Best Practice Guidebook

WOM in the Customer Contact Center

Presented by:

Customer Service Subcommittee

WOMMA
Measurement and Research Council

May 2011

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Summary of Findings

OPERATION:

- Apply the same hours of operation to social customer communication that are utilized to respond to phone calls, e-mails and other incoming communication
- A general rule for most companies is to try to respond to the necessary comments within one business day or 24 hours.
- In order to ensure the highest quality of customer service possible, customer interactions need to be monitored and reviewed often.
- Increasingly, customer contact centers are relying on commercial or internally built social media monitoring tools with capabilities that allow for direct engagement and response to customers.
- In social media, Customer Service Representatives (CSRs) are increasingly trusted to represent the organization without scripted messaging.
- You must have a unified approach to customer service in regards to your social space. CSR team members should meet regularly to discuss trends, changes, recent incidents and process improvements that can be made as customer needs and demands shift.

IMPLEMENTATION:

- Start the process of developing a social customer program via listening and asking for feedback. This will help determine in which social media venues you should develop a presence, based on what your customers are asking for and where they are already congregating.
- Ensure that all members of the organization that should be involved in the launch of a social media program are involved, as early as possible. These departments can include: customer service, public relations, corporate communications, engineering, operations, sales, staffing, employee communications and marketing.
- Start with a pilot program, similar to a restaurant's "soft opening" vs. "grand opening".
- The best staffing approach is to select experienced CSRs who have proven that they truly understand and respond professionally to customer inquiries.
- A recognition and response protocol should be established before it is needed. This includes establishing escalation paths for incidents that involve departments outside of customer service.
- Frame your goals to fit your business. Each company will have different objectives – be sure to not lose focus on what you are trying to achieve. Common objectives include:
    - Improve relationships with customers via answers and resolutions;
    - Drive business improvements by listening to customers;
    - Demonstrate brand innovation by participating in new channels of communication;
    - Nourish an online community;
    - Scale the cost of social customer service operations.

MEASUREMENT*:

- No clear measurement standards have emerged but each company should establish measurement criteria so that you can define program success and measure progress towards success. Whenever possible attempt to link to existing metrics that are already accepted by your organization.

- Common measurement areas for social customer service operations include:
  - Site referral traffic
  - Influencing future sales transactions
  - Customer retention
  - Call shed from the call center
- Common metrics reported include:
  - Number of Cases Opened, Closed – Resolved, Closed – No Response
  - Number of customers retained
  - Sales referrals
  - Customer Satisfaction Score
  - Service Level Attainment
  - Number of communications/contacts to reach a resolution
  - Number of escalations to external departments
  - Number of communications/contacts made to other departments before reaching the customer service social media team
  - Number of times content is repurposed for other customer service teams

Organizational Considerations:
- Customer service representatives are the “new face of the organization” within social media.
- While integration of social media into an existing CRM system is important, many companies are still in the research phase of the integration process.
- There are many legal issues that an organization needs to take into consideration before launching a social customer program

Introduction

Since its inception as a trade organization the Word of Mouth Marketing Association (WOMMA) has focused on ethical marketing practices to foster the revenue side of a consumer's interaction and awareness of a brand. With this document, *Best Practice Guidebook – Word of Mouth in the Customer Contact Center*, WOMMA is extending the ethical practice of WOM to the service and cost side of the customer experience with a brand.

This guidebook was developed in response to the member demand for a detailed look into examples of integrating WOM principles and social media into the discipline of customer service. It establishes WOMMA at the beginning of a movement that promises to be a critical step in both the maturing of WOM as a discipline and the evolution of the Customer Contact Center.

What this Guidebook Is and Is Not

This Guidebook uses case studies to show how WOMMA member brands use WOM techniques and social media tools in the Customer Contact Center. Each brand highlighted in the case studies would consider the work done performed to date as highly experimental.

The findings in the *Guidebook* consist of information gleaned through a series of interviews with 11 organizations, the majority of which are WOMMA members (alphabetical):

- **American Society of Health Systems Pharmacists**
- **AT&T**
- **National Association of Realtors**
- **NetApp**
- **Oakland Christian School**
- **Publishers Clearing House**
- **Quicken Loans**
- **Qwest**
- **Spiceworks**
- **USAA**
- **Warner Bros.**

A series of case studies outlining how these organizations are integrating social media and customer service is included at the end of this Guidebook. In addition, all of these organizations are referenced throughout the chapters of the Guidebook and should provide a solid basis for a practitioner looking to a) structure a new program or b) iterate upon existing models.

This guidebook is not intended to offer a definitive playbook, operational design or definitive statement on the "one right way" to develop a WOM Customer Contact Center. These models will develop over time for individual business models and are increasingly dictated by the customer demands from the companies themselves.

The chapters are an interpretation and summarization of the case studies by WOMMA Members. They are arranged to present a logical progression starting with the role of WOM and Social Media in the Contact Center to keys for implementation and concluding with the identification of best practices for integrating WOM into the contact center. A list of vendors and consultants identified in the case studies is provided but should not be considered comprehensive of the brands interviewed or the current offering in the marketplace.

Who Is Behind This Effort?

The following members of WOMMA's Customer Service Subcommittee contributed to this Guidebook:

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Chapter 1: The Role of Social Media in the Contact Center

by Mary Naylor, VIPdesk

Social Media in the Contact Center
Oftentimes an organization's expansion of its brand into social media starts when tools such as Facebook and Twitter are used for marketing promotions. While the marketing department and public relations or corporate communication department should always be involved in the way a brand presents itself in public, these departments aren't always ideal to manage the monitoring and response of customer inquiries via social media channels.

When customers learn that a company they do business with is active in social media, they will start to air their concerns, comments and general customer care issues via these tools. The influx of care and technical questions often overwhelms the capacity of the marketing department to respond in a timely manner to customer communication.

The exact manner in which specific companies monitor and respond to social media varies from organization to organization. As Todd Carpenter, Social Media Manager with the National Association of Realtors states, "There is no right or wrong way to do this. Social Media is really about customizing for your customer—it's not a one-size fits all. Build your plan based on your customer needs." However many companies including AT&T, Publishers Clearing House and Qwest Communications house their social media monitoring and response function in their customer contact center.

For these organizations—and many others—the contact center is the front-line and primary customer touch-point. When a customer has an order, a complaint, concern or any other communication, they contact a customer service representative (CSR) through their preferred communication method ranging from the traditional phone and fax to e-mail, online chat, and text message. Social media vehicles including Facebook, Twitter, blogs and more are quickly being added to that list.

The benefits of housing social media monitoring and response in the customer contact center can be broken down into two main categories:

1. **Consistent Cross-Channel Experience.** No matter what channels customers decide to utilize, they should get a consistent customer experience at every touch-point. Customer contact centers already possess a codification of rules, processes and procedures in place to guide the organization's interactions with customers through existing communication channels. This policy can serve as a starting place for application to communication via social media tools.

2. **Coordinated Response**. Social media response should happen in a timely, coordinated manner. The customer contact center already has a formalized response strategy in place—there are professional CSRs on duty who are already familiar with the service levels that are being provided customers regarding response times, response rate, and more.

Consistent Customer Experience
Incorporating social media into the customer contact center means that customers will receive a consistent customer experience via social media that they do via other channels—phone, e-mail, and online chat.

Processes and Procedures

One aspect of the customer experience is the processes and procedures that are followed by CSRs. Determination of which conversations are going to be responded by to, by whom, and how is one simple process that can ensure that every time a customer contacts an organization, they will receive the level of service that they have come to expect.

Outlining the processes and procedures such as these, before launching a social customer program, ensures that everyone involved within the program is on the same page, and will be able to act quickly and appropriately when necessary.

Many organizations provide their CSRs with documentation to ensure that they follow the appropriate processes when communicating with customers:

- **Qwest** has a process document in place, and requires preapproval of anyone who speaks on behalf of the company, either via their Talk to Qwest Channels, or @QwestNews.

Centralized Feedback

One benefit of a consistent cross-channel experience is the benefit of centralized feedback. It is much easier to compile and review customer feedback when it is being gathered in one central location—it can then be utilized to improve the overall customer experience.

- On an individual customer basis, all records of communication between the organization and the customer are easily stored in one place if they are received in one place.
- On a larger scale, if there is an upswing of complaints about a product or service coming in via phone, e-mail, and social media, it will be easier to identify the issues and develop a solution.

For instance, if the majority of feedback that is received involves customer confusion regarding how to read their bills, this information can be utilized to implement change at the problem source.

Integration of Social Customer Care and CRM

Communication that organizations have with customers should be integrated into the contact center's customer history as is the case with any communication that occurs via other channels. This will not only help to profile social customers to better help them in the future, but will also aid in identifying ongoing problems or product issues.

In a traditional contact center, CSRs utilize Customer Relationship Management (CRM) software to collect and mine relevant data to be able to provide their customers with a highly personalized and proactive service. Integrating social customer care into CRM is a work in progress:

- **AT&T** and **USAA** are both researching integration of social media into their CRM system as of September 2010.
- **Quicken Loans'** Social Media Manager forwards information on customer service issues resolved via social media to the client relations department to enter into their customer database. The number of inquiries, response time, and final resolution are all tracked, to ensure issues are being responded to in a timely and accurate manner.
- **Qwest** is not currently utilizing a tool to automate integration of their customer data into their CRM; instead, they are noting each account with the details of all communications for each customer.

Quality Assurance
In order to ensure the highest quality of customer service possible, customer interactions need to be monitored and reviewed often. Contact centers already have Quality Assurance procedures in place, and can easily add social media to the queue.

The Social QA process should be an extension to the existing protocols already in place, a process which often entails random reviews of customer interactions on a daily, weekly or monthly basis.

- **Oakland Christian School** utilizes a Director of Communications to ensure that all communications are consistent across every channel.
- **Qwest** monitors all of its social media channels for quality assurance.
- To ensure compliance with company guidance, **USAA** regularly audits its CSR's social media responses.

Coordinated Response
Customers will use social media for customer care purposes upon realizing that a company is active in social media channels. One organization that was interviewed, **AT&T**, is mentioned over 10,000 times in social media channels on an average day.

When determining a social customer communication strategy, factors that an organization should take into consideration include the following: official hours of operation, metrics regarding timeliness of response, and staffing of the response team.

<u>Official Hours of Operation</u>
Due to the "always on" nature of social media tools, many customers expect a nearly-immediate response to messages sent through social media vehicles, which means that social media can be a 24/7 job. Some companies like **Quicken Loans** have team members such as their Social Media Manager Kelly LaVaute, who stay connected on and off the clock, it is necessary for companies to let their customers know the hours of operation of the social media customer service department.

For many organizations, there is parity between social media response and that occurring in other channels. Many organizations interviewed apply the same hours of operation to social customer communication that are utilized to respond phone calls, e-mails and other incoming communication:

- **AT&T's** social media customer care team is available Monday-Friday from 7:00 am-10:00 pm CT and on Saturday from 7:00 am-4:00 pm CT; however they have someone on-call at all times.
- **NAR** has CSRs replying to social media from 7:00 am-7:00 pm, Monday-Friday.
- **Publishers Clearing House** covers all social media communication between 8:30 am-11:00 pm Monday-Friday and 8:30 am-5:00 pm on Saturday.
- **USAA** has "social customer service" hours of Monday-Friday 7:00 am-7:00 pm, which are the same as the organization's regular business hours.

