

# The Definitive Guide to Social Customer Service

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2015 edition

## New Foreword from Martin Hill-Wilson

"You are now the proud owner of Conversocial's 2015 guide to social customer service. But before you start grazing on this high protein nourishment, let me provide a little scene setting. Experiencing twelve months in social media is like cat years. Time is permanently accelerated. The ebb and flow in social network popularity is continuous. So too are changes in the broader digital marketplace. In particular, mobile expectations continue to mature. Add those two trends together and we have the conditions for a new generation of messaging, anchored in social network behaviour.

Maybe 2015 becomes the year in which this style of communication overtakes more traditional forms of social customer service. Certainly it plays to organisations' need to evolve a mobile first strategy. Will customers find comparable benefit when offered a more traditional 1:1 communication channel? Or will they miss the opportunity to escalate their issue publically to incentivise a faster response?

Time will tell. As is normally the case in multi-channel behaviour, 'channels multiply rather than die'. So maybe mobile messaging and 'old style' Twitter and Facebook will co-exist. Both still needed according to circumstance.

By the time Conversocial's 2016 edition is released, things might be clear as a bell. Or still thick as mud. And that's why social engagement remains such an important competency to get right. It's volatile with plenty of potential to cast your brand in the role of customer hero or villain.

It's not something to casually walk into and expect to get right. Certainly not by carrying forward legacy behaviour from traditional customer service. That's why this guide exists. It contains (in cat terms) a lifetime's experience of how to plan and execute social customer service like the best do.

I'll even wager that much of what is recommended still applies to messaging based customer service. Why? Core customer expectations are constant. Fast and effective service with a human touch never goes out of style. Any service mix enabling that will work.

Enjoy good fortune with your 2015 version of delivering effective social customer service. A quick read of Conversocial's excellent guide will allow you to do that even better!"



**Martin Hill-Wilson**

Customer Engagement & Digital Business Strategist - Keynote Speaker  
and Author of "*Delivering Effective Social Customer Service*"

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# Introduction

Customer service is undergoing a major revolution, with online communication moving away from private, anonymous, one-to-one channels toward public one-to-many channels that are mobile, social, and attached to real identity. In brief, social media is changing the entire business of customer service, posing great challenges and presenting new opportunities for brands. In the midst of this seismic shift, though, it's important to remember that the core principles of great customer service still apply.

Quality customer service — regardless of channel — relies on a meaningful dialogue between brands and their customers. That being said, the growing preference for social media as a preferred channel requires your organization to re-think its customer service strategy. You need to adopt a Social First approach.

## Multi-channel communication and customer expectations

Social media has already reached a high level of maturity as a communication channel. People have blended it into their lives alongside other technologies and they expect brands to follow suit. Increasingly, inbound customer service inquiries start on social ("Where is my X?"), move to a private channel (details of X given) and then finish back where they began ("Thanks for delivering my X!").

## Shifting ownership of social

Perhaps the most important change social media has brought to customer service is the complete reversal of the traditional channel ownership model. Social media is the first channel created and controlled by customers. It is also the first to be implemented by customers with the expectation that brands will adopt it, rather than the other way around. At the corporate level, the ownership of the social media channel is shifting away from Marketing and Communications as engagement increasingly relates to inbound customer service-based topics. Rather than social being seen purely as a space for companies to deliver outbound marketing messages, it is the inbound customer queries that allow for meaningful points of engagement and the building of brand advocacy.

## Technological limitations

Social media mixes public and private discussions, and combines customer service issues with general chatter and engagement. As such, it requires different approaches to prioritization, workflow and analytics.

All-in-one social media tools built for marketing are not designed to maximize agent efficiency, enable managers to resource their team or measure agent performance against SLAs. Businesses that recognize early on that social customer service needs a dedicated solution quickly gain a competitive advantage by being where their customers are at scale.

## Higher stakes

Social media not only presents the opportunity for brands to delight customers on a channel they choose and control, but also significantly reduce the cost of each interaction. In fact, Gartner has found that social agents are able to handle from four to eight times as many issues per hour as phone agents (Gartner 2012).

The public nature of social media means that each successful interaction has the potential to be amplified via peer-to-peer recommendation, delivering a marketing benefit that is significantly greater than other channels. Research from NM Incite, a partnership between Nielsen and McKinsey & Company, found that consumers who have positive social customer care experiences are nearly three times more likely to recommend a brand than those who do not (NM Incite 2012).

However, social customer service also presents high-volume interactions that risk attracting negative publicity due to conversations taking place in a very public forum. Therefore, companies must deeply embed their social customer service operation internally — taking all the steps necessary to minimize risk while optimizing results.

This guide is designed to help you deliver social customer service from within the contact center as a standardized, scalable and ROI-positive operation that lives up to your organization's promise of quality service.

## Section 01

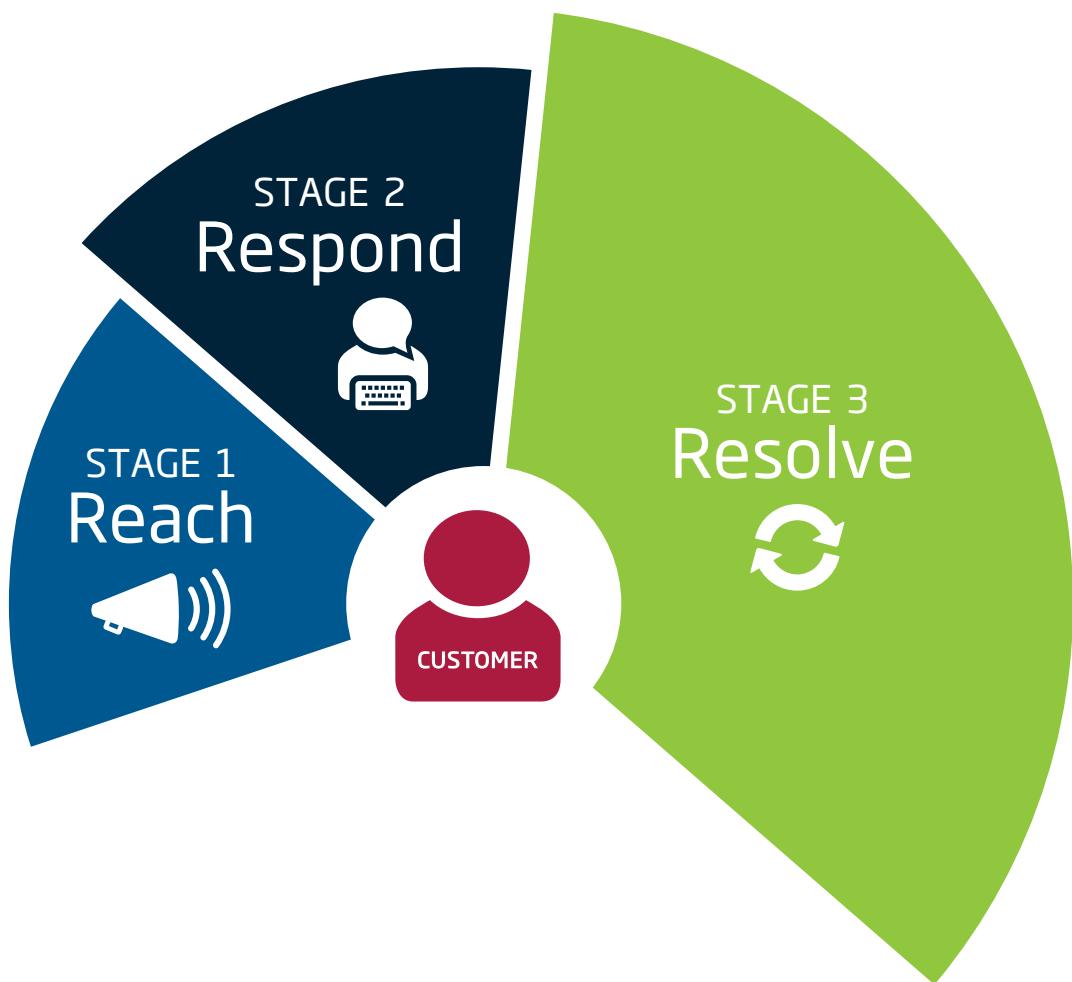
From Reach to Resolution



# From Reach to Resolution

Over the past few years, social customer service has gone from being the focus of a small number of highly innovative companies to a widely accepted requirement of doing business.

We talk about the transition to social customer service as a journey from 'Reach' to 'Resolution.' This journey takes place in three stages, from simply listening on social (that's the 'Reach') and redirecting customers off social media and back to traditional service channels, through to a small team of social agents helping customers in an ad hoc way, and finally to a fully-resourced team, focused on 'Resolution' and fully integrated into contact center processes, analytics and technology.



# The social customer service journey

## Stage 1 – Social media for marketing and listening (reach)

At the start of the journey, social media is a marketing channel used almost exclusively for outbound publishing and promotion. Companies at this stage are ‘Reaching’ out to their customers on social, but it’s largely a one-way conversation. There may be basic community management and engagement, but genuine customer service issues are either ignored or deflected to more traditional channels like email and phone. As a result, companies in this stage fail to use social as a customer service channel and thus fail to meet customer expectations or to leverage the efficiency gains of service over social.

## Stage 2 – Social customer service early adoption (response)

At this stage, companies — often beginning with the Marketing Department — recognize the need for some sort of social customer service presence. These organizations adopt a perfunctory social customer service strategy in an effort to improve their engagement over social, usually achieved through working with the Customer Service Department. The contact center resources allocated are usually just enough to deal with incoming volume and are in effect ‘on loan’ to marketing, typically using whatever tool the marketing team provides (often an all-in-one social media management system). This type of operation is usually managed outside normal resourcing and contact center management, with few strict processes or KPIs.

