Social Media Engagement Journey for Support and Beyond*

	Stage 1: Traditional	Stage 2: Experimental (what does it look like, proof of concept)	Stage 3: Operational (what is the business-level problem we are trying to solve? Also: funding)	Stage 4: Value Expansion	Stage 5: Fully Integrated
Strategy (governance, content, localization, business benefits and intent)	* Traditional channels of support. * Ambivalence to online conversations about brand. * Social Support not on executive radar. * Employee participation in internal SM kinds of spaces/tools may precede the external.	* Lots of dabbling in social networking and communities. Many not "owned" by company. * Asynchronous events (time bound). * Monitoring conversations in silos. * Brand promise is explicit and understood by all who interact with customers. * Brand promise is the basis for developing measures and goals.	* Social media channel focus and activities have been defined based on business strategy and goals and are explicit in the business strategy (example goals that SM might impact: improve customer sat, easy to do business with, reduce support cost). * Involves one or two key stakeholders. * Empowered SM team, with defined roles team, run by proven leader. * Discussions on cross-functional governance and coordination. * Beginnings of a content strategy (KB and customer generated, free-fee, archiving, multi-media, content reputation model, feedback and ratings). * Funding has been committed. * Quantifiable goals have been identified. * Publication calendar. * Organizational Culture shift/change management. * Adoption roadmap exists. * Social activities in one division or group (not across all functions). * Rules of engagement for social networks and communities are defined.	* All Execs bought in and agree on goals and intent of social engagement. * Cross-functional (all stakeholders) governance and investment model. * Fully integrated content strategy (community, social and KB). * Expanded social footprint: product, geographies, functions. Localization considerations, identify opportunities in other geographies. * SM integrated with ideation process and prioritization. * Integration between internal knowledge and SM knowledge.	* Social engagement embedded in organization's DNA and business processes (employees and customers). * Funding for SM is in run rate for budgets for each organization. * SM value and contribution is understood by all. * Employees participate in internal and external SM as part of getting their work done.
Customer Engagement	* Phone-based interactions. * Customers have to come to us (support). * No push of information to customer through social channel. * No attention given to customer interaction. * One to one communication. * Contract/SLA based customer engagement.	* May start with a push of information through SM or lurking (listening and not responding). * Marketing presence in SM . * Unstructured and siloed presence, use of personal accounts vs company identity. * No strategy, policy or rules of engagement across company on SM. * Discovery potential outlets and where the majority are and the preferences. * Assessment of tools, simple view of the players (likes and followers).	* Establish channels based on audience, multi-use (marketing, support, prod management), interaction vs just listening/lurking. * Monitoring specific channels with purpose/intent. * Baseline engagement policies, official rules of engagement, baseline metrics established. * Meet the customers where they are. * VOC programs include SM, we become part of the conversation vs just lurking. * Explicit declaration of intent from customer. *Uni-directional communication.	* Recognition of value creators (super users). * Promote deeper engagement. * Bi-directional communication. * Understanding of customer implicit and explicit behaviors and preferences. * VOC becomes part of the ongoing process. * Tools might start linking a customer's accounts.	* Personalization of service based on understanding of customer implicit and explicit behaviors and preferences. * VOC is driver of the business and product strategy. * Bi-direction and cyclical communication. *Monitoring and adjust emerging outlets.

