



**CUSTOMER SERVICE MEETS SOCIAL MEDIA:
BEST PRACTICES FOR ENGAGEMENT**

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EXECUTIVE SUMMARY

Your customers are talking—to each other. Social media is a new channel that demands attention from your organization. The customer experience increasingly includes interaction over “hot” new sites like Facebook and Twitter: contact center managers must understand how to participate in these conversations, while frontline agents need guidelines for how and when to respond. This white paper discusses how the social web has become part of the customer experience and includes best practices for incorporating social media into the contact center and guidelines for when to monitor only and when to respond.

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WHY DOES THE SOCIAL WEB MATTER TO THE CONTACT CENTER?

Your customers are talking about their experiences and opinions of you—to other customers and prospects. Social media sites like Facebook and Twitter have drawn a critical mass of consumers. Their comments about your products and services are easily shared and visible to more and more people which can carry a lot of influence. In short, the social web empowers everyone to be an author. Social media has emerged as a prominent platform in the Web 2.0 revolution and has a direct impact on how companies engage with their customers.

Contact centers must acquire an organizational skill set to tap into and respond to this powerful new channel. Contact centers can embrace social media to get closer to customers, spot trends, identify influencers, and create customer advocates, but they must align with social media norms that reflect an understanding that their organization does not own these sites.

A recent survey by Nielsen Online showed that social networks and blogs are now the fourth most popular online activity, ahead of personal email.



Contact center managers know the value of communicating with customers through the channel of their choice. Social web provides a new set of channels through which customers present feedback, concerns, and issues.

This marks a shift from companies and customers having one-to-one interactions to customers having simultaneous, public conversations with each other. People are increasingly looking to friends and family as trusted advisors. Today, it's critical that contact center managers empower frontline agents with access to these conversations and provide working guidelines to drive their response to customer issues. The voice of the organization in these conversations is just beginning to be heard.

While each social media site has its own norms of behavior, at a minimum, frontline agents need a set of best practices to know when to listen to the conversations and when to jump in. Another major difference between traditional contact channels and social media sites is that when you respond, your conversation is often visible to a large audience. Conversations between customers and contact centers could easily “go viral,” which can be positive or negative depending on the content.

We’ve entered a highly collaborative world: social media enables companies to literally co-create their products and services with customers, not just for them. Social media and what it means to business is being co-created daily by the people who show up—so, join in, even if it’s initially just to listen.

HOW DOES SOCIAL MEDIA DIFFER FROM OTHER CONTACT CHANNELS?

Social media accelerates and democratizes publication, which means consumers can create content about your organization. Combined with search technology, an individual comment or post on a social media site carries greater influence today than similar comments in the past.

This significant change represents the biggest challenge for contact center managers. Instead of monitoring a limited number of broadcast channels, managers must recognize that everyone is empowered to publish. This creative collaboration, whereby customers address each other’s questions, can reduce the burden on contact centers. The open conversation also serves as a great source of knowledge that contact centers can learn from and leverage. Contact centers need to tap into the wisdom of crowds and experts in these communities to reduce the cost of service and deliver better experiences.

Also, people are talking on sites across the internet, instead of bringing their problems and feedback directly to you (via the traditional support and feedback channels). Therefore, you want to start listening for these conversations and then systematically bring these conversations into your organization for incident tracking, reporting, feedback tracking, and more. Depending on the topic and emotion of the conversation, your agents should engage in these discussions, providing public acknowledgement, expertise and/or resolution. See Figure 1 on the following page for a sample visual illustration of this process.