Over the last couple of years, Conversocial has seen a rapid increase in the number of companies reaching Stage Two; with our latest analysis demonstrating that around 50–60% of companies are at this stage. While companies in Stage Two are helping some customers over social media, their minimal coverage means response times are usually slower than consumers expect. Additionally, the lack of information about agent and team performance makes efficient resourcing impossible, prevents the ability to integrate with CRM and business intelligence systems, and impedes the operation from being able to scale effectively.

## Stage 3 – Social media in the contact center (resolution)

Here, the business as a whole recognizes that social media is a key customer service channel, alongside phone, email and chat. The contact center is given responsibility for managing, training and resourcing the social customer service operation. The focus of social customer service becomes full engagement and timely ‘Resolution.’

At this stage, social customer service is measured for maximum efficiency and ROI. Precise metrics are used to ensure social customer service teams are delivering the experience customers expect, and are resourcing their agents effectively. These tools enable companies to efficiently train and manage a wider pool of agents, who can focus exclusively on social media (either completely, or within any one particular shift). Most importantly, customers receive excellent customer service over social media.

Please see Section 08 for more information about The Need for a Best-in-Class Solution.

Please see Section 07 for more information about Measuring Social Customer Service Performance and Impact.

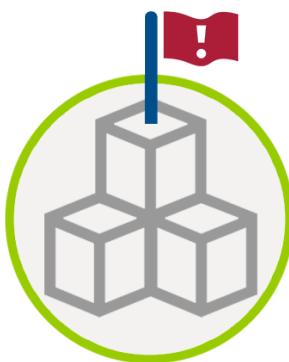
When will most companies reach Stage Three? Sooner than you may think. According to recent research from Forrester Consulting commissioned by Conversocial, more than 67% of companies believe that social customer service is growing in importance, and is the most pressing short-term priority for contact centers (Forrester 2014). Additionally, 92% of companies view customer experience as one of their top priorities in the long term and 60% use it as a competitive differentiator.

Providing excellent social customer service in the contact center is only possible with dedicated and best-in-class software that enables measurement, resourcing, and is capable of integrating with existing systems (e.g. CRM, workforce management, and central contact center technologies). Companies that attempt to make the shift to Stage Three without a social customer service solution explicitly designed for social risk being stuck with tools not built for their needs.

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of companies believe  
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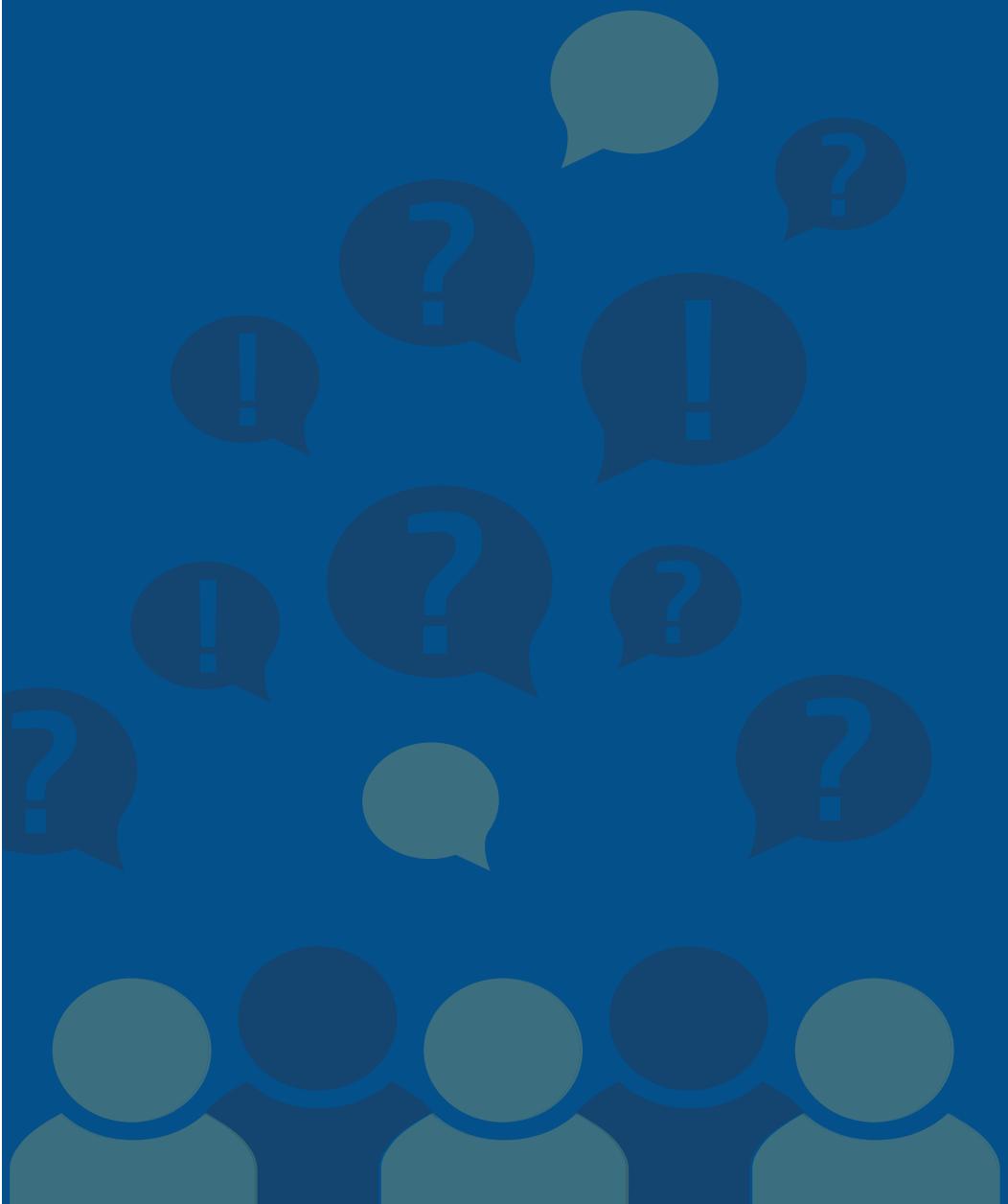
**60%**  
use social customer  
service as a competitive  
differentiator



Source: (Forrester 2014)

## Section 02

### The Challenges of Social Customer Service



# The Challenges of Social Customer Service

While the opportunities in social customer service are tremendous, there are also significant new challenges for brands.

## Customer expectations have increased

Customers have embraced social as a communication channel and brought it to companies along with their expectations for its use in customer service. Their first expectation is that companies should recognize their preference for engagement over social media and act accordingly. And, there is a growing force of numbers behind that expectation. Research from Forrester Consulting shows that between 2009 and 2014 the number of customers using Twitter for customer service has doubled from 11% to 22% (Forrester 2014).

Social media customer service, and the new customer expectations that accompany it, have brought about a distinct shift in the balance of power between brands and their customers. Customers are more in control of the customer service process now than at any time before. But, there's far more behind this power shift than customers' demand that brands recognize their preference for social.

Your Customers:

- Have more choice of suppliers and channels. 66% of consumers stopped doing business with a provider and switched to another in the past year due to a poor customer service experience, up 17% since 2005 (Accenture 2013).
- Are more connected. 53% of consumers will talk about a bad customer experience they have received on social, while only 42% will share a good one (American Express 2012). This trend and the viral nature of social media show how customers can wield their power.
- Demand more speed and simplicity. 71% of consumers say that valuing their time is the most important thing a company can do to provide them with good service (Forrester 2013).



## Your representatives face challenges delivering the best social customer service

Living on social media is second nature for most of us now; it's so easy and enjoyable that it's often the first place we go to share news, views and information. Unfortunately, providing effective and efficient customer service via social poses new challenges both for agents, who must deal with customers in a new and more intimate manner, and managers, who must balance resources, costs and corporate goals.

For your team, social is:

- **Noisy:** Unlike other channels, agents must sift through a lot of content in order to identify customer service issues on social.
- **Confusing:** Multiple public and private messages from a single customer are hard to track, and can get lost between agents.
- **A slow process:** Lack of efficient approval workflows mean slow, rigid and manual process with extra complexity when resolving an issue that requires involvement from other departments.
- **High stakes:** A single error can result in a full-blown social media crisis.

## Managers struggle to track KPIs & resource properly

Managers bear responsibility for the entire customer service operation and must satisfy a number of competing goals and interests. These challenges are primarily technological and operational. Here are the most important ones:

- Social customer care teams are getting bigger, but managers are stuck with slow and laborious processes to understand team performance.
- Systems that focus on individual messages rather than the full conversation make ticket-based analytics impossible. Metrics including First Response Time and Average Handling Time are essential for resource planning and team management.
- A lack of security and approval tools requires agents to slow down in order to follow inefficient reporting processes — such as tracking all activities in spreadsheets—negatively impacts SLAs and reduces quality of care.

## But done correctly, social can be highly efficient and cost effective

- **4-8x:** Social agents are able to handle four to eight times more issues per hour than phone agents (Gartner 2012).
- **<\$1:** Social costs less than \$1 per interaction, compared to \$6 per call for phone and \$2.50 to \$5 per email (NM Incite 2012).

## The answer is a #SocialFirst approach

We define our approach to social customer service as #SocialFirst. And, as the name suggests, it places social media at the center of customer engagement as both its foundation and its architecture.

#SocialFirst is about adopting social customer service and adapting to its culture with confidence and at scale to meet your customers where they are, on the channel they own. With a #SocialFirst strategy, brands can fully engage with their customers, provide fast and meaningful service, and gain a powerful differentiator that can result in a competitive advantage over their competitors.

#SocialFirst is more than a concept. It is a set of concrete and achievable goals that can guide brands toward social customer service success. We call those goals the Five Pillars of #SocialFirst.

