

SOCIAL SERVICE STRATEGY

Do you have a plan in place for engaging with customers via social channels?

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Just a few years ago, many businesses had put in place strict policies prohibiting employees from using social media during the workday, and in some cases, at all. It's amazing how things have changed in such a short time. Now most companies have a presence on one or more social networks, and leading-edge organizations have incorporated social communication into their customer engagement programs.

But let's face it—businesses haven't had much choice in the matter. The growth of the social channel has been largely customer-driven, which, for most companies means that they need to respond whether they want to or not.

Because of its public nature, it's understandable that companies initially may have wanted to progress cautiously, using social media primarily as a promotional tool to support marketing campaigns and build brand awareness. But, for many, the time for baby steps is over. As Garner previously reported, "Organizations that refuse to communicate with customers by social media will face the same level of wrath from customers as those that ignore the basic expectation that they will respond to emails and phone calls." Gartner also estimated that failure to respond via social media would increase dissatisfaction and accelerate customer churn (by up to 15%).

Many executives fear that allowing social media to evolve from controlled, one-way messaging to a dialogue will simply invite customers to air their grievances publicly. But those conversations are already taking place online—whether companies choose to ignore it or address customers' complaints directly.

Social media has put customers in charge of the brand image, says Bob Furniss, director of the Service Cloud Practice at Bluewolf. "The customer owns the brand more than they ever have before—especially when it comes to customer service, because they will tweet about their experiences and post comments on Facebook," he says. "What's interesting is that, while the social channel has been owned in the marketing environment, the potential damage to or potential success of the brand oftentimes is tied to what is happening on the service side."

As more organizations take the plunge into social media, the piece that's often overlooked is what Furniss refers to as "the social playbook," an organizationwide strategy for engaging customers via social. A typical playbook includes a plan for when to respond and how, key roles and responsibilities, how to integrate social contacts into the contact center's workflow, an escalation process, as well as social media monitoring and reporting processes and tools. Having a strategy in place that addresses these key areas before engaging will ensure that your customers and brand are supported in a consistent manner that adds value to both.

Key Considerations Before Jumping In

Developing a social media strategy that aligns all of your stakeholders naturally begins with the buy-in and support of various functions, including marketing, the customer service center, PR, the C-suite, IT, product development and legal. In particular, a strong partnership between marketing and customer service—or the "dream team," as Furniss refers to them—is ideal, since each group contributes unique skills and expertise to the social media voice.

Once you have put together a crossfunctional social service strategy team, what are the key decisions that you will need to examine before moving forward? While each company's game plan will be unique, some of the common initial considerations will include the following.

IDENTIFY AND PRIORITIZE YOUR SOCIAL SERVICE CHANNELS

Obviously, you'll want to be where your customers are, and especially on those social networks where they're talking about your company. But on which of these channels should you engage



Bob Furniss
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Baochi Nguyen
Social Canny

your customers? How do you recognize demand from social customers?

“It helps to visualize where that demand sits,” says customer experience and social business strategist Martin Hill-Wilson, founder of Brainfood Consulting and author of *Delivering Effective Social Customer Service*. “There is no set way to do this,” he explains. “However, mapping a territory helps you to understand it.” (See the sidebar on page 8 for more from Hill-Wilson on “Mapping Your Social Customer Service Ecosystem.”)

To get an idea of what types of comments and conversation are taking place in the social environment about your brand, many organizations employ social media monitoring tools. Social listening solutions like Salesforce Marketing Cloud (Radian6) monitor online conversations across social media platforms for specific keywords to identify trends and top influencers.

If your company is not ready to invest in a social media platform, you can use a simple method to monitor individual social networks, like Twitter, to get a general idea of what’s being said about your brand and how often.

“Even if you don’t have a Twitter handle, you can set up a search query on various incarnations of your brand—both how it is spelled and spoken,” says digital marketer and social media strategist Baochi Nguyen, CEO of Social Canny. “You can aggregate all of those mentions to understand if there is a bug in your product or some other type of problem. Trends associated with your brand on Twitter often provide insights into issues that you might not have learned about from the customers calling your center. It’s great feedback that you can take back to your product team.”

WHO WILL ENGAGE ON SOCIAL CHANNELS?