It should be noted that since social media operates 24/7, there are occasions in which large amounts of social media traffic are predicted. It is advised to expand monitoring and response hours as necessary. One such example is special events, which drive a high-volume of conversations, especially in mirco-blogging formats such as Twitter posts or Facebook status updates. If your organization is active in events, tradeshows and promotions, then it is highly recommended customer service is aware and coordinated with marketing.

- **Warner Bros.** generally replies to social media messages between standard business hours, 9:00 am-6:00 pm unless there is a special event. However, during a special event, the company will monitor social media around-the-clock utilizing CSRs hired for the particular event. For instance, the company had real-time Twitter and Facebook monitoring active during all open hours of the Comic-Con event. When complaints of long lines at the booth started to surface, the customer service team was able to work directly with the marketing team at the event to clearly understand the problem at hand, communicate it directly to the individuals posting and offer alternatives hours and even coordinated the distribution of signed posters and t-shirts for those waiting in line.

<u>Response Times</u>

While social media interaction happens 24/7, none of the organizations in our research had a response time of less than 24 hours. This means that while contact centers should strive to continuously monitor and capture all social media mentions and interactions that reference the organization, it is probably not necessary for most companies to respond in real-time, or have 24/7 coverage.

As an organization, set a goal for when you will respond to customer inquiries via social media channels based on your manpower, capabilities, and customer expectations. Response times varied between organizations interviewed, however whatever is decided it must be clear and consistent, in order to meet the expectations of the customer.

- **AT&T** has a Corporate Communications team monitoring social media channels 24 hours a day, 7 days a week, and notifies the Customer Care team if there are any urgent issues. Someone from the Customer Care team is on-call at all times. Otherwise, during off hours they utilize tools to scrape Twitter for mentions of the company and respond to the relevant messages once they are back online.
- **Publishers Clearing House** has a goal for social media response of 1-2 hours.
- **Quicken Loans** has a social media response time of 3-4 hours.
- **USAA** has a social response time of "within 1 business day".
- **Spiceworks** customers know they will get back with a response within 24 hours.

A general rule for most companies is to try to respond to the necessary comments within one business day or 24 hours.

- In some situations—such as a complicated issue—it will not be possible to resolve an issue in 24 hours or less, however **Qwest** ensures that they keep their customers apprised of the status of their inquiries.

<u>The Response Team</u>

Whomever communicates with customers quickly becomes the "face of the organization" to those who have no other personal interaction with the organization. This means that customer service representatives become the de-facto "new face of the organization" within social media—something that can be challenging to organizations for which this has traditionally never happened outside of the PR, marketing, or corporate communication departments.

Because social customer response must be specific to each organization's needs, there are many factors that affect organization of response team. These include:

- Nature of the industry
- Number of customers
- Current activity level of customers in social media
- Current organization of the customer service function

- Resources that can be diverted from other parts of the organization differ widely.

Other organization-centric decisions include whether social media monitoring and response should be assigned to employees dedicated to the task, or whether these duties will be combined with others.

Organizations interviewed have arranged their response team in many ways:

- **USAA** has two dozen customer service representatives and two corporate communications team members involved in its social customer effort.
- **National Association of Realtors** looked to experts in specific business line specialties: commercial, residential, land, global, international, green, etc. to address the needs of its customers.
- **Qwest** launched with five front-line customer service managers to engage in Twitter.
- **Spiceworks** has a single community manager overseeing the entire operation.

Key Takeaways

1. Customer service representatives are the "new face of the organization" within social media.
2. Apply the same hours of operation to social customer communication that are utilized to respond phone calls, e-mails and other incoming communication
3. A general rule for most companies is to try to respond to the necessary comments within one business day or 24 hours.
4. In order to ensure the highest quality of customer service possible, customer interactions need to be monitored and reviewed often.
5. While integration of social media into an existing CRM system is important, many companies are still in the research phase of the integration process.

Chapter 2: 10 Keys to Implementing a Successful Social Customer Program

by James Clark, Room 214

Customers are actively discussing product or services concerns online in an open and searchable forum. How does an organization appropriately start engaging in those conversations?

The organizations reviewed for this Guidebook vary widely in size, scope and mission, yet all have one thing in common - The utilization of 10 keys to implementing a successful social customer program:

1. Listen
2. Seek Feedback
3. Involve the Entire Organization
4. Identify a Target Launch Date
5. Determine Marketing Involvement
6. Use Appropriate Tools
7. Optimize the Results of Your Monitoring
8. Launch a Pilot Program
9. Develop Corporate Policies Regarding Employee Online Conduct
10. Heed Legal Issues

"To listen well, is as powerful a means of influence as to talk well, and is as essential to all true conversation"
– Chinese Proverb

Listen

It may seem trivial, but starting with listening provides the necessary "reality" for much of the needed strategy to address customer service in social media. One area of listening is online conversational monitoring to assess the topics, volume and circumstances. These insights help the organization as a whole develop a social media effort.

For instance, if an organization is monitoring the online conversation and finds that 80 percent of the total volume of conversation around the brand is deemed customer service conversations, one would be best served to start with a customer service focused program – not a corporate communications program. If the conversations are sales oriented—such as trying to find pricing—an entirely different response circumstance arises.

Listening provides organizations with the rational data necessary to balance the emotional need to engage. This data includes:

- **Who the audience is.** Are these prospects shopping for services or current clients seeking help, or both? The nature of the conversation will provide insight into the most active customer segment, which helps determine resources to allocate to the project.
- **The communities where the conversations are happening.** Is most of the conversation exchange on Twitter, or is it coming out of user forums, or self organizing groups in Ning or Facebook? **Oakland Christian Schools** entered social media with blogs and a YouTube account. However once they realized how many of their target demographic—mothers of current and potential students—were on Facebook, they launched a Facebook page and instantly got hundreds of followers.

- **The total volume of the conversation.** There is a distinct difference in strategy if it is necessary to respond to 10 posts versus hundreds of posts per day. **AT&T** is mentioned 10,000 times/day in the social media space—a large volume of conversation requiring an allocation of assets different than an organization mentioned 10 or even 100 times per day in social media.
- **Resource allocations.** Breaking conversational analysis into sub-themes helps define what skill sets are necessary to address the current conversational trends. If 80% of the total conversation is customer service oriented, how does that 80% break down? If 60% is about customer billing—you start to see a need for individuals with intimate knowledge of customer billing involved with the program.

Seek Feedback

By simply asking you might find a strategy that can be customized to your community. The starting path becomes clear when armed with conversational data and customer feedback.

- **NetApp** reached out to thousands of customers, partners, and industry leaders and asked them directly what they wanted in a social program. The feedback was overwhelmingly asked for a collaborative space where they can openly and interactively have conversations with NetApp experts and professional peers.

Involve the Entire Organization

Next, it is necessary to determine who within the organization should be involved. Many departments—customer service, corporate communications, marketing, branding, product development all have a business case to be involved in the conversation.

It is highly recommended that representatives from customer service, corporate communications and legal are aware of the social customer response effort. The reason: *having clear problem escalation can reduce the amount of time it takes to respond or address a sensitive issue*. The failure to quickly address or handle a sensitive issue in social media can generate more visibility than the original issue would have ever garnered.

To identify internal resources do a dry run for mock response efforts based on real customer conversations. A dry run can determine the process by which the customer service team would go through to provide resolution to a real customer problem as well identify the internal touch points in the process.

- **Qwest** ran simulations of customer responses to understand what it would take to provide customer resolution on 100 percent of the social engagements. Identifying hurdles, black holes and knowledge gaps prior to actually engaging set the stage for empowering its TalkToQwest customer service team with the ability to quickly drive resolution.

Identify a Target Launch Date

How long is it going to take from conception to inception? The listening and testing phase should take no fewer than two weeks to provide a clear picture of the nature and volume of conversation. Depending on the complexity of the customer engagement (federal mandates on customer privacy, etc.) it may take two to five months to fully launch a pilot effort.

- For **National Association of Realtors**, the customer demand was so high and employees had already started to informally engage the entire process took only 3 months.

Determine Marketing Involvement

It's often said customer service is the new marketing. How an organization responds and treats its customers is an important purchasing decision for many consumers.

- For **NetApp** it was determined that there would be very little marketing presence inside its customer community efforts. When those marketing messages did go into the community it was vetted to ensure those messages were valuable to the community base.

The recommendation is to limit marketing messages in the customer service stream unless the offer clearly benefits existing customers.

Use Appropriate Tools

The term "social media tools" is sometimes used to refer to social media communication platforms such as Facebook or Twitter; and sometimes used to refer to the tools used to monitor and respond to customer inquiries via social media. It is necessary to look at both of these categories and determine the tools that are best for the job.

1. *Select the Social Media Platforms You Will Utilize*
   Will you launch your social media program focused on one specific social media platform such as Twitter, or will you combine your efforts via several platforms—such as developing a presence on Twitter, Facebook, YouTube, and a corporate blog?
   - One option is to do what both **NetApp** and **Spiceworks** did, and build a community platform of your own. By doing this, you can ensure that you are providing your customers with the communication capabilities they require in order to communicate with their peers.

   Once you determine the platforms that you will utilize and are ready to share your presence with the world, you should develop a "hub page". This is a visible and easily accessible page on your corporate website that provides links to all of your social media properties. This gives your customers visibility into your whereabouts.
   - Another great way to increase visibility for your program is including these links in your corporate e-mail signatures.

2. *Determine Your Monitoring Tools*
   Knowing the tools you're going to use will help shape the process of how your team selects, converses, assigns and tracks customer engagements. At a minimum, online conversational monitoring tools and real-time engagement platforms are required. Depending on complexity of team set up (multiple users, different geographic locations) and needed workflow tracking different tools are more appropriate than others.

   The majority of customer service responses are focused in the real-time arena, due to the popularity of social media platforms such as Twitter and Facebook. There are many free real-time engagement tools, each with unique capabilities and limitations.
   - Kelly LaVaute from **Quicken Loans** uses a combination of free to tools to monitor and engage in the online conversation.

Optimize the Results of Your Monitoring

Due to the large amount of information available in the social media space, it can be a challenge to separate important messages from clutter. Optimizing your monitoring platform is critical for the sanity of your team to ensure that only relevant conversations are being pushed through to the customer service team. Otherwise, you can end up sifting through irrelevant information returned in your monitoring results.

- Optimizing your monitoring platform is accomplished by creating filters in the system to remove erroneous conversations from the response team stream.

Remember: if your monitoring tool provides too much irrelevant data there is a high likelihood of the team abandoning the platform completely and splintering into multiple monitoring and engagement approaches where institutional knowledge is lost.

Launch a Pilot Program

The public nature of social media does not provide the opportunity to test your engagement strategies in private, so in this sense "a pilot program" must be launched in a public forum.