### The Five Pillars of #SocialFirst:

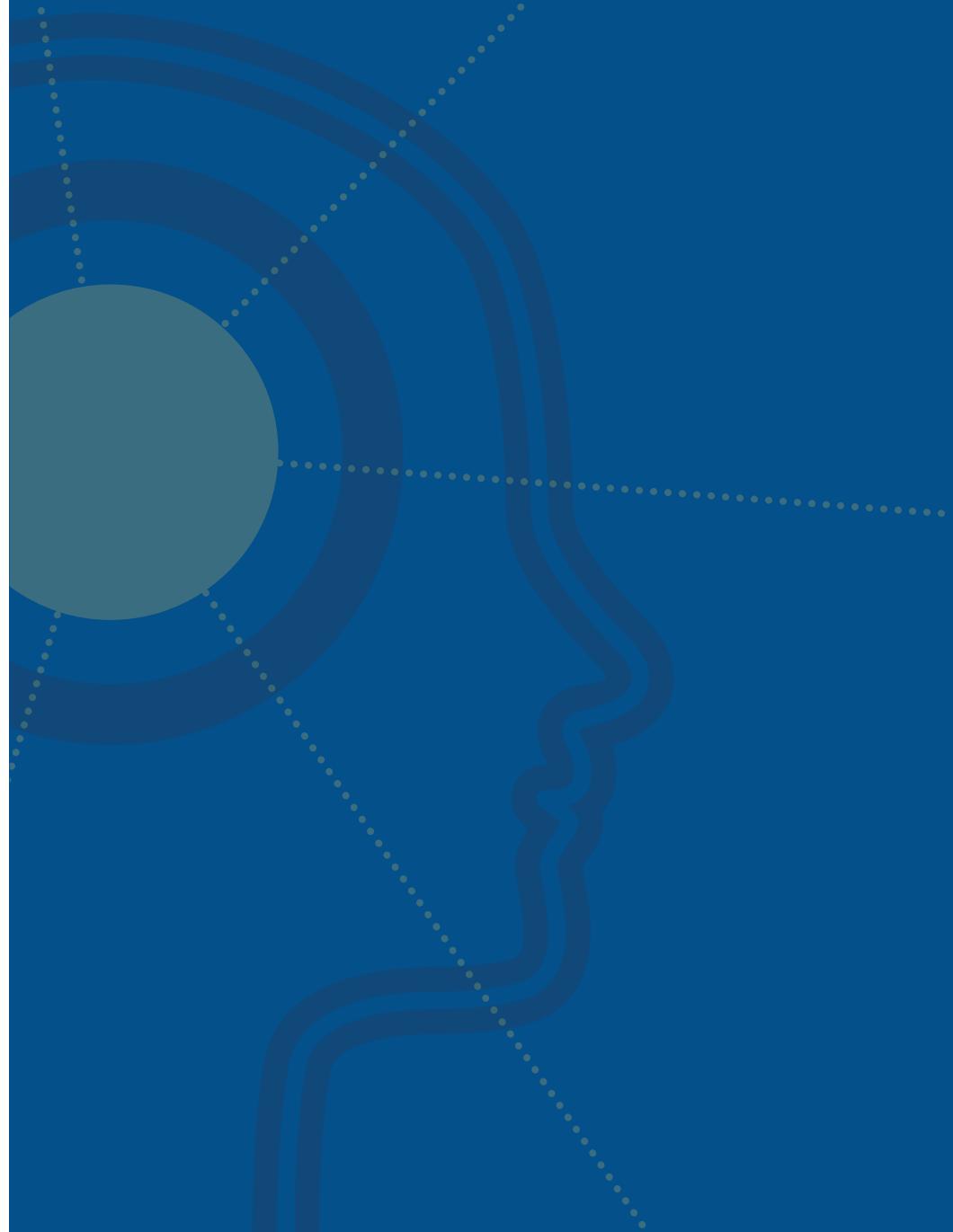
1. Proactive support for social customer service, making its existence widely known in marketing materials and sales/support collateral
2. Aggressive engagement aimed at exceeding customer demands
3. Interacting, rather than reacting as a means to anticipate what customers want and need—before they tell you
4. Recognizing of social media for its viral power and leveraging that reach to influence the market
5. Connecting with customers on a deeply personal and emotional level to build relationships and trust

In the following sections, we explain processes and strategies that will help you build an effective and efficient social customer service operation—one that puts #SocialFirst.



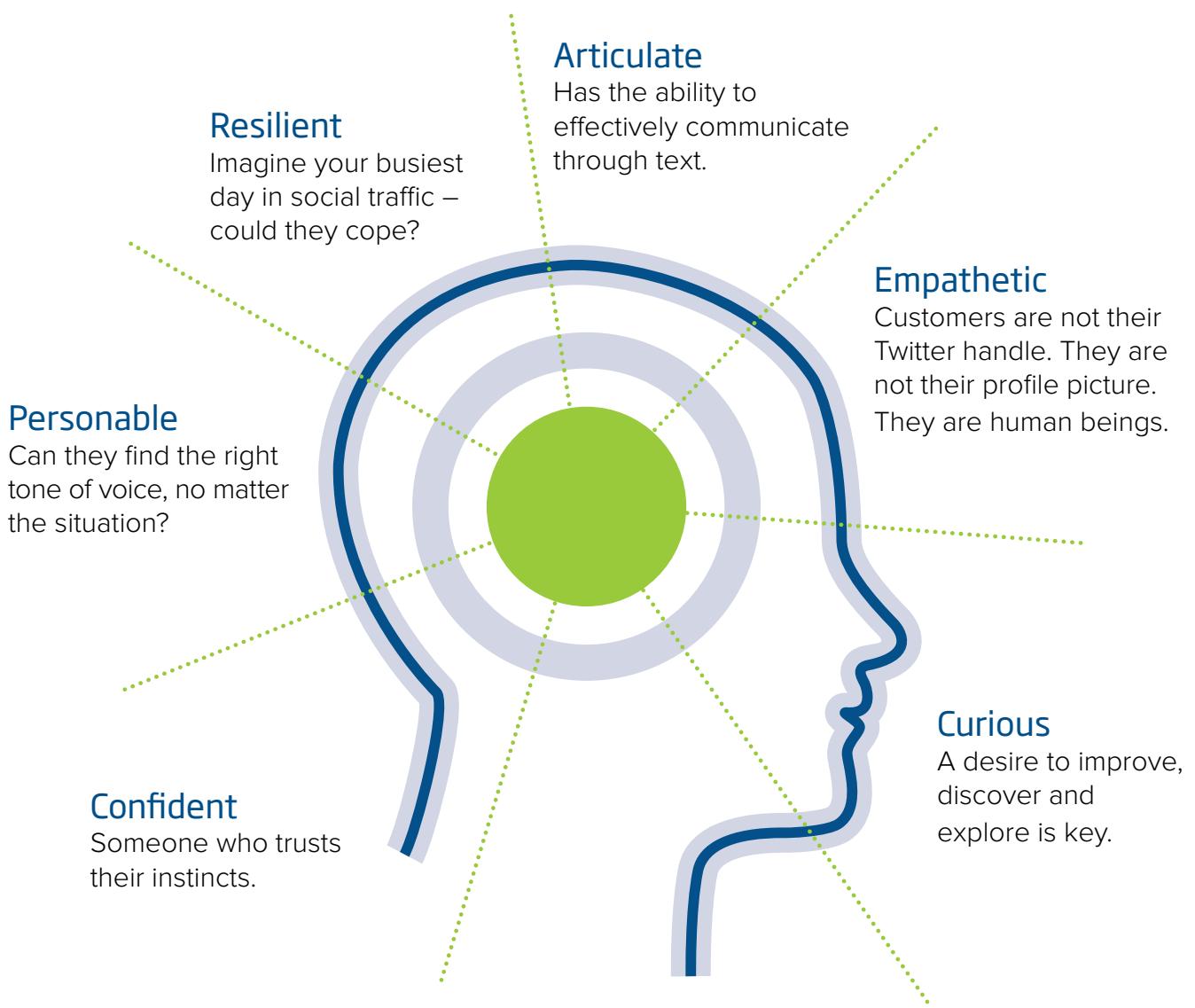
## Section 03

### Assembling a Social Customer Service Team



# Assembling a Social Customer Service Team

It is rare to come across a traditional customer service team that is perfectly suited to the demands of social media. On social, agents become brand ambassadors and therefore need to possess all the skills that come with a public-facing role, on top of the skill sets needed to be a great agent over traditional channels like phone and email.



## Great social customer service agents should:

- Be **personable**: During the interview process, assess whether this person can actually hold a conversation about a particular issue. Create a problem-solving scenario which involves a conversation back and forth; this can be the best way to judge how affable they are.
- Be **confident**: Content on social media can vary greatly not only in topic but also action needed from the agent. Some messages might be answered easily, while others might require escalation to another department. Very likely, many of the mentions might not include actionable customer service issues at all. A great social customer service agent must have the confidence to trust their instincts to quickly assess the context of a message and then be able to take the appropriate action. This should be tested alongside the ‘personable’ actions.
- Be **curious**: Whether recruiting internally or externally, it is essential that social customer service agents have the eagerness to not only learn new tools but also to know the industry inside-out. The best indicator for this is how well the potential social agent has up skilled themselves in previous roles, and are interested in developing the social customer care function.
- Be **articulate** through writing: Social agents must be able to succinctly and effectively answer customer service queries. Good spelling and word choice is also important; minor errors can tarnish the brand’s appearance and damage credibility with the customer.
- Be **resilient**: No matter the context, social agents must be able to react calmly, assess a situation and respond back to the customer. They must be able to show not only patience, but an ability to ‘roll with the punches’ by responding professionally in any scenario.
- Have real **empathy** for the customer: Every action an agent takes must revolve around making the customer happy. Make sure potential employees have this focus and talk about the customer during the interview process through practical scenarios.

