



# SOCIAL CUSTOMER CARE GUIDE

Corporate Strategies for Operational Readiness



# TABLE OF CONTENTS

<b>SOCIAL CUSTOMER CARE IN 2017</b>	<b>4</b>
.....	
<b>ABOUT THE SOCIAL CUSTOMER CARE GUIDE</b>	<b>5</b>
.....	
<b>COMMITTEE FINDINGS</b>	<b>7</b>
.....	
<b>THE VALUE OF SOCIAL CUSTOMER CARE</b>	<b>10</b>
.....	
<b>THE QUANTITATIVE DATA</b>	<b>10</b>
.....	
<b>THE QUALITATIVE APPROACH</b>	<b>11</b>
.....	
<b>REVENUE GENERATION</b>	<b>12</b>
.....	
<b>FOCUS ON THE BEST PRACTICES OF SOCIAL MEDIA ENGAGEMENT</b>	<b>14</b>
.....	
<b>SUMMARY AND PREDICTIONS FOR 2018</b>	<b>21</b>
.....	
<b>ABOUT EXECS IN THE KNOW AND RESOURCES</b>	<b>25</b>

---

## A LETTER FROM THE

# COMMITTEE CO-CHAIRS

It is with great excitement that we share with you the findings of the Execs In The Know Social Media KPI Subcommittee. We have been working together for the last couple years with some of today's brightest Social Media leaders from some amazing companies to collaborate on best practices.

While social care is still relatively nascent we initially struggled to align around common terminology let alone common measurements and best practices. Over time we established common definitions and aligned on common key performance indicators despite our internal difference. The result of those efforts allowed to share our internal operating techniques and decide upon best practices across our varying industries.

Despite our differences in management systems, the scope of our individual responsibilities, and servicing strategies; we found incredible value in the conversations and research that came out of this board. It became clear that we need to share these results with a broader audience to evolve the industry and our collective impact on better meeting customer's expectations.

With this paper, we hope you benefit from our efforts, but we also hope to see an evolving conversation and increased participation in the topic of social care KPI's and best practices. If you have differing viewpoints or would like to be involved in ongoing efforts in this area, we encourage you to work with EITK to express your interests. And on behalf of the other committee members, we want to thank you for taking the time to review our paper.

Sincerely,

Denise Pullen and Jay Wolcott  
Co-Chairs of the EITK Social KPI Subcommittee

# SOCIAL CUSTOMER CARE IN



**W**e live in a world of constant connection, where smartphones are a permanent fixture in everyone's hand and many enjoy doing as many tasks as possible with technology -- even interacting with their friends and family. It comes as no surprise that many also prefer to solve their customer service issues online, often through social networks, rather than in person or over the phone. Typically, a customer will reach out to a brand on social media for one of two reasons: Social is their preferred channel of choice for an interaction, or they've had no success solving their issue on another channel, are growing impatient, and turning to social media as a last resort. Regardless of motive, brands can no longer sit idly by listening to social conversations or, what's worse, ignoring them completely. In fact, according to Conversocial, eighty-eight percent of consumers are less likely to buy from companies that leave complaints on social media unanswered (Puzzo, 2016). Simply being present just won't cut it anymore. In order to please customers in this very public space, brands must actively moderate and engage with their customers, and in a timely and efficient manner.

2016 saw the number of brands with customer care specific handles and accounts increase, as they made it easier for their customers to solve their issues, answer questions and provide any needed assistance. Twitter reports that customer service interactions have increased 250% in the last two years (Koller, 2016), and Gartner predicts that 90% of businesses are estimated to use social media for customer service by 2020 (Hutchinson, 2015).

To contribute to a smooth, consistent customer journey, it's important for a brand to clearly distinguish which social networks/pages are used for marketing and fun brand messaging, and which are used for full-scale customer service. It's important to remember, however, that customer service (and excellent customer service, at that) should be a viable part of your marketing strategy. Social networks make every interaction easy to like, share or comment on. One good interaction could set your brand apart, and not only create a brand advocate with the customer you were directly communicating with, but influence others that may see the post as well. As author and speaker Jay Baer said, "When it plays out in social media -- in full view of the public -- customer service becomes a spectator sport. And in that environment, social care drives reputation, intent and purchase."

Another factor that plays into CSAT on social media is response time. According to Twitter, sixty-percent of customers who register a complaint expect a response within one hour (Koller, 2016). Speed and agent availability are critical, as is knowing the contact history of each customer for convenience. Equally important is decreasing the duration of the interaction (solve the issue in the shortest amount of time possible).

A number of trends came to the forefront of social media in 2016, including messaging, bots, live content and AI. Messaging originally became popular through apps like WhatsApp, Viber, WeChat, etc. And HubSpot research indicates these apps currently have over 4B monthly active, which clearly attests to their popularity (2017). Messaging is now directly integrated within social networks to fit the needs of each customer's journey. One example of this can be seen on Facebook, where you can click on an advertisement and be sent directly to a chat window for that particular brand. Live streaming content through networks like Periscope, Facebook and Instagram were also trending in 2016. In its 2016 annual recap, Periscope noted that users watched 110 years of live video every day using the app. In fact, on New Year's Eve 2016, live streaming on Facebook reached

record-breaking numbers around the globe (Facebook, 2017). Live streaming offers social customer care teams the opportunity to offer real, authentic content to customers, create a connection, and have a more thorough way of explaining a solution or solving a problem.