It is recommended to limit the exposure of the customer service team and let them test the load on system prior to making official announcements of your presence online. An analogy is the "soft opening" vs. "grand opening" of a restaurant: You invite friends and family to the "soft opening" to test the load on the wait, bar and kitchen staff to work out the kinks prior to bringing in independent customers at the official "grand opening."

- **AT&T** rolled out its social media program incrementally in Twitter, Facebook and YouTube, even in the face of significant conversational volume.

Determine Metrics

It is necessary to determine what the goals of a social customer program are, so that success can be measured by how effectively these goals are met. It is also important to ensure whatever activity is going on in the social space is right in line with the company image and objectives. Is social media helping to solve real business problems? Is social media making your company stronger?

- For example, a goal for a specific Facebook post may be to drive traffic to a certain website, but that same posting also plays a role in how people view your company.
- Should the site that you are linking to be associated with your business? Would everyone in the company agree with you?

At the same time, don't lose focus on the basic goals of what you set out to do.

- **Publishers Clearing House** has set in place short- and long-term goals for its social media participation.
- **Quicken Loans** has identified specific metrics to track for each social media channel it uses, depending on the purpose for which it is utilized.

As social customer response is rather new, there aren't a set of necessary metrics that have been determined. The only areas that are measured across the board by the organizations interviewed are those of response time. Other metrics to track could include the following:

- Number of followers/interactions
- Number of customer communications moved from phone/email to social media
- Rate of response
- Issue resolution rate

When developing a set of metrics, a good first step is to look at what your team is doing in the contact center already in regards to what constitutes success, and determine if that can be replicated in the social realm.

Develop Corporate Policies Regarding Employee Online Conduct

Determine corporate policies regarding employee conduct online before launching a program to ensure that all employees are on the same page. Otherwise, sensitive information could become public or CSRs could represent the organization in an undesired manner.

A number of resources that have already been developed that can assist:

- **AT&T** bases its social customer response policy on its current employee company policy. Social CSRs have an additional requirement of a minimum of one week of training with corporate communications and legal.
- **WOMMA** has developed a set of guidelines that can be used as a standard for employee online conduct.

Other areas to take into consideration when developing corporate policies are:

- When complex issues should be taken offline into a private channel.
- Ensure that the privacy of your customers is guaranteed—in no case should an organization ever publish a customer account number via a public forum.
- Develop guidelines outlining how you will communicate with customers. **Qwest** posts a link to its communications guidelines on its Facebook page.

Heed Legal Issues

There are many legal issues to take into consideration before launching a social customer program. The following legal issues that were discussed during the research conducted to develop the Guidebook are not exhaustive of all legal issues that can arise with a social customer program. As such every organization should seek advice from their corporate council before launching their program.

Three legal issues came up during the research conducted to develop the Guidebook:

- **Information for Internal Use Only.** Is there information that is common knowledge inside your organization that can't be published via a social media vehicle?
- **Customer Account Privacy.** It can't be stated enough, customer account information must be handled out of the public social stream.
- **Promotions**. Promotions are a frequent issue needing legal oversight. **Publisher's Clearing House** ensures all promotions are reviewed and approved by legal.

Key Takeaways

1. Start the process of developing a social customer program with listening and asking for feedback. This will help determine in which social media venues you should develop a presence.
2. Ensure that all members of the organization that should be involved in the launch of a social media program are involved as early as possible.
3. Start with a pilot program, similar to a restaurant's "soft opening" vs. "grand opening."
4. Determine measurement criteria, so that you know if your program is a success.
5. There are many legal issues that an organization needs to take into consideration before launching a social customer program.

Chapter 3: Best Practices for Integrating WOM into the Contact Center

by Mark Clayton, House Party

For many customers, the face of the organizations with which they do business isn't the executive team, but rather the people they communicate with on a regular basis. As such, there is a great deal at stake when deploying a customer service team to respond to social media. Some factors to be considered are the employees who will represent your organization in social media, how they are going to be trained and managed, what they are going to say, and how to guarantee consistent quality of customer care.

This chapter addresses three areas of importance and reviews best practices in each:

1. Recruiting and staffing
2. Training and managing
3. Recognition and response protocol

Recruiting and Staffing

Once the size of the team has been determined, it must be staffed. In order to provide good service, it is critical to hire and/or select and train the best qualified agents to manage online customer issues and complaints.

There are two primary ways upon which you can approach building a social media customer service team—both with benefits and drawbacks:

1. Recruit current employees
2. Look outside of the organization.

As a business, you want to find people who know your company the best—who knows an organization better than its existing employees?

- **Quicken Loans'** Social Media Manager, Kelly LaVaute, has been with the company for over 5 years, during which time she has worked in several different departments within the company. As such, she is very knowledgeable in assisting customers and knowing which issues to delegate or escalate.

The most common approach observed was to select experienced CSRs who have proven that they truly understand and respond professionally to customer inquiries. They know the ins and outs of the business structure, the flow of consumer inquires, are extremely familiar with the people and practices within the organization, and generally have the background and understanding of your company to allow the greatest opportunity for success.

- **Publishers Clearing House** utilizes CSRs who already have experience working in the company's customer service department, and trains them in the social space.
- **USAA** looks for CSRs who are already experts on the internal minutia of rules and regulations that govern the banking and insurance industry, and also have knowledge of social media channels and tools.
- **National Association of Realtors** utilizes CSRs in its existing "Information Central", which fields incoming calls, e-mails, and social media messages from its members.

Oftentimes, people are excited to work in this space.

- **Publishers Clearing House** found that utilizing existing CSRs provided them with a morale boost.

A secondary approach is to go outside you organization and bring skilled individuals into the fold. When looking externally to build a social customer team, it is best to find folks with knowledge of the social media space.

A team of new employees (outsiders) will lack knowledge of the business and standard practices, so organizations that take this route must make a point to get ahead in some other areas – such as expertise in the social space and experience in the medium.

- **Warner Bros.** looks at the existing social networking footprint of all of applicants for social media CSR positions.

<u>Skills Required of a Social CSR</u>

The people you employ in the social space will become an important branch of your company. Just as customer service never really sleeps, neither does social media. These representatives will be communicating directly with your consumers – they need to be trusted to do so in the appropriate manner. Therefore these representatives will have quite a bit of independence, which means that the words they choose often will prove to be the official response of the company.

As such, whoever you choose to work in Customer Service or the social space must possess extremely strong communication skills. More specifically, your people will need to know how to interact in different forums and have the ability to know what is appropriate at any given time.

- **AT&T**'s Customer Care Managers all have an extensive management and customer service background, and must go through a minimum of one week of training to ensure that all communications are handled appropriately.

A great deal of your social media impressions will be made with the tone of your comments; therefore, strong writing skills are also a must.

- **Quicken Loans** recommends hiring or utilizing someone who is comfortable with social media, a great writer, and familiar with the company (or at least the industry).

Training and Managing

Training for customer support within the social space is not that different than training for traditional customer support. The basic skills and principles remain the same.

- **Publishers Clearing House** emphasizes the need for Social CSRs to have basic customer service training, prior to launching the social customer program.
- **Warner Bros.** CSRs go through a training process that combines a step-by-step manual with hands-on training.

Much training and managing of social CSRs involves what to say, when to say, and how to say it as communication in the social space is very different than it is via more "traditional" customer service channels such as phone and email. All activity in the social space is potentially viral—it is public, there are no secrets, and it can spread to millions of people within minutes. It is critical to remember whatever response or information that is put out into the social space can and will be used by your consumers. You must be sure that the information is both accurate and in tune with the overall goals and objectives of the organization.

<u>Messaging</u>

Some organizations provide their CSRs with "scripted messaging", which are templates of scripts to meet 80% of anticipated situations encountered during the course of the day. However in social media, CSRs must be trusted to represent the organization without scripted messaging.

- **Warner Bros.** will provide CSRs with scripted messaging; however this is just a guideline for their potential use. CSRs are encouraged to provide their own responses, using the copy they are provided as a guide.
- When **USAA** launched a brand presence in social media channels, they initially provided CSRs with "canned" responses. However, utilizing these canned responses did not allow CSRs to reflect the empathy that USAA is known for, so agents now use their own words.
- **Qwest's** "Talk to Qwest" team tries not to use canned responses and make each interaction as personable as possible.

The spread of misinformation is one of the most challenging things that you may encounter in the social space. Many of your community members may think of themselves as "experts" and they will speak as if they know what is really happening with your company. It is critical to establish and make it known to your community that you are the official "voice" of the organization. However, the benefits of an engaged, expert community cannot be overlooked. There are industries—such as technology—in which your customers can be experts, and are able to provide in-depth information to other customers—sometimes better than you can.

- **Spiceworks** users often collaborate and support each other around-the-clock, using the company's social media channels. However, it is advised to always keep an eye on these conversations, so that any misinformation can easily be corrected.

Voice of the Organization

It is necessary to find a voice for your company. Typically, the voice on social media is more conversational than the "traditional" Customer Service voice. Some companies have difficulty in realizing that this new space can be a little less formal and a little more fun than traditional channels – it is almost a battle of 'new school' versus 'old school' – but this is certainly something that every company can expect to wrestle with.

From the people interviewed, most companies try to humanize themselves in the social space and find this to be the best strategy. Indications are that this approach leaves your community more likely to engage.

- When customers seek help from **AT&T** via their Twitter page, they are responded to as quickly as possible by an individual customer service representative, who will be handling their inquiry (i.e. @ATTTina, @ATTEmilia, etc.).
- **Qwest** CSRs use a single Twitter handle, however change their Twitter bio every time someone new comes on duty. This personal touch allows consumers the opportunity to know who they are communicating with.

By no means is developing a "voice of the organization" an easy process, the voice and approach will take some time to be refined. As NAR states, "There's no right or wrong way to do this…It's not a one-size fits all."

That said, an organizational strategy must be established; this cannot be left to the individual representative doing the actual responding. If this unified vision is not established, then you get into a situation where your social media activity has too many voices and the consumers never know what to expect.

Recognition and Response Protocol

A recognition and response protocol is a pre-determined breakdown of what types of questions and comments should be responded to and which can and should be ignored. Additionally, questions that should be filtered up through the company for a formal response from the organization.

Establishing such a process will be difficult and this issue is actually a point for debate across the industry. Some people prefer to respond to everything, some prefer responding minimally – the correct answer is probably somewhere in the middle. This question will ultimately be answered on a company by company basis.

- **AT&T** is mentioned an average of 10,000 times/day in digital media, making it impossible for the company's CSRs to respond to every mention of the brand at current staffing levels. AT&T instead, responds to every inquiry that comes directly to the brand through their branded social media channels such as Facebook Wall and @ATTCustomerCare Twitter page, and as time allows, the Care team responds to as many mentions as possible outside of their branded channels

It is extremely difficult to try to respond to every comment or question that pops up in the social space. It is up to the business on how often you want to respond or acknowledge posts. Many organizations make it a practice to not delete postings. That is not to say that if there is something obscene or offensive that it should not come down – because it should.

However, if there is someone who is being critical of your business or your product, our recommendation is to allow those comments to remain visible. This is an important best practice to follow and allows your users again to feel as if they are being heard.