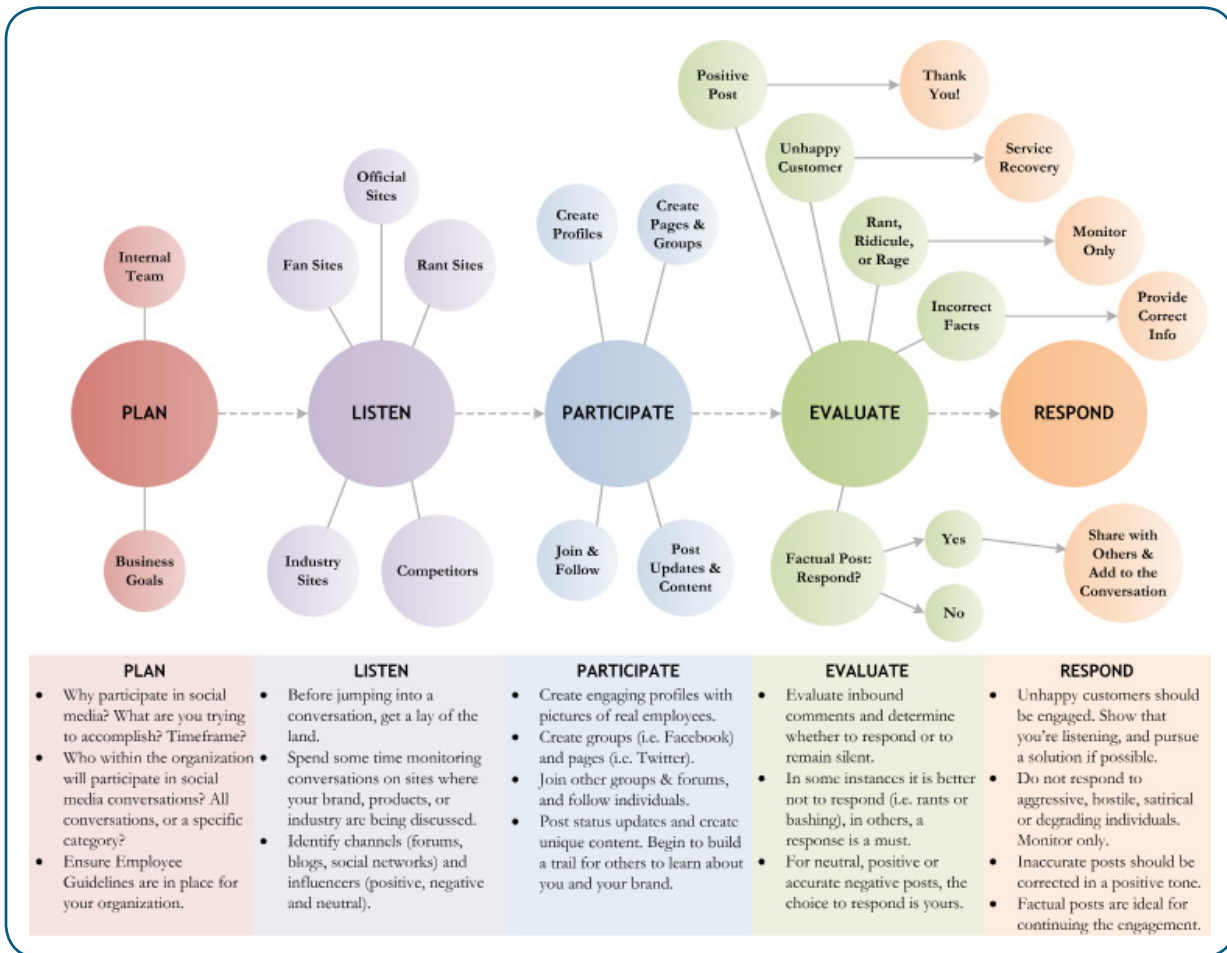


Figure 1 - When and How to Participate in the Social Web

WHAT ARE COMMON CHARACTERISTICS OF THE SOCIAL WEB?

Contact centers have a long history of adapting to new channels: 800 numbers, fax, email, web, web self-service, and chat. Social media is the newest channel in the mix, and it comes with its own set of unique characteristics. Below are some common qualities that apply to most social media sites. Understand that each site is different, starting with who publishes it and their unique terms of agreement, copyrights, and operating protocols. That said, sites commonly used by consumers today are:

Peer-moderated

- Participants can be seen as “experts.”
- Conversations are peer-moderated and, compared with other media, largely beyond an organization’s control.
- Negative postings may be countered or censored by a peer, which is far more powerful than the organization’s PR machine.
- Conversations (and contact center responses), both positive and negative, are shared across the internet and within networks, and therefore can easily spread—“going viral.”
- Highly collaborative - people offer opinions, solutions, resources, and other information on which other people base opinions and actions.