Is it best to promote agents internally or hire new agents for social? While great agents can come from both sources, we generally recommend promoting from within whenever possible for the following reasons:

- ✓ You are able to identify agents who already have both strong writing skills and a great rapport with customers.
- ✓ The agents will already be familiar with your core contact center operations, allowing you to focus on social training.
- ✓ Since social customer service is a relatively young field, there is currently a very small pool of agents that have social on their resume, giving outside recruitment little advantage.

All of this said, sometimes fresh minds bring fresh ideas. Companies should not be fearful of looking outside for external talent.

Companies sometimes think that only 'Generation Y' social media natives can be social agents — but we have seen great success in training agents of all ages in social media, and don't see this as an obstacle to recruitment. Social media knowledge can be taught; the personality traits that make for a great agent are harder to find.

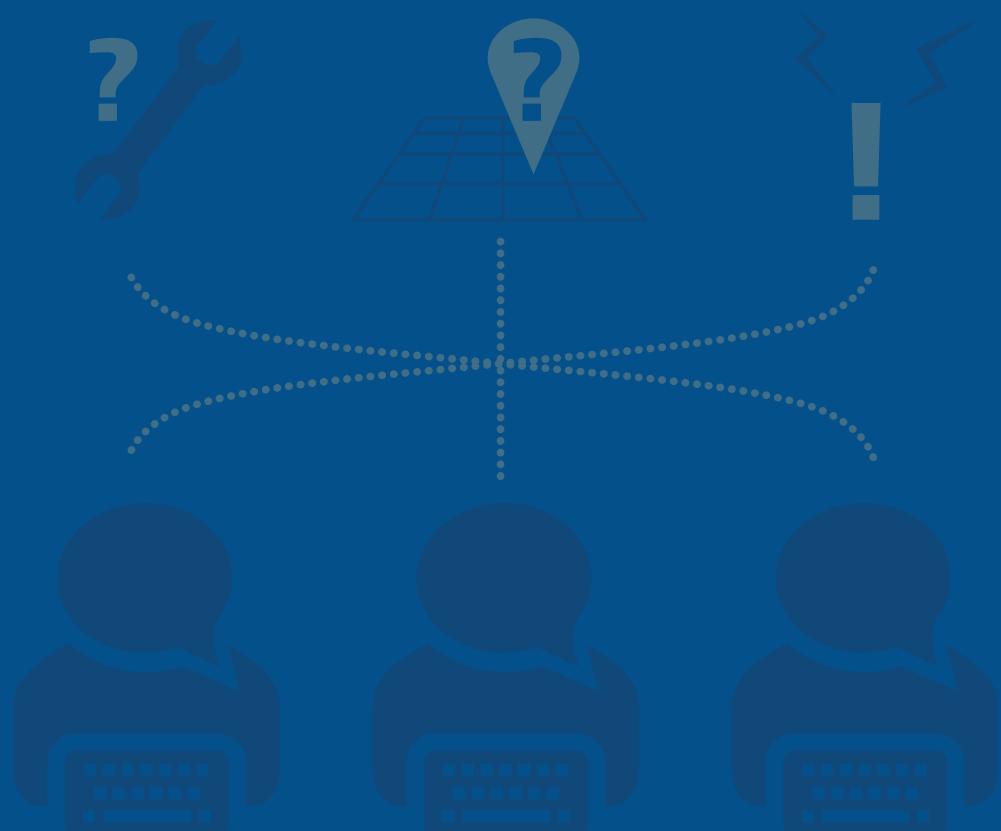
## Empowering agents for social customer service success

Before agents start posting from branded accounts, deliver training to establish the right social customer service processes. Training will not only prepare them for different situations, but will also empower agents to guide themselves through any social media eventuality. Even after agents begin responding on social, there should be ongoing training; social media is constantly changing, so agents must carry on learning and improving.



## Section 04

### Creating Your Social Customer Service Processes



# Creating Your Social Customer Service Processes

There are a number of unique requirements for a successful social customer service program that aren't encountered within a traditional customer service setting.

## Prioritization

Filtering through social messages is a major challenge for any brand receiving even a moderate volume of customer interactions.

Unlike private service channels, social media consists of many messages and interactions that do not require a response. A study of retailers using Conversocial found that 50% of social media messages merited an agent's attention, only 10% of which required a response. This demand to noise ratio does, however, vary across companies and industries, with service providers often seeing much higher volumes of actionable conversations (in the range of 50–80%).

It is important for managers to define criteria for what their team should respond to first. What is high priority? What should be always guaranteed to receive a response?

**Every company is different, but here's a framework for separating issues of varying urgency:**

 First-tier priority	Second-tier priority
A customer asking the company a direct question	General references of the company's products and services
A customer expressing dissatisfaction	Positive experiences of the company's products and services
Customers that have an urgent product/service need	Indirect references that are relevant to the company's industry
Escalating potential crisis issues	

## Resolution

Social customer service is all about resolving customer issues regardless of wherever, whenever and however those customers choose to interact. Issue resolution will vary between organizations and across industries. Companies generally determine resolution at one of two points: when a brand has fully addressed a customer's need or, even better, when a customer acknowledges the brand has solved their issue. On social, the latter type of resolution can often take the form of a public thank you.

## Know who you're talking to

When customers reach out to you on social media they want to carry on their existing conversations with you, not start afresh. This is a major challenge in a multi-channel customer service environment, but get it right and you can offer a much better customer experience.

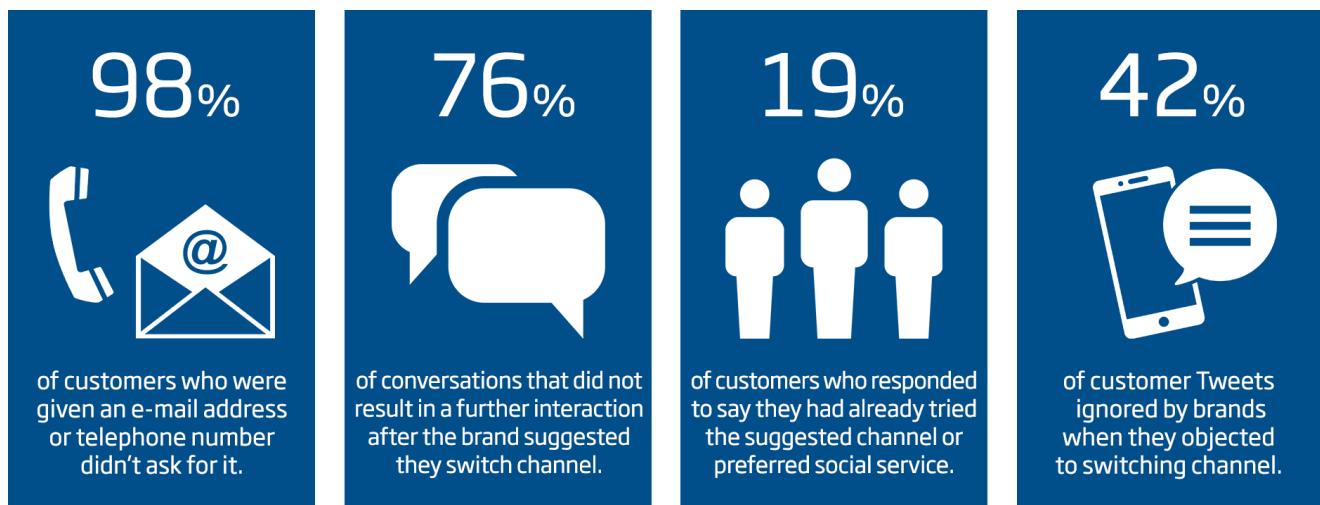
Firstly, make sure that your team has full visibility of your customers' social history. Are you already in the middle of a conversation? Have you had similar conversations in the past? Has the customer previously had a positive or negative relationship with your company? Which agent dealt with them before?

Secondly, as your team is fully integrated into the customer service environment, they should have access to systems that hold customer records from other channels, such as your email, chat and phone systems, and core customer information in your CRM system. Getting the data to flow across these systems is the most important step towards a single view of the customer.

## Redirection is not good customer service

Customers know that social media offers a different customer experience to traditional channels. They have chosen to speak with your company there, as it is convenient and human. They might even have potentially exhausted and lost confidence in other channels.

Redirecting customers away from their chosen support channel is one of the worst customer service experiences possible, forcing customers to interact in a form they have not chosen. According to the American Express Customer Service Barometer, 65% of customers report that in-channel resolution is the most important aspect of a good customer service experience (American Express 2012). Further, Conversocial research of a cross-section of social customer service interactions found that only 2% of customers who were given an email address or telephone number asked to be provided with one in the first place (Tweet, Email or Call 2013).



Source: (Tweet, Email or Call 2013)

By offering in-channel resolution whenever possible, the consumer receives the interaction they were looking for, and the brand can publicly display any thanks the customer gives. Anxiousness about dealing with sensitive customer information publicly can usually be resolved by using private messaging. This protects both the brand and customer whilst avoiding redirection and a manipulated experience. If it becomes necessary to take the issue to another channel (e.g. for regulatory reasons), keep it on social for as long as possible. And even if an agent resolves an issue privately or on another channel, be sure to take it back to social media to show public resolution. Just a 'thank you' to the customer for their time and patience can suffice.

## Escalation

For sensitive or detailed customer issues that require escalation to another team member, it's important to have clear processes in place so agents can easily handle incoming messages without confusion or delay. Develop an escalation map that provides:

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

## Tips for effective escalation

01

Look at the messages you receive on your social channels, and pick out some real-life examples of messages that do and do not need a response.