- **Publishers Clearing House** responds to all messages that are factually incorrect, and will sometimes take down messages that are seriously negative or problematic.

Escalation Process

Even if you have the upmost confidence in your social media team and representatives, there will be situations that should ultimately be handled by upper management. There should be a predetermined escalation process in place before these situations pop up.

Upon dealing with an angry or upset consumer, it is best to try to take the discussion offline. This is tricky task to do, but if you can accomplish the goal, then your social media space will not be consumed by the negativity of a few users. If a consumer has serious issues, send them a direct message via email, Twitter or Facebook – definitely do not try to solve the problem publicly. While your company has nothing to fear in your practices, it is all about controlling the flow of conversation. Taking these conversations offline helps achieve that goal.

- **AT&T**'s CSRs are given the autonomy to respond to messages and resolve issues online, but take any conversations regarding account information offline to ensure the privacy of their customers. If there are questionable inquiries, CSRs are trained to escalate those to the proper channels, such as the legal department.

Other one-sizes-fits-all examples of situations that require escalation can be hard to define without looking at the customer concerns that an organization already deals with on a regular basis. However whatever these are, the organization should make it known (up front) what these potential situations are, and what should be done.

If there is a proper escalation process, then these problematic times can be resolved quickly before they gain too much momentum in the social space.

- When working with celebrities, many topics can easily become viral. As such, there are often situations that arise that are not outlined in the predetermined escalation process. When this happens, **Warner Bros.** trusts its agents' common sense when it comes to what to escalate.

The point to stress here is the need for organization-wide agreement and acceptance of the escalation process. It is important to make sure that there is a unified approach to posting and responding that is communicated to all members of the social media response team.

Customer Engagement

Many organizations that were unsuccessful participants in the social space were unsuccessful because they announced their presence, but then never engaged their audience. Your community is not necessarily looking to bring about significant change or new practices to you business, but they do want to know that you at least care – that is what keeps them coming back.

One of the biggest things you can do to keep your social community engaged is to simply make it be known that you are "there." Even the most upset person will appreciate the simple fact that they are being heard. If the end result is the same as it would be without communicating with your organization online, their appreciation comes from knowing that they have been, at the very least, addressed personally by the company.

- One company that has been successful in letting its social community know that it is "there" is **Warner Bros.**. The Television Division of Warner Bros. monitors social media for mentions of their television shows, especially on the company's YouTube channels—where the company posts its own professional, branded clips. When they notice a lot of complaints about a specific television show's clips, they find the person, or "super-user", who is complaining the most, and ask them to curate the channel. In this way, the person who was complaining the loudest then became the person who got to tell Warner Bros. what videos to post.

Conclusion

You should not jump into the social media world before you think about it and plan. If you have the right people and the proper processes in place, then you should have a successful transition into the social space. That said, as mentioned earlier, there is no "one size fits all" approach for incorporating social media into your existing customer relations functions. The social space is wide open. With so much possibility out there, why not test the waters?

Key Takeaways

1. The best staffing approach is to select experienced CSRs who have proven that they truly understand and respond professionally to customer inquiries.
2. In social media, CSRs must be trusted to represent the organization without scripted messaging.
3. A recognition and response protocol should be established before it is needed.
4. You must have a unified approach in regards to your social space. All of your CSRs must be on the same page, just as upper management needs to be on the same page as everyone else in the organization.
5. Frame your goals to fit your business. Each company will have different objectives – be sure to not lose focus on what you are trying to achieve.

Case Studies

Case Study: American Society of Health-System Pharmacists

by Mark Clayton, House Party and Erika Blanchard, VIPdesk

Overview

Colleen Bush is the Market Research Manager for the American Society of Health-Systems Pharmacists (ASHP) where she has worked for over eight years. ASHP launched their social media presence in 2009. They began by blogging, and later created a Facebook Page and Twitter Account.

In addition to the standard channels, they also have a member-based board online. Since the ASHP is a membership organization, the key was to get started so they could increase membership and their primary focus for social media is on marketing and providing value to their existing members.

Since the organization is a very structured and meeting-oriented, they formed a social media committee and garnished total consent prior to submitting their proposal to the corporate team.

The Process

The legal department plays an important and on-going role. They are extremely careful in what they say and don't say. Ironically, their committee consists of someone from each department, excluding customer service and no one has been hired specifically for social media at this point. They have appointed a Facebook lead, a Twitter lead and a Blog lead, but are utilizing existing staff with other priorities.

Social media mentions are responded to during normal business hours Monday through Friday; however, they will occasionally respond at night and on the weekends. They do not have a formal service level agreement (SLA) for responding, they respond when they have time, based on their other job responsibilities and workloads. Additionally, there is no formal escalation process in place. When issues arise, they use their best judgment in escalating it to the appropriate departments.

Policies and Training

Aside from keeping legal involved, there has been no formal social media training. They are working on a trial and error basis to try and determine what is working and what is not working and will create a formal training process in the near future.

Social Media Expansion

In addition to creating a formal training policy, they also plan to hire someone to monitor the network site.

Best Practices and Future Plans

- For the pharmaceutical industry, Twitter seems to be the most useful
- To make your message viral, use hashtags and follow your followers' followers
- Conduct surveys and solicit feedback on Twitter after a meeting
- Continue learning through WOMMA, social networks, online communities and webinars

American Society of Health-System Pharmacists Social Media and Web Presence

Website	http://www.ashp.org/
Discussion Board	http://www.ashp.org/ashpconnect
Blog	http://ashpblog.squarespace.com/
Facebook	http://www.facebook.com/ASHPofficial
Twitter	http://www.Twitter.com/ASHPOfficial
	http://www.Twitter.com/ASHPPubs
	http://www.Twitter.com/ASHPCareerPharm
	http://www.Twitter.com/ASHPStudents
YouTube	http://www.youtube.com/ASHPOfficial
LinkedIn (Group)	http://www.linkedin.com/groups?home=&gid=2426910

Case Study: AT&T
by Erika Blanchard, VIPdesk

Overview
Molly DeMaagd is the Social Media Director for AT&T and oversees the Social Media Customer Care department. Molly has an extensive background in customer service; she started with AT&T 16 years ago as a customer service rep and moved her way up, spending many of those years as a customer service manager.

AT&T, a relatively new entrant to Social Media Customer Care, is doing a great job ramping up their efforts. Molly hired Shawn McPike, a social media strategist, in mid 2009 to strategically plan the customer care rollout. They both agreed that it was best to roll it out gradually, as they wanted to be certain that they had the proper resources in place to handle the volume that they anticipated. They were adamant that they would rather not participate at all, than participate badly.

Fortunately, Molly received executive level support across AT&T and was able to hire and train the staff she needed and was given the authority to expand as the need arose.

Although AT&T has many different social media identities, this case study will focus on the customer care aspect of their social media presence. To put it into perspective; on an average day there are approximately 10,000 mentions of AT&T. When the iPhone 4 launched, they reached over a half of million mentions in one day!

AT&T had a soft-launch of their social customer care in June 2010 and is slowly announcing their social media presence to the masses. They have a social media tab on their site; however, it is currently listed under the "About AT&T" tab on the website and cannot currently be found under the "Support" tab.

In addition to Facebook and Twitter, AT&T also has a presence on YouTube and a support community with over two million registered members.

Resources
When AT&T decided to launch the Social Media Customer Care team in August of 2009, they started out with four managers and knowing that they would need to rapidly expand. AT&T added nine more managers in November of 2009 and today the Customer Care team consists of 21 Social Media Managers. The team is available Monday through Friday from 7:00 am-10:00 pm CT and on Saturday from 7:00 am-4:00 pm CT; however, they have someone on-call at all times. The Corporate Communications team monitors all of the social media channels 24 hours a day, 7 days a week and notifies the Customer Care team if there are any urgent issues. Aside from the various Twitter handles mentioned above; each Customer Care Manager has their own Twitter handle (i.e., @ATTTina @ATTEmilia @ATTAlexM, etc.). During off-hours they utilize tools to scrape Twitter for mentions of AT&T and respond to the relevant messages once they are back online.

The Process
The amount of inquiries and feedback that AT&T receives is tremendous. Their Facebook page has over a half of million fans and they receive a lot of inquiries, praise and criticism on the page. The Customer Care Team works very closely with the Corporate Communications and Marketing Teams. They share training, insights and best practices as well as communicating frequently to ensure the conversations are being responded to by the appropriate people.

AT&T's main Facebook Page is a mixed bag, including not only customer inquiries but other announcements and promotions as well. They have custom tabs for Customer Care, the iPhone and more.

When customers seek help from AT&T via their Twitter page, they are responded to immediately letting them know who will be handling their inquiry (i.e., @ATTTina, @ATTEmilia @ATTAlexM, etc.).

It is virtually impossible, at this point, for the Social Media Team at AT&T to respond to every mention of the brand. They do, however, respond to every inquiry that comes in directly to their social media channels. They try to respond to as many mentions as possible outside of their channels and use tools and manual analysis to identify influencers. Their goal is to respond to the most influential people first, as those with a lot of clout can quickly help or hurt the brand.

Tools

AT&T uses several paid tools for monitoring and listening and additional tools for internal reporting. One of the biggest challenges for a company of this size is the number of mentions it receives. Many of the paid monitoring tools charge per the number of results. So AT&T chose tools that allow an unlimited number of search results.
For responses to Twitter and Facebook inquiries, the majority of the activity is handled through the native applications (directly from Twitter and Facebook); although, they have used CoTweet on occasion as well.

Policies and Training

Policies were developed based upon the company policies that were already in place. Each Customer Care Manager that has been brought on to the team has an extensive management and customer service background and must go through a minimum of one week of training with the Corporate Communications and Legal departments to ensure that all communications are handled appropriately.

They are given the autonomy to respond to messages and resolve issues online, but take any conversations regarding account information offline to ensure the privacy of their customers. If there are questionable inquiries, they are trained to escalate those to the proper channels (i.e., the Legal Department).

Social Media Expansion

AT&T is dedicated to structuring social media as a shared service across the organization. You can expect to see some changes in the near future. For instance, they may consolidate several of the different social media identities to increase efficiency. They will also be looking into tools to help them easily integrate social media into their CRM system.

In the coming months, they will continue to announce their social media presence by promoting it through various forms of media and collateral and we may even see a grand announcement – but for now, they will continue to increase the awareness gradually to ensure they can handle the growth.

Biggest Challenges

"It's like trying to drink water out of a fire hose", Molly said referring to the vast number of mentions that they receive daily. Trying to score influence and respond quickly is, by far, their biggest challenge. Additionally, structuring social media as a service that is intentional, disciplined and mapped to broader corporate objectives and goals is what they, like other brands, are moving towards. What started as organic and an experiment is shifting to a real discipline.

