

Social Success: Recommended Responses to the Social Media Opportunity

Future Visions

The Dream

“I have the best job ever!”

Lisa Schon’s pronouncement last night over dinner had caused an awkward pause, interrupting two of her friends who were complaining about work. It seemed like they were competing to see who had the most sadistic boss, the heaviest workload, and the least realistic deadlines. Lisa wasn’t trying to make them feel bad, and she was an empathetic person by nature, but she just had to say it. Today, in her cubicle, looking at her monitor, she smiled and shook her head at her tactlessness. But she still felt the same way: it **was** the best job ever.

Lisa ran social support for SmartBox, a leader in virtualized management solutions for green data centers. Her official title was Manager of Listening and Engagement. She was responsible for SmartBox Social, an active support community where customers shared problems, solutions, tips, ideas, opinions, configuration files, and even multimedia. She also monitored Twitter, Facebook pages, comments on the SmartBox knowledgebase, SmartBox-related blogs and their comments, and a handful of LinkedIn groups. She was always watching for the next new thing, but these channels seemed to be where the important conversations were happening right now.

And it’s all about the conversations, she thought. She had read the research saying that customers trust people like them more than they trust their vendors, even well-intentioned vendors like SmartBox. But honestly, she didn’t need to read the research. She lived it. She skipped through ads on her DVR, she threw away the junk mail that arrived at her house every day, she put her number on the Do Not Call list, and she kept her spam filters updated. If she wanted advice or help, she was going to ask a friend she trusted, or use an Internet search to find what the experts said. She didn’t dare mention it to Raj, the eSupport manager who treated the SmartBox self-service portal like his own precocious child, but she **never** went to a vendor’s support site...unless a trusted contact sent her a specific link.

SmartBox Social was the center of her workday, and she looked through recent posts for interesting news. She quickly skimmed new content, and then slowed down when she came to the new posts from people she was monitoring. Some of these were high-reputation individuals—SmartBoxers, they called them, with the coveted Golden Gloves icon next to their posts. Others were people she was watching and grooming for a SmartBoxer level of contribution. She also tracked the usual suspects: big customers, popular bloggers and other social heavyweights, and people with whom she had engaged for one reason or another—generally to fix an issue that had gathered attention in the social sphere. For example, she read a post from GreenGHZ, a prickly character from London’s Canary Wharf. The bank where he worked was a small customer, but when he wrote an acerbic (and widely retweeted) blog post that mocked an admittedly confusing bit of SmartBox documentation, she posted a comment that redirected him to a relevant, active thread on SmartBox Social. He was asking good questions there, and it looked like he was getting the

answers he wanted, so she made a note to check next week for an updated, more positive, GreenGHz blog entry.

Speaking of blogs, she went to SmartSupport, her boss's blog. He was explaining an unpopular end-of-support decision for an old legacy product. Customers weren't all happy, but many of the comments were from people who pointed out the upside of getting better support for current products. *It's a hard message, but at least we're being upfront, and customers appreciate that*, thought Lisa.

Lisa enjoyed helping people who were having trouble—she was in support, after all—but she enjoyed even more looking at the creative and positive contributions that so many of her customers made. SurfHaxx0r had collated many threads and KB articles into a new “Optimizing MS Exchange on SmartBox” guide that was the hottest download of the week—she hoped his consulting business got a big lift from that. She sent a link to the appropriate product manager and a friend in tech pubs. She knew she didn't even have to mention it to Shari, the KCS program manager—she kept up with what was hot in the forums, too.

In the “Off Topic” section, IT-QT posted a silly parody video showing an irate Hitler complaining about a competitor's product. It wasn't all *that* funny, and Lisa couldn't officially condone it, of course, but people seemed to be enjoying it, and celebrating their shared connection to SmartBox. To her, that seemed more valuable than the stuffy ads the competitor had posted in airports.

A notice on her screen reminded her that she needed to dial in to some upcoming meetings. First was the Voice of the Customer (VoC) committee, which included colleagues from marketing communications, PR, product marketing, product management, and engineering. It was a marketing-heavy organization, and she was pleased that they increasingly turned to her to get (as they put it) the “real scoop.” She had heard rumblings in the customer base about a new offer their competitor was bringing to market, and she wanted to make sure she ran that up the flagpole. As a matter of fact, their meetings had really gained momentum after a similar competitive threat had been discovered late last year. Quick action was taken, deals were saved, and since then the CEO had started taking a personal interest in the findings of the VoC committee. It was kind of scary, but also exciting.

There was more good work being done because of the VoC initiative: product management was defining a major new feature suggested in the SmartBox Social ideation site, a place where customers could suggest and vote on product ideas. In fact, product management had been proposing this feature for years, but it was always shot down by development as “useless in the real world.” Fortunately for product management, it turned out that the customers disagreed.

After the VoC, she was meeting with the customer experience team to discuss how to better integrate their Facebook, Twitter, and LinkedIn presences with SmartBox Social and the assisted support channels. *We need to use our influence in the social networks to make sure the best way for customers to get help is also the easiest and most natural way for them to get help*, she jotted down in her notebook. It was going to be a great afternoon.

She dialed in to her meeting before noticing the all-hands message that came in from the CEO, announcing record profits this quarter and big profit-sharing payouts for the entire company. When she checked her email that afternoon, she'd have a very pleasant surprise.

The Nightmare

What a day. Jason Angstrom put his head down in his palms, ran his fingers through his thinning hair, and looked back up at the screen. He had just escaped a support strategy meeting with the other operational managers, and he wanted the last two hours of his life back.