Artificial Intelligence and Chatbots were two other trends that gained momentum last year, and will continue to be important in 2017. Apple's personal assistant Siri is just a click (or voice command) away at all times on its iPhones. Chatbots can be used to solve basic or complex issues, depending on the intended use and creation of the bot. They can help to free up live agents to enable them to deal with more complex issues or deal with customers who prefer to communicate in a different channel (e.g., over the phone). The opportunities to apply Chatbots and AI to social customer care are vast and exciting; but above all, it's important to remember that every interaction must remain personalized and human.

## ABOUT THE

---

# SOCIAL CUSTOMER CARE GUIDE

In our recent Customer Experience Management Benchmark (CXMB) Series 2016 Corporate Edition report (a combined effort with COPC Inc.), those surveyed were asked their organization's level of maturity with regard to the social media care channel (COPC & Execs In The Know, 2017). Corporate maturity within the social media care channel has edged up slightly year-over-year, with 26% of respondents indicating some level of maturity in 2016. Although strides are being made, it's important to be cognizant of the fact that social care is still relatively new.

During its short life cycle as a customer service channel, many organizations have struggled with knowing what they should measure on social media, and how to go about doing it. There is a great deal of social data that is untapped, and organizations are missing the opportunity to capitalize on the data's impact on CSAT, revenue, product, efficiency and more. To comprehend the full impact and ROI of social customer service, companies need to cross-measure the data with other traditional channels, as well as other functional areas like marketing and research. Execs In The Know believes that, by bringing together leaders in social customer care, in various verticals, it can create cross-industry learnings and develop a holistic road map to effectively measure and utilize social data, across the enterprise. As a result, it was these principles upon which the EITK Social KPI Committee was formed. The committee is comprised of representatives responsible for social customer care at leading brands like Amazon, Cross Country Home Services, Belkin International, Outerwall, Nintendo, Fairytale Brownies, CIBC, and Hyatt.

The primary goal of the Committee was to create a framework of performance indicators for social customer care, and to establish corresponding benchmarks and universal KPIs that showcase the impact of social customer care, enable strong performance tracking and influence an exceptional customer experience.

The Social Customer Care Guide: The Corporate Strategies for Operational Readiness guide is designed to examine social media customer care through a functional and operational lens, providing key data sets that showcase the impact and opportunity of providing customer care in social media. There is significant variance in approaches and management of social customer care. Consumers continue to expect more from their social servicing experience, while companies struggle to maintain pace in developing programs that meet customer expectations.

The guide provides insights into best practices for social customer care and the evolution of program management. While many brands confess to not meeting customer expectations, our goal is to raise situational awareness so that we can begin to better align with customer wants and needs.



## COMMITTEE

---

# FINDINGS

**Research Methodology:** The Social KPI Committee was actively represented by nine leading brands that gathered for a series of meetings, interviews and surveys to identify, discuss and provide feedback on how social media care programs were structured within their organizations. Within the surveys, 30% of the questions were presented as multiple choice questions where brands could choose from more than one option. The remaining data was collected as free-form text.



## COMMITTEE

## FINDINGS

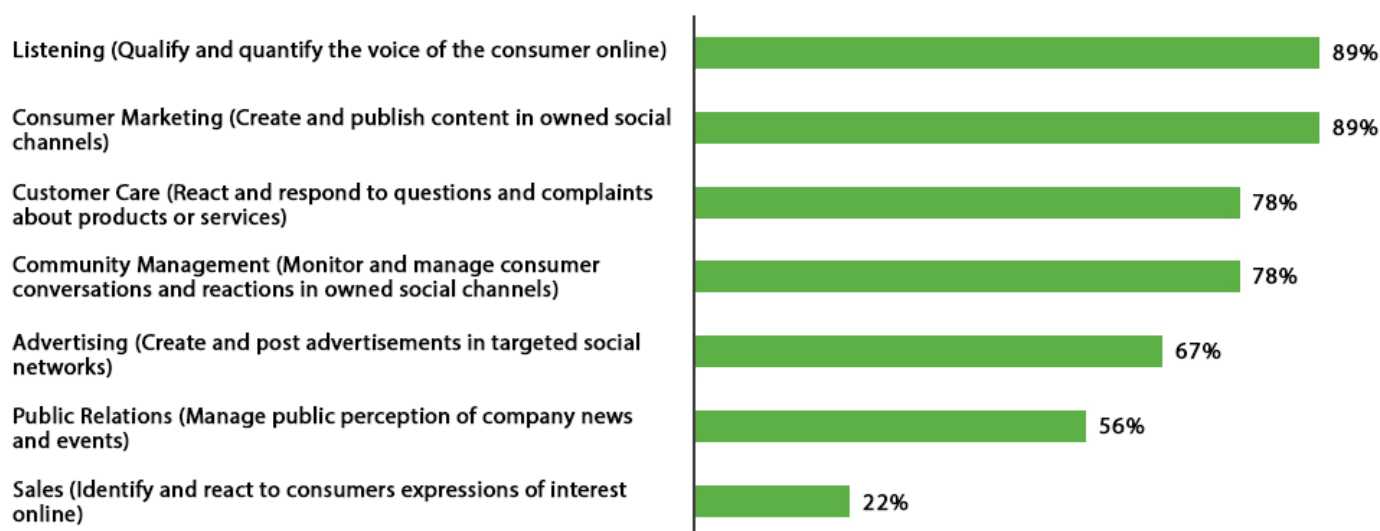
From our findings, it is evident that there is a need for establishing a baseline with set KPIs and program structure guidelines to help brands achieve desired satisfaction and service quality in their social channels. Below are some of the key findings summarized.

### *How does your company participate in social?*

Listening is still the most popular involvement for most brands in social. Almost all brands have established a team/individuals to actively listen in on social media conversations related to their brand, and engage when they find a question or complaint related to their products and services. In addition to listening, the social care teams are striving to provide customer care (78%) as well. This shift is not a surprise.

