

Social Media as a Customer Support Channel: Best Practices

Aligning social media strategies across marketing and customer service

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Author: Aphrodite Brinsmead

SUMMARY

In a nutshell

So far, most enterprises have only addressed the opportunities for using social media in marketing. They have adapted their marketing strategies to benefit from the new revenue and branding opportunities provided by social media. But in order to create a cohesive customer experience strategy and connect data across departments, enterprises need to include social media response in their customer service function. Agents should be empowered to handle interactions in social media, and to escalate to other channels where necessary.

Ovum view

In order to improve customer satisfaction, enterprises should adapt their contact center solutions to respond to customers in the medium of their choice, which is increasingly becoming social media. Enterprises need to invest in social customer service tools that enable interaction categorization, routing, and response from within the agent desktop. Social interactions should be handled and managed in a similar way to traditional customer service channels. Agents should have guidelines on response, as well as the ability to transfer to another channel where personal or complex information is required. Enterprises should prioritize interaction resolution and develop best practices for handling complaints.

Many types of organization can benefit from having a social customer service strategy. Enterprises in the utilities, retail, travel and tourism, telecoms, and financial services sectors can all use social media to respond to and manage customer issues. These organizations should also use social media as a proactive tool to alert customers to issues and resolve problems before they escalate.

There are a number of cultural changes to be overcome before social media is truly a useful service tool. Defining the relationship between the customer service and marketing teams will be important as enterprises determine which party is responsible for responding to particular issues via social media.

This presents an opportunity for vendors to provide services and to help enterprises route interactions and create collaborative teams.

Key messages

- Enterprises need to define the ownership of social media within their organization and create collaborative teams in which marketing and customer service can work together. They should review social information to determine where and how the channel can be used to provide social service.
- Social media should eventually be integrated into the contact center so that employees can respond from within the agent desktop and switch between channels where appropriate.
- The key benefit of social customer service is improved customer satisfaction, but implementing a social program can also help to improve customer advocacy and call deflection, and prevent brand damage.
- The competitor landscape is highly fragmented, despite a slew of acquisitions, and further consolidation is likely. CRM vendors, social media specialists, and contact center players all offer some of the capabilities required for a cohesive social media strategy.

THE SOCIAL CUSTOMER SERVICE CHALLENGE

Embracing social media

Enterprises have been quick to dismiss social media as a customer service tool. It is commonly thought that these tools evolve so quickly that Facebook and Twitter are unlikely to be useful long-term channels, and enterprises also worry about customer data privacy and the spread of inaccurate information. However, customers continue to adopt and use social tools. Social media provides an easily accessible place to read news, seek opinions of peers, share media, and manage events, and can be accessed from a smartphone, tablet, or personal computer. Customers are already using social media to connect with their peers, and it makes sense that they should also communicate with businesses in the same medium. The high adoption of social media combined with the challenges associated with traditional customer service (long wait times, irritating IVR, and the inaccessibility of correct phone numbers and email addresses) means that the evolution of social customer service is inevitable.

However, today's social customer represents a challenge. Enterprises fear damage from negative and inaccurate posts and worry about how they can adapt to the ever-evolving media; they also struggle to justify the budget for implementing social media tools. And yet Ovum believes that enterprises should not only monitor and respond to customer queries and comments, but fully integrate social media into their customer service strategies. Customers expect to receive service irrespective of channel, and social media should not be an exception. In fact, enterprises can use the distinctive qualities of social media to be proactive as well as reactive; they can reach out with useful information in order to preempt customer needs and improve customer satisfaction. A number of obstacles will have to be overcome, including technology integration challenges as well as changes in employee and customer behavior.

Enterprises will also need to manage ownership and communications across both marketing and customer service. Social media is already a lynchpin in the customer lifecycle, and enterprises must adapt their customer service strategies to include it.

How to integrate social media into customer support

Enterprises should assess traffic across Twitter, Facebook, and communities

Social media is exactly what its name suggests: a tool that allows customers to “socialize” via online media; customers communicate publicly or privately in groups or individually. Unlike traditional B2C communications, social interactions take place in public and, with the exception of private messages, may be viewed by everyone that accesses a page or forum. Although social tools can include video or music sharing, comments, and ratings, three particular services are the most relevant for social customer service.