It had started when he mentioned a recent Twitterstorm that had sprung up about one of their products, the Virtualeer OpsConsole. OpsConsole was now over five years old, an eternity in the sustainable virtualized datacenter market that Virtualeer had pioneered. OpsConsole had been their first flagship product, and it had a huge installed base, but it had been end-of-lived two years ago, and they had quietly started sending end-of-support notices and special crossgrade offers to OpsConsole customers. “Let’s not do a big press release or anything,” said Kari Johnson, VP of Support. “We don’t want to spook the customers, and we want to give our sales team the advantage of surprise when they visit their strategic accounts—that’ll make it easier for them to migrate our customers to our current XCon platform, and make a nice commission in the process. Everyone wins.”

Jason had started to mention that it was hard to keep things like this quiet nowadays, but stopped quickly when it became clear that other people in the room thought he was talking nonsense—or even threatening to leak the bad news to the press himself. He quickly backed off.

But customers hadn’t. The first week that the “quiet” notifications were supposed to be taking place, two customers tweeted their anger with “#Virtualeer #FAIL” hashtags. Other customers picked up on it, retweeted the message, and posted long rants in a LinkedIn group used by OpsConsole customers. Now the calls had started coming in to the account managers—and the VP of Sales wasn’t happy. Salespeople always seemed to learn about stuff after the customers did from one public site or another. Since the VP of Sales wasn’t happy, that meant that Kari wasn’t happy either.

“What’s with all the twitting?” railed Kari. Jason wasn’t sure if the “twit” part was scorn or simply ignorance, but decided to leave it alone. “Well,” explained Jason, “as I mentioned last week...”

“Don’t these people HAVE A LIFE? Don’t they have HOMES TO GO TO? Jobs? If they worked for me, and they spent all their time playing Facebook Farm Wars and spreading rumors instead of doing their work, I tell you it would be a short trip to the unemployment line.

“Besides,” continued Kari, on a roll, “what on earth are they doing talking to each other anyhow? Don’t they know they compete with each other? Sharing their vendor issues online just isn’t smart. I’m so glad we established the policy that our customer forums are for marketing only...we don’t need dummies like these customers sticking their fingers into each others’ problems. Can you imagine our legal liability? That’s why it’s so important to remember our mission statement.”

Winding down a bit, Kari pointed to the poster, a copy of which was on most walls of the support area. It read, *Customers Pay Us To Know Our Products and Solve Their Problems.*

Twitter had been a hot issue for Kari since the CEO had read about the Comcast Cares initiative in an airplane in-flight magazine. He told her to staff a team looking for support issues in Twitter and other social media spaces, which she reluctantly did. Surprisingly, working on this team was considered a pretty soft job because Kari didn’t establish any

metrics to track. Also the team got to work from home, because IT had long-ago blocked Twitter, Facebook, LinkedIn, and other social sites inside the Virtualeer firewall. Anyhow, there wasn't much they could do for customers anyhow, other than tell them to open a case, so it wasn't clear how much good it was doing for anyone. But the PR group was pitching stories about the Virtualeer Victorious initiative, so the CEO liked that.

Although it wasn't really part of his job as a support manager, Jason tried to keep abreast of what was happening in social media. He periodically went to the coffee shop across the street, got on the free wireless, and checked the LinkedIn groups where their customers were most likely to be talking about Visioneer and their competitors, like the up-and-coming SmartBox. He also checked out a couple of blogs that his colleagues were writing—although definitely not on Visioneer.com, and with big disclaimers about how they didn't speak for the company. He had another colleague, Jorge, who used to blog, but gave it up after an uncomfortable meeting with HR and Legal about one of his posts that implied morale was low. "It's just not worth the risk, they convinced me," Jorge shrugged.

He also checked out the forums and Facebook pages Marketing ran. He noticed that customers tried to post how-tos and support questions, but as Kari said, those were moderated out immediately after being posted. It seemed like what was left was mostly links to press releases and "special offers." Jason wasn't an expert, but it seemed like a missed opportunity to him. *I guess you have to protect the brand, though.*

He went back to his email, and a message from the CEO caught his eye. The subject was Workforce Realignment. *Uh-oh.* "In these challenging economic times, Visioneer needs to continue to invest to maintain leadership in the market by focusing scarce resources on the core business—that which differentiates us in the market. Obviously, sales, marketing, and development are those core businesses. In order to maintain industry-leading customer satisfaction while managing costs aggressively, we have decided to partner with ConvergedStream, a leader in outsourced technical support and customer service. Affected employees who are willing to move to their centers in North Dakota or Nova Scotia are welcome to apply for their former jobs within their new salary bands. We appreciate your years of dedicated service to Visioneer."

Jason's head dropped again. A few seconds later, he lifted up slowly, picked up the phone, and called his friend at SmartBox.

"Lisa? Hi, it's Jason. You know that position you had open? Right...the one working on social media for support?"

Background

In Summer and Fall of 2010, members of the Consortium for Service Innovation, a not-for-profit alliance of organizations focused on advancing the state of the art in customer interactions, held a series of meetings to discuss the emergence of social media and its implications for customer service and support.

“Is social a threat or an opportunity?” was the first issue the team addressed. The consensus quickly emerged: social media presents a tremendous opportunity—if embraced. Because it represents a change from the status quo, social becomes a threat only if ignored.

While there was widespread agreement that social media was an opportunity, members presented a very diverse set of experiences and opinions on how best to seize the opportunity. The team organized its work in three areas:

- What is the best *near-term response* to the opportunity?
- What is the right *long-term strategy* for social support?
- What *organizational transformations* will be required in the long term, and how can we enable them?