Consumer marketing by creating and publishing content on owned properties is another leading usage of the social channel. However, as a result of these marketing activities, only 22% of the brands capitalize on sales opportunities or interact with consumers expressing interest to purchase online.

#### *How does your company participate in social media?*



### *Do you look online for customer questions or complaints outside of owned accounts?*

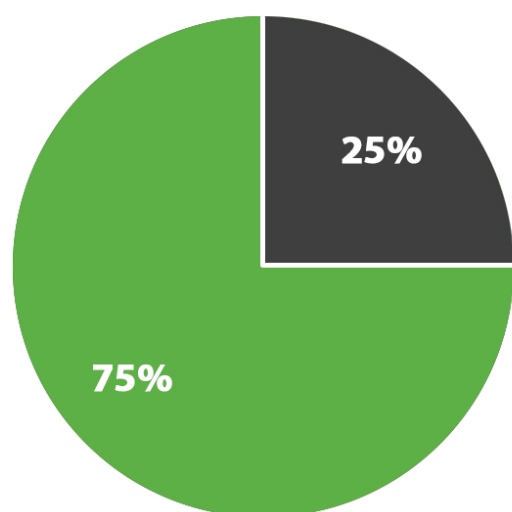
Most brands (78%) actively listen and participate only on owned social media properties, branded Facebook pages and brand mentions within Twitter. During our subsequent interviews with participants, we identified the reason attributed toward limited scope of engagement as size of social care teams, legal restrictions and efficacy of social media tools to scale to interact with a broader audience, beyond popular channels. Of the nine brands that participated, only two monitored social media posts outside of owned properties.

In a similar follow-up question to learn how brands decided on scope (or) areas to engage and if there was a central governance team involved in deciding, 100% of the brands responded that their social care presence naturally evolved from their marketing presence within the same channels.

*"Currently, we pull in/search @hyatt mentions from Twitter into our work stream. We then proactively respond to anyone who mentions any of our brands, whether they tag our accounts or not. The direct channels we engage include Twitter, Facebook, Facebook Messenger and Instagram. We also monitor hotel review sites, Flyer Talk and Milepoint."*

- Denise Pullen, Assistant Director of Operations Design and Learning Communications, Hyatt

## Measure



- Yes
- No

**Which KPIs do you measure to determine the operational effectiveness of your social customer care team?**

One of the important objectives of the Social KPI Committee was to identify a methodology to measure operational effectiveness of social media care teams by establishing required KPIs. Based on research, most brands (70%) measure average handle time (AHT) and Response rate (Total post count) as key KPIs.

*"Overall it is difficult to truly measure the various KPIs for social for us due to the variety of channels we support and how we leverage our team. The main way we have been measuring effectiveness so far has been through QA audits and calibration sessions between various teams to set a baseline of expectations for how we should be engaging and when we should engage."*

-Lucas Peterson, Director of Customer Advocacy, Belkin International

## Do you have a specific approach to quantify the ROI of this operation?

One of the areas where we identified a huge lag within social care programs was measuring ROI of care efforts. Seventy-five percent of the brands surveyed reported that there appeared to be a lack of credible, quantifiable metrics that can be used to measure the ROI of social media operations.

Due to the perceived lack of a tangible measurement, brands that currently measure ROI for social care programs mentioned measuring sentiment/satisfaction as an indicator of program performance.

While measuring customer satisfaction after a social interaction could potentially serve as an indicator, brands have not established defined guidelines around when customers are surveyed for satisfaction (CSAT). Since most social media interactions do not end during the first response, the brands that do measure CSAT manually initiate a survey when a care-type interaction is assumed to be complete by the team. Quality measurements within social interactions also tend to focus on non-critical aspects like usage of punctuation, greeting the customer, etc., as opposed to critical aspects like effective issue resolution, providing correct information, and more.



A black smartphone is shown at an angle, displaying the Facebook login interface. The screen has a blue header with the 'facebook' logo in white. Below the logo are two input fields: 'Email or phone number' and 'Password'. To the right of these fields are 'Log In' and 'Back' buttons. The status bar at the top shows 'T-Mobile.pl', a signal strength indicator, the time '10:38', and a battery icon. The phone is resting on a dark wood-grain surface.

THE VALUE OF

# SOCIAL CUSTOMER CARE

---

## THE VALUE OF

# SOCIAL CUSTOMER CARE

The unicorn of social customer care tends to be a robust business case to quantify the ROI. Often the effort behind an initiative like this turns into an anthem that explains the cost of avoiding customers -- not necessarily a typical cost-benefit analysis. This is not a particularly useful tactic in an organization that has active shareholders. Behind some of these challenges is compelling evidence that shows the strength and return on social customer care. Some of the advantages can easily be quantified, while others are more qualitative. Behind each of those are areas that impact the income of an organization all the way through R&D. The most valuable social goals align directly to the overall business goals. With a more creative approach, your program can benefit many parts of the organization, rather than just that individual customer interaction.

### The Quantitative Data

Information that's available about a brand's performance and social channel for customer service is often limited by the tools used to manage those channels. However, with a little creativity, we can discover many elements that will demonstrate where our efforts lead.

The first area on which to focus is the decreasing cost of servicing in the social channels. To better quantify the true cost of each contact is to look at the variables which contribute to an effective measurement.

There are normal variables of cost which include information technology, labor cost as FTEs, management, performance management and facilities. These cost components can be leveraged from other channels to give you a good idea of the fixed and variable expenses for social support.

