

thinkJar

**LESSONS LEARNED**

***From Silos to Social-  
Blended Multichannel  
Customer Experiences***

*A Seven Step Roadmap for Success*

Created Exclusively for

**eGain<sup>®</sup>**  
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## Introduction

Even before social became an issue for customer service departments, we had other large problems:

- Customer experiences were badly delivered. According to a study done by Bain and Company, 80% of organizations surveyed felt they were doing a great job in delivering good customer experiences. When their customers were asked, to contrast the perception, only 8% agreed (yes, eight – it is not a typo)!
- Customers knew what to expect. Forrester interviewed 4,200 customers and found that between 45 and 70% of them (depending on the industry) expected their customer service interaction to “be complicated.”
- Customers knew what to do. A study from YouGov in the UK concluded that 44% of people who contacted customer service did not really think they would get a resolution. From those, 71% raised their complaint to a government entity.

The advent of the social customer, that marvelous entity concocted by mixing a vociferous customer with social channels, has made matters far worse. Social customers spend 17% of their online time in social networks (surpassing other uses for the first time ever), and have even turned the balance of power in customer service interactions around. They are using the aggregate power of online communities to warn organizations loudly that they are not going to put up with bad service or lack of insight.

The social customer has sent customer-facing organizations worldwide into a frenzy of new initiatives to try to restore balance to the transactions. Society is changing, not just customer service, and expectations for service delivery are changing with it. Organizations are at a loss as to what to do.

The very strong message being sent by pundits so far was “do something”; listening, learning, piloting, and testing new channels and new tools to manage the onslaught of data and (seemingly) irate customers does not seem to have worked well so far. Having spent the last ten to fifteen years in building integrated multichannel contact centers, customer service organizations don’t want to see more silos (or rather new silos) emerge. The memories from the myriad single-channel implementations that plagued customer service are still haunting them.

How can a well-run, effective contact center not be able to deal properly with social channels and new customer requirements?

We reacted to the hype of social networks by throwing caution to the wind and forgetting all the lessons we learned in the past few years. We rushed to deliver single-channel, non-scalable, non-integrated solutions for Twitter, Facebook, and blogs. We simply wanted to be there and showed that we were able to do it, spending time and resources poorly.

It is time to stop and plan, then execute. It is time to figure out the lessons we learned from the early implementations and work on a better model.

It is time for the seven step roadmap to create a socially-blended multichannel customer service.

## Doing Social Customer Service Well in Seven Steps

By studying and learning from existing implementations—both those that did well as those that did not—we were able to compile the lessons they learned, and create recommendations for better implementations. These are lessons learned but they definitely need to be adapted to each organization.

### Step 1 – Recognize the Uniqueness

Let's face it no two organizations are created equal. What works for one does not necessarily work for the other. It is critical to recognize that just because customer service via Twitter works for your competitor does not necessarily mean you can (or have to) do it. Each channel has particular characteristics that make it perfectly suited for one or more actions, and each customer base is equally well suited to conduct some transactions via Twitter—or not.

For example, the model that Comcast uses for providing customer service via Twitter is not very likely to work the same in another organization where the culture or politics do not support a large department providing single-channel support.

Recognizing the uniqueness of each channel and interaction, for each organization, is what will deliver success.

### Step 2 – Recognize the Need and the Demand

Equally important is to understand the business need and customer demand for social channels. Deploying a Facebook page, for example, without a specific strategy or purpose may land an organization in a fate equal or worse than what happened to Nestle on Facebook with Greenpeace.

There must be a specific business need to implement a channel for support: simply because a competitor does it (or some other hipper company does it) is not sufficient. The business needs must be identified in a proper business plan that will follow (optimally) customer demand.

Unfortunately, for most organizations, moving in to support a social channel is not as simple as doing it for other channels. The openness and exposure they gain going in almost always means they will have to stay, no matter how poorly they perform. Worse, if customers don't use it, organizations will have entire departments sitting idly without sufficient volume of work. Taking a decision in response to customer requests without a specific goal or objective is not an effective way to deploy social channels and will almost certainly fail.