This paper is the team’s answer to the first question. Although specific tactics and actions will vary from company to company, we have created a framework that Consortium members and other companies in the industry can use to define a near-term social support strategy and tailor it for their specific business model, customer set, and industry.

The Opportunity

At first blush, social media appears to threaten our ability to control our brand, manage a consistent customer experience, and satisfy customers. But examined more carefully, social can be used to create a vibrant brand, tap in to a groundswell of knowledge and trust, and scale to increasing customer demand.

Social Supports The Brand

“We live in a world where the little things really do matter. Each encounter, no matter how brief, is a micro-interaction which makes a deposit or withdrawal from our rational and emotional subconscious. The sum of these interactions and encounters adds up to how we feel about a particular product, brand or service.”

David Armano

“For marketers, the end goal changes from creating brand awareness to satisfying customers.”

Regis McKenna

Social media can transform a brand from a static logo into to a living community of advocates. Even traditional marketers like Regis McKenna now acknowledge the importance of the post-sales experience in developing the brand.

When customers help each other in social support, they not only get more value from their product or service; they also become part of a mutually beneficial community that is built around that product or service. Customers like products that work, but they’re loyal to the communities of which they are a part, and by extension, to the product or service served by that community.

It may be just small things—a helpful tip from a fellow customer here, or a rapid, unexpected response to a tweet there—but as David Armano says, little things matter. It’s impossible to imagine the strength of the Harley-Davidson brand without also remembering the bond that riders share as part of the Harley Owners Group (H.O.G.) Similarly, communities of customers brought together with new social technologies strengthen the brands they support.

There’s More Knowledge Outside Your Organization than Inside

“Innovation must extend beyond the boundaries of the firm to the very edges of the Web, where companies will engage with customers and a dynamic network of external collaborators.”

Don Tapscott

“83%.”

Forrester Research, reporting the percentage of people who trust the “opinion of a friend or acquaintance who has used the product or service,” a source more trusted than “known experts” or “information on the company’s website.”

Traditionally, support organizations have thought of themselves as the ultimate experts in how to use their products and services—second only to the product development team, if anyone. Yet a careful look at the caseload of most support organizations shows that the majority of the questions aren’t product issues per se, but rather customer and usage issues. Customers, both business and consumer, don’t want to know what the menu items do; they want to know how to accomplish their goals: listening to music stored on another MP3 player, securing a network against malware, or optimizing the efficiency of their power plant. That’s why users’ unwillingness to “read the [darn] manual” has become a joke in our industry: manuals are full of product knowledge, but rarely have practical knowledge.

Certainly, support organizations gather practical knowledge in the course of helping customers, and Knowledge-Centered Support (KCSSM) can help gather and share that information. But in many cases, other customers are the real experts: they (unlike most support professionals) have extensive real-world experience with our products.

This shouldn’t cause us to throw up our hands and give up. As support organizations, we should work hard to be a trusted source, and we should make the case to our customers about our unique value proposition. We must never abdicate our responsibility as customer advocates. But we should recognize the power of collaboration.

Social support technologies that allow customers to tap into this deep mine of external expertise will do a better job resolving issues, answering questions, and creating value for the users of our products and services. They’ll also enable trust.

Social Scales

“87.5%.”

ServiceXRG, estimating the percentage of support that is delivered through “Social Networking,” rather than Vendor Self-Service or Vendor Assisted-Service

Because social channels engage so many people so quickly, they expose an unprecedented demand for support. There is no practical way for the traditional support organization to scale to this demand, which may be orders of magnitude higher than their traditional assisted service processes can address.

Fortunately, the challenge contains its own resolution: not only does the demand scale, the response scales, too. Thousands or tens of thousands of users are willing—even eager—to help their fellow community members.

In short, the only way to deal with social...is socially.

The Challenges of Social

Support organizations have dealt with an unending string of challenges in the past: increasingly demanding customers, increasing product complexity, multivendor issues, budget constraints—all of these have made the job of delivering loyalty- and brand-building service difficult.

But social presents a different kind of challenge: one that requires a more systematic change in thinking and a more structured response. In discussion, Consortium members agreed that three characteristics of social media presented fundamental challenges to business-as-usual in support: volume, visibility, and velocity.

Volume

As of this whitepaper's writing, Facebook has 500 million users, over 50% of whom log in on any given day. People spend over 700 billion minutes per month on Facebook. On Twitter, users average 600 tweets per second—50 million tweets per day. The video customer service complaint “United Breaks Guitars” is approaching 10 million views on YouTube. In social, things get big very quickly—especially as compared with the caseloads most support organizations manage.

In the face of the overwhelming volume that can be created by social, organizations need to decide where to focus their attention. For all but the smallest companies, tracking down every unhappy tweet or forum complaint just isn't possible. And, while the promise of “voice of the customer” programs is high, the reality is that we simply can't listen to, or meaningfully process the feedback, product ideas, and helpful suggestions that customers share socially 24 x 7. And we certainly can't apply traditional case management processes to social demand.

Visibility

In the social world, support happens in public. An old saying reminds us that “a happy customer tells a friend; an unhappy customer tells the world.” Through most of human history, this was hyperbole; today, it's literal truth. “Dell Hell,” a series of vituperative and influential posts on Jeff Jarvis's BuzzMachine blog in 2005, was, for a time, the top Google response to the query “Dell.” Another old saying is “never argue with a man who buys ink by the barrel.” In the social world, customers who have taken the time to build up their online reputations have an effectively unlimited supply of virtual ink. Mistakes and mishandled customers can come back to haunt us—adding stress to the already stressful job of support.