Facebook

Facebook was originally built as a closed community, used by individuals to connect with friends and peers, but this is gradually changing. Although Facebook users “choose” their friends and can tailor their security settings, the network is becoming more open. As long as users have signed up for the service and logged in, they can now communicate with a brand via messages, whether or not they are “fans” of the brand’s page. Enterprises with Facebook pages can choose whether they want to enable private messaging. Ovum believes that enterprises with a strong web presence should allow their customers to use messaging as a support option in conjunction with responding to public posts on a page. Private messages give an option for customers to share more personal detail in addition to public queries. However, enterprises must also carefully manage information shared on Facebook, and educate customers about divulging account or credit information, which may not be appropriate even via private messages.

Twitter

Twitter is an open discussion forum where customers can vent about their issues or reach out directly to a brand with a short question. Direct messages are allowed only if the two parties are “following” one another, making it more difficult for businesses to respond privately to customers. The nature of Twitter means that posts are short (less than 140 characters) and information sharing is limited. This makes it an ideal forum for complaints and quick questions, but also means that there will likely be a necessary follow-up interaction via another medium, such as a link to community post or a web chat. The information flow on Twitter is very fast, with heavy traffic flow, making it more difficult to pinpoint relevant conversations than on Facebook. Marketing teams may need to handle retweets and customer recommendations to ensure visibility and increase positive brand perception. At the same time, customer service teams need to know how to react to customer service requests, and should escalate them to a new channel where relevant.

Communities

Enterprise-managed and topic-specific forums also contain relevant social support information. Enterprise-managed forums are set up to discuss queries relating to a specific product or brand. Topic-specific forums are often managed by a group of people independent of the specific brands and enterprises that are discussed. The difference between Twitter and Facebook and these specific forums is that all the information on these sites is related to products or industries rather than to personal messaging. In addition, queries are mostly answered by peers rather than the organization itself. However, it is important that these tools are monitored by the enterprise to ensure accurate information and boost customer satisfaction. It makes sense to use Twitter and Facebook to link to forum posts, where there are often detailed explanations (or even videos) that can help to resolve technical queries. As with other social communications, community information can also be used to help product and service teams based outside of the contact center to address issues.

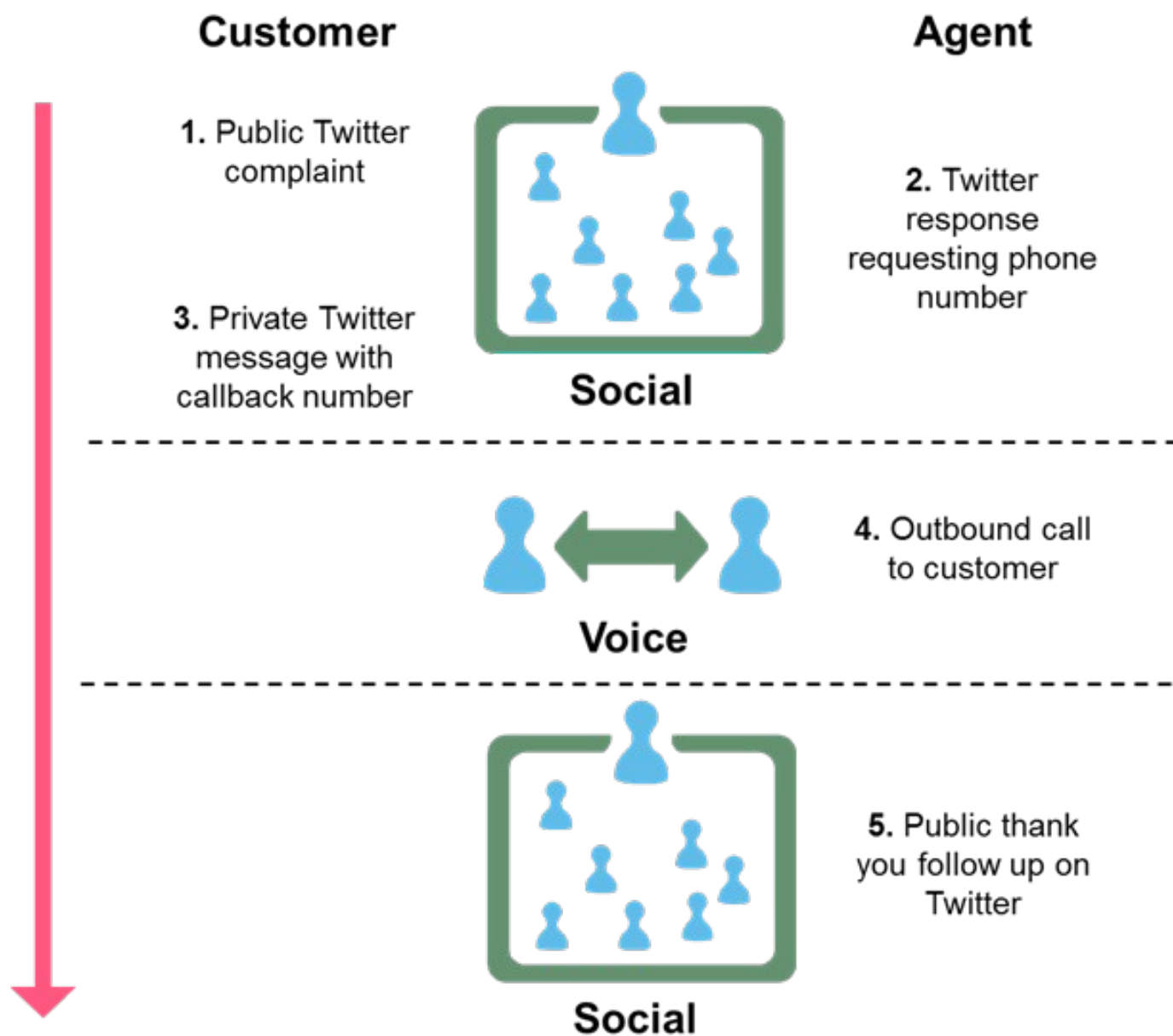
Enterprises should pinpoint queries that can be completed within social media

