



8

Steps to Transformative Social Customer Service

salesforce

Brought to you by Salesforce's ExactTarget Marketing Cloud and Service Cloud

Table of Contents

Introduction	03
Step 1: Define Goals and Align With Business Objectives	05
Step 2: Develop a Social Media Strategy	07
Step 3: Start Listening Where Your Customers are Talking	09
Step 4: Monitor Industry Discussion	11
Step 5: Create an Engagement Playbook	13
Step 6: Train Your Teams on Their Assigned Roles and Responsibilities	14
Step 7: Measure What Matters	15
Step 8: Engage and Respond So Existing and Future Customers Know They've Been Heard	16
Conclusion	19

Introduction

In 1955, if you walked into the local butcher shop, the butcher knew your name, what cut of meat you liked, and what you bought the last few times you were there. He could recommend a cut he knew you'd like or tell you how to season a rib eye. The shopping experience was personal—more of a congenial conversation than a transaction.

Two decades or so later, spending in customer service and support skyrocketed with the advent of the efficient but impersonal call center. This soon became the cost center, as we went from understanding the customer to understanding the average cost per customer interaction. It worked for a good while. But now, amidst a jumbled mess of touch-tone navigation and poorly trained outsourced agents, a newer, more profound change is occurring. Customers have turned in favor of a more immediate and satisfactory resolution: social media channels.

42% of customers expect a response on social within an hour, and 67% within the same day (Edison Research).” And social media continues to grow with twitter users increasing by 44% from June 2012 to March 2013 and Facebook users increasing by 23% from 2012 to 2013 (MarketingProfs, 2014). The heart of customer service is listening, and when the conversation is taken online and you don't have a solid social service care plan, you forego a second chance to make things right with a customer. When a customer takes the time to let you know how you could make things better and it is repeatedly ignored, they will go anywhere else to finally feel heard, understood, and valued.

“You call my 800 number, you wait in my queue, you press 1, and your call is important to me, but not quite as important as the efficient utilization of my agents, otherwise you wouldn't be waiting on hold. But now, the customer isn't [waiting]. They're going to complain where they are, and we have to find them.”

Marcel LeBrun

SVP, Product, Salesforce Marketing Cloud

Before Social Media

- ✓ **Call time**
How quickly did we get the customer off the call?

- ✓ **Call volume**
How can we reduce the number of calls we receive?

- ✓ **Time in queue**
How long did a customer have to wait to speak to someone?

- ✓ **Abandonment rate**
How many people weren't prepared to wait?

- ✓ **First call resolution**
How often did we solve the customer's problem in a single call?

After Social Media

- ✓ **Contact engagement**
How much can we empathize with what customers need?

- ✓ **Searchable self-service**
Can we give customers great service even if they never speak to anyone?

- ✓ **Speed to connect**
How quickly can we react to a customer issue (both those communicated directly and problems highlighted on third-party sites and forums)?

- ✓ **Defection rate**
How many people are leaving us for the competition?

- ✓ **Net promoter score**
How many customers will recommend, like, or tweet us as a result of our service?



1

Define Goals and Align With Business Objectives

It all starts with a commitment to your customer. Customers should be able to self-serve from your site through a knowledge base, an FAQ section, a “How To” guide, or a troubleshooting wizard. So that you again become the place they’ll turn to first. To succeed, however, a great user experience is key. Too many self-service experiences fail because they’re not 100% focused on the customer—their expectations, their level of knowledge, their terminology. The more you invest in a self-service web experience, the less you have to spend on less efficient, personnel-driven solutions.

But you also have to commit to being pro-active to meeting customers where they are; it involves putting them at the center of everything you do. Speed of handling service issues should no longer be your company’s primary mindset. You must shift to viewing each customer interaction as your most important investment—in customer satisfaction, loyalty, and your overall future.

Social Spotlight:

Air Canada's Social Media Channels Are an Integral Part of Communication Strategy

“A few years ago, customers could only reach our customer relations department via mail or fax. Email then made its entrance, and has now mostly eclipsed correspondence received via these more traditional mediums. Then, faced with the complete closure of London’s Heathrow airport at the peak of the holiday travel season in December 2010, our social media channels became an integral part of our communication strategy, allowing us to reach out to travelers thousands of kilometers away who needed assistance. From that moment on, there was no turning back. The use of social media has since enabled our customer service team to extend our online availability to 24/7, and to reach out to new international markets. Our customers can expect to be able to complete an increasing amount of tasks via our social media channels. Committing ourselves to providing the highest level of customer service online was only the beginning.”