Along with expenses, we need to quantify our activities. These activities primarily come in the form of interacting with customers, but it's not as straightforward as other channels. We need to think not only in terms of productive and unproductive time, but within our productive time those items that are most contributing. For instance, typical unproductive time includes breaks, training and activities away from interacting with customers. In social, we have a whole new element of reviewing content that we might not end up responding to. While necessary, we are using manual labor to search and discover content that is important for our brand to react to. Most often brands quantify this as processing information compared to responding to customers.

Exhibit One shows that the highest level you can start with is the number of brand mentions, which is often easier to identify or estimate. Within all of these mentions, brands are able to determine which require review or moderation from the team processing them. Utilizing these resources to process these mentions is a starting point from which to look at productive activities. However, within those productive activities of processing information, the ultimate metric is the number of entries that we ultimately respond to. This sufficiency metric allows us to look at the ratio of information we have to process versus all of the information we post to. Within this ratio, if it's not one-to-one, we're able to identify many areas where we can improve our efficiency of processing information. Some brands invest heavily in tools that provide Boolean search techniques that allow them to eliminate unwanted contact, while focusing on reliable searchers. Other brands have begun to invest in artificial intelligence to make determinations for them. Within those, brands can leverage the information they responded to historically to train systems to identify similar content for going forward. This is a best practice in the industry, which leads to the highest levels of productivity and efficiency of team members responding to customer posts.

## EXHIBIT 1

All Mentions (Radisson, etc)	600	
Direct Mentions (@ Radisson, Radisson FB Page, etc.)	100	
Actionable Customer Service Opportunities (powered by AI)	30	
Private Messages / Direct Messages	10	
Agent Responses	20	
	Response Rate	50%
	Response Time	05:38:00
	Service Level	10% / 20 Min
Quality (Internal)		
CSAT (External Survey)		

*This exhibit provides a sample methodology for quantifying your cost per contact for social customer care, and some useful techniques to improve the overall performance in these areas.*

### The Qualitative Approach

Much like other customer contact channels, we have qualitative metrics that contribute to the overall impact of our efforts. With social, we have a unique ability to look at overall sentiment of customers. However, we learned that many organizations are struggling to measure the overall customer satisfaction. Within the best practices, we have seen many organizations becoming more precise with their quality monitoring techniques. Each of these areas goes a long way to help further validate social impact on the overall customer experience.

Sentiment is often available to identify the Voice of the Customer on important topics, and we have a wealth of information available to us that looks very similar to data we used to get from market research on customer feedback. However, in this day and age, that information is available live and in real time. By measuring customer sentiment when mentioning important topics about our brand, we can begin to gauge the true pulse of the customer.

Another area of importance is trying to identify the customer satisfaction from our processing of social customer care activities. A unique challenge with social compared to other customer contact channels is that there is no efficient way to survey those customers on those contact experiences. Platforms like Twitter and Facebook do not provide easy ways to survey post-contact. Some brands develop workarounds to correlate the social customer data to other data that may exist in their systems. When instances like that occur, they

may follow up with an email-based survey or phone survey, knowing that they have interacted with the customer over social. In 2016, we saw Twitter an ounce in a melody for customer service handles to begin doing a quick survey for customer satisfaction. This is only available for those interactions that are done over Twitter, but is a good starting point for the platform to begin to leverage customer feedback.

In addition to sentiment and customer satisfaction, brands are placing heavy emphasis on internal transaction monitoring or quality monitoring activities. With the visibility of a social post potentially going beyond that individual instance, we need to place a heavier emphasis on the quality of response. Since the information is largely textual and one direction in nature, it requires further management of communication effectiveness due to its lasting nature online and potential misinterpretation.

Teams have begun to leverage internal transaction monitoring resources that are available and used to manage quality monitoring for channels like chat or email. Often, they adapt the monitoring forms and criteria to be specific to the nuances of social that can (and should) include adherence to social media policies.

Qualitative measurement techniques are important for both internal validation, along with performance management.

## Revenue Generation

Social customer care is uniquely focused on servicing customers that have issues. However, we often find many of the questions that are handled over social tend to be related to sales support. It is important for a program to understand its role in supporting sales, marketing and, ultimately, revenue generation, along with their social customer care activities. We need to measure our activities that support revenue generation alongside servicing activities.

In an organization that has an opportunity to address customer inquiries related to sales activities or your marketing support, it's important that the team try to capture and quantify how often this happens, and estimate what it contributes to in customer acquisition. The team should begin by dis-positioning items handled to measure how often they address inquiries such as these. They can also use custom link tracking to gauge how often the customers interact with that content shared.

When an interaction has begun, it's important to have an internal design that allows the social customer service agent to support the customer through the sale. This provides ultimate visibility into sales conversion. When we have an opportunity to track sales conversion for these interactions, we can begin to look at how often we up-sell based on the original inquiry.

Clearly, a best practice for social customer care teams is the ability to support sales and generate revenue and, more important, see it as an opportunity to ensure we can quantify how often that happens as an offset against our expenses.

*"In Social Care, we only get a few words or sentences to make an authentic connection with a customer. If we don't have impeccable resolution and follow up skills, we cannot earn that trust back. You really only get one chance to make it right."*

- Janet Poklemba, Customer Experience Manager, Cross Country Home Services



A close-up photograph of a person's hand holding a silver smartphone. The person has purple nail polish. In the background, a laptop keyboard is visible, slightly out of focus. The overall lighting is warm and soft.