A strong partnership between marketing and customer service will create the best environment for social customer care. While the marketing team has the expertise in brand messaging, tenured agents are prime candidates for the service side.

“Working in a call center often provides the sensitivity to language necessary for social media customer care,” says Pat Perdue, a social media consultant and Chief Customer Experience Designer at Socialicity. “Call center experience provides a sense of urgency necessary to handle customer issues in a timely way. There’s no better training in how best to communicate with customers than actually communicating with customers” (see “Social Media Customer Care Agents,” *Pipeline*, August 2013).

Communications and information technology corporation Nokia found that a mix of service and product expertise provided an effective escalation process for its social channels. Nokia’s social customer care team is staffed by a first-tier technical support team offsite. This team is responsible for the initial response and basic topics, such as those covered in the published FAQs, says Social Media Manager Sean Valderas. “For escalations beyond this, we leverage the expert knowledge of our Product Quality managers who have a direct interface to R&D,” he adds. “This allows more real-time feedback on device performance in the field and faster turnaround time for solutions.” (See “Social Media Customer Care,” *Pipeline*, February 2013).

WHAT WILL YOUR SOCIAL SERVICE TEAM RESPOND TO?

Will your social service team respond only to certain posts or comments—or everything? In *Pipeline’s* 2013 Multichannel Metrics Survey (cosponsored by Interactive Intelligence), we asked contact centers for the criteria that they use to determine when to respond and when not to. Just over two-thirds (67.5%) said that the issue type plays a key role. For instance, some mentioned that not all posts or comments require a response, but that they typically respond to problems and questions.

Two common indicators for which comments to respond to from among our survey participants were the severity of the issue mentioned and the customer’s level of dissatisfaction. Some centers

indicated that they also consider customer type as a key criteria for responding. Depending on how you assign responsibility for social engagement, recommendations, compliments and sales leads may be assigned to marketing, PR and sales teams, or within the social care team.

What types of comments and/or posts do *not* require engagement? Comments generated in response to promotions or current marketing campaigns most likely do not require further interaction. Also, survey respondents said that general rants are largely ignored if it is clear that the poster is not seeking assistance with an issue, as well as obvious Internet trolls (i.e., those who purposely post controversial, inflammatory, irrelevant or off-topic messages to provoke an argument).

And sometimes a conversation online is just that and not an opportunity to intrude. For instance, two people may be having a dialogue about an issue with your company or your product, but that doesn't mean that a social service agent should insert himself or herself into the conversation.

Practical Pointer: Make sure that you differentiate your social service channel from the marketing channel by creating a unique Twitter handle to respond to customer service inquiries and issues, such as @ABC_Care. "Many times, customers don't know that a customer care handle exists for a company, so they might just post a tweet to the company handle with their complaint," explains Nguyen. "If the marketing team or social community manager sees that tweet, they can either reply back to the person with an apology and include the customer care handle so that message pops up in the agent's dashboard, or the social care team can monitor tweets to the company handle and respond to the customer using the customer service handle and leaving out the company handle. Then it becomes a ticket like any other ticket, and you can measure and monitor it."

WHEN AND HOW ARE SITUATIONS ESCALATED?

A critical component of any social service strategy is the escalation policy, which defines when a situation needs to be escalated (e.g., how many comments or posts will you see about an issue before it is escalated), and what steps to take during a crisis (who is alerted; who is responsible for which actions)—whether the issue involves an employee posting an inappropriate comment, a product malfunction or someone launching a social media attack on your organization.

"Mistakes are going to happen," says Furniss. "Social media is a human interaction and people make mistakes. It's important to acknowledge the issue and to be genuine in how you address it. If you attempt to ignore the situation or, worse, try to edit, delete or hide the offending tweet, comment or post, it can cause more backlash." (Think Nestle's 2010 social media meltdown.)

Instead, Furniss adds, a sincere apology will generally diffuse the situation and will often even turn haters into fans.

Nguyen agrees. In a situation that calls for damage control, an apology should be the first step, she says. If it's a public mistake, say, an inappropriate comment is posted from the brand's Twitter handle, then it requires a public apology. An honest, authentic apology can work to your advantage. "There is something about the human race that makes us genuinely appreciate it when people own up to their mistakes," she points out.