Ideally social agents will answer customer queries that begin in social media within the same channel; it makes sense to engage the customer in their channel of choice and provide the rapid, friendly response that customers expect from social media. The goal for enterprises should be to resolve issues in the fastest possible time, reducing the need for escalation and for customers to repeat information. To achieve this, enterprises need a clear strategy for handling and responding to social media interactions. They should define the types of queries that are most common, create rules about who will respond to them, and create templates with ideal answers. Technical and cultural processes should be refined based on historical customer interactions across both social and traditional channels in order to make the process as smooth as possible. Of course, this will be a gradual and iterative learning process as enterprises gain experience handling social questions.

Some interactions will need to be completed via email, voice call, or web chat

A significant number of queries will still need to be addressed by an agent via a private channel, whether via a Facebook message, a web chat, an email, or a voice call. Queries where customers need to divulge personal details such as their date of birth, social security number, credit card number, or healthcare records should be kept private for both security and personal reasons. Regulations may prevent customers from sending credit card information over a text-based channel, so in the event of a sales query, such numbers would have to be given in a phone call.

Figure 1: A cross-channel interaction that begins on Twitter and is resolved via a voice call



Source: Ovum

Customers do not necessarily view channels separately in the way that enterprises do; the customer's priority is problem resolution and, perhaps in the case of a complaint, feeling recognized and valued. Enterprises should note this, and ensure they can complete interactions across different channels where appropriate.

Agents should be empowered to provide a callback where necessary to respond to particular issues. For example, a Twitter complaint about a phone bill charge would need to be escalated to a phone call if

that customer were to ask for further, account-specific advice. From the customer perspective, Twitter is useful to make initial contact and publicly display frustration, hopefully leading to a fast response from an agent. However, an agent would not be able to check the bill or get access to account information without understanding the nature of the issue. The information needed to connect the customer with their account would be a name and an account number, which are best provided via private message rather than publicly. Figure 1 indicates how such a query may begin in Twitter with the customer reaching out to the enterprise and then end with an agent being proactive. Although the problem is eventually resolved in the phone channel, it makes sense for the agent to follow up publicly on Twitter and ensure it is made clear that the issue was addressed. If the agent makes an outbound call to the customer, rather than the other way around, the customer is less likely to have to repeat information or wait on hold, thereby improving customer satisfaction. Following the call, the enterprise then has the ability to link that Twitter account with an existing customer phone number in a CRM system.

Proactive communication is just as important as responding to customers

One benefit of having an integrated social media marketing and customer service strategy is that enterprises can reach out to a large number of customers with alerts and information, as well as offers and promotions. It makes sense for enterprises to be proactive as well as reactive to preempt customer queries and manage issues. For example, enterprises can use social media to explain a technical outage and the estimated resolution timeframe. By providing additional information and explaining how they are handling sensitive situations via social media, enterprises can potentially deflect calls. Although social media cannot be relied on entirely to push useful information to customers (since not all customers will be online), it is an effective way to reach customers. Proactive social media campaigns should therefore be part of an overall cross-channel strategy to alert customers to problem resolution information alongside promotional materials.