Noisy!

- Customers are having simultaneous conversations with each other across different mediums and sites (e.g. Facebook, Twitter, YouTube, blogs).
- An unrehearsed, ad-hoc tone is the cultural norm.
- Postings are brief—“short form”.
- Most feedback is unsolicited. Contact centers must be able to respond and weigh this feedback against feedback gathered via traditional, organization-sponsored channels.
- Overt selling and advertising are not welcome.

Highly mobile

- Hand-held devices, cellular, and wireless technologies enable people to interact anytime, anywhere.

Cost-effective way to be close to customers

- Used correctly and consistently, social media sites may offer a low-cost way to deliver service and to gather important data on market trends, product feedback, brand perception, and customers.
- Contact centers can find and engage super users in order to get feedback, tap into customer expertise, crowdsource incidents, and thereby reduce the contact center’s workload and create word of mouth marketing.

BEFORE YOU GET STARTED

Know why your organization is participating in social media and then adopt a phased approach to accomplishing these business objectives. Start with these questions to hone in on your goals for social media:

- Why are you participating in social media?
- What percent of your customer base uses which sites?
- How can social media improve the customer experience?
- Will social media help you build and reinforce your brand?
- How can you support agents in monitoring and responding to social media?
- How can social media help you build your knowledge base?
- What protocols are in place to help agents determine when and how they should respond?
- How can agents use the knowledge base to support conversations?

HOW WILL SOCIAL MEDIA IMPACT THE CUSTOMER EXPERIENCE?

Take heed—and comfort—in all the basics that still apply (see [RightNow's 8 Steps to a Great Customer Experience](#)). Delivering the best customer experience remains the highest guiding principle. Each organization will have to evaluate best practices in the context of its customer base.

By joining conversations in social media sites, contact centers co-create content with their customers on those sites. Leverage the wisdom of crowds and experts to build your organization's knowledge base. When you see a consistent thread of conversation on a given topic, consider creating relevant answers and posting them on your social media pages.

Often the best response, at least initially, is to simply listen. The customer-to-customer nature of social media means that if you wait, another member of the community may respond, converting the conversation from a negative tone to a more neutral or positive one. Contact centers are increasingly pressured to aggregate unsolicited feedback from social media sites with solicited feedback gathered through surveys and the organization's website. Agents should be supported in monitoring and capturing unsolicited feedback and be able to create service incidents in your internal system if needed and track issues to resolution.

Contact center managers know that the biggest champions often started out with a problem for customer service, so evaluate when a direct response from the organization is an opportunity to thrill that customer and build their sense of investment.

WHAT DO MY AGENTS NEED NOW?

Depending on your contact center's structure and support channels and your goals for social media, there will be different considerations. But there are some generally agreed upon practices that will apply to support agents interacting in social media channels.

Agents should be trained on the social media principles, particularly how they're different than traditional support channels. More specifically, make sure your agents are familiar with your target social media sites and the general "rules" of each channel.

For agents participating in social media, they should respond as a named individual with their organization affiliation disclosed, so it's clear that the organization is listening to and responding to their customers and the agent isn't accused of misleading the participants by not disclosing their employer.

Information gathered from social media sites should be incorporated into the contact center's customer history. If possible, agents should have a complete customer profile before responding; has this person also interacted through traditional contact center channels? Ultimately, your posting on a social media site may be brief, but the time still has to be spent on the back end to deliver a carefully considered response. Check the customer's background and aggregate existing internal information with the new issue raised on a social media site.

There are many considerations to how your employees participate in these sites, and contact center managers shouldn't have to go it alone. Companies must recognize the need to adopt and implement social media guidelines at all levels. Contact center managers should realize,

however, that their agents have a personal life—for instance, many of them may have their own Facebook pages or Twitter accounts. Should they be allowed to “friend” customers? What guidelines, if any, should dictate what an employee can do with their personal accounts? The following best practices are suggestions and considerations for your contact center’s social media initiative.