For large-scale mistakes, Nguyen recommends that the apology be communicated through a blog posted by a company executive, which then can be pushed out through other social channels via tweets and posts.

SET RESPONSE TIMES AND CUSTOMER EXPECTATIONS

Because social media interactions take place in a 24/7 world, your social service strategy needs to define your response time goals for various social networks, whether you will staff

those channels around the clock, and if not, how you will communicate that information to customers, as well as a plan to set customers' expectations for which types of interactions can be handled via social and when they can expect to hear back.

For the most part, contact centers that respond to customers via social channels tend to respond quickly. Over half (54.1%) of the participants in our Multichannel Metrics survey that use Twitter have an average response time of within one hour. For Facebook, almost one-third of centers (32.6%) have set a target of within two hours, while 21.7% set a goal of within two hours, 17.4% said within 12 hours, and 19.6% set a goal of within 24 hours.

The speed at which you respond to social interactions depends on the social channel, type of post and type of interaction, says Furniss. "If someone posts a tweet to your customer care Twitter handle, then it should be handled the same as a chat. It's immediate because they've reached out to you directly," he says. "But if it's a random mention—'the service I just received from @ABC_Care was great'—then that might fall into a four-hour window. Much like service level, you have to understand what types of interactions you're getting on social and build service levels across those contact types." Keep in mind, though, that conversations that happen in the social environment are real-time, therefore, customers expect companies to respond in real-time.

But what if your center is not a round-the-clock operation? Furniss suggests posting information about the times that your team is available on each social channel site, as well as the time zones in which you operate (keep in mind that the social channel may be global, even if your company is not).

Royal Mail is an organization that does this particularly well. The government-owned postal service uses Twitter to provide quick responses to customers—but within traditional contact center operating hours. The customer service team is careful to set customer expectations on its Twitter home page (e.g., "We are here between 8 a.m. and 6 p.m., Monday-Friday") and through humorous tweets at the end of the day ("It's a bird... It's a plane... No... it's our bus, so that means it's time for us to be up, up and away! We'll be back at 8 a.m." "Tweet dreams are made of this; back tomorrow from eight til' six #Eurhythmics") (see "Social Customer Care," *Pipeline*, October 2012).

If you want a 24/7 presence, you can set alerts to be sent to your team, the marketing team or designated individuals, Furniss adds. "If there are a lot of contacts about a certain topic, your team will be alerted, and they can respond and/or immediately escalate the issue, if necessary."

SHOULD THE CONTACT CENTER BE REACTIVE OR PROACTIVE?

Although contact centers traditionally have operated in a reactive mode, social media offers the opportunity to reach out to customers you might never have heard from to turn around a negative experience, identify opportunities to improve products and processes, stop problems from becoming widespread or escalating, and create brand advocates.

"By monitoring social media, customer service can become proactive—agents can help the company spot growing trends of customer dissatisfaction before it becomes too late," points out Mike Ellsworth of Social Media Performance Group in a webinar produced by Bright Pattern. Ellsworth is, author of *The Infinite Pipeline: How to Master Social Media for Business-to-Business Sales Success* (To view the free webinar recording, "Social Media Customer Service with Social Media Performance Group," visit www.BrightPattern.com).

"When you engage with customers via social media, your customers will speak to you differently than they do when they're irritated at a long wait in the phone queue," Ellsworth says. "When you speak with them in real time, at the point at which they've expressed a problem, you can easily nip a problem in the bud."

HOW WILL YOU CHOOSE THE RIGHT SOCIAL CARE AGENTS?

Keep in mind that you may need to change your hiring profile to ensure that you're hiring agents who can interact with customers in an unscripted conversation.

Contact center consultant and coach Melissa Kovacevic, founder and president of CommPlan Consulting, advises contact center leaders to consider first whether there is a high enough volume of customer service-related social media contacts to have a dedicated team, or if they should select and crosstrain agents who will interact on social media in addition to handling calls, email or live chat. "Either way, you need to identify the skills needed, write a job description appropriate for your social media customer care expectations and then look for agents inside your center or outside who meet the skills and experience needs for the job," she says. (See "Social Media Customer Care Agents," *Pipeline*, August 2013).