FOCUS ON THE

---

# BEST PRACTICES OF SOCIAL ENGAGEMENT



## FOCUS ON THE BEST PRACTICES OF

# SOCIAL ENGAGEMENT

## 1) Level-Setting the Definitions Within Social Media Customer Care/Type of Operating Method

### Active Listening

Active Listening is the act of collecting and processing online conversation relevant to a brand either manually or through the use of one or more software tools. The most common software tools used for active listening are based on either Keywords or Natural Language Processing. For smaller, low-volume brands, Active Listening can also include the manual review of social pages or search engine results, although this method proves inefficient and ineffective at scale. Active Listening provides companies with a number of key insights about their brands, products, services and target consumer. By employing a mechanism for Active Listening, brands are able to discover what's being said, who is saying it, where it's being said and in what volume. This information is critical in the development of programs that are more focused on consumer engagement.

### Reactive Engagement

The Reactive Engagement space is where brands often make their first foray into engaging consumers within social media. In the truest sense, Reactive Engagements are responses to consumer comments or inquiries that have been directed specifically at a company or brand, often directed at a brand page or handle. In this way, the brand is engaging in an exchange initiated by the consumer. These initiations are often public, and it's not uncommon for these types of posts to be the result of a failure to get resolution in an alternative contact channel. Other times, these inquiries are in the form of simple questions related to the company or its product and service offering. Regardless of the reason for the inquiry, the best practice is to engage the consumer, keeping the adage in mind that if a consumer takes the time to write, a brand can take the time to respond.

### Proactive Engagement

Proactive Engagement is the most active form of social media participation. Proactive Engagement includes the discovery and engagement of two distinct types of consumers:

- 1) Those discussing a specific brand, but not specifically addressing their comments to the brand
- 2) Those discussing a relevant brand, product or service

These discussions can be generated from either existing or prospective customers, and they can deal with any variety of topics ranging from service issues to brand comparisons. By proactively engaging consumers, companies can discover customers in need, shape conversations and add value that can surprise and delight consumers.

In recent years, Proactive Engagement has also grown to encompass outbound communications based on a specific event, such as a product recall. This is a customer-centric approach to communication, and can often result in greater trust and a reduction of inbound contacts to other channels.

**Best Practice:** Today, all brands must have a process in place for reactive engagement. For large, well-recognized brands, a proactive approach to social media care is necessary to take the brand to a higher level of engagement and connection. Advances in content processing and engagement dashboards have brought a level of ease to finding and engaging consumers. At the same time, the ability to conduct an effective Proactive Engagement program depends largely on the conversation volume and engagement scope. Finding consumers to engage presents little challenge for large, widely discussed brands.

## 2) Ready, Set, Go: Defining Your Swim Lanes

**Best Practice:** Swim Lane Documentation (Defining the Roles of Marketing, PR and Customer Care in Social Media).

Simply put, Swim Lanes are a documented definition of departmental responsibility based on the content of a social media conversation and/or post. For instance, individuals needing help to get information about their billing balance might be in the Swim Lane of the Customer Care team, whereas individuals interested in learning about a new product might fall within the Marketing Swim Lane. Naturally, the larger the organization and the broader the engagement scope, the more detailed and nuanced the Swim Lane documentation might be. What's important is that all parties involved have a hand in developing and approving the operating document. This ensures optimal buy-in and reduces the likelihood that a specific communication topic gets missed.

In addition, Swim Lanes are most effective when they include sample consumer posts that relate to the specific topics of responsibility. While the example Swim Lane (@Target) on the following page focuses exclusively on Twitter, Swim Lanes should include examples from a variety of covered sources. If a program includes coverage of Facebook, Twitter, Blogs and Pinterest, for instance, the Swim Lanes document should include examples from each of these sites.

Swim Lane documentation should be considered a living, breathing document. As a Social Media Engagement program evolves and progresses, the departments involved in supporting the engagement operations should meet periodically to discuss what is working in the Swim Lanes, and what could use adjustment. This will ensure continued buy-in and go a long way in making sure consumers receive the best care possible.

## 3) How to Become More Pro-Active: Tools to Succeed

Given the sheer volume and variety of the social media conversation, selecting the right tools and technology is essential. Program efficiency, productivity and effectiveness are all heavily dependent upon putting the right solutions in place. For the purposes of simplifying the tool and technology selection process, this document will focus on three primary areas: Engagement Tools, Insight Tools and Program Technology. There are a variety of other tools in the social media space, many of which focus on marketing. These include publishing tools, monitoring software and paid/targeted advertising applications. Since the focus of this document is Social Care, we'll concentrate on tools that have a direct application to the care function.

### Engagement Tools

Often referred to as engagement dashboards, engagement tools come in a variety of flavors, each offering different levels of capability, functionality and price point. Depending on the underlying technology, engagement tools can be grouped into two primary camps: Search-Based and Analytics-Based.

**Search-Based:** Search-Based engagement dashboards rely heavily on user-generated rules, and searches to identify engagement opportunities. Almost always, these searches depend on key words in combination with techniques such as Boolean search and/or Latent Semantic Analysis (LSA).

Boolean search uses common operators (such as AND, NOT and OR) to construct searches that limit results. For instance, a search such as "computer AND help, -Dell" would return results with the words "computer" and "help," but not the word "Dell." Through Boolean search, users can attempt to target content that is relevant to the specific scope of their program. LSA, on the other hand, is a technique for identifying words or phrases of similar or related meaning, based on their position in a piece of text. For instance, if an LSA system sees, "I need help with my computer" and "I need assistance with my computer," it can associate "help" and "assistance" based on the other words that occur in context. In this way, LSA can help expand keyword searches by recommending additional terms around those identified by a system's user. In the hands of a skilled and detail-oriented operator, Search-Based systems can provide a high level of accuracy in identifying engagement opportunities; however, there are two significant drawbacks to the Search-Based approach: The first is that searches require a high level of effort on behalf of the rule maker or user. This is often a process of trial and error, and much refinement is required to hone the system. Furthermore, the system isn't self-updating, so any time the parameters of the program change, and scope expands, new searches and rules

need to be created. The second major drawback is that users will only find specifically what they are looking for. In other words, they won't see content that's not accounted for in their rules. Since the social media conversation is enormous in scope, it would be virtually impossible to account for all the variables required to discover all the permutations of actionable content. Therefore, a lot of engagement-worthy content is likely to be missed using a Search-Based engagement tool.