BEST PRACTICES FOR WORKING WITH SOCIAL MEDIA IN THE CONTACT CENTER

Listen

- Monitor customer-to-customer conversations. While internal CRM solutions have evolved over the years to empower customers, social media begins with empowered customers. Companies must empower their frontline agents to join and contribute to the conversation as appropriate.
- Track which comments and content come from which sites. Sites known almost exclusively for ranting may be ones to which you never respond directly. Industry sites where multiple vendors, suppliers, and partners contribute “official information” (such as a non-profit industry association that offers information on safety, etc.) should also be monitored if they take public comment.
- As you’re getting started with social media, you want to listen with the filter for understanding which social media sites and conversations are relevant to your organization, your department, and your business objective. Ask: where are your customers and prospects talking? What are they talking about? Which channels/conversations map best to your organization’s objectives? Over time, you may want to rate sites like Facebook against other sites where fans rave and discontents grumble.

Profile customers

- Take a minute to try to get to know your customers. If you can track the username back to your contact history, check to see if there are service incidents from this person. Don’t forget to check the person’s profile on the site in question (i.e. Twitter profile page, their blog profile). Often, a simple Google search might help.
- Think about customers in social media as extensions of your organization. They’re willing to provide feedback, help each other, share experiences, and make recommendations. It’s not outsourcing, it’s crowdsourcing.

Follow social media norms.

- Be social media friendly. Sign up for a Facebook page and a Twitter presence. Consider whether contact center agents should have a personal account on Twitter (with organization affiliation disclosed) or whether you should have an organization account through which they respond.
- Let agents be individuals. Consider allowing photos and limited personal data on their social media profiles (especially if it relates to the organization, such as being an avid runner at an athletic apparel organization).
- Understand that your 1:1 conversations over social media are generally visible to many people, including, potentially, your competitors. Have agents disclose their organization affiliation.
- Be helpful; provide useful content—don’t sell or pitch.
- Remember there is a lot of noise in this channel, and many people are using mobile

devices, so make your content meaningful, brief, and consumable.

- Use brief, conversational style.
- Have organization-sponsored bloggers include the ability to share to community sites (like “Diggit” or “Delicious”).
- Encourage prospects and customers to join, find, follow, or subscribe to your organization’s pages by adding links from your website and even your outbound emails. (Examples include “Find us on Facebook”, “Follow on Twitter”, “Subscribe to our YouTube channel”, “Join our Group”, “Become a Fan”).

Know the Terms of Agreement for each site you participate in.

- Each site has different policies. Twitter is entirely public and open to all, while other sites own the content posted on their site. Use discretion when considering what to publish to these sites and consult appropriate legal counsel.
- Be careful about what you post. Secure and private data may be best reserved for your internal systems—consider your organization’s privacy as well as your customers’.

Develop social media guidelines for your organization and your contact center.

- Devise protocols to guide agents on whether and how to respond.
- Provide a process flow to guide agents, such as suggesting when a “conversation” should be moved from social media to the contact center’s CRM platform. See Figure 1 - When and How to Participate in the Social Web.
- Consider putting customers in touch with other customers, partners, vendors, or third-party organizations as appropriate.
- Use social media as another venue to build your knowledge base.
- Incorporate social media into your CRM vendor selection criteria. Can you initiate incidents generated from a social media site? Can you detect the emotion of the post?
- Revisit and revise policies and practices frequently to keep up with this quickly evolving space.

Stick to Principles

- Evaluate social media practices against guiding principles for your contact center.

It’s safe to say social media is becoming more ubiquitous and relevant every day. Incorporate this emerging channel into your CRM planning, processes and applications and start thinking social when you think about customer experience.

RESOURCES

For recent data on user adoption to popular social media sites: A Collection of Social Network Stats for 2009 « Web Strategy by Jeremiah Owyang Social Media, Web Marketing.mht

ABOUT RIGHTNOW

RightNow is a provider of on demand customer relationship management (CRM) solutions that help consumer-centric organizations deliver great customer experiences. Founded in 1997, RightNow is headquartered in Bozeman, Montana, employs more than 700 people, and serves over 1,900 organizations worldwide. RightNow is listed on the NASDAQ under the symbol RNOW.

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