Top benefits include improved customer satisfaction and risk mitigation

One of the inhibitors for enterprises using social media to communicate and respond to customer issues is that it is difficult to justify investments without understanding the financial gains. Compared to marketing efforts, where ROI can be directly attributed to social marketing promotions and sales efforts, the financial benefits of social customer service and response management are more difficult to measure. However, having a social media response strategy will not only improve customer satisfaction and loyalty, but will also help to prevent damage from negative or inaccurate information. The benefits of investing in social media tools will be seen over time as enterprises tune their operations and processes. Table 1 provides details of how enterprises can measure the impact of their social media response strategy.

Table 1: The benefits of implementing a social customer service program

Benefit	The impact of social media response
Improved customer satisfaction and loyalty	A response strategy will help enterprises to provide their customers with faster answers to their social queries. Many customers are already posting on social channels, and if they

realize the enterprise is listening and proactively working to resolve any problems, it will help with brand perception. Customer loyalty is directly related to satisfaction with a product or service, and to their experience of interacting with a business, whether via traditional support mechanisms or online via social media. By improving response times and providing better resolution online, enterprises can ensure both satisfaction and loyalty.

Enterprises can track customer sentiment and net promoter scores, use text analytics, and ask for direct feedback from customers to get a balanced picture of customer satisfaction. One challenge lies in attributing this satisfaction directly to social media rather than other customer service efforts. A way to measure the way social media customer service affects satisfaction is to have social agents report customer sentiment before and problem resolution after each social interaction. This will help managers understand whether a customer's sentiment has been changed by a social interaction.

Call deflection

Initially the volume of social interactions will increase irrespective of call volumes. Customers are asking different questions via social media, and many interactions will escalate into a call or web chat in addition to the social response. However, as social support becomes more established, problem resolution will also increase – agents will be empowered to handle social interactions within the channel, and customers will learn how best to use social media for support. Another way in which the number of calls can be reduced is through the introduction of customer-assisted service. When customers post on a public social site, other customers have the ability to respond. If a large number of customers have the same issue, such as with a service outage, they will be able to see that other customers have already posted the same question, and so will not need to make their own inquiry.

In order to track this, enterprises will need to link customer data from social with existing customer records to find the number of interactions carried out by an individual customer relating to one issue. They can also get feedback about problem resolution directly from customers via social media.

Customer advocacy and promotion

Responses and comments from social forums can be viewed by a large number of customers, and have the ability to influence new customers. However, since customers are more likely to share very negative or very positive experiences, organizations must work harder to get positive social reviews and recommendations. This means responding to interactions and resolving issues as quickly as possible to avoid the spread of negative information. When organizations do get positive feedback they can then publicize it by retweeting it or sharing it with a wider audience.

Enterprises can easily track recommendations by analyzing the content of posts and monitoring the number of recommendations that they receive.

Prevention of brand damage

Enterprises should consider the potential legal implications of inaccurate social posts, spam, or negative backlash, especially when erroneous advice could result in a broken laptop or a violation of the law. By monitoring information on social media, enterprises can react quickly to ensure that problematic content is removed. By responding to issues quickly enterprises can also ensure that negative feedback does not go viral before they post a resolution.

As with brand advocacy, enterprises should track the number of posts with negative sentiment, and also look at escalation following social response.

Source: Ovum

Who can benefit from social customer service?

One type of enterprise that will obviously benefit from using social customer service solutions is retailers. Increasing traffic to e-commerce sites means that customers are spending more time engaging with these organizations online, and most retailers have already set up Facebook and Twitter pages to boost their marketing efforts and brand presence. While there is a clear opportunity for these organizations to further engage with customers via social media, many other organizations can also benefit from implementing social customer service programs. Table 2 gives examples of how social media can be used across some of the most relevant verticals, including retail, public sector, utilities, travel and tourism, telecoms, and financial services. Proactive social outreach is related only to customer service efforts, and will likely be in addition to offers and promotional marketing material.

Table 2: Specific industry inbound and outbound use cases for social customer service

Industry	Inbound customer social queries	Proactive social outreach
Retail	Requesting shipping, technical product, or website assistance; making complaints and giving feedback about products or services.	Providing links to common technical resolutions in videos and forums, asking for feedback from customers that mention the brand, alerting customers to shipping delays and issues.
Public sector	Reporting local issues and commenting on updates, posting photos and live information from a mobile device, asking questions about benefits and form completion.	Alerting customers of issues and how they will be resolved (including disaster recovery or weather concerns), reminding customers of deadlines, providing links to assistance for common issues.
Telecoms	Submitting technical, billing, or plan support queries; reporting outages or spotty service areas.	Alerting customers of outages and issues, defining timeframes and problem resolution, updating customers on new products, providing technical tips.
Travel and tourism	Asking questions about flight or hotel bookings, finding out about facilities offered at airports or hotels, checking availability, getting assistance with websites or bookings.	Providing information about the weather, cancellations and delays for flights and other public transport, and road blocks and other traffic issues.
Financial services and insurance	Asking about store opening times or the best time to reach support, seeking new product information, requesting claim or form completion assistance.	Making customers aware of changes to account terms and conditions or privacy regulations, providing alerts and warnings about security and fraud.
Utilities	Raising service issues, asking questions about rate changes, requesting help with accessing account information.	Alerting customers about outages and predicted recovery times; providing information about new plans, account maintenance, self-service tips, and how to save energy.