Mathieu Lagacé

Community Manager, Air Canada

2 Develop a Social Media Strategy

A social media strategy is the game plan for your organization's digital communications. It outlines how your organization will use channels like email, Facebook, and LinkedIn to foster the relationships necessary to transform business goals into reality.

Once you've identified how you'll use your communication channels, crafting a content marketing plan to help steer, increase, or improve the broader conversation is crucial to your overall social media strategy. Whether a video, blog post, or status update, content is the engine of the social web: it's what gives brands something to talk about with their communities above and beyond customer complaints, compliments, or questions. Welcome to content marketing, where the big idea is this: if you produce and share fantastically useful content, your community will be more likely to become customers, remain customers, and send you more customers.



A good social media strategy supports the overarching marketing plan by addressing the following:

Target Audience Personas

Who are you trying to reach? How do they use social media? What do they care about?

Goals and Objectives

What are the social media objectives that will support your organization's goals?

Strategies

What are the big ideas, changes, or maneuvers that will make this plan work?

Messaging and Content Strategy

What are the messages you want your target audience to understand or believe? What content can you create to educate or entertain them?

Tactics and Technologies

What specific social networks will your organization be a part of? How and where will you publish digital content? What are the specific apps or technologies you'll use to shape the customer experience?

Measurement

What are the specific metrics that you need to keep track of to determine whether your social media efforts are helping you meet objectives? How will you measure them?

Roles and Responsibilities

Who's going to write blog posts? Who will monitor social media and respond to customers? Who will develop a social media training program for employees? Define the needs. Assign the tasks.



3

Start Listening Where Your Customers Are Talking

Companies are overwhelmed by the volume of conversation, and sometimes don't know where to start. Simply listening the right way provides the compass to the right entry into online dialogue. Once you've explored the nature of the conversations taking place, you can start to prioritize listening and engagement objectives.

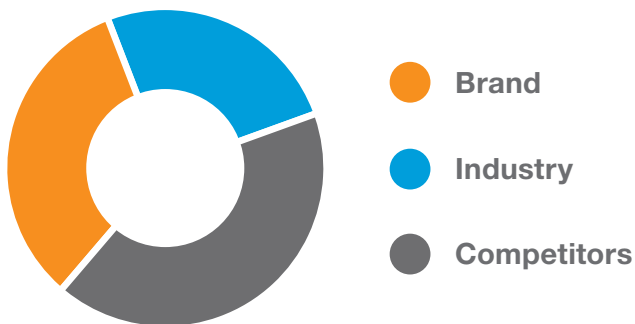
The key is to pick a specific type of conversation and start there. For some companies, the first step is to work to correct reputation problems, like negative comments or posts. For others, it's just to establish a presence in the communities where their customers are already talking about them, to show they're listening and available. And for those that don't yet have buzz about them, the place to start is by contributing to larger conversations—the ones they want to be associated with.

Start Listening Where Your Customers Are Talking

First, do a search for mentions of your company and product or service brand names. Then add some extreme keywords on either side of them, such as “fail” or “sucks.” What should you listen for?

Three types of conversations can lead you to new or existing customers online:

1. Mentions of your brand
2. Mentions of your industry
3. Mentions of your competitors



“As you listen, you’ll find that you see activity around topics. Drilling into what’s causing the activity often leads you to the most influential people driving the conversation. Those are the people influencing your customers. So finding customers is usually a process of finding relevant discussions and then seeing who’s there on the receiving end paying attention.”

Larry Robinson

VP, Product Management, Salesforce Service Cloud

4

Monitor Industry Discussion

It's not about just listening to direct feedback from your customers. Getting involved in the conversation surrounding your industry and the verticals you serve is essential for establishing your business not only as a thought leader, but also as a helpful business that truly cares about its community. At the end of the day, you're providing a service or product that solves a deep human problem, and sharing your knowledge about how to solve that problem—without forcing your product or service—will create trust with your customers.