Support policies are sometimes created not to help customers, but to protect companies from competitors and liabilities. Consortium members occasionally lament that they're not able to share knowledge that customers would find valuable because of concerns that competitors' salespeople would highlight problems in the sales cycle, or customers would be notified about problems that don't affect them directly, requiring expensive and unnecessary repairs or replacements. In the social world, however, there's little chance of keeping potentially damaging or embarrassing information under wraps: once you've told

one customer, you may well have told the world. Although it's an inevitable consequence of our socially connected world, this transparency effect can make social media extremely unpopular with Legal, Marketing, and others who wish to "control the message."

Another challenge with the hyper-visibility of social content is dealing with user submissions that are erroneous or inappropriate. The hope is that the very visibility of harmful or inaccurate content will help neutralize it, as other community members pile on to correct and caveat—"sunshine is the best disinfectant." But inappropriate content can be harder to self-police. Spam can't be "corrected;" just being there, it reduces the signal-to-noise ratio and accomplishes harm, although community flagging mechanisms can reduce the damage it does. Offensive speech and images are even more difficult to manage, especially as cultural and legal standards vary dramatically from region to region. Some organizations avoid moderation of content, relying on "common carrier" standards to keep them from legal liability. Others, like Consortium member Yahoo!, feel that a safe environment is a core part of their value proposition, and invest accordingly in abuse moderation. Either way, because social media environments are new and pseudo-anonymous, social norms aren't well established and are difficult to enforce.

Velocity

The third challenge presented by social is that it's fast. It only takes a click to share, retweet, or blog about a knowledgebase article, a company blog post, a complaint, or a cry for help. The words "twitterstorm" or "socialstorm" are apt: by the time a company notices that there's a problem, it's likely to be a very big and very public problem.

With traditional support cases, vendors are able to set contractual service level agreements (SLAs), perhaps promising different response times for different support tiers or for incidents of different severity. In the social world, there is no SLA; there's only the customer's expectation, and they expect the same immediacy they have with their friends. The more wired in to social media a customer is, thus the more influential she is, the more her expectations will have been set for near-real-time responses. Big companies, with their command and control infrastructures, PR spin doctors, and legal reviews don't do "fast" very well.

Ironically, by attempting to manage risk, companies place themselves at risk of further damage in social channels. Consider the case of Nestle, a large global company with sometimes-controversial business practices. When Greenpeace launched a well-coordinated social media attack against specific Nestle practices in early 2010, including a viral video, Nestle's response was at first too slow, then too defensive. Nestle initially tried to track down and remove all copies of the video on the Internet, but came to learn that removing provocative information from the Internet is impossible. They retreated into an adversarial role, threatening even supporters on their Facebook page to stop using the Nestle logo. Rather than being part of the discussion, they attempted to squelch it—but the conversation moved too quickly for them to stop. In the final analysis, they found that traditional damage control tactics aren't nimble enough for the social web.

The Strategy for Social Support

Before starting to tweet and ideate, it's important to understand the context in which social media will be used in your support organization.

- ***What's the strategy for support overall?*** If your support organization differentiates itself by providing white-glove service to a small number of entitled and highly-profitable customers, then hiring an intern to answer Twitter direct messages on an ad-hoc basis is probably a poor plan. On the other hand, if you're looking for a low-cost way to engage students with your product, even if they're not yet entitled customers, social network outposts and communities can provide a low-cost, familiar path for help. In any event, your social support should complement and align with your overall support strategy.
- ***Where are you in the support maturity continuum?*** The Consortium has defined maturity levels for organizations adopting Knowledge-Centered Support and Adaptive Organization principles—a series of levels from “A” (emerging) to “E” (proficient.) Engaging effectively with social requires a mature foundation in case management, knowledge management, and customer engagement. Companies closer to the “A” end of the continuum should probably work on the basics, first.
- ***Harness the power of social for social.*** When social support is just another one-to-one support delivery model—for example, allowing customers to request service through Twitter private messages—then it loses its power to address volume. The most effective social engagement models are those where many can contribute, and many can benefit—such as collaboratively edited knowledge, ideation sites, or support communities.
- ***Understand what's happening in the rest of the company.*** Other groups within the company, especially marketing communications, have likely launched some initiatives to engage with social media. It's important to conduct a Social Inventory to find out what other groups are doing, decide how you want to partner, and coordinate to keep a consistent face to the public. For example, if the marketing team is overwhelmed with support requests coming from those who “like” its Facebook page, tell them your strategy for dealing with social outposts so they can advise customers appropriately and guide them to the most appropriate way of getting help.

Just as the Consortium has defined KCS as a Double Loop process, we have developed the social support strategy as a Three-Loop process. The A-Loop concerns itself with how we listen to and engage with individuals, the B-Loop focuses on the collective voice of the community, and the C-Loop explains how we learn from, and improve, the A- and the B-Loops.