AT&T's Social Media and Web Presence

Websites	http://att.com/socialmedia
	http://www.att.com
	http://www.att.net
	http://wireless.att.com/businesssupport
	http://calmcoolconnected.com
Facebook	http://www.facebook.com/att
	http://www.facebook.com/attshare
	http://facebook.com/attlatino
Twitter	http://twitter.com/ATTCustomerCare
	http://twitter.com/shareatt
	http://twitter.com/ATTNews
	http://twitter.com/SmallBizInSite
	http://twitter.com/YPMobile
	http://twitter.com/ATTDeals
	http://twitter.com/ATTJobs
	http://twitter.com/BizSolutions
Flickr	http://flickr.com/shareatt
YouTube	http://youtube.com/shareatt
	http://youtube.com/user/ATTEnterprise

Case Study: National Association of REALTORS® Commercial Real Estate Division

by Linda Ford, USATODAY and Erika Blanchard, VIPdesk

Overview

Jean Maday is the Marketing Manager Commercial Real Estate for the National Association of REALTORS® (NAR). Jean's responsibilities include oversight for the marketing and branding of commercial programs and services offered to NAR members. She works collaboratively with other team members to develop the appropriate messaging copy and to implement tools to achieve her goals. She then determines the appropriate messaging and format including digital & social media, print campaigns and direct mail. Additionally, she manages the brand presence at tradeshows and conferences and is responsible for maintaining content on Realtor.org for the commercial real estate pages.

The National Association of Realtors is the largest trade organization in North America and represents 1.2M members, 270K of which are commercial agents. They launched their overall social media presence in 2009 and are now utilizing Twitter, Facebook, LinkedIn, Blogs and an ActiveRain forum.

They initially began using social media as their members demanded it. The intent of their presence in social media was to assist their members (Realtors) with no real intention of marketing or promotion. Prior to their launch in 2009, many of their employees were already utilizing social media. At one of their Re-bar Camps (or "un-conferences" which is a one day meeting with no agenda until everyone gets there); the decision to launch and hire for social media was decided upon. From there, it took approximately three months to officially launch their social media presence.

Resources

During late 2009, NAR hired a Social Media Manager, Todd Carpenter, who was, and still is, an avid Real Estate blogger. He was hired to support Realtors who were starting to use social media. He was also instrumental in working with the team to establish policies and guidelines.

For NAR, social media lives across the organization; there are approximately 15-20 people (approximately 10%) who use social media as part of their job. They typically staff four agents per shift. Todd acts as a consultant to its members and supports other internal managers using social media for their business line or specialty (i.e., Commercial, Residential, Land, Global/International, Green, etc.) The Marketing Department has the least amount of participation in social media.

The Process

NAR's "Information Central" is made up of 10-12 full-time employees who field calls from members and then transition those calls to the appropriate specialty coordinator(s). Additionally, they monitor and update Twitter and Facebook. They receive approximately 80k-100k calls/emails per year, plus any interactions on Twitter and Facebook. They respond to any inquiries, including social media inquiries and comments, Monday through Friday from 7:00 am-7:00 pm CT. They do not use canned responses for social media replies, as they trust the agents they have put into place and want their responses to be as genuine as possible.

Tools
NAR utilizes several social media tools for monitoring and responding, but primarily use TweetDeck and HootSuite.

Policies and Training
Once Todd was hired within the Publications Department, a small team was formed which included Legal, Human Resources and Social Media, among others. This team was tasked with putting together the guidelines. Formal documentation was developed which is consistent with their normal HR policy, but is its own stand-alone documentation.

Key Takeaways and Best Practices
- Utilize existing staff who are already engaged in the social media space and advocates of social media.
- There is no right or wrong way to do this. Social media is really about customizing for your customer. It's not a one size fits all. Build the plan based on your customer needs.

NAR's Commercial Social Media and Web Presence

Websites	http://realtor.org/Commercial
	http://commercialsource.com
Blog	http://blog.commercialsource.com
Facebook	http://facebook.com/CommercialSourcedotcom
Twitter	http://twitter.com/commsource
LinkedIn	http://linkedin.com/groups?mostPopular=&gid=1811792

Case Study: NetApp

by James Clark, Room 214 and Erika Blanchard, VIPdesk

Overview

Navneet Grewal is the director of marketing programs and user communities and drives the strategy of NetApp's online user and subscription programs which include its technical user community, newsletter, and magazine through social media and integration with outbound go to market strategies. Under her leadership, the NetApp community has seen tremendous growth in membership and engagement since its launch in April 2008.

NetApp creates innovative products—storage systems and software that help customers around the world store, manage, protect, and retain one of their most precious corporate assets: their data.

They began blogging in 2005 and today, have over thirty corporate blogs, some individual blogs hosted by key executives and group blogs from different solutions and technology teams. They began soliciting feedback from their customers and partners in 2006, and for the next two years worked on a plan to get the word out. In 2008, they were ready for their formal brand launch.

They first launched their online communities which were based on the feedback they received. Their customers and partners wanted more collaborative spaces where they could openly and interactively have conversations and discussions with other users and NetApp experts. They then began participating in the various different media channels including Twitter, Facebook, LinkedIn, YouTube and Flickr.

Although their social media strategy was built from and is led by the corporate marketing department, there isn't a lot of marketing within the communities. The communities are customer focused and the active engagement is all they've needed for marketing.

Having a customer community reduces the amount of man-power needed within NetApp. The users actively participate and answer questions from their peers. They also use these communities to collaborate on projects with their customers and partners.

Because they conducted so much research early on and got proof that their customers and partners wanted a place to communicate, it was fairly easy to get approval for the initiative. Additionally, the culture at NetApp is very open and, despite the few naysayers that worried about putting everything out in the open, it was a unanimous decision to launch the initiative.

The legal department was heavily involved in the planning and rollout. They formed policies and procedures to ensure they were in compliance. Before they launched, they made sure there was valuable content on the sites. And when they launched the beta version, they sent out a communication to their customers announcing the new community and its features. They reached out to their brand ambassadors and super-users and encouraged them to participate and initiate conversations. They continued to market the community, by cross promoting it on the website, in newsletters, etc.

Resources

There are several different communities including a support community, which is for customers only and not open to the public. This is not indexed by the search engines to protect their customers' information.

The little marketing efforts that they use are primarily on the community side and are managed by the marketing team. The support side is solely for customer support and communication and managed by the support team.

There are two different groups comprised of ten people (not including the product and support reps) that manage the overall social media process. Navneet's team manages the communities, and there is another team that manages the mainstream social media channels like Facebook, Twitter, LinkedIn, etc. Both teams work very closely.

Navneet has a dedicated community manager who is responsible for all operational aspects such as, system issues, maintenance, etc. Additionally, he is also responsible for some of the monitoring. She has another part-time resource who regularly, and manually, monitors the engagement and sentiment within the communities. Additionally, they have PR agencies globally who monitor the overall communities.

The Process

The customers and product experts answer all of the customer support questions. Marketing does not engage, unless a question goes unanswered. They may wait, in order to encourage peer-to-peer interaction, but if no response is given, they acknowledge the question and let them know they will find someone to help them. Marketing may also solicit general feedback to gain knowledge or simply start the conversations.

There are no official support hours for the community, as it is self-run and mostly peer-to-peer. They have community moderators in India and the US, so rarely does a question go unanswered for any length of time.

The systems they have built make it easy for their customers to engage. They can subscribe to get notifications via email in their areas of interest or expertise. They do not need to login to the site. They can simply respond via email. Additionally, they recently launched an iPhone app so people can communicate on the go.

There is an internal escalation path in place for any issues that need to be addressed. There is an escalation chain up to and including the legal department; however, they have been fortunate so far and have not had to get legal involved in any issues.

As social media is still in its infancy they, like many others, are learning as they go by putting processes in place as issues surface to ensure the same issues are not repeated.

Tools

Up to this point, monitoring and moderation is done manually; however, with their explosive growth, it is getting increasingly more difficult to manage. They rely heavily on Google Alerts to notify them of any mentions of their brand and products. They use Jive and have business objects integration so that they can report on standard metrics.

Policies and Training

NetApp holds moderators training for anyone that is going to participate in the communities. This training consists of one-on-one sessions and pre-recorded WebEx sessions to walk them through the process and examples. They are currently working on a formal training program within their education department, NetApp University.

Metrics
They measure quality and define success by the stability of the platform, the quality of interactions and content, as well as consistency of the programs they execute. They were hoping to get 500 customers to sign up by the end of the first year, but to their amazement, they had 8,000 members by the end of the first year. By their second year anniversary, they had over 50,000 members.

They do not have any set metrics or goals at this time and will be satisfied as long as it continues to trend upward; however, they are currently in the process of building an ROI framework to show community influence in terms of revenue touched or influenced.

Social Media Expansion
They are looking to expand their communities and social channels to better engage with their customers. They plan to invest in paid monitoring tools so that they can listen closely to customer sentiment. They also want to tighten integration and alignment with business initiatives and support key business objectives. Navneet wants to drive innovation and better measure the outcomes so that she can show the impact social media has on business.

Best Practices and Future Plans
- Have a clear purpose
- Keep the longer term goal in mind, have a vision for what you want to accomplish in the end
- Start small - You won't be able to do everything right away
- Do all of the foundational work before jumping in
- Work closely with your IT and legal department before launching a community website to ensure buy-in from all departments and to ensure that all compliance requirements are met
- Build relationships with members.
- Have strong relationships not only with customers but also with internal experts.
- Community drives the direction of content so it is so important to listen to and recognize key contributors
- Keep your stakeholders informed on regular basis
- Avoid over-marketing to the community
- Take risks but set the right expectations
- Be clear on how you are going to measure success

NetApp's Social Media and Web Presence

Website	http://www.netapp.com/us/
Online Communities	http://communities.netapp.com/index.jspa
Blogs	http://www.netapp.com/us/communities/communities-blogs.html
Facebook	http://www.facebook.com/NetApp
Twitter	http://www.Twitter.com/NetApp
	http://twitter.com/NetAppCommunity
	http://www.Twitter.com/TeamNetApp

Case Study: Oakland Christian School

by Erika Blanchard, VIPdesk

Overview

Randy Speck is the Superintendant of Oakland Christian School in Detroit, MI. Oakland Christian is a private pre-kindergarten thru 12 school. Randy has been with the school system for over 12 years. Prior to his role as superintendant, he was a teacher and a coach.

Randy is active in social media, as he knows the importance of staying in contact with his current, past and future enrollees.

In 2008, Randy started a blog which he uses to highlight announcements and upcoming events. He also began utilizing YouTube. All of the videos are created in-house and include a variety of creative messages such as, ads for the yearbook and school, unique changes to the interior design of the school, school trips and local community outreach projects. It is a great medium for letting viewers, especially those considering enrollment, see what the school is all about.

In 2010, he identified the need to become active on Facebook. Randy knows that there are a lot of parents, specifically moms who are active on Facebook. He realizes that this is one of the best ways to keep in touch, as most people check their Facebook accounts several times a day. Upon launching their Facebook page, they instantly got hundreds of followers after announcing it to their alumni.

Randy also created a Twitter account, but for the time being hasn't spent a lot of time focusing on it. For now, Facebook, YouTube and his blog are the major players for his audience.

Resources

Randy has been the driving force behind social media at Oakland Christian School. However, he recently hired a Director of Communications. The goal of the Communications Director will not only be to expand their social media reach, but to integrate social media into their existing lines of communication. She will be tasked with ensuring that all of their communications are consistent across every channel.