The balance between business needs and customer demands is what will drive the strategy, help select the metrics, and focus the implantation.

### Step 3 – Select Appropriate Channels, Actions

Just as with any other channels before them, the social channels do not perform well individually. They may have some value as a standalone in limited conditions (when a customer wants to have a very fast response, for example) but they must be integrated with other media for full context and continuity.

Specific limitations make them poor at resolving issues: Twitter has merely 140 characters to communicate — even if two or three tweets are used, how much information can be conveyed in that short space? All these channels are very public by nature, no sensible information can be used in the open to either confirm identification or solve issues.

The bottom line is that they have their place in the continuum of service, they have a value and a specific set of actions (simple transactions that could've been automated have proven, so far, to be the best to handle via social channels without escalation) for which they work. World class implementations have already figured out the proper workflows and actions to take with social to drive towards a resolution. Today, that resolution is latent escalation of reactive nature. In other words, if contacted through them, we will aim to escalate to a more appropriate channel to conclude business.

Figuring these actions, workflows, and how they apply to each channel and even to each situation is part of the planning process. Just like we were able to determine how to properly staff and train for each channel, and what transactions made more sense through which channel when implementing previous channels in the multichannel deployment, we need to do the same for social channels.

#### Step 4 – Choose the Right Metrics

This was another early lesson from multichannel implementations, but is one that is becoming harder to learn with social channels. Just like it made no sense to measure average handle time or total number of interactions via email, given the latency built into the model, or to not measure concurrent chats for chats (given the flexibility built into that model), it does not make a lot of sense to track the interaction per se in social channels.

For businesses that have lots of social customers, the volume is going to be much, much higher than it is in other channels. The adage of going where the customers are holds true; social customers inhabit social channels and make them their preferred method for expressing their like and dislike of a customer service experience; brands need to capture and act on those. In conversations with clients we uncovered that the volume of social data is between 20 and 100 times more than the current model through all other channels combined. It is not merely about the interactions, it is about the results of those interactions.

Further, there is very little that an organization can do to measure ROI for the social channels—not for the interactions, those are easier to measure, but for the channels. Channels must exist for the organization to become social and move on to become a collaborative enterprise; they have no choice. Thus, the number of interactions to handle is going to be very high, and the cost of handling is going to be, based on early research, lower.

The real metrics for social channels, the ones that matter are going to be about effective delivery, and correlated to KPIs. Yes, it should be the same for other channels—but the volume of social interactions means that it has to be ever so more about that.

Some of the metrics that we have seen used so far, with different levels of success (and in some cases not so much success), are:

- Number of Calls Diverted
- Number of Tickets Created
- Number of Solved Issues or Tickets
- Number of Escalated Tickets or Issues
- Customer Retention (this one is tricky, as most organizations are not even sure how to calculate that—in the cases we have seen it implemented, it referred to churn avoidance more than anything else)
- Number of New Customers Created

In addition, some of the metrics would be used to help prove ROI for marketing and sales initiatives, to strengthen the quality of profiles we keep on customers and prospects, and for being able to better measure operational costs of providing customer service through different channels by understanding the level of true satisfaction and effectiveness of all channels (i.e. a bad telephone experience is going to be discussed on a forum or tweet, not over the phone).

A final note on metrics: Organizations are beginning to shift their metrics and measurement efforts to be cross-channel to reflect the way customers behave. The large majority of interactions occur over two or more channels, when all steps taken to solve a particular issue are counted, those interactions that are not independent of each other should be counted as a single one. The infrastructure and tracking data to do that is a large part of the decision on what metrics to track and what model of measurement to use in customer service going forward, including the use of social channels and their metrics.

### Step 5 – Learn

The absolute bottom line on doing social customer service is that we are just beginning. There is no surefire way to do this. We have some early lessons that we are incorporating in our daily work, but we are also learning as we go along.