**Analytic-Based:** Natural Language Processing (NLP) techniques power most Analytics-Based engagement tools. In the simplest terms, machine-learning NLP algorithms are used to literally teach a machine how to understand the language used to construct a post. True NLP differs from LS in that NLP is not a simple (or in some cases, complex) word association exercise. NLP derives its intelligence and improved accuracy from the analysis of large corpora, or sets of texts — often real-world examples. Machine-learning NLP systems use these examples to score new content, even if the content is only being seen for the first time. System analysis and intelligence can continuously be improved by providing additional data, often in the form of processed program data.

Systems based on this machine-learning technology have a few distinct advantages over those based on user-generated searches and rules. First, NLP systems excel at identifying new, previously unseen issues. With Search-Based tools, only content explicitly covered by the search rules will be returned. This is not the case with an Analytic-Based tool. In fact, Analytic-Based tools excel at discovering new and trending topics. Newer, more advanced systems can accomplish this regardless of the volume that's informing the issue, helping companies spot issues before they become a crisis. Secondly, Analytic-Based systems are often designed to provide improved accuracy over time as additional data is added to the corpus.

While Analytic-Based systems excel at discovering content, the accuracy of such systems is dependent upon NLP algorithms that are well designed and trained. Since these sorts of systems often err on the side of inclusion (versus exclusion), such systems are more prone to falsely identifying an item as relevant versus a highly calibrated Search-Based system. As additional data is added to the system's training set, this difference in accuracy performance is typically mitigated, with the added benefit of identifying much more of the relevant conversation.

**Best Practice:** For small to medium-size brands that don't expect heavy off-handle engagement volumes, a Search-Based system can be a serviceable, cost-effective solution. However, for brands that expect heavy engagement, particularly off-handle or in communities like forums or blogs, an Analytics-Based system is the best way to ensure comprehensive coverage.

#### 4) Defining the KPIs: Why These Measurements Matter

Defining how social care teams will be measured is critical to success of your social care program. Metrics must be holistic in measuring all aspects of social care program, from data collection to assessing quality of agent responses. KPIs can be grouped into two sections; program related measurements and performance related measurements. Program measurements focus on metrics that will allow management teams to monitor and measure program expectations and Performance metrics will focus on individual agent attributes which are critical to overall program success. Below you will find a selected list of metrics for measuring and monitoring your social care program. Note: Not all metrics apply to all programs.

Social Media Care KPIs		Area	Description
Section 1: Data and Overall Volumes			
1	Inbound Data Volume	Program	Total volume of data collected for the program/ brand
2	Actionable Data Volume	Program	Quantifying volume of data that is actionable (engageable) for the brand under social care swimlanes
3	Actionable Volume %	Program	Percentage of data that is actionable of total collected volume

4	Arrival Pattern for Inbound Volume, Actionable Data	Program	Arrival pattern of data on a 24-hour scale --Broken by overall inbound volume & actionable volume
5	Incoming Data Volume by Site Type	Program	Total volume of inbound data broken by site type- e.g., Facebook ,Twitter, Forums, Q&A sites, etc.
6	Incoming Data Volume by Brand/Product Line	Program	Breakdown of incoming data by brand/product line (if applicable)
7	Unique Customers	Program	Total number of unique customers engaged by asocial media care team
Section 2: Handling of Social Media Care Post			
8	Processed Volume	Program	Volume of data that was touched by social care agents. Could be engaged, rejected or tagged data
9	Total Number of Public Engagements	Program	Total no. of customer engagements that were public
10	Total Number of Private Engagements	Program	Total count of direct messages or private messages
11	Total Number of Indirect Engagements	Program	Total count of indirect engagements, i.e., likes, favorites, pins, shares
12	Number of Proactive Engagements vs. Reactive Engagements	Program	Reactive: Response to @brand mentions, complaints on owned properties; Proactive: Responses to brand-related content on third-party sites (or) content not directed @brand
13	Total number of Rejections with Reason	Program	Total amount of data which not requiring a response (or) rejected by social care team
14	Customer Contact Reasons (Contact Types/Issue Drivers)	Program	Reasons for customers contacting social care
15	Issue Tags	Program	Tagging issues based on brand/product line arriving through social media
16	Trending of Issues	Program	Trending of issues over time
Section 3: Social Care Program Performance			
17	AHT - In Customer Time: Tracked to SLA	Performance	Average time to respond to customers in social media (broken down by site, issue type)
18	AHT - In Program Time: Tracked to SLA	Performance	Average time to respond to customers in social media during program hours (broken down bysite, Issue type)
19	AHT - Escalations/Transfers - Tracked to SLA	Performance	Average time to close cases which were escalated from social media platform to othersources
20	Response Rate	Performance	Percentage breakdown of posts resulting in an engagement out of all actionable data
21	Rejection Rate	Performance	Percentage breakdown of posts rejected by the social care team
22	Engagement: Revenue Tracked to goals	Performance	Total number of posts engaged relating to a revenue opportunity (leads, marketing inquiries,comparisons, etc.)