Additionally, hiring a Communications Director will give him more time to focus on creating engaging content, like blog posts and podcasts, while not having to worry about the logistics.

Tools

Currently Randy isn't using many third party tools to manage his social media profiles, but feels as their social media presence grows, they will begin to utilize more tools. He has, however, used Involver for quite a while. Involver has a variety of apps that help you get the most out of your social media mix. He currently uses Involver's YouTube app to seamlessly integrate the school's videos onto their Facebook page. They are planning to use additional Involver tools, such as AMP, the world's first "audience management platform", to help them get the word out about their upcoming "Servathon", a community outreach project that is being sponsored by Pepsi.

Policies
With the hiring of the Community Director and the expansion and empowerment of students contributing content, policies will need to be put into place, which are currently being developed.

Social Media Expansion
They plan to continue being active with their social media endeavors and have plans to launch several more Facebook pages, specific to other activities within the school (i.e., athletics). With that they plan to get more of the students involved in developing the pages and maintaining the content.

Conclusion
Despite the economic downturn, especially in Detroit, Oakland Christian School has been successful thanks to their quality education and innovative approach. They have a 95% retention rate and have seen 40% growth in the last year. Amazingly they do not pay for any advertising and any new enrollments are all secured via word of mouth recommendations.

Oakland Christian School's Social Media and Web Presence

Website	http://www.oaklandchristian.com/
Blog	http://www.oaklandchristian.com/content.cfm?id=151
Facebook	http://www.facebook.com/ocschool
Twitter	http://twitter.com/ocschool
YouTube	http://www.youtube.com/user/OaklandChristianSchl

Case Study: Publishers Clearing House

by Mark Clayton, House Party and Erika Blanchard, VIPdesk

Overview

Francisco Alberini is the Social Media Manager at Publishers Clearing House. Publishers Clearing House (PCH) was founded in 1953. They are a leading multi-channel direct marketer of value-based consumer products and magazines and a respected leader in the direct marketing industry. Nationally known for its famous Prize Patrol that surprises screaming million dollar winners, the company has awarded over $220 Million in prizes. Nearly half of the company's profits go to the benefit of charitable causes ranging from the arts to social services to the environment.

PCH.com has a growing family of online properties that offer many ways for consumers to play and win, including pch.com, pchgames.com, pchlotto.com, pchscratchcards.com, pchcoupons.com, pchtv.com and pchonlinesurveys.com.

PCH got involved in social media in 2008. Initially, it was something they did on the side. They soon realized the value and committed to growing their presence. They mainly focus on Facebook, although they have various other online presences such as interactive websites, Twitter, YouTube, blogs and more. Their social media presence was initially focused on their existing customers, and their fan base consisted mostly of their customers. However, it grew virally over time. They now use the channels for customer service as well as for promotional endeavors.

Resources

The social media team consists of ten people, five of which are agents that stepped into the social media role. The agents respond to the consumers and are fully cross-trained customer service agents. They initially handled phone and email customer service and were trained in the social space, namely Facebook.

The Process

Their primary goal is to give people a great impression of PCH. The primary role of the agents is to provide a two-way real-time dialogue. They use that dialogue to gain customer insight and provide instant feedback to get customers engaged and keep them happy. They often utilize this feedback to tweak their existing and future campaigns. They rely on social media to exploit the human-side of the brand and promote their family friendly products, services and community.

When issues surface that need to be escalated, the agents will advise Francisco and if necessary, move the issue up the chain or get the legal department involved.

For many of the comments posted, they must determine how, or if, they should respond. If something is posted that is factually incorrect, they will respond to right the inaccuracy. If they are clearly promoting themselves to win ("pick me!") they do not get a response. If there is a comment posted that is extremely negative and doesn't warrant a response or can cause damage to the company or its customers, it is removed.

They currently measure their success based on engagement and follower-base. The agents are put on a 2.5 hour rotation basis to cover all social media engagements. If a CS rep works a 7.5 hour work day, then 2.5 hours are used on social media work. The social media coverage hours are from 8:30 am -11:00 pm CT Monday-Friday and 8:30 am– 5:00 pm CT on Saturdays. All inquiries are to be responded to within 1-2 hours.

They've used their past social experiences to help them better plan for the future. For example, if a prize award is about to be announced, they are aware of many of the questions that will be asked based on the history of the announcements.

Policies and Training
Since all of the agents have traditional customer service backgrounds, it has been an easy transition moving them into the social media space. They follow the WOMMA guidelines and are familiar with the existing policies. For example, promotions which are announced in the social media space are reviewed and approved by the legal department up front. Most responses are reviewed and approved as well.

Social Media Expansion
Their overriding goal is to open a new channel and expand the appeal to a broader and younger audience. They are exploring GetSatisfaction and working on a database of FAQ's which they are hoping to integrate into other sites so that members can access the same pool of questions.

They would also like to get representatives from each department involved and interacting with the community to really give a sense of the company and better connect with their audience.

Best Practices

- Have a plan
- Need to have all the basic customer service training in place
- Be active and consistent - Social media is a constant process that never sleeps

Publishers Clearing House Social Media and Web Presence

Websites	http://www.pch.com
	http://www.pchgames.com
	http://www.pchlotto.com
	http://www.pchwonderland.com
	http://www.pchsearchandwin.com
	http://pchscratchcards.com
	http://pchcoupons.com
	http://pchonlinesurveys.com
Facebook	http://facebook.com/pch
Twitter	http://twitter.com/pchwinningways
YouTube	http://www.youtube.com/user/pchprizepatrol

Case Study: Quicken Loans
by Erika Blanchard, VIPdesk

Overview
Kelly LaVaute is the Social Media Manager for Quicken Loans and is focused on engaging clients, answering questions, and educating consumers on the ins and outs of personal finance and the mortgage process.

In 2006, Quicken Loans, the nation's largest online retail lender, dipped its toe into social media by launching What's the Diff, a blog about the things that make the difference in business and in life.

A couple of years later, they expanded their social reach by adding more blogs and utilizing other social media platforms. Today, they have an active Presence in Social Media and participate on Twitter, Facebook, Yahoo! Answers, YouTube, FriendFeed, Flickr, Zillow, LinkedIn and Active Rain. Additionally, they have added new informational blogs such as; Community DIFF, Quicken Loans Insider, and Quicken Loans Mortgage News, several of which have multiple contributors and user-generated content.

Resources
Despite the fact that Quicken Loans, as a whole, works with 10,000 new customers and closes 200-400 loans per day, Kelly is the *sole resource* for all of Quicken Loan's social media channels. Although, she can't answer every inquiry, she has been with the company for over 5 years, which makes her very knowledgeable in assisting customers and knowing when and which issues to delegate or escalate. Kelly predicts that as more consumers embrace social media, they will need to hire additional resources.

The Process
Kelly actively monitors each social media channel utilizing many of the free tools available. She says, *"We don't pay for monitoring; there are too many free tools!"* Kelly responds to any relevant posts, including questions, complaints *and praises* as quickly as she can – immediately if possible, but at least within 3-4 hours. If an issue needs to be delegated, or requires additional research, customers are notified right away. It is important to let them know that their issue has been received and is being researched further.

She stays connected on and off the clock, as she feels that social media is a 24/7 job. According to Kelly, in the beginning, it can be a challenge determining which messages are relevant and which are spam, but it gets easier to decipher as you dive deeper into it.

All new hires are provided a brief overview of Quicken Loan's social media processes. Depending upon their position within the company, they may be encouraged to use multiple social media platforms for customer engagement and service.

Employees are encouraged to participate in social media, and at least setup a Google profile (which can be used to combine all of your public social identities). Mortgage Bankers are encouraged to use Active Rain (a social network for the real estate industry) by not only setting up a profile, but also joining groups and becoming active within the discussions as well.

Quicken Loans has been very successful in social media by listening and being fully engaged. They encourage feedback, often providing incentives for completing surveys. This helps them to ensure that they are meeting and exceeding their customers' needs – and it has worked! According to their responses, 94% of closed clients would recommend them.

Policies
Quicken Loans doesn't have policies specific to social media, but employees are expected to adhere to the company's core values by being professional and respectful at all times. She feels she is lucky because she works for a company that trusts and empowers her to handle issues without obtaining prior approval for each response.

Metrics
Social media is tracked differently for each channel and purpose. For basic statistics, she utilizes Twitter Counter and uses Su.pr to track links shared within social media. For Facebook, she references the Facebook Insights, which provides a clear overview and graph of their social media statistics.

Customer service issues are tagged when they are forwarded to the client relations department. The number of inquiries, response time and final resolution are all tracked to ensure issues are being responded to timely and accurately. Reporting is handled by the Client Relations team.

Social Media Expansion
Kelly is continually learning and ready to test the waters with additional social media channels. Quicken Loans is planning new applications for Facebook and she is currently hoping to plan a scavenger hunt in downtown Detroit, utilizing Foursquare. This will not only help Quicken Loans get to know the local businesses, but will help the local businesses get exposure as well.

Best Practices
- Hire or utilize someone who is comfortable with social media, is a great writer and familiar with the company, or at the very least, the industry
- Monitor, listen and respond to all posts (positive and negative)
- Take complex issues offline
- Educate clients before, during and after
- Encourage and acknowledge feedback
- Try very very hard not to delete posts
- Don't be all business, it's important to humanize your brand
- Don't be afraid to try and fail – This is the only way you'll truly know what works the best

Quicken Loan's Social Media and Web Presence

Website	https://www.quickenloans.com/
Blogs	http://www.whatsthediff.com/
	http://www.quickenloans-difference.com/
	http://www.quickenloansinsider.com/
	https://www.quickenloans.com/mortgage-news/
Facebook	http://www.facebook.com/QuickenLoans
Twitter	http://twitter.com/quickenloans
YouTube	http://www.youtube.com/user/quickenloans
Yahoo Answers	http://answers.yahoo.com/my/profile?show=S4swOoyDaa

Case Study: Qwest Communications

by Erika Blanchard, VIPdesk

Overview

Josh "Sipp" Sippola is the Talk to Qwest Team Lead and a Social Media Strategy/Development Pioneer for Qwest Communications. Sipp joined Qwest in 2005 and started in the Residential Customer Care Department and now manages customer-facing social media efforts for the company, which considering his background is a great fit.

Qwest is a large telecommunications carrier, which provides local service in 14 western U.S. states: Arizona, Colorado, Idaho, Iowa, Minnesota, Montana, Nebraska, New Mexico, North Dakota, Oregon, South Dakota, Utah, Washington, and Wyoming. They partner with several big voice and data players such as DIRECTV and Verizon Wireless.

In the beginning, customer support was handled via the standard channels: the company's toll-free call line, email and chat. Realizing that consumer habits were changing and people were spending more time online, Talk to Qwest was born. Talk to Qwest is a program focused on resolving customer service issues through online outreach. Through social media, Talk to Qwest provides quick and courteous resolutions for customers who need assistance.

In February of 2009, the Twitter handle @TalkToQwest was secured and was officially launched as a support channel in March of 2009. In the beginning of 2010, they created a Facebook Fan Page as they, once again, saw a need to provide their customers and potential customers with another communication channel.