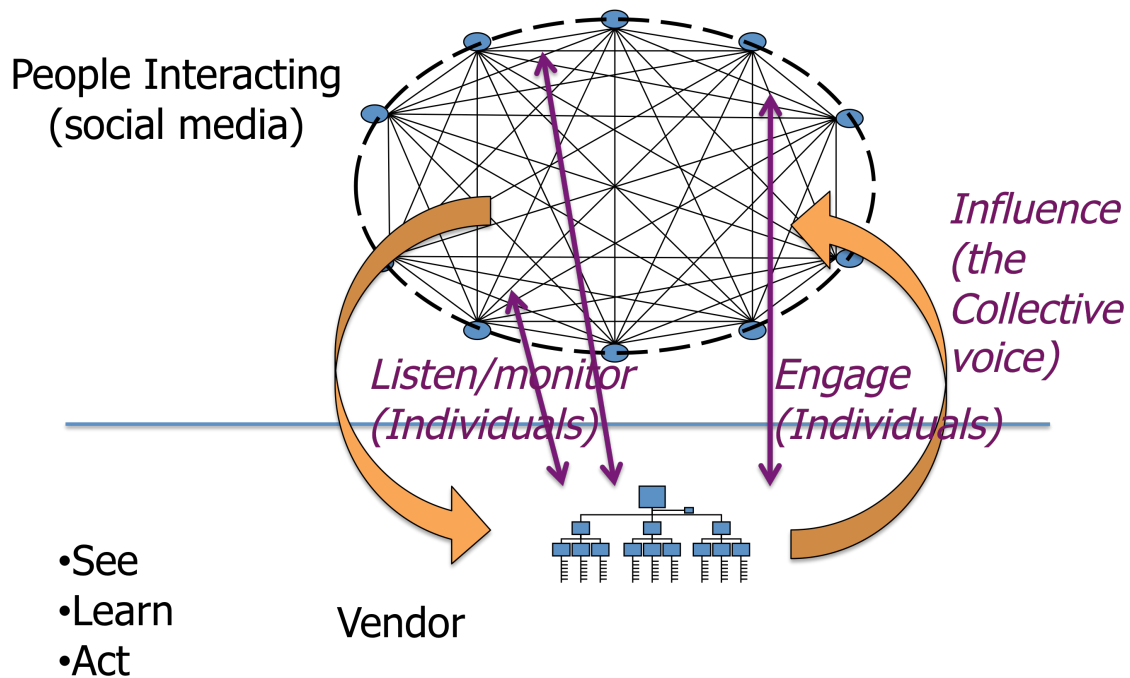


Figure 1: *The Social Strategy*

The Social A-Loop: Engaging with Individuals

Criteria

Social media allows companies to listen to, and engage with, their customers. But, in most cases, they can't engage with them all. How should companies decide which customers to pay attention to?

- **Customer segmentation.** The old rules still apply: money talks. Most companies segment customers by value. B2C companies segment customers by loyalty tier, average revenue (ARPU), repurchase rates, or other proxies for lifetime customer value. B2B companies segment customers by total contract value or by explicit support tier (e.g., Platinum vs. Silver). Internet companies may focus on time on site or page views. In any event, high-value customers should be listened to and helped more than others.
- **Social reach.** "It's not just what you know; it's who you know." Measures of reach or influence provide a sense of the impact a social participant will have. The more followers, friends, connections, or subscribers a customer has, and the more connections those connections have, the more they may be presumed to speak for other customers, and the more their experiences will be amplified through the market. Pay special attention to highly connected customers.
- **Social reputation.** Measures of social reputation (such as Klout for Twitter) are emerging, and will provide an increasingly precise measure of the influence of individual customers. These measures will complement and extend raw reach numbers with measures of the quality and depth of the connections.

The art is to combine customer value and social influence in a way that reflects the dynamics of your market. For example, a B2C or Internet company may find social influence paramount—Jeff Jarvis may not have bought many computers, but he ended up being critically important to Dell. Conversely, a boutique engineering firm with only a handful of specialized customers in its target market may choose to focus almost exclusively on its strategic customers. See Figure 2.

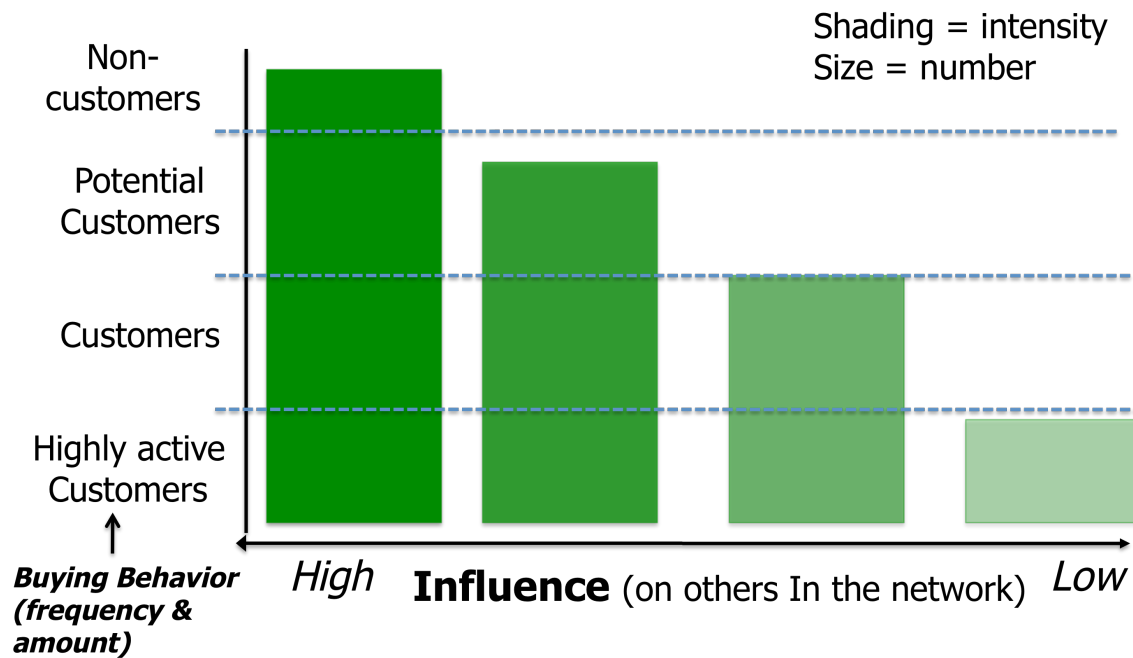


Figure 2: Whom Do We Care About?