Employee Engagement	* Employee participation in SM is totally separate from employee's business role. * Relationship that the employee "owns" independently of the company. * Event based, seldom spans time or numerous interactions. * No awareness, no documentation, no policy... NADA.	* Engagement in pockets or silos. * Informal process. * Pilots/trials of ways to engage. * Behavior shift starts from transaction to interaction (learning) but largely through the employee initiative vs company policy. * Rising level of awareness of SM and a need to address how to engage and the value of SM engagement. * Employees are lurking (support engineers finding value in the community to solve issues). * Self selecting participants in the company. * Minimal cross functional interaction.	* Sub-set of employees are expected to engage. * Policy and procedures developed. * Cross-functional coordination and interaction. * Training, defined roles/responsibilities to pay attention to SM. * Responsive to customer issues through SM. *Rewards and recognition for social participation emerging or ad hoc. * Measures for recognition for social participation emerging or ad hoc.	* Engaged and competent. * Goals established and validated; measurable value/benefits for those participating in SM. * Shift from transactions to relationships, awareness and training on SM for all employees. * Scaleability/tuning of resources focused on SM (new product). * SM participation/contribution is included in employee assessment (for relevant roles) of contribution and rewards and recognition programs.	* SM sensitivity/awareness/engagement is pervasive/part of the culture. * Goals constantly reevaluated to match/drive business needs. * Validated model that aligns with the business model for the company and integrates SM into the day-to-day operations of function/teams across the company (prod mgmt/marketing, engineering, sales, support). * Employee contribution is driven by sense of pride (not by rewards).
People Profile Management * Identity * Preference * Skills * Interests * Reputation (history of value created)	* We don't know if social participants are customers and/or internal users. * Internal users posting as an alias (e.g., @Target) and customers don't know who that internal person is (other employees may not know, either!).	* If employees participating, then using personal accounts/identities. * Rights and visibility management based on people profiles. * Manual solutions to identify employees where they use standardized alias and/or user ID. * Superficial (eg., know name or know that I've been at the site before), limited recognition. * Manually created customer profiles include social channel identity information. * An architecture for people profiles.	* Know more about people based on information collected through social channels: people's behavior and the content they interact with. * A greater ability to use automation and tools to help identify users in different systems. * A unique identifier exists for individuals that is recognized by the individual and the organization they are interacting with. * Skills are part of the people profile (maybe manual or automated). * Know who your customers are and their level of influence as it relates to your business. * Having some way to identify the influential contributors.	*Identity/reputation/profiles. * Developing the ability to determine intent and needs, recognize need and act upon that need. * Using the identity of the customers to differentiate services provided based on what we know about them. Social support information is included in the profile that we have for customers. Adapting the interaction with the customers based on this information.	* Cross-platform identification possible. * Skills profile is updated based on an algorithm. * Starting to take social channel information to know who they are, what they do and what would make them happy(ier), anticipating needs with a high degree of accuracy. * Provide people with a preferred view of content based on a dynamic profile. * Universal/portable profile (identity, skills, preferences, reputation), across multiple platforms. * Merge of the personal profile with the business profile (customers in control of level of exposure and to who).
Crisis Management Processes	* Not handled in support. * Not handled via social media. * Response phone call based. * Typical escalation processes. * Alerts. * Determination of the crisis is made through standard support channels. *Internally driven through known issue. *Sales rattle the cages.	* Ad hoc responses, ad hoc monitoring. * Have social gurus who are watching and let someone know. * OR Gurus don't know where to take the issue. * No process and no guidelines: no specific time to respond expectations, no real follow-up. Erratic timing and follow-up. No ownership/ accountability to respond. * Inconsistency in responses.	* Established procedures and responsibilities as a process to listen and respond. (Identifying, escalating, resolving, confirming.) * Roles are identified and people are assigned to these roles. * Understand and communicate internally customer's expectation for response. * Different LOB's define and react to crises differently. * Processes aren't always working as expected. * Processes are adjusted as learning takes place. * Danger here is overreaction of response. (Answering too much/too soon). Encourage the behavior you are hoping for (make it sustainable).	* Timelines/expectations are refined and understood. Targets are measurable. * Process in place to learn from crisis (post-mortem?). * Able to measure sentiment during and after crisis. * Customers crises are heard and responded to regardless of channel they use. Use social to get customers into the right channel as soon as possible. * Lots of listening and responding very quickly. * Processes evolve as social channels evolve. * Reduction in overlap in roles. Internal folks are empowered to respond and know how to escalate internally.	* Engineers interact with customers from a single dashboard but into different channels. * Crises addressed so much earlier to avoid/reduce the number of crises we see. Very proactive monitoring and responding to keep the impact of crises small. * Self help/self healing is used to mitigate crises and encourage self help as the optimal channel. * Community participants engaged and communicating effectively about the crises at hand. * Lots of transparency about crises, how it is being fixed, and ETA on fix.