What are the attributes, skills and work experience that translates into success in social media customer care? Social media customer service experts point to the following:

- Product and policy knowledge
- Communications savvy
- Brand knowledge
- Decision making and reasoning
- Able to work autonomously
- Customer driven
- Writing skills

The ideal social customer care candidate should have experience handling escalated complaints in a contact center environment, "and have a track record for turning complaints into compliments either over the phone, email or live chat," Kovacevic says.

TRAINING AND GUIDELINES FOR SOCIAL SERVICE AGENTS

At Nokia, social care team members are drafted from the company's Product Quality and Services Quality teams. "We look in-house for candidates who have a deep level of product knowledge, passion for the Nokia brand and interpersonal skills that facilitate interaction in social," says Valderas. Those who make the cut are provided with training on the tools, as well as etiquette and engagement techniques for social networking. There is a social media policy and guidelines to which team members must adhere, and they must also demonstrate mastery of techniques via testing prior to engaging in social activity, he adds.

"By training, testing and follow-up auditing of our team members, we are able to ensure a consistent voice in social conversations. We do, however, encourage a level of individuality in the course of discussions so that the conversation is authentic and does not appear scripted," Valderas says.

While interactions may be monitored for consistency and quality, global Wi-Fi services provider Boingo also places a priority on authenticity, and strives to ensure that tweets and posts sound genuine. Boingo's social media interactions are monitored for quality similar to phone and email transactions. Customer support has report cards for each channel, with a QA checklist of the elements that make up a successful transaction, and to make sure that agents are meeting brand expectations for driving the customer conversation by displaying the appropriate voice, tone and emotion.

So how do you coach reps to find their authentic voice? "Just be honest," says Boingo's VP of Corporate Communications Christian Gunning. "There are all sorts of ways that companies can

fabricate messaging that sounds disingenuous,” usually by too much scripting. While Gunning says that it’s beneficial to start with a script to help reps understand what the company is trying to communicate, “if you provide them with a raw script, then people will start getting lazy and just read the script.” Instead, Boingo provides reps with an outline with multiple bullet points so that they understand the key details that they need to communicate, but can personalize the message.

GETTING THE RIGHT TOOLS IN PLACE

Fortunately, there are plenty of tools available to help you, and your social service team, manage social interactions. In his April 2013 *Pipeline* column (“Social Media Technology Connects the Contact Center”), Strategic Contact’s Ken Barton points to technology that serves three primary functions:

Social media monitoring and analysis tools search millions of public websites—e.g., online news publications, blogs, forums, photo/video sharing, social networks—to find and extract content based on mentions of defined keywords (e.g., company names, product names, industry terminology).

Social media routing tools queue actionable mentions from social media monitoring tools to the most skilled and available agent. This functionality has been integrated into most traditional contact center routing solutions. Some have developed their own monitoring solutions to front-end their routing application. Most integrate with third-party monitoring tools.

Social CRM (SCRM) tools integrate all modes of contact into a coherent, single-view agent desktop application that truly reflects relationships. Through SCRM, agents have access to a complete history of all forms of interaction with each customer.

Can You Decide Not to Adopt Social?

Yes, unbelievable as it may sound, some businesses still opt not to engage with customers via social channels. Even so, says Furniss, “you still need a plan in place *not* to have a plan.” For instance, you will need a policy for what your employees can say about the company on their personal social media accounts.

Even more critical, “you should have an escalation process in place, and you should be listening to what your customers and others are saying about your company,” Furniss stresses. “You can decide not to engage in the social playground, but you can’t stop people from talking about your company.” 

Editor’s note: Bob Furniss will present a session on “#goingsocial In The Contact Center” at ICMi’s Contact Center Expo & Conference, May 6-9, in San Diego; www.icmi.com.

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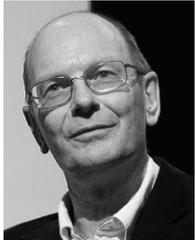
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MAPPING YOUR SOCIAL CUSTOMER SERVICE ECOSYSTEM

By Martin Hill-Wilson



There are two key differences between mainstream and social customer service.

First is the switch from private to public engagement.

Organizations and customers are still waking up to the consequential upsides and downsides.