Source: Ovum

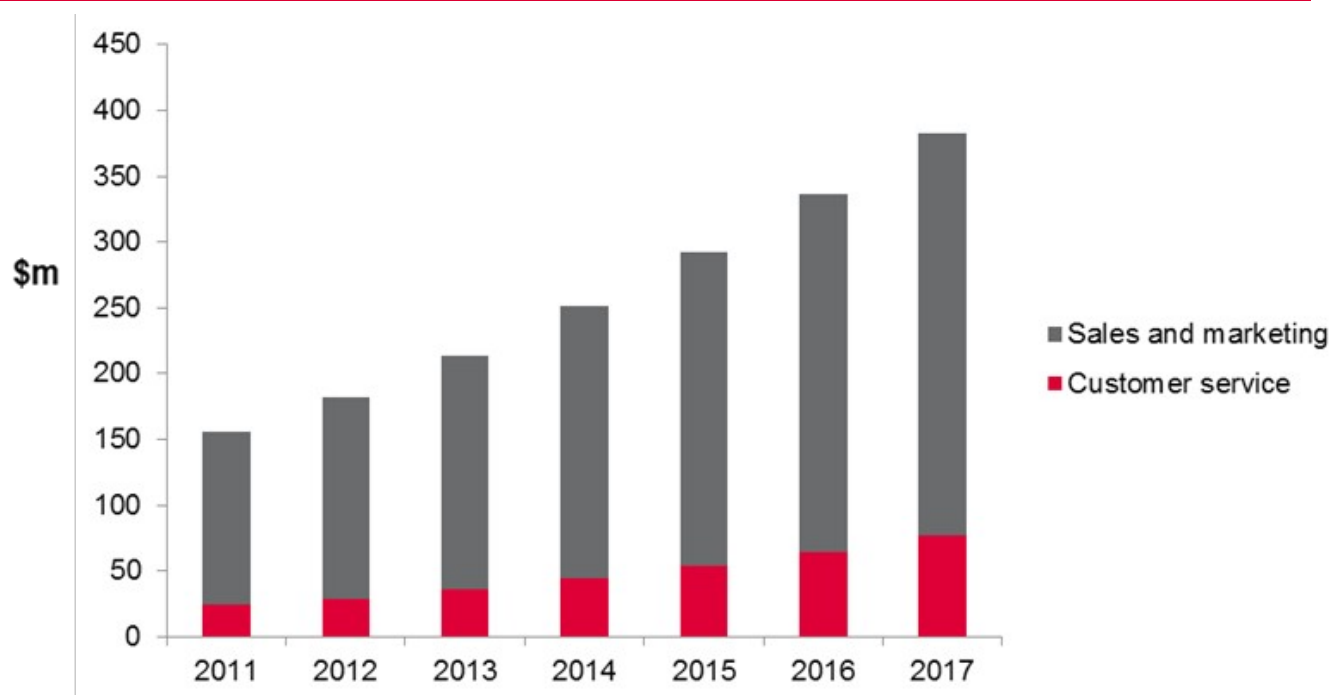
Hurricane Sandy in October 2012, Con Edison, a regional utility, used Twitter to provide updates to its customers about power outages in the New York area following. Customers interacted with Con Edison to find out when power would be restored in their area.

What does the social media response technology stack look like?

Social media monitoring is the foundation for any social solution

Social media monitoring is the core of any social media solution: organizations need to be aware of any posts and interactions that mention their brand before they can respond. Manually searching and responding to information can be slow, and does not allow enterprises to track and information. As the number of social interactions increases, it is important to automate this monitoring using one of the many social monitoring platforms. Figure 2 shows how Ovum expects spending on social media monitoring to increase over the next five years. Although the majority of the spending is on monitoring for sales and marketing, spending on social media monitoring for customer service is predicted to grow at a CAGR of 21% from 2012 to 2017 as customers' use of social media for support increases. Contact centers are recognizing the need to deploy integrated monitoring and response management applications on the agent desktop.