02

Make the first level of escalation the team leader. They can determine whether any ambiguous customer messages should be escalated further, and track the ongoing performance of their agents.

03

Pick out real examples of brand-related tweets/posts that should be passed to communications for approval. Identify criteria for your supervisors and ensure they are well connected into PR and marketing, and potentially experts in other areas of your business.

04

Make your escalation map a live document. For extremely sensitive issues, frontline agents should be equipped with a continually updated list of topics that need PR or legal approval when formulating a response.

## Crisis management plan

Social media provides an early warning system for developing business issues, from campaigns and product launches to serious reputational problems. It's also the fastest medium for corporate crises to spread, with a high risk of brand damage.

As such, it is critical to have a clearly defined social media crisis management plan in place. Ensure your PR team can quickly pick up potentially damaging issues, work with management on the official response if needed, then collaborate effectively with frontline social agents on getting that message to customers.

Your social media customer team can likely provide great reach over platforms such as Facebook and Twitter than the PR team can achieve via traditional media. Social is a very effective channel to distribute an official response to issues affecting your customers.

## Tips for effective crisis protection

01

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

02

When an issue escalates, draft responses to different types of customer messages for agents to use as template examples.

03

Establish clear criteria for when a message has to be escalated to PR or Legal.

04

Create a schedule outlining who exactly will be responsible for dealing with these escalating messages at any given time, to ensure that nothing falls through the cracks.

## Section 05

### Creating a Social Customer Service Playbook



# Creating a Social Customer Service Playbook

A social customer service playbook details processes for how different departments should transfer knowledge seamlessly to one another, and how social conversations should be engaged with securely by customer service agents. The playbook provides consistency across your team and creates processes that can be measured, refined and scaled. This playbook should be a go-to resource for agents, both trained and newly hired.

## Checklist of things to include:

### Why are you using social media and how does this tie into your company's goals?

Social customer service needs to align with your high level business goals and your playbook should explain that this initiative is an important one. Agents need to be trusted with flexibility to manage an ever-changing channel with limited time to act, but that doesn't mean you shouldn't provide guidance. Key motivators and priorities will help empower your team to make the best judgment while delivering fast service to your customers.

### Introduction to social platforms

If you're bringing in agents from other areas of the contact center, it is best to include details of your goals for the different platforms you are using and to explain how customer service over public channels differs from what they may be used to.

### Processes agents should be following

Clearly explain the steps for processing a customer message, including how to respond, what data to record such as sentiment and categories, and when to archive. Document response escalation and crisis processes so they are accessible to every agent.

### Tone of voice

Describe the brand personality you'd like agents to convey during their engagement with customers to form a guiding principle.

### Do's and don'ts for engagement

Being explicit with examples of the responses that would and would not fit the brand is a good way to demonstrate tone of voice guidelines and avoid misinterpretation.

## Example responses

Providing example responses to common customer issues can help your team to understand how to craft their own. It is important that agents use these guides in conjunction with tone-of-voice guidelines, rather than templates to be copied directly. Due to the public nature of social, customers will notice if agents are copying and pasting their responses. Authenticity is essential for a good customer experience.

## A list of resources to find support information

Your agents' go-to resource should include anything from knowledge-base articles and how-to videos to solutions posted a branded community. Linking to this existing content can help your team shorten response times and remain relevant.

## Contact details for relevant internal stakeholders

Ensure that the playbook has a complete directory of stakeholders that may need to be involved in different customer service needs or social situations.

# Does your organization need a separate Twitter handle to deliver effective social customer service?

A common debate amongst social customer service professionals is whether organizations should have a dedicated service handle, or if they should deliver customer service from their primary Twitter handle. Companies have been successful with both approaches, meaning that there is no clear-cut answer — but instead a series of pros and cons. Choose the approach that makes the most sense for your organization.

## Reasons for using a dedicated Twitter account

### Dedicated Service Updates:

Some customers might want to engage with your company, but might be weary of marketing updates. Having a dedicated handle alleviates this concern and can also provide customers with service-only updates — a huge plus for industries in which a single published post can preemptively resolve a large number of queries.

### Separate Tone for Customer Service:

Having a separate service handle enables companies to create a tone that is different from the one used by marketing. For example, some brands choose to sound a certain way on their marketing account but be more colloquial when providing social customer service.

### Separation of Ownership:

Creating handles for distinct purposes enables each department to have full ownership of their processes and activities. This mirrors the division of ownership on other channels, where dedicated email addresses and phone numbers are used to reach customer support.

### Analytics and Reporting:

Customer Service has a different set of KPIs and success metrics from PR and Marketing, with greater emphasis placed on SLAs and efficiency measures. Separate accounts make it easier to track and report on the performance of the customer service team without dilution from marketing activity.

## Reasons for using a single Twitter account

### Limited Consumer Visibility:

Most customers will not go through the trouble to find out if there is a dedicated support handle, and will send their inquiries directly to the primary account. This means that customer service will need to monitor content coming in to both accounts, but engage customers with service issues from the support account.

### Process Consistency Across Social Channels:

While creating dedicated support accounts is common on Twitter, it is not standard practice on other social channels, such as Facebook, YouTube and Google+.

### Consistency of Voice:

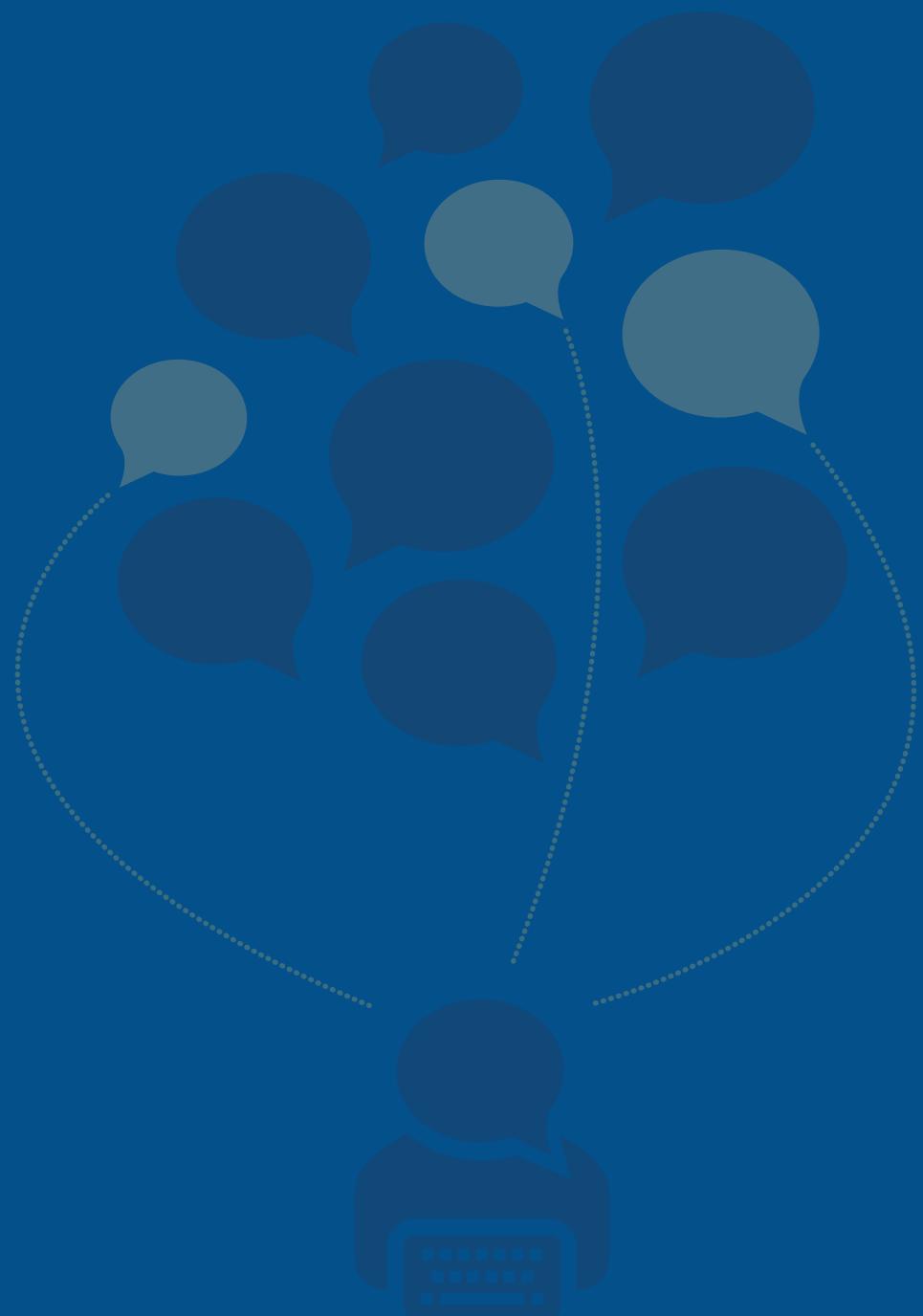
A single brand handle can increase the consistency of messaging, creating a stronger and more unified voice. This positions service as a core offering, synonymous with the brand reputation on social media.

### Marketing Opportunity:

Actively engaging in customer service on Twitter using the primary brand account usually results in a significant increase in followers. Each new follower becomes a potential recipient of future marketing and promotional messages.

## Section 06

### The Importance of Proactive Customer Service



# The Importance of Proactive Customer Service

Proactive customer service is not a new concept, but social media has changed the method in which it can be carried out.

Before the rise of social customer service, companies concocted ways of solving customer issues before the customer reached out in order to reduce call volume. Many of these methods worked: a report from Enkata found that preemptive service can reduce call volumes by as much as 30%, while increasing customer retention rates by 3 to 5% (Enkata 2012).

Traditional proactive customer service can take a number of forms, from FAQs and forums to knowledge bases and instructional videos.

