities, and strategize ways to capture consumer sentiment about your products, the services you provide, and the level of emotional engagement that exists with your brand.

Do you know which commentators mean the most in terms of reach and influence? Which trends can improve or impede your business progress? Clearly, solutions and processes that can help wade through the noise and turn data into actionable insights become necessary.

In addition to helping you respond to customer needs, this effort can play an important role in risk mitigation by helping you identify and handle issues that may gather enough steam to garner unfavorable coverage of your brand in the press.

Furthermore, long-term integration with customer service means that brewing problems can be headed off and resolved by properly trained experts, instead of being left to untrained, yet well meaning, marketing team members.

> **Establish a presence:** Beyond monitoring, it is also critical that you establish a robust presence on social sites. If you build out your own communities and forums for support within your brand's own site, then these will be the first place consumers go to discuss your brand, not the last.

Establishing a presence on social sites has two key benefits. Not only does it improve the range of issues resolved by customers themselves through input from employees and other customers, but it also can help bring important issues to the attention of the customer service organization by offering a window into the way some of your most active customers think.

> **Capture customer profiles:** Another key first step: Capturing customers' social media handles/ profile information (their Facebook or Twitter profile names, for instance), so specific comments, questions, and concerns can be tied directly to actual customers or prospects — thus enabling your response, if warranted, to be much more productive.

By capturing this information, companies can begin to bridge the knowledge gap by integrating relevant case histories to gain a 360-degree view of the customer and the perceptions they hold about their interactions with your brand.

2. Prioritize – Define, Segment, and Prioritize Actions Toward Social Media Activities

Harness community input and make it an integral part of enterprise knowledge.

Capturing and then sharing crowd-sourced knowledge from the social sphere should be made a real-time component of the enterprise knowledgebase.

Social media content tends to be more current than that in existing corporate databases; pooling this "tribal knowledge" and then incorporating the perspectives of the most influential customers into enterprise knowledge resources can provide valuable insights across the enterprise that can impact many areas of your business.

Some key ways to do this successfully:

> **Analyze, categorize, prioritize:** New business rules and work flows need to be developed to help you define what social media content is available, assign it to an appropriate enterprise category, and then prioritize what action, if any, is warranted — and by whom.

> **Distribute unresolved posts:** For many customer queries, the ability to appropriately escalate issues, from community-based self-service to assisted service, can dramatically enhance the customer experience.

When assisted service issues do arise, the ability to manage, prioritize, and then route social media information to the most appropriate party — whether it's marketing, customer service, or some other area of the enterprise — can help ensure the right response is put into motion, from the right people, adhering to the right corporate policies.

> **Provide escalation rules to manage SLAs:** Obviously, the escalation process requires a careful consideration of how unresolved issues are assigned SLAs and escalated to the appropriate party under specific conditions.

This is no small matter. According to studies from CareerBuilder, 57 percent of employees say they have no idea who is responsible for handling social media matters within their companies. Instead of leaving it up to employees to figure out ways to solve an issue or find the right person who can help, brands must develop systems that recognize these situations and can alert the people who are best suited to the task. Not only is establishment of such rules time- and cost-efficient, but it leads to much better customer outcomes.

> **Don't just listen — act:** Beyond day-to-day service operations, social media provides a tremendous amount of research on user behavior, attitudes, and insights that can uncover opportunities your brand has never yet imagined. Whether it's a great idea for a new product; input on everything from pricing or packaging; thoughts on business process innovation; or just commentary on how to better deal with your customers, establishing methodologies for applying this knowledge can help demonstrate that you're not only listening to your customers, you're putting their ideas and input into action — and profiting from a real-time, real-world focus group like never before possible.

3. Engage – Respond, Inform and Notify High Target & High-worth Consumers

Transform your support processes and go where your customers are.

True social media engagement is about connecting reactively and proactively with customers and prospects in the most appropriate manner:

> **Respond in-media:** When responding to issues, interactions ideally should occur in-media. If a customer tweets, you can respond back in a tweet, for instance, or suggest moving the interaction to a more private venue. This not only demonstrates you're promptly responding to customer needs, but also that you understand customers' preferred modes of communication.

It should be noted that this kind of in-media engagement should include mobile interactions. Social media is a channel that spans any number of communications devices. And, just as PC-based e-mail was once a strange new addition to the customer channels embraced by the enterprise, so too are companies beginning to reach and connect with consumers where and how they live.

By 2013, smartphone users will surpass PC users, and 80 percent of businesses will suffer a revenue loss from not supporting Web-based customer service on mobile devices, according to Gartner; therefore, smart brands will begin integrating mobile devices as a key customer touch point now.

> **Get proactive:** Now that you've begun capturing social media profile information as part of the customer record, engagement can be initiated by customer care (or marketing) in a manner that takes full account of customer histories and segments, and complies with established SLAs — a notion that is standard operating procedure for customer service, but now must be looked at by marketing and other enterprise functions.

Indeed, beyond response, new support processes can be used to reach out with the most appropriate new product and service offers to high-target, high-worth individuals via the most effective channels.

The importance of this cannot be understated. For the first time ever, you can dramatically enhance the efficiency of your outbound marketing efforts by segmenting customers with a 360-degree view of who they are, what they mean to the company, what their experience with the brand has been like, and what offers will appeal to them most. It's not just smart customer service or marketing communications, it's both.