Resources

Their Talk to Qwest department is comprised of five knowledgeable front-line managers, who respond to and resolve all of the customer inquiries. There are also two other members of the team. One is the admin for the Qwest Facebook page and involved in Social Media strategy. Both handle metrics and reporting. When they launched the Talk to Qwest Team, they immediately put a full team of four in place. Shortly thereafter, they added an additional representative to ensure that all inquiries could be handled in a timely manner. All of the managers go through a rigorous training and are hired based on their ability to resolve complex issues and think out-of-the-box.

The Process

The TalkToQwest Team is available Monday through Friday from 7:00 am to 7:30 pm MT and on Saturday and Sunday from 8:30 am to 5:00 pm MT. For Twitter, the Twitter Bio is changed each time a new manager comes on duty. This personal touch allows consumers the opportunity to know who they are communicating with.

In the event someone on the Talk to Qwest team is unable to handle an issue, they are still the primary point of contact and notify the customers immediately, letting them know that their inquiry has been received and is being worked on. Once the issue is resolved, they are the ones to notify the customers of the resolution.

The Talk to Qwest team tries not to use canned responses and make each interaction as personable as possible.

Policies
There is a process document in place. Anyone that speaks or responds on behalf of the company through the Talk to Qwest Channels or @QwestNews must be preapproved. Additionally, all of the channels are monitored for quality assurance. A more official social media policy is in the works and will be ironed out in the near future. In addition to their existing internal policies they have a link on their Facebook page with communication guidelines for interactions within the page. It is intended to ensure that their Facebook community is helpful, fun and interactive for all of their customers and fans.

Tools
The Talk to Qwest Team relies heavily on Radian 6, a paid monitoring tool, to monitor any mentions of the brand. Additionally, they rely heavily on Tweet Deck to monitor mentions and handle interactions within Twitter. By setting up multiple keywords to search, it makes monitoring the brand much easier, as often, users misspell the company name (Quest vs. Qwest).

Metrics
Utilizing Radian6, all requests are tracked and reported on monthly. These reports are used to identify trends and aid them in identifying issues up front, so that they can be proactive and avoid future issues. They are not currently utilizing a tool to automate integration of their customer data into their CRM. Instead, they are noting each account with the details of all communications for each customer.

Social Media Expansion
Sipp not only wants to keep up with the evolving trends in social media, he wants to ensure they stay ahead of the trends. They recently began working with Room214, a social media and word of mouth marketing agency, in order to help them better engage with their customers and increase brand awareness for the company. They recently launched a customized user help form on Facebook with an interactive twist. For any urgent issues, there is a fun "In Case of Emergency, Break Glass" application. This is a great way for customers with service issues to let out their frustrations in a fun and interactive way.

Best Practices
- Be sure that everyone speaking on behalf of the company knows that anything they say lives online forever
- Do not doubt the power of social media!
- Customers love options
- Customers will appreciate being able to communicate with your company via their preferred communication channel
- It is important to understand social media and find out how it can work for you and your company
- Social media is FREE market research - It is important to listen and find out what your customers are saying. This can help to identify areas of weakness or areas of opportunity

Qwest Communication's Social Media and Web Presence

Website	http://www.qwest.com
Facebook	http://www.facebook.com/Qwest
Twitter	http://twitter.com/talktoqwest

Case Study: Spiceworks

by Erika Blanchard, VIPdesk

Overview

Jen Slaski is the Director of Marketing and Communications for Spiceworks. A company that provides a free collaborative IT management application that incorporates crowdsourcing to help over 500,000 small businesses simplify everything IT. Spiceworks makes it easy for IT pros to manage their networks, collaborate to solve technology problems, and find the best practices, products and services they need day-to-day. Spiceworks is completely free and one of the first ad-supported business applications. The ads are from technology advertisers such as HP, Microsoft, Intel and 100 others - all valuable providers of IT products and services.

Resources

Jen oversees the Marketing and Communications functions for Spiceworks, but the community-at-large and the Community Manager is responsible for the day to day aspects of the social media initiatives.

The Process

Although they are not heavily involved in traditional social media, they have one of the largest online social communities for IT professionals. This community has over 1,000,000 active IT pros engaging on a regular basis. They refer to it as the "Facebook for IT Professionals" adding over 1,500 new users every day.

Spiceworks' support is built upon this social community which allows users of the company's software to collaborate and support each other around the clock. In early 2008, they secured their Twitter handle and later created a Facebook Fan Page. The Community manager is mostly reactive in these social media channels, answering inquiries and comments within 24 hours. The posts on Twitter and Facebook come from certain areas of the user community which are automatically fed to Facebook and Twitter.

In February of 2009 – Spiceworks launched several new social networking enhancements to its free IT management application, including a feature that works like Facebook newsfeeds to help users track changes to the hardware and software in their networks. In addition, Spiceworks added Twitter-like messaging for users. These capabilities were designed to help IT professionals stay better informed on what is happening in their networks and to more easily collaborate with peers by using features similar to the ones found in the social networking tools they already use.

<u>The social networking and community features of the Spiceworks IT Desktop include</u>:

- **IT Network Feeds** — brings IT news, community discussions, educational content, product and vendor updates directly into the user workflow. This information is displayed in-context of the user's specific hardware, software, industry and network size so IT pros get the critical information they need to do their jobs more quickly and easily.
- **Twitter-like Micro-Messages** — allow users to quickly share status updates about themselves with thousands of other IT pros and groups in the Spiceworks user community. These include updates on managing their networks, attending a professional conference, or negotiating with a vendor. IT pros can also use it to more quickly and efficiently get the information they need to do their jobs, such as researching a storage-area network to solve a backup problem.

Tools
Most of the social media engagement is handled within the software and user community. For responses to Twitter and Facebook inquiries, the majority of the activity is handled through the native applications (directly from Twitter and Facebook). CoTweet, however, is also used to assist in managing responses from multiple users, enabling them to keep their communications in sync.

Policies
With the hiring of the Community Director and the expansion and empowerment of students contributing content policies that are being developed will need to be put into place.

Social Media Expansion
Since their astonishing growth is almost solely based on word of mouth marketing, they will continue to embrace their "Spread-Spicers". Spread-Spicers are ambassadors of their product who are extremely happy with the software and more than willing to spread the word. Spread-Spicers are known to spread the word about Spiceworks via their own social media profiles; providing free advertising for the free software provider they rely on to manage their networks.

Spiceworks Social Media and Web Presence

Website	http://www.spiceworks.com/
Community	http://community.spiceworks.com/
Facebook	http://www.facebook.com/Spiceworks
Twitter	http://twitter.com/Spiceworks

Case Study: USAA

By Linda Ford, USAA

Overview

"*We all work for customer service at USAA,"* was Bret Gallaway's, VP of Business Communications, response when asked whether USAA's social media presence is primarily a function of customer service or marketing. What you would expect to hear from a company cited in virtually every book, article, and web post referencing companies who are champions of customer service.

Customer service is a key to everything USAA does. When it came to social media, naturally, they started with customer service and evolved into social media as a marketing tool. How do customer service and marketing work together in the social media space? USAA holistically embraces customer service which is integral to how customers view and engage with their products.

The Process

USAA officially launched their social media presence in October of 2008. However, as early as 2005, you could find USAA on sites such as MySpace and military.com. What did USAA want to achieve with their social media presence?

1. Reach customers where they are rather than expecting customers to come to USAA
2. Join the conversation
3. Facilitate community conversation among a world-wide customer base

Today, approximately two dozen USAA customer service representatives and two members of the Corporate Communications team are responsible for social media communication. Initially the representatives used "canned" responses. Not surprisingly though, the responses sounded canned. Today, to reflect the empathy USAA is known for, the representatives use their own words. To ensure compliance with company guidelines responses are regularly audited.

When selecting and training customer service representatives, USAA looks for representatives who are already experts on the internal minutia of the rules and regulations of the highly regulated banking and insurance industries, and also have some social media savvy. Rather than modify existing, general customer service training they developed formal social media customer service training documentation.

So how does USAA determine social media success? Like many others, it's two-fold:

1. Participation on all social channels (.com, blogs, Facebook, "usaa" mentions, etc.)
2. Do social tools lead to action/ROI? (self-service transaction, product acquisition, etc.)

Recommendations

Recommendations for the rest of us: There is so much excitement around social media – keep the focus on what you would normally measure. Are you solving real business problems?

Once you have addressed that key question:

1. Do not underestimate the importance of top-down buy in
2. Do make legal a part of the social media team early and make them a true team member, not an obstacle
3. Start small – don't try to fully integrate from day one
4. Do test and learn in the early stages of development

5. Follow the same process as you would for any new project

Stats & Tools

- Social customer service hours: Monday-Friday 7:00 am-7:00 pm CT (same as normal business hours)
- Social response time: within 1 business day
- USAA uses Radian6, supplemented by Google analytics, TweetDeck, and a few other free monitoring tools

USAA's Social Media and Web Presence

Website	http://www.usaa.com
Facebook	http://www.facebook.com/USAA
Twitter	http://twitter.com/USAA_News
YouTube	http://www.youtube.com/user/USAAvideo
	http://www.youtube.com/user/askjune

Case Study: Warner Bros.

by James Clark, Room 214 and Erika Blanchard, VIPdesk

Overview

Jodi Flicker is the Vice-President of Audience Development for the Worldwide Television Division of Warner Bros. Jodi is responsible for building and managing a department to provide emerging platform marketing strategy for the Warner Bros TV Worldwide Marketing Group digital businesses. Specific areas of responsibility include the management of WB TV Group Digital Distribution Affiliate Marketing team, the creation of the WB TV Group Social Media and Word of Mouth Marketing Team and Audience Development Strategy for WB TV Online Destinations.

TheWB.com is the #1 fan site for shows targeted to adults 18-34. TheWB.com paves the way as a premium video entertainment destination. It's TV online. On TheWB.com, you can watch full-length episodes of One Tree Hill, The O.C., Buffy the Vampire Slayer, Gilmore Girls, Everwood, Smallville, Friends, Pushing Daisies, Chuck, Jack & Bobby, Angel and Veronica Mars. Plus, it has additional features that include community and message boards, extensive photo galleries, games and downloadable features that allow you to have a deeper relationship with these and other television shows.

Warner Bros. usually distributes through other direct-to-consumer distributors, but they have a fully functioning marketing department at the studio, which is rare for studios. So the social media focus is both marketing and customer service targeted. The original online community concept was born in 2005. Like most studios, they were thinking of different ways to communicate with their fans. They had to determine the different platforms in which content was being consumed, taking into account how quickly the online environment was changing and evolving. Videos were becoming increasingly popular and they had to determine how to communicate with the fans in that space.

The primary focus of the Audience Development department is social media and word-of-mouth marketing. They started discussing social-media platforms in 2008. The studio already had a large digital-media group and was deep into digital media through sites like the cwtv.com. However, when they decided to re-launch the WB network as an online portal instead of as another network, they decided to use a guerrilla or word-of-mouth marketing ambassador program.

To begin the process, they were tasked with drawing up a plan for approval by the EVP of Worldwide Marketing for Television that approved the plan and then had to get approval from the head of the studio. Fortunately, the team at WB is forward thinking and gaining approval for their initiatives was fairly easy.