23	Engagement: Retention Tracked to goals	Performance	Total number of posts engaged relating to a retention opportunity saves (service, warranty, recall, etc.)
24	Total number of cases created by Social care team	Performance	Total number of cases initiated by social care team
25	Total number of cases handled in Social Media	Performance	Total number of cases closed by social care team internally
26	Total number of cases escalated to a different department	Performance	Total number of social media posts escalated to different departments for handling with reasons for escalation
27	Quality	Performance	Overall quality of social media care team responses tracked to business compliance errors, critical errors
28	Backlog	Performance	Total volume of data queued as actionable but untouched by social care team
29	CSAT - Sentiment	Performance	Overall feedback from customers engaged based on replies and actions
Section 4: Performance of Social Care Team			
30	Total Processed - By Agent	Performance	Total number of posts handled by agent (rejected or engaged)
31	Total Engagements - By Agent	Performance	Total number of engagements by the agent (public and private)
32	Total Rejections - By Agent	Performance	Total number of rejections by agent
33	Engagements per hour (post rate per hour)	Performance	Average number of engagements per hour by agent
34	Rejection rate - By Agent (rejections per hour)	Performance	Average number of rejections per hour by agent
35	AHT - By Agent	Performance	Average time spend per post by agent (engagements only)
36	Quality: End-User Errors, Compliance, Critical Errors & Business Critical Errors	Performance	Quality of agent Social Media responses (posts)
37	Case Performance: Creation, Handling, Closed	Performance	Number of cases created, escalated and handled by the social media agent.

*"If possible, when it comes to doing social support make a concerted effort to clearly identify roles and responsibilities between your sales, marketing, and support organizations. As each department moves into the social arena, the possibility of people stepping on toes between departments increases dramatically. If just beginning the social support journey, attempt to identify key stakeholders and create a high level set of processes that can help identify who should be responsible for what."*

-Lucas Peterson, Director of Customer Advocacy, Belkin International



## 5) Hiring and Training Agents

### Hiring

Prior to starting the process of hiring agents, brands need to establish a clear description of responsibilities with required minimum skills and criteria for agents to succeed in their role. Defining a success criteria will allow hiring managers to choose the right personnel that can successfully deliver on expectations of the role and program. Whenever possible, brands should evaluate their current customer service teams to identify agents they can promote. Internal agents will be familiar with company practices and the brand voice. In addition, management should have a strong idea of their writing and customer-facing skills. When hiring outside social media care agents, the key is to look for candidates with strong, customer-centered backgrounds. Experience with large brands is desirable, but also look for boutique experience, as handling each customer or case can be so unique in those settings and require a little more time and effort on the part of the agent.

Social media agents are truly your brand ambassadors, and need to be able to excel in a one-to-many environment. Similar to other customer-facing roles, your agents should be:

- Empathetic
- Personable
- Calm under pressure
- Articulate
- Eager to learn

Candidates who have the skills listed above and a degree that focuses on writing tend to make great social care agents. In addition to writing and journalism, those holding degrees in soft sciences like History, Anthropology and Pre-Law are great potential candidates, since a large portion of those degrees include multiple writing projects.

**Screening:** To get an idea of a candidate's thought process, during the screening process, ask for examples of dealing with a difficult customer. Since the social media agent role requires excellent writing skills, test each candidate with a writing assessment that includes questions in different formats (multiple choice and short answer questions). If the candidate will be required to assist in multiple languages, also include a writing or translating skills test.

### Training

#### **Best practice:** Brand Voice

As with any position, thorough training is key to ensuring a strong, fundamental basis for success. For Social, this training begins by clearly articulating your brand voice. How formal or informal is the brand voice? When interacting with your social team, customers should feel a consistent voice/tone from your team. In order to achieve a clear brand voice, establish examples that clearly demonstrate the tone you are looking for.

#### **Best practice:** Training built on your social media strategy

First and foremost, your social strategy should define the relationship you are looking to achieve with your customers through social and the goals you have for the channel. Your social training should be reflective of your social strategy. This will help to naturally develop rules for when agents should engage, and how they should engage.

**Best Practice:** Social Care agents should thoroughly understand the customer life cycle, and be trained and empowered to handle issues through to completion.



**SUMMARY**

---



# 2018 PREDICTIONS

## SUMMARY AND THE FUTURE PATH OF SOCIAL CARE

# 2018 PREDICTIONS

This paper provides insights into the evolution of program management, along with the best practices for social customer care. Leveraging our team's collective experience, coupled with industry research, this paper provides insights into how SCC is functioning today and provides the operational indicators for program success and management.

While consumers continue to have high expectations from their social service experience -- and most companies struggle to maintain the pace to meet these customer expectations -- the rewards far outweigh the challenges or initial investment required. McKinsey & Co. research reports that solving a customer issues on social media costs nearly one-sixth, compared to a call center interaction (Koller, 2016); and customers spend 20-40% more when companies engage and respond to customers over social media, according to Bain & Company findings (Koller, 2016). There are positives to take away and profits to be made from the investment in social customer service development.

We wanted to conclude with a look to the future. With all of our committee members contributing their thoughts, it's clear that Social Media is a channel with great opportunity. Overall, for 2018, we predict even clearer measurements for the ROI of social media customer care with which to measure cost for resolution compared to more traditional channels. While there may be an increase in self-service options through social, similar to the increase in self-service we're seeing in other channels, it won't completely eliminate the need for human monitoring, moderation and engagement. Above all, best-in-class service should be what you strive for, regardless of channel.



**Janet Poklemba**

Customer Experience Manager  
Cross Country Home Services

"Social Media conversations have earned their spot right next to phone calls, chat and emails, immediately followed by SMS for service. In 2018, brands must embrace a holistic view of customer interaction in order to set the stage for improvements in predictive analytics, automation via bots, and a deeper understanding of consumer preferences for engagement."