Figure 2: Spending on social media monitoring in North America and Europe, 2011–17



Source: Ovum

Social interactions also require categorization, routing, and management

In addition to monitoring services, enterprises looking to implement social customer service solutions require tools that will help them to route and manage social interactions as they do voice calls and emails. Once social interactions have been pulled into the enterprise they can be:

- **Categorized:** Enterprises need to extract relevant and actionable messages from among personal tweets and noise. They should set rules in order to group interactions into categories such as product, website, technical, or billing. Enterprises may wish to set up a second level of categorization, further marking interactions as complaints, feedback, or support.
- **Routed and queued:** Based on the categorization groups, interactions can be sent to the most suitable agent to handle the response. If there are enough interactions being created, enterprises may also determine priority queries. For example, complaints or sales assistance queries could be pushed to the front of the queue.
- **Answered:** Enterprises should train agents in the types of response they believe to be most relevant for common queries. It makes sense to create guidelines that will help agents to respond appropriately. Interactions should be viewed via an agent desktop application, from which agents can respond directly to a social platform. Contact centers may need an additional security layer to ensure that sensitive data is not shared
- **Escalated:** In some instances, social interactions will need to be completed in another channel, particularly where private details or booking information needs to be disclosed. Agents must have the ability to follow up with customers via a web chat or voice call where necessary.
- **Stored and managed:** Social interactions should be recorded and, where possible, tied to a customer record. Eventually customer social profiles will be matched to a customer or phone number in order to create a complete customer interaction record.
- **Analyzed:** Post-interaction analysis is just as important for social media as for other channels. By using text analytics and natural language understanding, enterprises can identify trends and find common issues based on historical social communications. This will help them to develop guidelines and educate agents on how to respond, and will also allow them to make improvements to customer service and products across the business.

Integrating social media into the contact center stack

Many of today's social media tools have been designed for use in marketing rather than the contact center. This is now changing, with social customer service vendors entering the market and traditional contact center vendors rapidly developing their social capabilities. Ovum expects to see greater integration of social media with the contact center stack. Customers do not view social customer service interactions as separate from their overall customer service experience, and neither should enterprises.

Social media also needs to be linked to the contact center so that agents can transfer interactions to another channel where necessary. They may wish to include a callback number or begin a chat, and it makes sense to have one integrated platform so that the customer does not have to repeat information and so that the query is answered as quickly as possible, in the most relevant channel.

However, integrating social media into the contact center is often easier said than done. Social tools are continuously evolving to include new features, to provide added value to advertisers or customers, and to ensure that users remain interested. This means that unless a social media platform is already part of the contact center stack, integrations will need to be adapted to take into consideration new functionality. An example of the inclusion of new functionality is the addition of a messaging function to Facebook brand pages in March 2012.

Supporting technology to connect the enterprise

Social media management tools should to be integrated with the following applications in addition to contact center infrastructure:

- **CRM:** Social customer interactions cannot be matched to traditional records without a phone number, email address, or customer ID number, but enterprises should still aim to integrate social media into their existing case management records. If agents have access to customers' historical cross-channel information they can respond better across all channels including social media. They can better tailor their responses if they know that a customer has already reached out, and they can try to reduce the need for customers to repeat information, thereby improving customer satisfaction.
- **Knowledge management:** Social media often includes peer-to-peer support and the provision of links to technical assistance by both customers and agents. Knowledge management will ensure that social trends and information are linked to relevant articles from FAQ pages and the knowledgebase.
- **Agent desktop:** Agents may use a social-specific, CRM, or contact center desktop, but they should be able to view and manage social interactions easily. Agents handling queries across multiple channels need to view queries within one desktop tool to reduce agent frustration and customer wait times.
- **Analytics:** Enterprises can use analytics to get a better understanding of which customers are using social media for service inquiries. They can compare the types of interactions that occur across each channel in order to define processes and improve guidelines for agents.
- **Workforce optimization:** Today's social media systems track agent performance data such as time to respond and number of queries handled. As the number of queries increases, enterprises may also require scheduling tools in order to ensure agents are responding efficiently to queries across different channels. Enterprises may also look at scheduling to assign agents to different channels as queries come in.
- **Realtime decisioning and virtual agent services:** In the future enterprises may integrate realtime analytics capabilities into social media. They can help speed up the response process by pushing relevant information to agents and determining when a query needs to be escalated to another channel. They may even integrate virtual agent solutions where they can automate responses, with links to FAQ pages for simple queries.