The second is that your channel mix for social customer service is now a decision driven by your customers. Moreover, they often expect you to find them. This article explores the implications of this second point and recommends how organizations should plan for this.

Unlike traditional customer service in which the organization controls both channel mix and service wrapper, the dynamics of social customer service are reversed. We as customers discovered social networks long before the business world cottoned on. We still set the pace in how they can be used. Individuals such as Dave Carroll (United Breaks Guitars) and Hasan Syed (BA Loses Luggage) teach the rest of us how to leverage social networks in the cause of publicizing poor service.

It is most important in this volatile environment that organizations recognize some home truths.

- First they are playing catch up. This experience is not likely to go away anytime soon. Social networks are in the center of the whole Digital Disruption trend: a transformation only just under way. The lesson is that rapid evolution remains the norm.
- Thinking you can understand social customer needs through traditional listening techniques, such as post interaction surveys, is the equivalent of trying to watch a Hollywood blockbuster through a pinhole. Keeping up has to be tackled in an altogether more fundamental way.

Acting on these insights will lead forward-thinking organizations to map and monitor their own social customer service ecosystem. Those who have been involved in The P&Q Campaign (www.brainfoodextra.com/pq-campaign) will recognize this approach to integrated planning.

In terms of planning assumptions, the first thing to recognize is that your customers' social habits are unique. Maybe not in terms of being on the "big" social networks of the day; many of them will be. But what about the less obvious places? They use all manner of forums and online resources as part of their digital lifestyle. The topic of your organization can be mentioned anywhere.

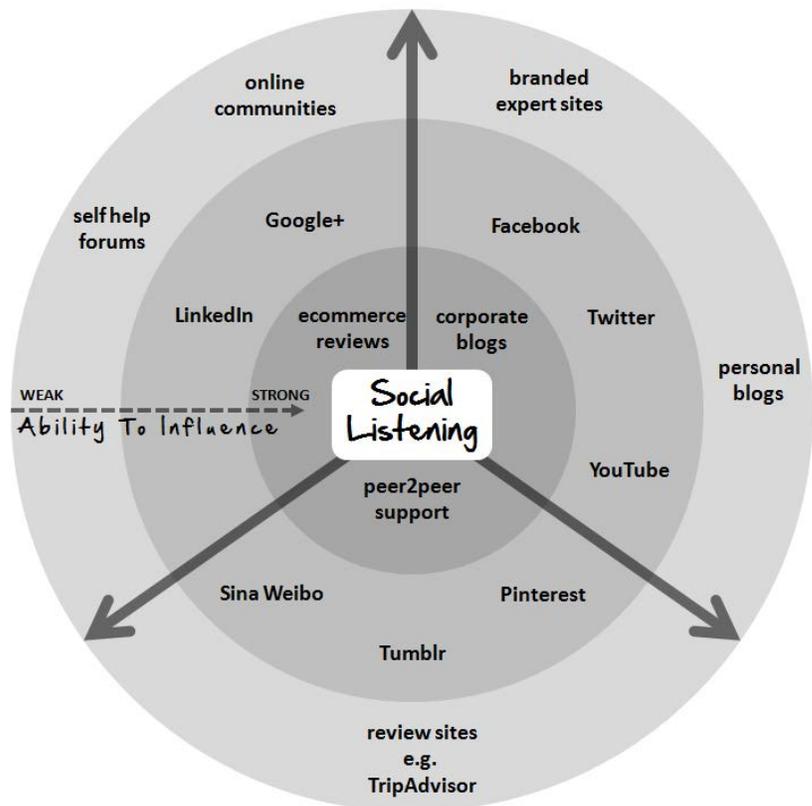
For this, you need a scalable solution for listening. Social media monitoring can quickly plot where your organization is mentioned. Obviously,

not all "mentions" are going to be service-related. Nor necessarily will they originate from customers, for that matter.

This leads to a key planning activity that I'm simply going to mention within the confines of this article. How proactive do you intend to be? Some would argue every mention merits a response. Others decline through limited bandwidth. You and your Marketing colleagues will need a common plan of action to answer this. One which both teams should anticipate will change over time.