**Alyssa Andrews**

Sales/PR  
Fairytale Brownies

"To remain competitive and maintain the pulse of the customer in 2018, it is imperative to be an active listener and engager on social media. Consumers are more than willing to share their buying experience or customer care experience on social channels -- whether good, bad, or indifferent. One bad comment gone viral could cause much damage to a business if left unattended or answered insensitively. Then again, a well-worded tweet, response, etc. by a business could be the key to building loyalty and increasing sales."



**Gina Debogovich**

Head of Social Media Intelligence,  
Devices  
**Amazon**

"Social media is the most pervasive shift in communication in history. It is permeating all aspects of society, from inspiring citizens to organize against governs as in the Arab Spring, to how students learn with communities such as the Khan Academy, to how brands support their customers. There are 3.2 billion internet users worldwide[i]. There are 2.3 billion social media users worldwide[ii]. Social media is the communication format for the 21st century, and a challenge to quantify its impact using 20th century methodologies. However, its effects can be clearly observed in its changes to human life. While equations for the calculations of ROI will continue to be refined, we should look at the ROI of social media as Risk of Irrelevance. Facebook, Twitter, Weibo, etc. are how 2.3 billion people across the world communicate with one another, governments, and brands. Embracing this technology is a clear mandate to participate in social media and to harness the potential it offers. Brands that do not make this shift will become irrelevant, and languish as their consumers find new brands to love."



**Shellie Dow**

VP - Consumer Service, Repairs,  
and Product Testing  
**Nintendo of America**

"When moving customer service conversation from a 1:1 interaction to a 1:many, companies must be aware and ready to address how this changes consumer expectations and impacts the brand. It is a transition that offers many opportunities for organizational growth! By 2018, you'll see many more social channels offering the ability for the consumer to initiate a 1:1 conversation with companies. This will allow for further expansion of the use of social channels for providing customer care."



**Lucas Peterson**

Director of Customer Advocacy  
**Belkin International**

"I feel as though 2018 will really be the year that Social Support begins to come into its own as an official support channel. More and more I am seeing companies step out of the mode where they have been only listening to social chatter, to now engaging."

Also, we seem to be reaching a point where the tools have matured enough to allow companies to engage more effectively across multiple channels, which has been a challenge for anyone monitoring beyond Facebook and Twitter.

I think distilling social support into easily measurable KPIs is still going to be a challenge; however, as more companies begin sharing what has been successful for them, and what has failed spectacularly, we will get closer to that reality."





**Nygel Weishar**

Director - Channel Management,  
Digital & Contact Management  
**CIBC**

"The next evolution in social care will focus heavily on agent enablement and channel containment. One of the biggest detractors during a social engagement is when a client is forced to migrate to a different channel to fulfill their request. In order to overcome this barrier, businesses will need to build more robust/client centric processes, in conjunction with creating social media authentication tools, to support social media agents. These enhancements will drive better experiences for clients and ultimately result in more effective business operations."



**Denise Pullen**

Assistant Director of  
Operations Design & Learning  
Communications  
**Hyatt**

"In my opinion, our number one priority is to care for our customer in the channel of their choosing. This priority need not be measured by ROI, it is just a necessity for brand relevance and brand survival. I feel the future of social care will be vastly improved by partnering with AI, machine learning, natural language processing and other digital disruptions still emerging in the space. In the end, the customer experience is all that matters."



**Jay Wolcott**

VP Social Product  
**Interactions LLC**

"For 2018, I think we will see social become an increasingly important channel for differentiation amongst brands. Those that embrace this medium and drive proactive customer care will reap broader rewards than the individual reply they are handling. This is the channel where consumers spend the most time on a day-to-day basis and those brands that think the opportunity isn't there are only reacting to the consumer that takes the time to knock on their door (or communicate at them)."



Execs In The Know

## ABOUT US

Execs In The Know is a worldwide community of customer experience leaders, across a broad spectrum, focused on working together to improve the customer care industry, and create innovative experiences for their respective brands.

Our largest event, Customer Response Summit, takes place twice a year, uniting executives to create impactful connections and share actionable insights.

# CUSTOMER

ABOUT

---

# EXECS IN THE KNOW



# REFERENCES

- COPC & Execs In The Know. (2017, February 8). Customer Experience Management Benchmark Series 2016 Corporate Edition.
- Facebook. (2017, January 4). The live blog: January 4, 2017. Retrieved from <https://media.fb.com/2017/01/04/the-live-blog-january-4-2017/>.
- Hubspot. (2017, July 19). Messaging apps have over 5B monthly active users. Retrieved from [https://research.hubspot.com/charts/messaging-apps-have-over-4b-monthly-active-users?\\_ga=1.257805385.392874239.1485363398](https://research.hubspot.com/charts/messaging-apps-have-over-4b-monthly-active-users?_ga=1.257805385.392874239.1485363398).
- Hutchinson, M. (2015, August 13). Are you prepared? Gartner predicts 90% of companies will soon use social customer care. Salesforce. Retrieved from <https://www.salesforce.com/blog/2015/08/gartner-provides-insights-social-media.html>.
- Koller, K. (2016, August 4). 20 social customer service stats to show your boss. Sparkcentral. Retrieved from <https://www.sparkcentral.com/blog/20-social-customer-service-stats-roi/>.
- Periscope. (2016, March 28). Year one. Medium. Retrieved from <https://medium.com/periscope/year-one-81c4c625f5bc>.
- Puzzo, D. (2016, October 27). 7 customer service facts that actually add value. Fonolo. Retrieved from <https://fonolo.com/blog/2016/10/7-customer-service-facts-that-actually-add-value/>.