Data from social media should be linked back to marketing and customer service teams

Figure 3 illustrates how social media should be linked with routing and agent desktop tools in the contact center while being used to optimize marketing campaigns. Data from social and web communications needs to be shared by both social media and marketing in order to align efforts and ensure customers receive consistent messaging. Enterprises should use behavioral and text analytics in order to improve processes and deliver more personalized support and marketing to customers.

Figure 3: Integrating social across marketing and support tools



Source: Ovum

The social customer service competitor landscape

Like social media itself, the competitor landscape is rapidly evolving. This makes it difficult to track players, and potentially confusing for enterprises looking to purchase new solutions. Over the last year there have been a number of acquisitions among customer service players. Ovum views the social customer service market as consisting of three distinct categories: CRM vendors, social media specialists, and contact center providers. There is overlap among some of the social capabilities provided by these players, and further consolidation is almost certain as well-established customer service vendors enhance their social capabilities. In addition, text analytics vendors will play a role in helping enterprises to analyze and categorize social interactions.

CRM vendors

The link between CRM and social media is clear: enterprises need to manage and store social interactions within existing customer case records. By integrating social media with CRM, enterprises enable agents to view a more complete customer picture: they can view interactions within the desktop solution they are already familiar with, and respond without having separately to log into Twitter, Facebook, or another external social site. CRM vendors often also provide related functionality, such as web chat, cobrowsing, and knowledge management, which should work alongside social response.

Two very active players in the space are Oracle and Salesforce.com. Oracle acquired three social media specialists in 2012: Collective Intellect, which specializes in social media monitoring, and Involver and Vitruve, which both focus on branding and social marketing. In 2011 Salesforce.com acquired one of the largest social media monitoring players, Radian6, and the company prides itself in integrating social media monitoring into its Service Cloud offering. Pega, eGain, and KANA have all also developed their own social customer service solutions that integrate with their CRM platforms.

Social media specialists

While there have been a number of acquisitions in the social media space, a number of standalone players remain. Even within the social market there are categories of vendors that include different types of solutions; vendors typically focus on monitoring, marketing, customer service or community platforms. The list of social media monitoring vendors is still significant, and includes Alterian, BuzzMetrics, NetBase, NM Incite, Sysomos, Sprout Social, Trendrr, and Visible Technologies. Many of these players have a specific focus on marketing; two vendors stand out for their focus on social customer service:

- **Conversocial:** Conversocial is a social customer service specialist offering response management and agent desktop tools. It provides interaction categorization and priority response, as well as agent performance and analytics capabilities. It was one of the first standalone vendors to focus solely on customer service.
- **Lithium:** Lithium's core focus is on building customer communities, but it acquired Social Dynamx in October 2012 to add social media response capabilities to its platform. Its integrated customer service platform is called Lithium Social Web and includes social media response, prioritization, dashboards, outbound message publishing, and direct integration into Lithium customer communities.

Contact center providers

The big contact center infrastructure vendors all have social media solutions as part of their stack. Cisco, Avaya, and Genesys all include a social media product as part of their contact center suites:

- Cisco SocialMiner provides social media monitoring, queuing, and workflow tools to organize customer posts and route them to agents.
- Avaya Social Media Manager is integrated with Avaya Aura Contact Center so that social interactions can be analyzed and routed.
- Genesys Social Engagement uses a content analyzer to discover actionable social interactions from the general noise of social media. Interactions are then routed using Genesys Intelligent Workload Distribution (iWD).

Hosted player LiveOps also has a social media platform, while Interactive Intelligence and West both work directly with social media monitoring players to create integrated monitoring and response capabilities. The advantage of these vendors' solutions is that social media can be more readily

integrated with existing contact center routing and voice tools, enabling agents to transfer a customer to a voice call or create a callback. This approach makes more sense for organizations that have a large number of queries to handle and need to be able to manage high volumes of information.

RECOMMENDATIONS

Recommendations for vendors

As social customer service gains traction among enterprises, vendors need to establish their social capabilities. Rather than adapting to customer needs, they must be proactive and provide integrated tools that allow cross-channel communications that start in social media. Vendors have the opportunity to provide services around social media strategy as enterprises determine their internal organization and strategies for implementing social customer service.