What to Listen For

Brand monitoring

The first thing you want to do is see if there's conversation about your specific brand happening online. Hone in on search terms related to:

- Brand names
- Seasonal campaign names and terms
- Names of executives or stakeholders
- Names of specific products and services you offer
- Nicknames, misspellings, or abbreviations of any of the above

Industry monitoring

Want to be proactive? Focus on these search terms to understand the larger landscape surrounding your business to determine where you fit in:

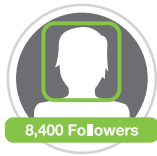
- Terms related to verticals you specialize in
- Phrases that define the markets you serve
- Larger industry keywords or categories
- Professional organizations you belong to or that fit your business profile
- Names of your industry thought leaders
- Keyword phrases that indicate an intent to purchase or learn more

Competitor monitoring

Keeping tabs on your competitors can provide vital intel about who they're hiring, how they're promoting their products and services in social media, and what their customers think about them. Armed with this knowledge, you can tailor your business strategies accordingly.

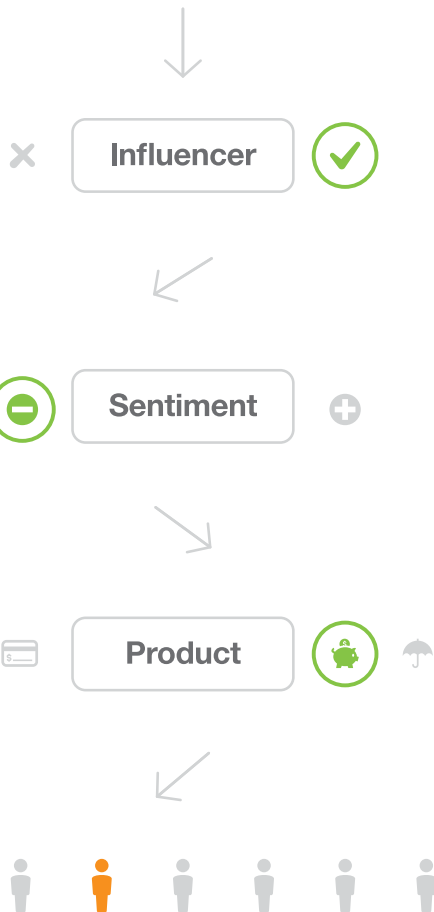
Concentrate competitor monitoring on:

- Names of competitive companies, brands, products and services
- Stakeholders in those companies
- Buzz around competitive campaigns or promotions
- Nicknames and misspellings (and the like) of any of these



John Doe @johndoe

@boahelp still can't get mobile deposit to work. it crashes every time i submit check for deposit #fail



5 Create an Engagement Playbook

Leaping into social media without a plan may feel more authentic, but you'll either be overwhelmed by the volume of conversations, be frozen by situations you hadn't anticipated, or, worst of all, ignite a social media controversy with an ill-considered response.

You need an **engagement playbook** to adequately care for your community and customers. Your playbook shows your personnel step by step how to:

1. Listen to the right conversations
2. Flag and prioritize conversations
3. Classify conversations ("product review," "sales lead," "industry discussion," etc.)
4. Tag the source ("tier 1 customer," "influencer," "employee," "competitor," etc.)
5. Escalate the conversation if needed
6. Assign the post to the appropriate handler ("sales," "tech support," "training," etc.)

The playbook should also outline how to join conversations, setting out which ones you should respond to privately or publicly, and which are best ignored, deflected to self-service, or handled via phone or email. The playbook will also explain what to say ("How can we help?") and what not to say (profanity or sensitive information).

A good playbook allows enough freedom for agents to respond promptly to the different situations that arise every day, while protecting your public image, ensuring a consistent customer experience, and ensuring nothing falls between the cracks.

6

Train Your Teams on Their Assigned Roles and Responsibilities

To run an effective playbook, people need to clearly understand their individual roles in social media engagement. To make sure nothing or no one falls through the cracks, ask yourself these questions:

- Does marketing already monitor social media?
- Will they answer queries and direct questions to customer support?
- Or do you want support to handle your social media listening and route the right conversations to the corresponding department within the company?

The important thing is not where you draw the line between responsibilities. The important thing is that your people know where the line is, that everyone involved has the proper skills, and that everyone understands the processes in the engagement playbook you've set forth. That way, you'll avoid more than one employee answering a customer query or, even worse, ignoring it entirely.





7

Measure What Matters

All too often, business metrics themselves work against giving the very best customer service— the kind people want to like, tweet, and blog about.

The most important part of developing your customer service strategy is determining how you are going to measure your success. It's important to establish your metrics at the same time you create your goals.

For example, if you are trying to increase the number of customer service interactions you have by social media, start by establishing a baseline for what that looks like now. Tie your metrics to your business goals—otherwise you'll waste time pursuing numbers that don't really matter.