The metrics, for example, need a lot of work. We are still looking at social interactions as if they were branding or marketing touchpoints—even if they happen within customer service—and as such we are following the metrics that matter more to marketing or even sales, not those that matter to customer service.

As for integration, we are not even sure yet of how deep or how detailed data- and process-flow and integration needs to be. What else, beyond connecting a Twitter or Facebook ID or handle with the rest of the customer data, do we need to store or record? What do we need to look at to understand who is at the other end of the interaction? How do we know their entitlements and how can we define and follow rules and SLAs over the social networks? All these, and many more, questions remain to be answered.

Learning as you go along will be the best way to bring social networks to work as you need them in your organization. Make sure to document those lessons, use that information as you plan the next steps.

## Step 6 – Plan Whole World Domination

By now you have sufficient information to build a strategy for your organization to take on social channels. Defining a strategy is essential to ensure that your implementation of social customer service fits within the strategy for social CRM, social business, the collaborative enterprise, or any other social strategies at work in your organization. At the same time, laying out a strategy for social customer service and building a social-blended multichannel customer service will ensure that your existing strategy for customer service is updated—as opposed to just taking on a new set of channels.

If your organization already has a methodology in place to create strategies, and you have used it before for bringing another customer service channel to fruition, then you are pretty much set with what you need to do. Just take the information to justify the social channels from the steps outlined above, and start laying out the strategy.

If you don't have a methodology or strategy already in place, the simplest model to use is one I use with clients to get them thinking of what they need to do (see figure x). It is not a complex model, nor is it long—it is just one page and has four topics: Mission, vision, roles, and objectives. If you have never done a strategy, or don't have a methodology, this is what you need to do:

- 1) Write a paragraph that answers the question in each quadrant
- 2) Put it together in narrative form
- 3) Run a gap analysis (what you need versus what you have)—that is your list of projects to do
- 4) Prioritize them based on internal needs and pressures, potential for costs savings and revenue enhancements, and overall fit to the strategy

This method works really well to generate a first-pass strategy and create a list of steps to take.

## Step 7 – Deploy, Monitor, Improve, Iterate

Yes, all of the above.

Once the list of prioritized projects is created and organized, start going down the list and implementing them. One at a time, in small steps. This is the easiest way to see what and how it works, to make corrections and, more importantly, to learn how it will be adopted and embraced in your organization.

The most significant part of deploying is to ensure that the people who use it understand the proper place and importance of the social channels, and how to use them. This may take time. For example, writing sentences limited to 120 characters (as most twitter messages demand after you include the name of the recipient and additional tracking information needed) needs practice.

As you have learned when deploying other channels, user training and change management disciplines you adopt to ensure a coherent end-to-end adoption and use are critical. Don't forget that you are not doing something new and completely different— however, you are doing it faster and you are performing on a public stage.

As you also learned before, the iteration—the repetition of the steps above to grow the strategy and improve the deployment, is what gives the solution its value. The use of small steps is to ensure that both management and users understand the solution, embrace it, and adopt it for the long term.

The real solution will only be deployed over the long run.



## What Should Your Organization Do?

Certainly the seven steps above are a guide on what and how to begin to deploy social customer service in your organization while ensuring that you blend it with your existing multichannel implementation. You don't want to make the same mistakes as you did before, which is why the steps detailed earlier mix what we already knew about multichannel solutions and what we learned via social.

However, the first step always is to make sure there are a need, a want, and a fit for the new channels in the organization. Thus, before doing all of the above, please ensure that:

- 1) Your customers and target markets want it
- 2) The business stakeholders need it
- 3) And there is a fit with corporate strategy

If those three steps are not present, don't bother trying.

During the implementation of the previous channels we saw that some organizations don't necessarily need or can manage a specific channel. Companies that cannot embed latency in their organizational communications cannot use email. Those that cannot interact in realtime with customers have a hard time doing chat. This does not mean it doesn't work—it just means the benefits are not there.

Social channels are the same, please make sure you can use, measure, and manage them within the context of a multichannel solution. Else, it does not mean it won't work—just that you won't get the benefits you think you will.

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