> **Capitalize on influence:** To maximize the value of these interactions — both proactive and reactive — the brand will need to capture, track, and capitalize on a new metric within each customer record: social influence.

Sure, a wealthy customer may spend millions with your company each year, but perhaps only has 75 Twitter followers. Another customer may only spend pennies, yet has 5 million followers. This is a data point to not only note, but leverage.

When a customer makes contact with the contact center, service representatives should not only have access to that customer's demographic information, but also the individual's social graph, in order to maximize the value of that interaction based not just on account balance, but the influence that individual yields in the social sphere.

Likewise, this information can prove to be priceless when proactively reaching out to individuals via social channels based not just on who they are and what interests them, but how they might influence others to think, feel, and act as well.

The old adage "treat different customers differently" takes all new meaning in the age of social media. Engagement without this kind of customer service integration minimizes its full potential for brands.

4. Integrate – Combine Touch Points Across Marketing & Customer Service

Integrate the conversation across the enterprise in a way that leverages existing IT investments.

A growing number of companies are hiring dedicated customer service representatives specifically assigned to social media — consumer electronic retailer Best Buy's "Twelpforce," for instance, responds to customer issues via Twitter — but when one or more departments establish dedicated social media teams, how are the rest of the people in the enterprise able to capture and leverage the insights they gain?

Long term, the critical factor in empowering the social enterprise is a technological infrastructure capable of automating the business process transformation we've discussed in this paper by capturing and prioritizing social media content and interactions as part of the customer record, escalating as needed, and routing to the appropriate person with full visibility from start to resolution. Some areas to consider:

> **Get multi-modal:** Consumers should be able to choose the level of engagement in a public forum. It is sometimes desirable or necessary to shift interactions with customers to other channels. As a result, infrastructures should enable customers to cross channels easily. For instance, not everything can be resolved through social media, so a seamless transition to direct human interaction may be required, whether that's through voice, e-mail, or SMS. The customer should feel they are having a consistent experience with the brand within — and between — each mode of communication. And those responsible for interacting within each channel should be fully informed about the entire interaction throughout.

> **Get real time:** Ideally, a single dashboard should provide a real-time, intraday view of content, information, and trends originating from social media and other data sources that stakeholders — spanning corporate functions such as marketing, PR, customer service, HR, legal and so forth — can see, understand, and use to ensure the right action is put into play by the right individuals adhering to the right business rules.

> **Report and measure:** The solution should also incorporate real-time and historical reporting and analytical capabilities so that users can watch for important trends. For example: Are many customers or prospective customers reacting positively to a particular product, feature, or service? Perhaps it's time to ramp up production or plan for increased service help. Are customers expressing dissatisfaction? Be thankful for the input, and make changes as (or if) appropriate.

> **Leverage what you've got already:** In most organizations, this is not necessarily a rip-and-replace proposition requiring heavy new infrastructure investment. In most cases, systems can be built leveraging — and maximizing — the investments, processes, and workflows that already work well. What's more, enterprises are becoming aware of the potential for new platforms to rise and existing ones to fall. For example, the massively popular Renren and KaiXin001 sites may explode beyond China's great firewall and suddenly be potential new social media channels elsewhere in the not-too-distant future. Having a flexible, open infrastructure that enables best-in-breed plug-ins is solid investment protection.

> **Integrate your knowledgebase with forums:** Integrating your existing enterprise knowledgebase into online forums, for instance, not only augments insights developed within the forum, but will cut down on calls to customer care. It is already estimated that between 2 percent and 10 percent of customer issues that currently result in calls to customer service can be resolved through these forums. Even a small percentage offload to social media can save millions every year. And emerging technologies like virtual assistants can be deployed to guide and assist users in social sites, further reducing operational costs.

Likewise, providing a single source of truth from social media to all knowledge workers can dramatically improve operational efficiencies while providing the kind of customer experience that bolsters brands — and their revenues.

Conclusion: The Truth Shall Set You Free (to Achieve Some Serious ROI)

The simple truth is that the integration of social media and customer service operations is no longer an option. Failure to do so results in marketing or other departments trying to address issues that are outside their area of expertise. Or, it results in duplicative efforts from both marketing and customer service to resolve issues without one knowing what the other is doing.

For the customer, the attendant service gap or disconnected response is likely to create an unsatisfactory resolution that can have a disastrous effect on your brand's reputation as word spreads online. Most important of all, failure to harness the power of social media / customer service integration means severely limiting the effectiveness of any social media operation to bring true value to your brand and its customers.

Beyond just the customer's perspective, whether it's reduced waste, less legal liability, more highly targeted marketing, or more personalized customer care, this integration can make a tremendous difference to your bottom line.

It costs much more to replace a good customer than to keep one. In a competitive marketplace, companies that understand and capitalize on the power of social media integration with customer service operations will take control of their industries. Before long, this integration won't just be the stuff of competitive advantage, it will be the cost of entry. Smart brands will start bolstering their position — and banking the rewards — now.

This paper is designed to provide a starting point for carefully considering and planning out the integration of social media with existing channels managed by customer service, and extending its value throughout the enterprise. It can spell the difference between a brand that reacts defensively to ever-shifting consumer sentiment that exists outside of its control, or one that proactively harnesses the power of social media to delight customers — and shareholders — as never before possible.

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