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Metrics	* Success measured in cost per interaction. * Standard escalation SLAs in place.	* Collecting lots of customer data. * Success measures evolve to include reach. * Influence scoring (like KLOUT) might start to be utilized. * Desire to measure the strength of influence of participants. * Starting to identify areas of influence that are relevant to business/industry. * Start to explore influence algorithms. * Simple activity measures (eg visits, page views, registrations, repeat visitors, posts, responses).	* Success measures: community resolved issues, customer success measures w/o support center assistance (call shed/deflection). * Customer satisfaction score with experience in social support channels, initial measures and goals are defined. * Customer engagement in social channels (eg VOC, CHI, visits, posts, requests, responses). * Influence scoring is used more frequently to identify how and who to respond/ communicate with. * Employee engagement in social (eg CHI, time spent, ratio of employee to customer participation). * Diagnostic measures (CHI, Dr. Wu): volume and growth of members , content, and traffic. * Progress on culture shift (eg understanding and buy-in, milestones on culture shift programs). * Customer expectation assessments (must be inferred from operational data and sat survey). * Data as input to success measures. * Goals and measures are aligned to the business objectives. * Community success measures (different from Community Health). * Critical mass activities identified and measured.	* KPI, score cards, dashboards. * Outcome-based measures. * SM measures (non-traditional) become part of the measurement model for the business. * Channels yielding impactful results. * Rigor in dashboards moves execs numbers: loyalty, customer effort, customer retention. * Success measures include customer sat and willingness to recommend. * Predictive measures and engagement measures (CHI): liveliness, interaction, responsiveness. * MVP activity and value (eg. responses, response time). * Customer listening and ideation measures - trend in volume of suggestions, trend of voting rate, # implemented. * Customer effort scores/assessment. * Social Network Analysis: mapping relationships, shape of the network(s) (see Marc Smith's work SNA/ONA). * Measures for diversity and reach in target areas.	* Integrated and shared metrics cross/inter-organizationally. * Metrics drive business decisions (business strategy, funding decisions, executive commitment, "the grinder"). * KCS and SM metric integration, able to track and use it to drive decisions. * Measure impact of changes made. * Metrics demonstrate SM producing results. * Cross-discipline/program integration. Possible convergence of metrics, uniform reporting, shared goals. * Customer success metrics utilized.
Tools and Integration	* No integration of tools, all separate. * Lack of awareness of social media platforms.	* Fractured tools but proliferating, social media engagement and VOC programs active but using different tools. * No structured data available or used but thinking about it. * No integration with the tools. Case management systems and social tools are separate.	* Fractured tools but integration is starting to take place. * Monitoring social is combining into other channels such as voice, chat, email. * Social becomes a channel to push information to customers strategically. * Case management, KCS tools and/or CRM might still be separate or could have some integration. Might start to see the ability to hook between social, KCS and CRM systems for escalations and problem solving without copying and pasting. * Manual integration done on case by case basis by employees (not automated). * Social channels become a tool that is used as appropriate to address customer engagements. * Tools architecture	* Social, KCS and case management systems are integrated. Social becomes just another integrated channel to engage customers. * As crises are encountered, issues are addressed as appropriate within the right channel in a timely way. * Tools have enforced processes and employees are utilizing the tools as appropriate. Employees don't have to step out of the tool to go to another one. * A balance of Qualitative and Quantitative measures.	* Systems and tools optimized. Social and case management systems are integrated. Data is in the right place across all the platforms to see what is happening for the customers in all the channels. * As crises are encountered, issues are addressed as appropriate within the right channel automated in a timely way. * Use social to encourage the correct channel for the crisis at hand. * Ability to escalate and solve issues through your tools cross-departmentally. * Internal and External tools integrated
Considerations for using social tools within a company	* Executive buy in and participation * Integration of tools into the workflow * Deal with the issue/question of too many tools to interact (email, IM, text msgs) and to store (SharePoint, Google docs, dropbox,...) * Ideation processes for internal issues, policies				