However, proactive customer service over social media means something slightly different. Due to the public nature of most of its content, Twitter in particular allows companies to reach out to customers when they've indirectly mentioned a brand or used a key term relating to that brand. With Twitter, you're not just listening or monitoring; you are engaging with the customers who need you most.



# 4 tips for effective proactive customer service

These tips will not just satisfy your customers; they will help you provide service that will delight your customers and bring tangible results.

01

## See every issue - not just the ones with @mentions of your brand

Research we conducted with New York University found that over 37% of all tweets were customer service related but less than 3% used the @ symbol (Guide to Proactive Customer Service 2013). Access to the Twitter fire-hose is a must-have to gain real-time access to consumer conversations. It's important to understand how to filter data based on keywords, location, and language to help direct the customers' issue to the right member of your team quickly. Simply put, you can't afford to leave your customers unanswered, even if they're posting about you indirectly.

02

## Know there's a problem? Tell your customers you're fixing it

It's always better for customers to hear about a problem from you directly instead of realizing the product or service doesn't deliver. Maintain control of potentially volatile situations by confronting problems head-on, which helps build customer trust and avoid damaging PR. Tell customers what you're doing to figure out a solution and ensure the problem doesn't happen again. Or make sure customers know who to contact if they have further questions or feedback. You can even offer a discount on a future purchase, or provide a refund if the action you take to fix the problem doesn't satisfy their needs.

03

## Measure success with customer service KPIs

It's important to make proactive outreach accountable with real customer service analytics and reporting. Demand volumes, customer sentiment, issue categorization and response rates should all be measured to glean an accurate picture of discussion around your brand and your team's ability to make a difference.

With good social customer service analytics, it's easy to quantify the results of proactive service, such as increased call deflection and profitability. In a recent survey we found that 14% of tweets that @ mentioned the company directly were sent from in-store, meaning that through proactive listening, companies have the ability to reach out and influence a sale — affecting the most important KPI of them all, the bottom line (Tweet, Email or Call 2013).

04

## Don't just reach out when something's wrong

No relationship is sustainable if you only communicate when something's wrong. When those relationships are with a rapidly growing customer base, social media is an efficient way to stay in touch with a large audience through individual conversations. As Seneca said, "He who gives when he is asked has waited too long" (Forbes 2014).

Companies now need to be proactive, rather than just reactive, over social. They should be calling out to their customers — engaging with them — when things aren't necessarily deemed a customer service issue as of yet. This will add an element of 'surprise and delight' for customers, turning them quickly into brand advocates.

## Section 07

### Measuring Social Customer Service



# Measuring Social Customer Service

If social customer service operations are to improve, managers must be able to resource social media as efficiently as possible and demonstrate value alongside other service channels such as phone and email — all while delivering a great customer experience.

Despite this, research from Forrester Consulting commissioned by Conversocial shows that 20% of companies do not measure the success of their social customer service operation at all (Forrester 2014).

Forrester also reports that companies struggle to provide consistent cross-channel experiences, with only 23% rating their ability to do so as 'effective' or 'extremely effective'. This suggests that a large number of companies have not yet applied measurements that can be used across channels as a benchmark, or are not yet using a dedicated social customer service platform for analysis.

Below we have outlined the most important metrics to measure:

## Volume

- **Inbound volume** — Count of incoming messages on all social channels. Allows you to understand the bigger picture, and to calculate the percent of customer service issues compared to the total number of social inbound messages.
- **Response volume** — Count of responses issued by your brand.
- **Volume by category** — Count of messages by interaction type. This includes broad categories such as marketing messages, PR messages, and customer service messages. It also includes subcategories within these such as the number of issues related to deliveries, product, website, etc. Make sure that this categorization matches your organization's existing system used in the contact center for other channels such as phone and email, enabling you to match 'apples to apples'.
- **Case/conversation volume** — Count of groupings of messages pertaining to individual customer issues. By grouping messages into meaningful customer conversations, it is possible to count how many customers the agents are interacting with, as opposed to just how many messages they have responded to. Focusing on customer issues versus individual messages makes metrics like handling time and sentiment conversion far more meaningful.

## Why it's important:

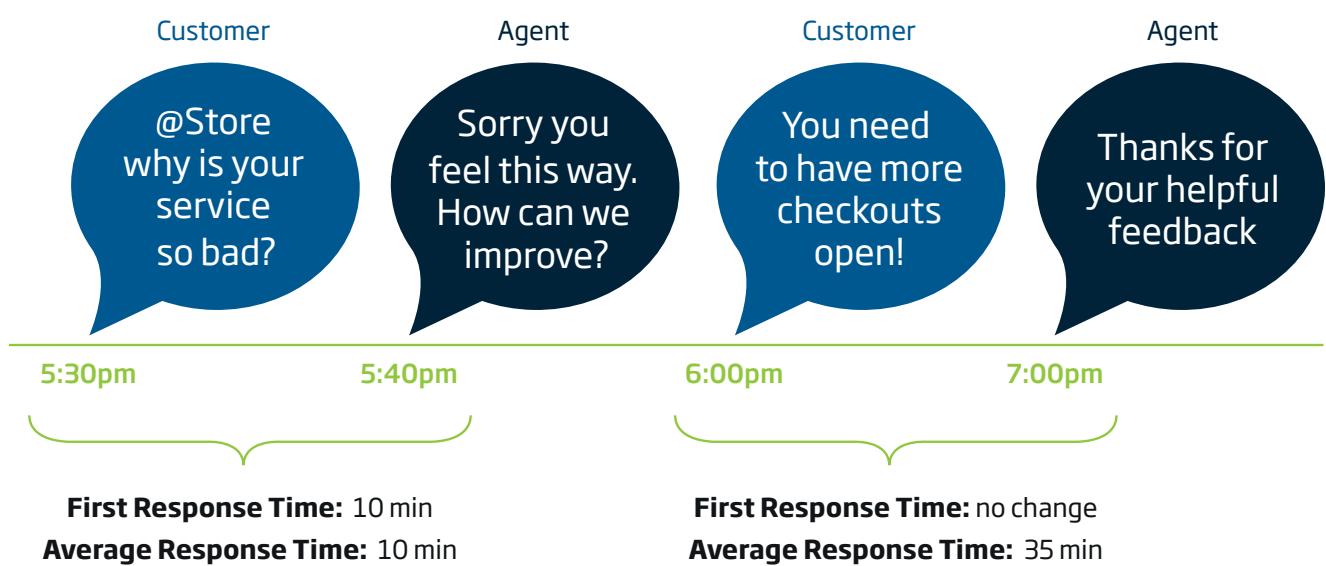
Measuring volumes makes other key performance indicators (KPIs) meaningful; however, volume does not constitute KPIs on its own, as it does not measure performance.

You cannot control inbound volumes or your volumes by category. Rather, these metrics are important for providing a baseline from which to understand your other metrics. It's hard to understand what a change in handling or response time means unless you can match them up with changes in volume over social channels.

## Average Response Time & First Response Time

- **Average Response Time (ART)** — Average time elapsed between all customer messages and agent replies.
- **First Response Time (FRT)** — Average time elapsed between initial customer messages and initial agent replies. This can be compared with the metric of Average Speed of Answer (ASA) on traditional channels.

To illustrate the difference between the two, it's helpful to look at this timeline of an interaction between an agent and a customer.



### Why it's important:

Regardless of channel, response time is a key driver of customer satisfaction, with First Response time particularly important over social. Even when an issue cannot be resolved immediately, it is important that an agent show the customer — and everyone who might see the post — that the company has heard the message and is working on a solution.

Because of Average Response Time and First Response Time's close relationship to customer satisfaction, these two metrics typically provide the foundation of your Service Level Agreement (SLA). A strong internal SLA for response time ensures consistency across the team by providing a clear target for response time — both amongst agents and for your social customer service operations as a whole.

It is crucial that you are able to measure these metrics and performance against SLAs in real-time. If you have a sudden spike in volume, you need to be able to reallocate resources in order to bring the SLA down to baseline.

Response Time and First Response Time also enable you to compare your team's performance in and out of operating hours. Many operations, especially in their nascent, are not able to scale to 24/7 social customer service. As a result you want to be sure that your hours of operation match customer expectations; if you see that your response time in business hours is wildly off from your response time overall, that can present a business case to shift or expand your hours to be more in line with customer expectation.

## Handling Time

- **Handling Time (HT)** — Amount of time agents spend processing an issue. Handling time covers all activity, including elements such as reading tagging, marking sentiment, looking up customer account info, making notes and drafting responses.
- **Average Handling Time (AHT)** — Average amount of time agents spend processing issues over a given period. AHT can be measured for individual agents or multiple agents if they're handling the same issue (i.e. not re-routed, frequent shift changes, assignments, etc.).
- **Total Handling Time (THT)** — Total time agents spend processing issues over a given time period.

Average Handling Time is slightly different for social than on more traditional channels, in which one issue is dealt with at a time. On social, you might respond to one tweet and not return to an issue until the customer tweets back hours later.



## Why it's important:

Handling Time is one of the first truly cross-channel metrics for social customer service, enabling you to compare the performance of social against other channels. If it takes 10 minutes to resolve an issue via email and five minutes to resolve an issue on social, you have a solid justification for the ROI of your social customer service operation.