Listen, Monitor, and Engage

Once a company has decided whom to track, there are a number of specific listening programs that Consortium members have found to be effective.

- **Proactive Programs (e.g., “MVPs”).** In companies with active social support communities, it’s good practice to identify and recognize high-value contributors. These contributors are generically called MVPs, after Microsoft’s Most Valuable Professional program. MVP selection has typically been made on the basis of pure technical contribution, but should also consider social reach and reputation. These MVPs typically have priority access to support—for example, Novell provides private forums for their Novell Knowledge Partners, staffed by senior engineers. At Novell, Knowledge Partners can also submit defects directly to the bug tracking system, creating a listening post for product issues. They also have other specific opportunities to provide input, such as annual in-person meetings, customer advisory board sessions, and “meet the product team” events. Proactive MVP programs are the most common and proven way of monitoring individuals.
- **Reactive Programs.** When an important or influential customer starts raising a ruckus on social networks, it’s important to be able to take action. The first step is being able to monitor the community at large to find the people who need

(and warrant) help—those processes are described below. Having identified a candidate, organizations will use their criteria to determine if they should take action. Action may include:

- **Social 911.** Using a phrase coined by Yahoo!, some influencers can be handled by “dropping in rescue swimmers,” or moving select social issues into a more formal case management or even escalation process. In effect, Social 911 opens a high-severity case on the customer’s behalf.
- **Entitled escalation.** If entitled customers or influencers are not getting answers in the community, a time-based trigger might automatically open a support case for them. This reinforces their behavior of trying the community first, while providing a safety net that gives them confidence they’ll get the help they need.
- **Bring them in to the fold.** As pioneered by Consortium member Symantec, frustrated customers can be contacted and pointed to more productive social channels—instead of broadcasting #fail tweets, which is unlikely to get them the help they need, they can be steered towards functioning communities where their complaints will get a sympathetic ear and—hopefully—useful responses from other community members. By bringing disaffected customers into the community, the support organization accomplishes several things: it stops the public bashing; it shows trust and respect for the community; it gets help to people who need it; and it adds knowledgeable (if currently disaffected) people into the group. It does this in a way that acknowledges the criticism without being defensive, settling the complainer among company advocates in the community.
- **Post-Engagement Monitoring.** There’s no point in sending in rescue swimmers if the paramedics aren’t waiting on the shore. Once engagement has started with an individual, organizations should follow their blogs, their twitterstreams, the community postings, in order to make sure things are improving. Check in with them as appropriate. This accomplishes two goals: one, it makes them know you care about their success; and two, it subtly reminds them that it might be appropriate to be as unsparing with their thanks for the service recovery as they were with their complaints about the original problem.

Cautions

The Consortium’s discussion of social media highlighted three cautions that organizations should keep in mind when listening to, monitoring, and engaging individuals.

1. **Don’t teach people to treat you badly.** The airlines were early on the social media bandwagon, and made a point of sending upgrades and coupons to any frustrated traveler who happened to tweet about a bad experience in an airport. Business travelers, an astute group, quickly learned to complain early and often, in order to get more goodies from the airlines. In effect, the airline’s well-intentioned actions increased travelers’ already ample motivation to bash the carriers in public. Organizations considering Social 911 must keep the airlines’ lessons in mind: engagement should be the exception, not the rule, and those who are handled

socially because of a public issue should not expect better treatment than those who go through the preferred, official case management process.

2. ***Don't focus on the cool instead of the essential.*** Comcast Cares is widely cited as a social media success story, putting a friendly face on a company in an industry, cable service, that isn't typically known for good customer service. But is it a success? Comcast continues to increase staffing for the Comcast Cares social channel, yet the fundamental gripes about poor service, long waits for onsite visits, and inconsistent pricing remain. Perhaps the money and management attention would have been better spent fixing the fundamental issues? A TechCrunch editor noted, "As a very unhappy Comcast customer, I've had a number of interactions with Comcast's Twitter team. There's no doubt, they are very responsive, and are trying to be helpful. The real problem Comcast has is that their product and all other forms of service are simply not up to par, to put it nicely (I often put it much less nicely on Twitter)." Get the product and service at a minimum acceptable level, and then you'll have the right to "care."
3. ***Don't create a new channel.*** Most organizations have thoughtfully put together a channel strategy. Should social media, willy-nilly, create a parallel channel strategy? Avoid treating social as just another channel to integrate—remember, social is powerful when it's many-to-many, and channels are intrinsically one-to-one.

The Social B-Loop: Harnessing the Collective Voice

The social sphere isn't just a collection of individuals—it's a community that has characteristics of its own, such as sentiment, responsiveness, and liveliness. In the social success B-Loop, support organizations need to listen to, monitor, and influence the community as a whole.

Listen and Monitor

Some social communities are generally positive about the product or service around which they're built; others take a more pessimistic view. Some are emotionally engaged; others are all business. Some are casual; others are buttoned down. All of these characteristics—especially when they change—can provide useful input for the entire company, starting with the support organization.