- When measuring your social customer service efforts, remember to:
- Tie what you measure to hard business metrics
- Don't ignore the soft benefits
- Focus on quality over quantity
- Measure what will truly make your business remarkable

8

Engage and Respond So Existing and Future Customers Know They've Been Heard

And now it's time to start engaging! Brands that engage use social media as more than a self-promotion platform. They listen, respond, and craft content that serve people's needs and interests in ways that elicit dialogue. Two ways to do this—*Respond* by jumping in, being helpful, and routing conversations to the right people. Or *initiate* conversations by offering interactive experiences, useful content, and stimulating questions. Over time, you'll start to identify common questions, complaints, or requests as well as which actions agents are repeating over and over. That's when automating things like CRM case creation, post categorization, post translation, routing, and even response starts to come in handy, allowing agents to focus on what matters most.



Respond: Answer the social phone.

If there's conversation about your brand, that's the place to start engaging. From saying thank you for a compliment to calming down an angry customer, remember there's no universal industry standard for engagement. The right way to respond is defined by the goals in your social media program.

Be timely.

Most customer service issues that blow up on Twitter are due to companies taking too long to respond. Be timely and consistent. And remember, you don't have to solve a customer's problem right away in fewer than 140 characters. You simply need to acknowledge their issue and begin the process of addressing it.

What do we say?

can be the hardest question to answer, due to fear that letting people speak on the brand's behalf could create mixed messages, inaccurate information, or even legal issues. Here are some basic, reassuring comments you can say without causing problems for your brand: Thank you. We're Sorry. How can we help? We're listening and we hear you. Here's some information. Yes or no, and here's why.

Reward advocacy.

You have customers who are die-hard fans of your brand. And they love to show it on their blog, Facebook, or Twitter. Often this rubs off on their peers, and may influence others' perceptions. Why not give them a virtual pat on the back by featuring them on the company blog or Facebook page?

Say thank you.

Even a small, seemingly insignificant thank you can go a long way. Consider a public gesture to let your customers and social media followers know you value them, like Burberry did when they created personalized note cards for Twitter followers in the form of animated GIFs.

The Activision logo is displayed in a bold, black, sans-serif font. The word "ACTIVISION" is written in all caps, with a registered trademark symbol (®) to the right.

Social Spotlight:

Activision Automates Service Cases for Video Game Hacks

Activision, creator of video games such as Call of Duty and World of Warcraft, uses the Salesforce Service Cloud to aggregate customer cases coming in through every possible touch point—their mobile app, email, phone, Facebook, Twitter, YouTube, and other social channels. When an agent doesn't know the answer to a user question, he shares the case on Chatter so other Activision employees can help resolve the issue, minimizing the customer's time away from game play.

Through social media monitoring, Activision also discovered gamers tend to create "map hacks" for Call of Duty, enabling players to see where the enemy is during a match. Activision has since begun automatically flagging social posts containing keywords related to map hacks using the Salesforce Social Hub rules engine, and a new Service Cloud case is then automatically created and routed immediately so the bugs can be fixed.

Conclusion

Incorporating social media into your customer service strategy changes your focus. Instead of answering a ringing phone when there is a problem, now you can focus on solving customer issues proactively, in a way that customers will become evangelists for your brand, not your competitor's.

The 1950s butcher from the introduction could recommend a different cut of meat and a good recipe. Now, your brand can learn how to please a customer before they have even realized that they have a problem. Like the butcher, your customer service reps can contextualize and recommend based on socially acquired knowledge. And then they can respond with immediacy. This is the advantage that social customer service affords. Social media provides both the context and the mechanism. This will help you personalize brand interactions, and resolve issues or answer their questions quickly, sometimes before customers even know that they have them.

Remember, happy customers drive tangible benefits to the bottom line. It all starts with making the commitment. Start small and ensure you're implementing scalable processes along the way.



Want help getting started? Get in touch with Salesforce to learn more about how the Service Cloud, the ExactTarget Marketing Cloud, and the rest of our products can help your company.

[Request a demo](#) ➔

[Learn more at salesforce.com/marketing-cloud](https://salesforce.com/marketing-cloud) ➔

[Learn more at salesforce.com/service-cloud](https://salesforce.com/service-cloud) ➔

Power Your Customer Journeys

Make the most of your customer data with email, social, mobile, and the personalized web. Our cloud-based marketing software powers relationships between brands and customers.

Check out exacttarget.com to learn more!

salesforce®

exacttarget®
marketing cloud