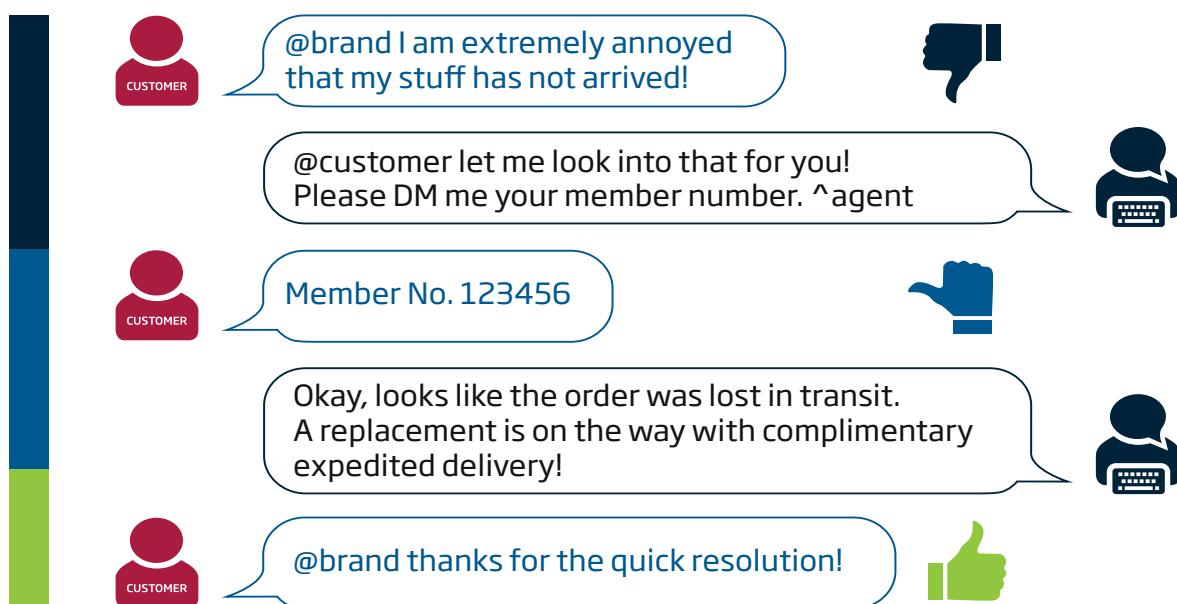
Handling Time is an important measurement in evaluating agent performance. If you have an agent whose Average Handling Time is significantly off from his peers, that might mean it is time for some coaching from the manager. Handling Time also enables you to measure the effect of process changes you have made in your organization. For example, if you want to add an approval workflow for your agents — in which a manager spot checks 20% of all issues — you can track and benchmark the impact of the change on your Handling Time.

## Sentiment

- **Sentiment** — Qualitative assessment of customer satisfaction based on the tone and content of messages.
- **Sentiment Conversion** — Change in sentiment as a result of brand interaction. While individual sentiment is important to track, it doesn't give you a story to tell. The story comes from being able to actually see and quantify the conversion rate from negative to positive.

### Why it's important:

Measuring sentiment conversion enables you to analyze the level of service you're delivering, as well as the impact of any changes implemented, such as releasing a new tone-of-voice guide. Sentiment can also contribute to an ROI model, enabling you to measure revenue protected by improving customer sentiment.



This diagram shows a sequence of interactions between a brand and customer, resulting in a successful sentiment conversion.

## Section 08

### The Need for a Best-in-Class Solution



# The Need for a Best-in-Class Solution

Improving social customer service is the most pressing short-term priority for contact centers in the US and UK according to a study conducted by Forrester Consulting (Forrester 2014). More than half of the companies surveyed believe that it will continue to grow in importance. Companies are, in principle at least, recognizing that not only must they offer social as a customer service option but that it must be a premium-level service — a service that can deliver satisfaction, inspire loyalty and encourage advocacy. Clearly a best-in-class solution is called for.

However, such solutions appear to be the exception rather than the rule. Only 33% of the social customer service solutions being used by those surveyed were actually selected by the Customer Service team. The majority of solutions were obtained, instead, by Marketing. This often results in a disconnect between Customer Service and Marketing, with the former stuck using Social Media Management Suites (SMMS) for Customer Service.

These suites are often great for Marketing but insufficient for the complex needs of a Customer Service department. This leads to organizations having to make unplanned investments to fix the social customer service problem.

The issue becomes easier to understand when approached in terms of departmental priorities:



Ultimately, best-in-class solutions allow customer service teams to do what they do best—serve the customer. These teams are not focused on reaching as many people as possible, building brand awareness or adding subscribers like their Marketing colleagues, and as such, require a different tool.

Best-in-class social customer service solutions provide the tools to deliver what contact center teams actually want:

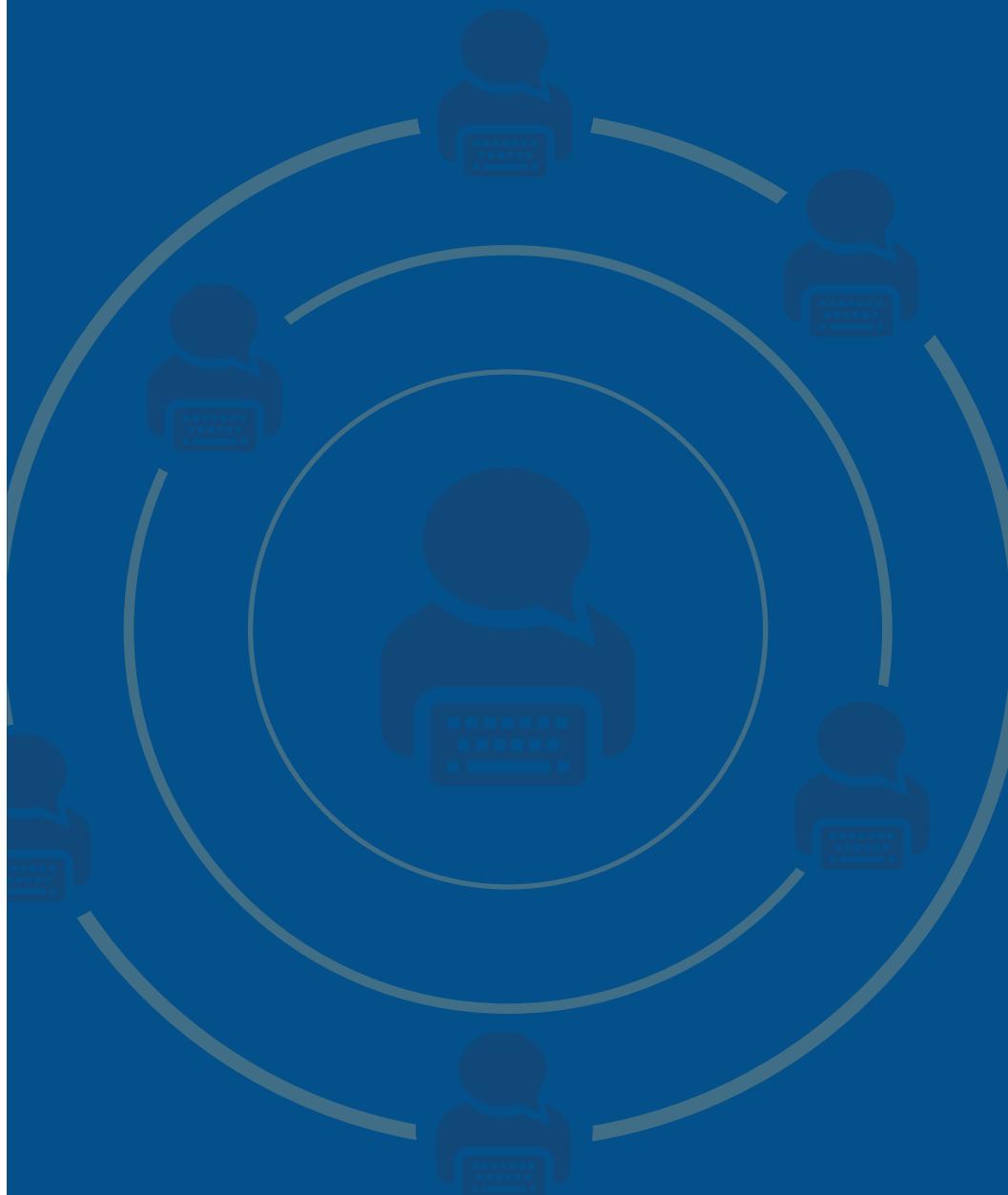
- A timely and awe-inspiring social customer experience
- An increase in operational efficiency and cost-savings
- A well-managed and limited-risk organization
- A platform that fits seamlessly and effortlessly into existing contact center systems

It is essential for social media to be fully integrated into the contact center. Integration allows agents to be managed and resourced properly, with the same efficiency metrics as other channels; and with integration of data across different channels allowing a customer to move seamlessly among social, email and phone, when necessary.



## Section 09

### What to Look for in a Social Customer Service Solution



# What to Look for in a Social Customer Service Solution

Delivering customer service over social media presents an opportunity to delight customers and improve brand reputation, while significantly reducing the cost per interaction. At the same time, the public nature of social media carries a number of unique challenges, and minimizes the margin for error. An effective, secure, and scalable social customer service program starts with a dedicated solution that provides:

-  **Context:** Social customer service software needs to provide prior interaction history to give agents full context of the customer's issue. Threaded conversations of both private and public messages gives your agents more information about the customer's outreach, resulting in more educated engagement and issue resolution.
-  **Prioritization:** Social media is full of noise, making it difficult for agents to identify sensitive issues that matter to your organization. Ensure your social customer service software applies intelligent prioritization to incoming messages, enabling agents to respond to 'higher risk' issues first.
-  **Real-time analytics:** Real-time analytics are key to continually monitoring the SLA and KPI attainment of agents, as well as providing an early indicator for issues that might require involvement of other departments. Additionally, social customer service software should provide historical insights into trends over time to deliver actionable insight for your business.
-  **Security:** Regardless of industry, comprehensive safeguards need to be in place to ensure information security and regulatory compliance. Look for a software that provides role-based permissions, an approval workflow, IP locking and a fully searchable, exportable archive.
-  **Integration:** In order to achieve a single view of the customer, it is vital to choose a social customer service software with a full set of APIs, which allows you to surface social information through your CRM systems and contact center technologies.
-  **Proactive customer service:** Brands using tools that only process @mentions are likely to miss service issues, or potential sales opportunities. A tool that provides proactive searches over social media will broaden your scope for engagement, meaning you don't miss out on valuable conversation opportunities.
-  **Workflow:** With the high incoming message volume social brings, agents and managers need to work seamlessly to balance workload and avoid duplication of effort. Choose a social customer service software that enables you to add a layer of automation, providing a smart workflow for large-scale customer service teams, and empowering your agents to deliver better and faster social customer service.
-  **Expertise:** Choose a social customer service partner capable of helping you implement a scalable operation that aligns with business requirements and industry best practices.