Social sentiment analysis can be done subjectively or anecdotally just as Lisa did in the story above—by skimming communities and groups, and by searching through Twitter and Facebook. There are also text mining tools that can apply more systematic algorithms to large volumes of data—although automated text understanding is still a relatively immature technology, it may be the only option for very large social data sets.

The volume of activity is another indicator of the level of engagement with social support. The number of registered users of a community, the number of tweets and direct messages, the blogs covering relevant topics, the number of posts and the average number of responses all can shed light on how big an impact the social sphere is having on its participants. Although it is hard to measure precisely, if social engagement is trending up while contact rates are trending down, it's a indicator that suggests that social support is preventing or pre-empting low-value contacts to the traditional assisted support center.

There are emerging indices that attempt to correlate activity with community health. For example, Dr. Michael Wu of Lithium presented his approach to measuring community

health that combines metrics for growth, utility, popularity, responsiveness, interactivity, and what he calls “liveliness” into a single index for rapid evaluation. We believe that this model and others like it will develop into highly workable indicators that will be appropriate to apply across the social landscape for a particular product or service.

In addition to the opportunities for pure social engagement, monitoring the community and its writings can provide highly valuable information for the knowledgebase. Astute organizations look to harvest and repurpose content from influential blogs, MVP-provided answers, and high-severity community threads. To revise an old KCS phrase, “collaboration is creation.”

Influence

The most potent tool for shaping behavior is making it visible to others. Accordingly, support organizations that wish to influence what their social communities do must build their desired behavior into a reputation model. Ebay wants participants who conduct business honestly and fairly, so they let buyers rate sellers and vice versa. Newegg wants buyers of confusing, ever-changing computer components to feel as confident as possible in their purchases, so they integrate reviews and ratings into the entire shopping and checkout process. Support communities that want active, responsive participants who ask good questions, provide good answers, and share content will reward those behaviors with high reputation ratings, too.

Reputation can come from:

- Volume of activity
- Confirmation that your answers answered questions
- Number of times your content was reused (like KCS Citations)
- Ratings on content you’ve provided
- Organizational assessment of your value and contributions.

In addition to reputation, organizations can influence good behavior by the community at large by their own active, respectful participation in the community—in effect, by modeling the behavior they want to see. A few approaches they can take include:

- ***Support community ambassadors.*** Support organizations that seek to drive adoption of customer support communities can seed them with company employees who track, monitor, and respond to issues. To be effective in influencing the community, these representatives should be marketed, as Google effectively markets its “Google Guides.” These staff should complement MVPs, if possible, including providing back-line support to them.
- ***MVPs***, as mentioned in the A-Loop section above, also influence the social community by modeling productive behavior and setting community norms.
- ***Support blogs*** are a great way of sharing information with the community, especially dealing with a controversial issue or providing application-specific how-to information. Dedicated customers will likely subscribe to support blogs, staying constantly updated and engaged. Another virtue of support blogs is that they generally rank higher in search engine results than do traditional knowledge base articles, meaning that the casual user on an Internet portal will have a better chance finding them. Also, while blogs start out as one-to-many,

the comments section of an active blog will often turn into a real discussion. Blogs should be provided through RSS, Twitter, Facebook, and the LinkedIn profile of the blog's author.

- Social networking outposts—identities on Twitter and pages on Facebook—provide a place for people to find help. (They also defuse competitors or detractors who may attempt to take a name like yours for malicious purposes.)
- Ideation sites, or “IdeaStorms,” are a way to solicit input from customers on new ideas and on other customers’ ideas. While only the most engaged customers typically participate in ideation, when their ideas are acted on it gives them the strongest possible motivation to buy—after all, it was their idea! One word of caution: be prepared to act on ideas, whether they’re ones you like or not. When Dell’s customers told them that their number one priority was to be able to buy a computer without Windows but with Linux, Dell had many legitimate business reasons to say “thanks for the idea, but...no.” To Dell’s credit, they took their customers’ advice, building gratitude, loyalty, and further engagement in ideation.

Moderation of all social channels is an important enabler of positive engagement because it creates a safe, high signal-to-noise environment for participation. CAPTCHAs or logins should be required for community members to reduce spam, and community flagging mechanisms can be used to reduce the damage caused by the unsolicited or unsavory messages that do get through.

Moderators, aided by filtering technology, should eliminate threatening, obscene, unlawful, and hate content. However, they should take as light a touch as possible when the topics are simply undesirable or unflattering to the company. It’s far better for other community members to step up and set the record straight for an ill-informed flamer, than for the company to delete the content or block the sender. And if other community members agree there’s a problem...there likely is one. Your customers have now given you excellent ammunition to take to the rest of the company to take action.

In all dealings with the community, the company should act with great transparency and respect:

- Always identify employees or agents as such
- Only post what is known to be true
- Disclaim when opinions are those of an individual employee, not of the company
- Speak in a natural, human voice, not in corporate legalese
- Never engage customers or other participants in arguments
- Don’t disparage competitors or other community members.

The Social C-Loop: Improving the A-Loop and B-Loop

In addition to being an excellent new resource for monitoring and engaging customers, social media provides new opportunities for organizations to learn and improve.

Learning

Enterprises are becoming especially mindful of the importance of the “voice of the customer.” VoC initiatives, whether sponsored by marketing or service and support, are increasingly common in the corporate world: customer experience analyst Bruce Temkin

reports that 57% of enterprises have a formalized VoC program, and almost everyone has informal programs in place. Yet Temkin also notes that only 22% of VoC programs use social media—this is a missed opportunity. If you want the voice of the customer, go to where the customers are speaking freely.