Visualizing the Ecosystem

As I said earlier, it is easier to recognize demand for traditional customer service because the customer has to use the channels on offer, which are directly plumbed into your service environment.



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You can use traffic reports to track and forecast. However, demand from “social customers” is not nearly as obvious or explicit.

Therefore, it helps to visualize where that demand sits and how you intend to build your social channel mix. There is no set way to do this. Indeed, most organizations don’t do it as such. However mapping a territory helps you understand it.

The following approach is one way to layout your map. (See the figure below.)

Start by working from the center outwards. Map the social universe in terms of your relative ability to influence. I’ve visualized this as three circles of declining influence.

Let’s start within the first circle (darkest gray) Here, social interactions built into your own website as a self-help community are certainly within your direct influence. You can moderate discussions, determine how they are laid out and functionally operate. Of course, that does not mean you can entirely control the conversation even though you can set house rules around communication etiquette. If you mess up big-time still expect the community to let you know in no uncertain terms.

The second “circle of influence” operates at a deeper orbit. These are the large social networking sites that your customers are already familiar with in their own personal context. In this sense, you are joining them even if you offer your own Facebook or Twitter facility for customer service. Also, from a strictly legal perspective, you are operating within the terms and conditions of each site: a piece of due diligence that is still often ignored. Moreover, you have to communicate within the design and functional parameters of each site, which can change without notice.

It is now common practice to treat these platforms as “honeypots” to attract social customers before then systematically transferring them via direct or private messaging to private channels. Customer journeys now move back and forth between social and traditional channels. Amongst other things, this raises a key infrastructure issue.

As we know, cross channel is not the same as multichannel. One maintains the service context while the more common version requires customers to make extra effort and re-explain their situation. It is a shame so few organizations have mastered this. Bear in mind that a significant proportion of your social traffic exists because traditional customer service failed. So you are already on the back foot before adding to customer effort.

From a planning point of view, cross-skilling becomes much more important. For instance, moving between Twitter and Chat should be seamless, maintaining context and advisor until completion.

You might consider the final outer “circle of influence” to be “deep space.” This is the place where you have little ability to set up your customer service store other than to participate in the discussion. These could be forums, blogs or community sites you don’t own. To date, organizations have preferred to maintain a watching brief in these situations. They are content to track conversational trends, which might then break out onto the more mainstream networks.

However, some have been more proactive and directly engaged in discussion. They might feel that facts are being distorted or that a “person in need” deserves outreach even if they might not be directly requesting it.

Research shows this has a mixed impact on customers. When an intervention is unexpected, it can deliver that “wow” factor and generate subsequent positive word-of-mouth. This is central to a modern Marketing agenda and so is not to be sniffed at.

As we know, sometimes organizations get lucky and “wow” someone with a celebrity level of followers. However, customers remain contrary. We want to be left alone in privacy when it suits us but also recognized when we need help. Maybe we just want it on our own terms. This is a tricky balance for organizations.

But this much is certain. Interventions in “deep space” can either end up as a “wow” or as an inva-

sion. So give extra consideration before venturing this far in your proactive engagement agenda.

Conclusion

I’ve briefly described how your social customer service ecosystem can be visualized. Social monitoring allows you to identify and map where your customer engage from. Evolving customer expectations and internal capacity influence your engagement policy.

The value of doing this is that it helps you understand what is happening and share that insight with colleagues. It will, of course, keep changing as customer habits evolve and the popularity of customer networks come and go (at an alarming pace).

This phase of planning should be updated on a regular basis to ensure you remain close to where your customers interact online. Without it, your service responsiveness will suffer and the risk of missing the incoming situation-that-can-turn-into-a-crisis greatly increased.

Editor’s note: *This article is based on Martin Hill-Wilson’s book, “Delivering Effective Social Customer Service,” which includes a social customer service self-assessment to help you design your social customer service strategy.*

Martin Hill-Wilson is a customer service and social business strategist. His company, Brainfood Consulting, provides customer strategy services to a range of B2B and B2C brands. Martin is a long-standing member of the UK customer service community, often contributing as a keynote speaker, blogger and curator of industry trends.

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Martin Hill-Wilson’s book, *Delivering Effective Social Customer Service*, is available from Amazon.

For a sample chapter, visit www.brainfoodextra.com