## Section 10

### The Future of Customer Service



# The Future of Customer Service

In this guide, we've presented a model for enhancing customer experience through social customer service. We're now at the stage where social customer service is becoming an established part of doing business. Tweet any company and most will respond, publicly and quickly. And, although many companies haven't begun delivering of social customer service at the level consumers expect, they know they must — and are working toward that goal.

As a result of this change, the future of customer service is much clearer and, perhaps, even predictable. It is being driven by three powerful trends, all of which would be impossible without social media and the adoption of social customer service. First is the growing integration of social customer service with other departments as a key source of customer and market insight. Second is the adoption of Social Identity, which allows companies to track individual customers using their social media handles as universal identifiers, enabling a unified customer view. Finally—but far from least important—is the mobile revolution: the technology-driven cultural shift that has put smartphones and tablets in everyone's hands and made those devices, increasingly, the primary means of connecting to the online world—and your company.

In brief, social customer service will become more intelligent, more mobile and less anonymous.

## Social is a mother lode of business intelligence waiting to be tapped

Social media means that local problems can gain global exposure in mere minutes. But it also allows businesses to get in-depth, real-time insight into their customers and supply chains that can be instantly fed into relevant business units. It gives an amazing opportunity to engage customers at the point-of-sale, whether in-store or at the online (or mobile) checkout — with the potential to directly encourage sales and increase customer retention. Over half the revenue of leading internet retailer JackThreads comes from mobile commerce — and they report that their customer service team receives more product questions through Twitter than any other channel (JackThreads 2013).

The transport industry provides a perfect example of the immediate need for information, and the positive value that is created by taking a proactive approach via social. The social customer service team of Greater Anglia, a UK train operator, is based in the central command center (Greater Anglia 2013). They engage their customers in real time, not only to deliver service, but also to gain feedback about what is happening across their network, and feed this back into the rest of the business.

## From anonymity to universal social identity

One of the more frustrating problems for customer service has been the lack of a unified customer identity. Prior to social media, each new inquiry by an individual customer tended to create a new identity for that customer within the customer service system. Back when the phone was the only channel available (other than letters and telegrams), the problem didn't exist because most people had only one phone number to work with. Now, however, customers have multiple email addresses and can phone from work, from home, or from their cell phones. Even IP addresses can change, depending on the location of the computer being used. The same goes for delivery addresses; people often move to a new home or switch jobs. This is the challenge companies have been struggling with for decades: how to create 'single view of the customer' regardless of the channel being used or the customer's physical location.

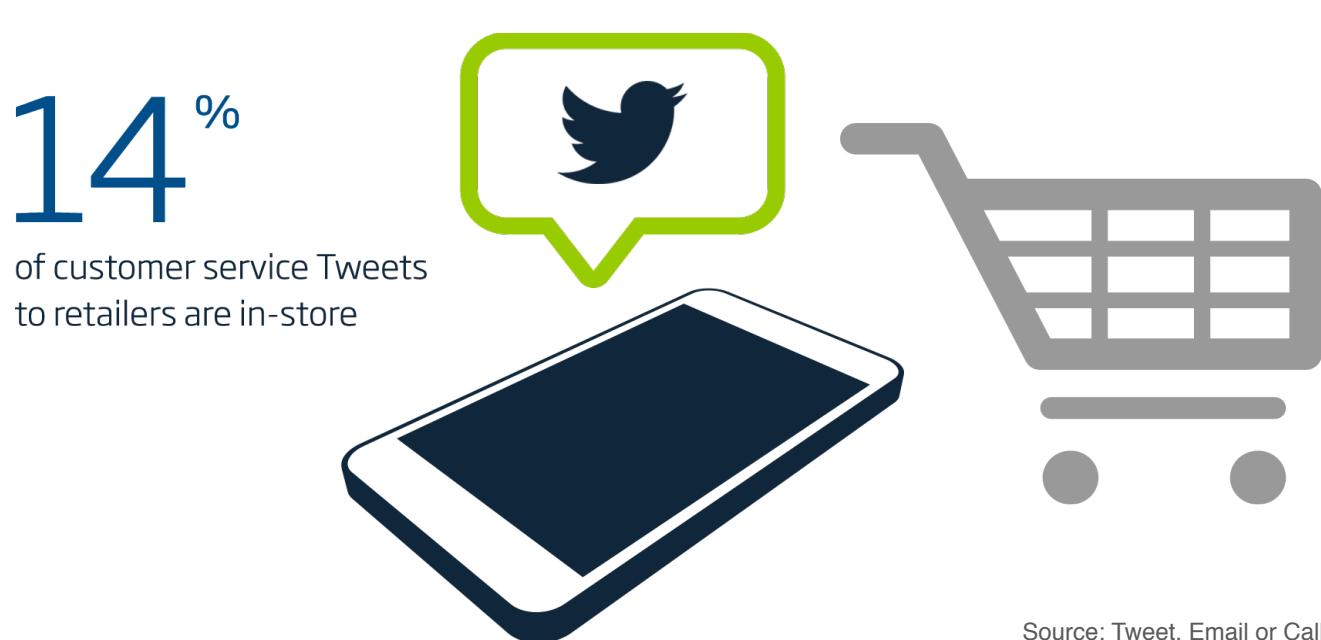
Social identity has the potential to tie all of these details together. Your Facebook profile ID is fixed (even if you change your name), is deeply tied to your real identity through the social graph, and is already linked to most of your email addresses, your phone numbers, and potentially even your credit card accounts. What's more, most people are constantly online now, whether via computers, tablets, or smartphones. Social sign-ons gives businesses the opportunity to connect social data to core customer records and use it as a primary identifier. This is possible in-store and offline: many hotels and travel companies are now issuing tablets to ground staff so they can display up-to-date and personalized customer information.

Using a #SocialFirst approach, companies can finally put an end to the 'anonymous customer.'

## Mobility: Leveraging social media communities for customer service

The potential value of both previous trends is made even greater when combined with the third and possibly most important, trend: smartphones, tablets and the advent of continual connectivity. This is not just about social as a take-it-with-you-wherever-you-go channel, however. The real power comes from leveraging social media communities with the customer-as-a-service concept. Here, your most knowledgeable and loyal customers, in addition to being brand advocates, take an active role in delivering customer service by making their product expertise available to your brand's customer community via social media.

This peer-to-peer resolution can have the dual benefit of cost reduction and increased customer satisfaction. According to Gartner, companies that integrate social communities into customer support realize cost reductions ranging from 10 percent to 50 percent. Accenture research shows that companies can also increase the degree of loyalty and advocacy they have with those customers. And the concept is bound to grow significantly. Gartner predicts that community-based peer-to-peer support, on platforms like Conversocial CROWDS, will quickly replace up to 40 percent of existing phone support.



Source: Tweet, Email or Call

# Closing Thoughts

"Type in your account number. Then repeat it again, this time verbally to an agent. Then repeat it again to another agent. Oh, the pain. Even 30 seconds is too long for today's in-the-moment, always-engaged customer to wait, spelling trouble for the future of customer service through traditional channels like email and phone. But it doesn't have to be this way. With digital communication, personal smartphone devices, and constant social identity, you should always know who your customer is; whenever and however they decide to reach out. Instant, personalized service is rapidly becoming the minimum that your customers expect. Anything else is falling behind, and letting your customers down. We've all been talking about getting towards a 'single view of the customer' for years — it's now time to make it happen. Social data should be fully integrated into your CRM system, and customer data into your social platforms.

Getting this single view of the customer is one of the major trends we see happening over the next 12 months. The two other most important trends in social customer service are peer-peer resolution, and mobile messaging.

## Peer-to-peer resolution

Establishing lasting connections is both increasingly essential and difficult, as companies work to build intimacy and loyalty in a time where consumers are more digital, more distant and more discerning. Customers trust brands less, but they still trust their peers highly. But the online forum, the traditional platform for peer-peer support, is an archaic technology. Based on primary research, 50% of customers aged 18-29 are more likely to turn to social media when they have a technical issue rather than a support forum. It's time for peer-peer support to move into the mobile and social era.

## Mobile messaging applications

Mobile messaging consists of applications that provide messaging functionality on phones and tablets delivered via data, rather than SMS. WhatsApp and Facebook Messenger are the biggest in the West; WeChat is huge in Asia. These messaging apps are the biggest new force in communication, and still growing. The daily message volume on WhatsApp (owned by Facebook) is now 50% bigger than global SMS volume. Their functionality for 1:1 messaging has everything you need for service: real-time, asynchronous, carrying a persistent identity and plugged into smartphone notifications.

These messaging apps have the potential to become the biggest service channel for the mobile, social customer. Technology is allowing us to move more and more basic transactions into self-service functionality. But this doesn't change needing to engage with your customers in a human, authentic way. The world is now mobile and social focused — and your customer service strategy should reflect this. It's time to take a Social First (#SocialFirst) approach to customer service and turn social customer service into a competitive advantage, not something to try and sweep under the table."



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