- Develop interaction categorization and analytics capabilities. Contact center vendors need to round out social solutions to include social media categorization and natural language analytics. Analytics is an essential part of ensuring that relevant social media interactions are routed to the right contact. Those vendors that are currently working with social media monitoring partners should consider making an acquisition to ensure that they keep up with rapid social media developments among their competitors.
- Determine clear pricing. One of the challenges for enterprises is in justifying budget to spend on social media tools for the contact center. Social customer service vendors need clear pricing that is relevant for their particular customer set. Pricing should also include services fees to ensure that enterprises are implementing their strategies effectively.
- Promote the advantages of social customer service. Vendors should use existing case studies to make the advantages of social customer service more apparent. This will become easier as vendors gain more customers. They should also determine how they want to position themselves to support marketing as well as customer support teams, and tailor their solutions and messaging accordingly.
- Provide services around social strategy. The adoption of social media customer service is dependent on cultural change. Enterprises need to determine how communications and responses will be balanced across marketing and customer service, and vendors have an opportunity to sell additional strategy services or to work with systems integrators to apply new rules for collaboration and creating customer experience teams.
- Include social media in cross-channel tools. Agents need to be able to escalate a social interaction to a web chat, a voice call, or an email interaction where relevant. Vendors must integrate their platforms so that agents do not need to use multiple desktop applications, and so that they can retain customer information as they move across channels. For the specialist vendors, this may mean developing partner relationships, whereas for the larger vendors it is about defining processes that will help agents manage interactions that begin in social and switch to other channels.

- Define social guides and best practices for customers. Enterprises need help determining rules for social media response. Vendors should create industry-specific guidelines with model queries and responses that can be handled via social media.

Recommendations for enterprises

Social customer service is most appropriate for those enterprises that already have an online presence, particularly those with existing Facebook or Twitter pages. While social customer service does not make sense for every organization, enterprises should assess their customer base and analyze their interactions across all channels to determine whether they can benefit from this approach. Once an enterprise has decided to implement a social customer service strategy it should take the following steps to increase its usefulness.

- Find a robust social solution. Enterprises should look for a social response solution that has been tailored for customer service (rather than just for brand or message management). It should allow them to route, manage, and automate categorization as well as monitor interactions; these capabilities will be important for scalability later.
- Encourage adoption. If enterprises are prepared to support customers via social media, they should also make it clear to customers how to access this support across these channels. Customers need to be educated about the types of questions they should ask, and which information should not be posted on a public forum.
- Collaborate across marketing and customer service. Enterprises need to determine how social media response will be handled across departments. These teams need to collaborate in order to share and manage customer data and handle interactions. Enterprises should not take a siloed approach: the overall customer experience is dependent on connected communications.
- Define rules for social interactions. Enterprises need to be clear who will be responsible for answering different types of queries. For example, if social media is routed via marketing, how will they handle or transfer more traditional support issues? Enterprises should review common queries and define guidelines for agents about the types of response they should provide, including language styles and when to switch to another channel. Once interactions have been categorized they can then be routed to the agent or team with the most relevant knowledge. Enterprises will need to spend time training agents about the appropriate language and information to share.
- Be proactive. Enterprises should use the social platform to alert customers of issues and problem resolution times, and to forward relevant information. They should also proactively use information to educate other parties within the organization about trends. This may include product teams or agents that handle customer queries across traditional channels.
- Measure the impact of social media programs. While it is not always straightforward to link social media to customer satisfaction rates, enterprises should use surveys and sentiment analytics wherever possible. They can also look at the way in which satisfaction rates change following new social programs. In order to get some indication of the financial benefits,

enterprises should estimate the value of a customer and look at ways in which customer satisfaction relates to loyalty and repeat business.

- Review customer uptake. Enterprises should measure customer uptake and use of social media as well as looking at its impact on customer satisfaction. They should look at whether new customers are adopting social media customer service, and review the number of interactions across these channels. This will help enterprises to determine how they will need to adapt in order to handle potential growth in use of the channel.
- Connect social media with other channels. Enterprises should integrate communications across channels in order to allow agents to easily switch from a social interaction to a web chat, an email interaction, or a voice call. They should empower agents to switch channels where necessary, and create ideal processes for when an interaction should be escalated out of social media.

APPENDIX

Methodology

This report was written using a combination of primary and secondary data sources. The research included interviews with leading social media, contact center, and CRM vendors. Secondary data included research from online blogs and news sources. The author also included information from Ovum's existing internal knowledgebase of consumer surveys, financial data, and vendor product information.

Further reading

2013 Trends to Watch: Customer Experience and Interaction (October 2012)

The Future of Customer Service in a Mobile World: Smart, Connected Interactions (July 2012)

Redefining the Customer Experience (June 2012)

Through the Contact Center Lens: New Metrics to Define the Customer Experience (April 2012)

The Customer as the Contact Center Agent (January 2012)

Social Media Metrics for Customer Service (April 2011)

Author

Aphrodite Brinsmead, Senior Analyst, Customer Experience and Interaction

aphrodite.brinsmead@ovum.com

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