Follow the lead of Jeff Bezos and Amazon, who gave his customer service organization the mission to “tell me one interesting thing you learn from our customers every week.” Plan on a weekly memo to the executive team sharing an insight from a customer review, a blog, a tweet, or forum posting—anywhere people are sharing information. It could be an unexpected way the product is being used, a formerly unexpressed need or desire, a partner problem, a nagging issue that could be easily fixed—anything. For better or worse, when we say it, we’re often seen as “those Support people again,” but the customer’s words are taken seriously.

Another form of learning that has already been mentioned is harvesting knowledge from social support media into a more formal knowledgebase. Remember to acknowledge the contributions of those who participated in the original discussion, and close the loop with them to let them know you appreciate it. The fact that you’re making their content “famous,” with attribution, is a great motivator for ongoing contribution.

It’s also useful to periodically do an after-action review of select Social 911 engagements. A key motivator for the meetings that led to this paper, for example, was a case study of a Yahoo! Social 911 interaction with a customer called “Piper of love,” which generated considerable questions and excitement.

In these Social 911 after-action reviews, describe the outcome, compare that outcome with the likely outcome if no intervention had been taken, determine what (if anything) could have been done better, and whether this was an appropriate intervention. Based on the answers to those questions, the criteria for action, or the procedure used, can be continuously improved.

Measuring

Measurement provides us the information needed to understand and improve the value created in social support.

The Consortium’s measurement models, including this one, are based on a balanced scorecard of metrics—a scorecard that tracks trends in activities, sets goals on business outcomes, and monitors and improves quality. The existence of social support doesn’t generally change desired business outcomes, so this paper will present only measures of activity and quality.

Activities

Generally speaking, we look for increasing levels of activity over time. Differences between groups, products, or comparable companies might prompt investigation. Organizations shouldn’t put goals on activity measures; they’re for learning and improvement.

- ***Numbers of participants.*** This can be measured by the number of registered users in environments where users must log in, or by unique users (UUs) in environments where anonymous users participate. In environments with registered users, these can be further segmented into “active” users (those who have logged in recently) and “contributing” users (those who add content or

interaction to the environment). Of course, “participants” will be defined in a way that is appropriate for each medium, e.g., followers on Twitter, people who “like” your page on Facebook, members in LinkedIn groups, and so on.

- **Amount of participation.** Page views, posts, messages, threads, responses, comments—depending on the medium, different quanta of activity make the most sense to measure. Generally speaking, though, this is a reflection of the number of times that individuals take action or make contributions to the community.
- **Exceptions.** From a voice of the customer perspective, we’re attempting to count the number of issues reported in the customer experience. For example, for a company with a product called The Gidget, the number of exceptions on Twitter might be the number of posts that contain the hashtags “#gidget #fail” or “#gidgetfail.” Negative reviews on Amazon are another example of a customer exception that can be counted. (Obviously, this is an activity where more isn’t better.)
- **Engagements / interventions.** How many Social 911 interventions were taken? Engagements can be further segmented by the level of engagement—if Comcast Cares sends a simple apologetic note, or waives a \$10 fee, that’s a very different type of engagement than a truck roll on Super Bowl Sunday.
- **Social resolutions.** If each intervention is the analog of an opened case, social resolutions are the equivalent of closed cases—occasions in which social requests for help resulted in a confirmed fix. While most support cases are closed, a smaller percentage of social interventions will be successful.
- **Knowledge repurposed.** How many knowledgebase articles were added based on information harvested from social channels?
- **Ideas implemented / feedback acted upon.** Customers will suggest product and service ideas through ideation sites, on communities, and in special customer advisory boards comprising high-reputation social participants. Additionally, knowledge domain experts or knowledge management teams will often track how many customer-suggested improvements they have made in their knowledge.

Quality

Measures of quality provide balance and context to activity measures, making sure that the activities are focused on the right business outcomes.

- **Ratings and feedback.** The social world is designed for rapid feedback. Sometimes feedback is built in to systems (for example, Facebook’s “like” button, retweeting in Twitter, comments on blogs, YouTube channel subscriptions, and “this answered my question,” kudos, and content ratings in communities.) Sometimes the feedback is external, like Diggs, or sharing a link on Facebook or Twitter. Support organizations should take action on the content of the feedback. But the raw numbers alone provide a proxy of the value

of content to its users.

- **Sentiment.** As discussed above, manual or automated measures of sentiment provide information on the quality and health of the community, as well as the reputation of the company and its products.
- **Health measures.** Systems like the community health measure developed by Lithium can combine activity and feedback measures to characterize and estimate the health of parts of the social sphere. We expect automation of health measurement to be a major research topic in the coming years, and the practical application of these techniques should increase.

About the Consortium for Service Innovation

Business has moved from a model where value came from physical products to a world where value comes from knowledge, influence and relationships. This shift in the source of value requires new models, processes and practices.

The Consortium is a non-profit alliance of organizations focused on innovation for the support industry. Its members create innovative ideas through a process of collective thinking and experience. The Consortium's work integrates academic research and emerging business trends with the members' operational perspectives. The result is innovative operational models that improve the customers' support experience.

Rather than make incremental improvements to current processes the Consortium develops new innovative ways to deliver outstanding customer support.

If the topics in this paper were of interest to you, we invite you to join us and advance the work. Information on the Consortium for Service Innovation and membership programs is available at <http://www.serviceinnovation.org/membership/>.

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