Resources

Within the television division, the Audience Development department is tasked with taking the lead on best practices in social media. Jodi was initially doing the monitoring for promotional efforts for projects such as Comic-Con and the communities surrounding their programs. Her Marketing team members do the outreach. The team members, or audience-development administrators involved in the outreach are responsible for monitoring the channels on YouTube and other online platforms and communities branded around the WB shows and movie clips.

For example, if there were a lot of complaints around the Smallville channel, they would identify the super-user and ask them to curate the channel for them. They would then be directly involved in determining what videos would be broadcasted on that channel.

There are seven dedicated people in the television department located at the office whose hours vary. Staffing is dependent upon the needs of the business. During special events, they may have coverage around the clock, but for typical business related issues, the coverage is during regular business hours (9-6).

They also manage another team which strictly handles word-of-mouth marketing. That team of people consists of 500+ people across the nation and the program (or team) is referred to as WB Word. These are paid ambassadors whose roles vary. They may respond to comments within the communities (i.e., YouTube) or simply post comments to get the conversations started. In addition, they have a full-time analyst that tracks all of the online activity within the department.

The Process

Within the Audience Development department, there is a fine line between marketing and customer service and a lot of the communication takes places on Twitter.

For example, when they were at Comic-Con, they used Twitter to help them understand what was happening from their fans' perspective. The team at HQ was monitoring the brand keywords and noticed there were a lot of complaints about the lines at the booth for a particular signing. Because of the instant nature of Twitter, they were able to contact the right people to quickly remedy the situation.

Although they mainly use Twitter to find out what their audiences are talking about, they also actively monitor additional fan networks, boards, Facebook and other online communities and respond within those platforms.

For the in-house team, they work like an agency, and base their scheduling on workflow coming in, assigning resources by project.

For the WB Word team, they post and recruit per project based on the number of project hours, although typically they will hire 15-20 people per project. For each project, copy guidelines are provided, but it is important to give the teams autonomy, as they want the conversations to be natural and real. As far as an escalation process, the press is the key factor in determining what needs attention. Since they deal with celebrities, they can easily see when things are hitting the zeitgeist.

Tools

They use a myriad of tools to monitor mentions of the brand. Tools they regularly use for monitoring are TweetDeck, IceRocket, Trendistic, and Twazzup. Additionally, they rely heavily on Google Analytics and Omniture.

The tool is dependent on the platform that they are monitoring – and all of the tools they use are free, as they feel many of the paid tools are far too expensive and unnecessary.

Policies and Training

The internal team consists of people that Jodi inherited or hired. Applicants are hired based on the typical interview process (knowledge, skills and experience). Additionally, they use a lot of behavioral interview questions, but a lot of the decision is based on gut-feeling.

New hires are considered based on their reach and drive. They have an in-depth recruiting process that requires applicants to provide a lot of information. They use certain filters (must be over 18, US-based) to weed out a lot of applicants and then they look at their social-networking footprint. They have set requirements that need to be met.

They have a deck that is used to communicate. When issues arise that need to be escalated, the Corporate Communications team gets involved. All of the team-members go through a training session with step-by-step instructions and are managed very closely, considering the fact that many of the team-members are right out of college. Upon hiring, each person has to shadow an existing team member through, at minimum, one campaign. They will then be shadowed, when they manage their own campaign. The quicker they jump in, the better.

They do not have a lot of service level agreements in place, as far as response content requirements. However, agents must respond within 24 hours. Additionally, they use the WOMMA guidelines as a guide. They gauge their success on engagement, impressions, consumption and sentiment.

Social Media Expansion
They want to have an even greater focus on community. They feel that there are opportunities within each community (YouTube, Facebook, Twitter, among others) and that what they are doing is just a microcosm of what they could be doing. They realize that social media is an ever-changing and always evolving space – and are committed to continual learning and development.

Key Takeaways

- Success is making a fan happy
- Listen!
- Be open and willing to take a risk
- Get involved in social media, companies who aren't are just plain foolish
- Use Twitter – great for instantaneous feedback and consumer insight
- Two-way communication is key – Don't speak without listening or simply evangelize your product
- Keep up with the technologies – they change every minute
- Be sure to let your customers know what resources are available and how they can communicate with you

Warner Bros Television Social Media and Web Presence

Websites	http://www.thewb.com/
	http://www.wbword.com/
Blog	http://www.thewb.com/blog/
Facebook	http://www.facebook.com/theWB
Twitter	http://twitter.com/thewbdotcom
YouTube	Multiple – by show

Case Study and WOM Terminology Framework

Some terms used in this Guidebook aren't necessarily those that people outside of the customer service field would be aware of. They are defined below, to avoid any confusion.

1. **AHT** — AHT is short for average handle time, which is the total amount of work time related to every contact a CSR handles. AHT is comprised of both average talk time and average after call work time, the total of which is divided by the total number of contacts the CSR handles.

2. **Blended Queue** — When a CSR works on multiple types of contacts at once—this can mean either a combination of incoming and outgoing contacts, contacts from more than one client, or contacts of more than one type (i.e. phone, e-mail, online chat, social media).

3. **Contact Center/Call Center/Center** — A center equipped to take a large number of contacts coming into an organization, usually from customers. Historically, call centers used to only respond to inquries via telephone, however as technology has advanced, so have the capabilities of contact centers to include e-mail, online chat, text message and social media response.

4. **CRM** — Customer Relationship Management software maintains all records of an organization's contacts with its customers. This includes records of all product inquiries, sales, returns, shipping, billing, service, and any other interaction the organization and customer have.

5. **Customer Service Representative/Rep/Agent/CSR** — Someone who provides assistance to customers when they contact an organization. Often the first, or only, live person that a customer interacts with when working with a vendor. CSRs can manage incoming or outgoing customer communication and communication channels including phone, fax, e-mail, text message, live chat, social media, and more.

6. **Dedicated Agents** — CSRs who only work on one type of contact at a time. This can mean either that they handle only incoming or outgoing calls (vs a combination of both), they only handle contacts from one client (vs multiple clients at the same time), or contacts of one type (i.e. only social media contacts vs a combination of multiple types, such as phone, e-mail and online chat).

7. **FTE** — Full Time Equivalent or Full Time Employee. Example: An organization that has one FTE dedicated to social media monitoring could have multiple CSR working on their social customer program, whose combined work hours on social media equal half of a full-time employee.

8. **Multi-function agent** — CSR who responds to multiple forms of customer communication. This can be a combination of incoming and outgoing contacts, or contacts of multiple types.

9. **Quality Assurance/QA** — The process of reviewing customer communications to ensure that the service provided meets with expected levels of service.

Monitoring Tools

The monitoring tools mentioned in this series of interviews are below. This is not a comprehensive list of tools, merely a sampling based on what each organization was using at the time of their interview.

- BackType
- BlogPulse
- BoardReader
- BoardTracker
- CoTweet
- Facebook's native platform
- Fan Page Notifier
- Google Alerts
- Google Analytics
- Google Reader
- HootSuite
- Ice Rocket
- Involver Tools—YouTube app, AMP
- Omniture
- Radian6
- RSS Feeds
- Seesmic
- Social Mention
- Trendistic
- Twazzup
- TweetDeck
- Twitter Analyzer
- Twitter's native platform
- Twitter Search

A Look Forward

While the case studies are a look at historical implementations, the concept of WOM in the Contact Center is quickly evolving. Significant changes have already occurred at these organizations since the time of our first drafts. What the case studies do not capture are the prospective plans, roadmaps, experiments and operational milestones that show where the practice of WOM in the Customer Contact Center is headed. Many of those plans include aspects of the following but could not be stated in the cases or specifically ascribed to a single brand due to the forward looking nature of the concepts:

- **Designing a Team to Scale:** The majority of discussion in the cases reflects One-to-One interactions via social media tools. A key future advancement in the Social Media Contact Center is the ability to scale to One-to-Many interactions. Some brands are already making headway here, for example in the area of "content curation" – The co-development of knowledge articles by consumers and bands using collaborative techniques. There are tools and processes to do this, but often achieving scale requires the collaboration of additional departments, capabilities and processes – for example those who develop and support the customer facing Knowledge Base. While that aggregation of support issues and their routing to agents can be solved by technology, content curation to develop new articles utilizing WOM and social media techniques requires people and processes that incorporate staff from the brand and the customer community.

- **Reintegration to the Contact Center:** Small WOM/Social Media Customer Contact Centers will both expand in size, continue to be centers of innovation, and eventually some of the most repeatable, actionable, and scalable tasks will be reincorporated back into the Call Centers.

- **Operational Metrics and Reporting:** Business plans are emerging for running the WOM and Social Media Contact Center with discipline and rigor similar to other aspects of the contact center. This includes the ability to justify costs within the same fiscal period. Heuristics now exist for metrics such as:
    - The number of cases an agent can handle in a period;
    - The cost per case;
    - Average time to resolution;
    - Customer Satisfaction benchmarked to other channels in the Contact Center;
    - Call Shed – the shift of phone calls from the call center to lower-cost channels of resolution such as online knowledge base
    - Capacity to aid Loyalty and Retention;
    - Emerging Issue Identification and Action Response;

  All of this yields a Cost/Benefit analysis that result in the coveted ROI conversation – the key to seeking startup and sustainment funding for a department.

- **Marketing and Advertising Budgets**: Teams will begin marketing and advertising their WOM and Social Media Customer Contact Centers in order to drive awareness and adoption of this channel. This will either occur in conjunction with existing marketing and advertising skill sets at the organization or represent a new role and be a marketing skill-set developed internal to the Contact Center. Budgets for funding the awareness and drivers of this channel will begin or continue to expand if they haven't already. The service and support marketing mix can include driving the adoption of self-service tools including website, knowledgebase and increasingly mobile applications and account management tools.

- **Defined and Accountable Service Level Agreements:** Consistency of experience, proper expectation setting, and robust delivery capabilities are all required to deliver upon Service Level Agreements (SLAs). Many of the concerns and issues about setting SLAs are being addressed and monthly, quarterly and annual management against stated objectives and goals with dashboard reporting is possible.

- **Channel Shift is Accelerating:** The "Face of the Organization" will continue to democratize to departments beyond public relations, branding & advertising, retail locations and web sites towards the centers of service and support. The people behind the solutions provided are real with personality that often develops a level of trust directly with customers.

- **Social CRM is Emerging with Results:** Technology vendors are positioned to provide relevant products which support customer service operations through social channels. These new "Engagement and Response" capabilities includes the lifecycle management of a case logged via social channels such as Twitter and Facebook, including the capture and reporting of operational metrics to support WOM via Social Media as a customer service discipline.

- **Sources of Innovation:** The WOM and Social Media Customer Contact Center will be a source of innovation. This includes ways to turn relevant, timely and actionable data quickly into Knowledge Base articles, developing techniques to innovate upon the customer communities, crowd-sourcing the curation of Technical and Service content developing Advocacy, Ambassador and Influencer programs.

The Research and Measurement Council hopes that this Guidebook both addresses some of your questions and spurs additional conversation on the topic.