BUILDING A SOCIAL CUSTOMER CARE TEAM

A step-by-step guide to an effective social customer care program

ENGAGOR
A Clarabridge Company

Contents

ENGAGOR

The Current State of Social Customer Care

Not meeting your customers' expectations on social isn't just bad customer service, it's bad business.

It has never been easier for customers to reach out to brands. Last year, there were over 879 million[1] complaints on social media directed at brands. Social media has given unprecedented power to customers—they can talk *about* you much more publicly than ever before and also talk *to* you when they need assistance. That's why the feedback, questions, and complaints that brands track through social are so important for capturing your customer's authentic voice, and ultimately, growing your business.

Many of today's businesses clearly see the value of social customer care. According to research by the Aberdeen Group, in 2015, 62%[2] of organizations have adopted social customer care programs.

[1] http://venturebeat.com/2014/12/12/social-media-we-complain-879-million-timesyear-and-facebook-is-our-top-target

[2] Social Customer Care: The Path to Success - Aberdeen Group

ENGAGOR

Ad-hoc activities and the lack of a proper social customer care strategy leads to failure. Without clear direction, there's no significant improvement in response times, which causes organizations to fail to meet their Service Level Agreements.

Many brands are still behind the curve when it comes to effectively managing questions and complaints received through social media. Missing out on messages or taking too much time to respond on social could mean losing customers. To efficiently manage a large influx of social media messages and prioritize which messages need a reply (and which don't), you need a social media team.

This eBook gives you insights into the best-in-class practices allowing you to:

- **Build a social customer care team from the ground up**

- **Optimize your social customer care strategy based on your customers' needs, not on organizational needs**

- **Create successful social media teams, located across the globe, that are attuned to each other and are able to collaborate smoothly**

- **Keep your social customer care team motivated: identifying and quickly resolving pain points**

Why Your Organization Needs Social Customer Service

Being able to quickly solve issues and respond to customers who are dissatisfied with a service or product makes or breaks your business. When customer complaints remain unanswered, the likelihood of churn increases, particularly when competitors are more receptive than you are to customer needs.

Businesses have identified the key role of social customer care and are emphasizing a social customer care team as part of their CEM program to improve customer loyalty and customer satisfaction.

ENGAGOR

What types of businesses rely on social customer service?

If you are struggling with any of the pain points below, you will benefit from a social customer care program.

- **You deal with a large inflow of social media messages on a daily basis. Because of this influx, you need to identify and prioritize mentions and make sure no message slips through the cracks.**

- **Your organization operates in an extremely competitive industry. The level of service you deliver is a key differentiator to stand out from the crowd.**

- **Gaining competitive insights through social is essential to optimize your product or service and have your business stay ahead of the curve.**

- **Your customers are sensitive to all sorts of promotions, deals, value offers, etc. You need to quickly identify trends, understand the wants and needs of your customers, and tap into new opportunities in a timely manner.**

- **Your customers expect and rely heavily on the availability of instant, real-time information.**

You have probably noticed that the quality of social customer service varies greatly per industry. When it comes to social customer care, the industries below rely on it the most.

- Telecom
- Travel and hospitality
- Transportation and logistics
- Finance, insurance & banking
- Retail (both in store and online)

Social customer care is critical for these industries because they are extremely service-oriented. For example, in the telecom industry, customer service is one of the few areas where a company can differentiate itself because the product has become a commodity. With travel and hospitality, having a pleasant experience is critical to customer satisfaction. In many cases, customers are at the mercy of airlines and hotels, and the ability to quickly get a question answered is paramount.

What Can a Successful Social Customer Care Team Do For You?

ONE

Manage social effectively:

Social media data is flooding in at record speed in countless different languages, from across the globe. A dedicated team ensures that you are routing messages to the right person at the right location to take immediate action.

TWO

Communicate meaningfully:

Every agent replying to your customers represents the voice of the brand. There's a huge opportunity out there for your brand to engage with customers on social. Using an authentic voice in a language that resonates with your customers amplifies your brand, increases profit, and leads to upsell.

ENGAGOR

THREE

Engage confidently:

Social customer care gives you a chance to be proactive and reactive, delighting customers and solving their problems. An organized, efficient team makes a great impression for new or returning customers interacting with your brand.

ENGAGOR

FOUR

Measure intelligently:

Social customer care metrics can give you information about customer loyalty, engagement, and influence, and also show how your online efforts are impacting your bottom line.

ENGAGOR
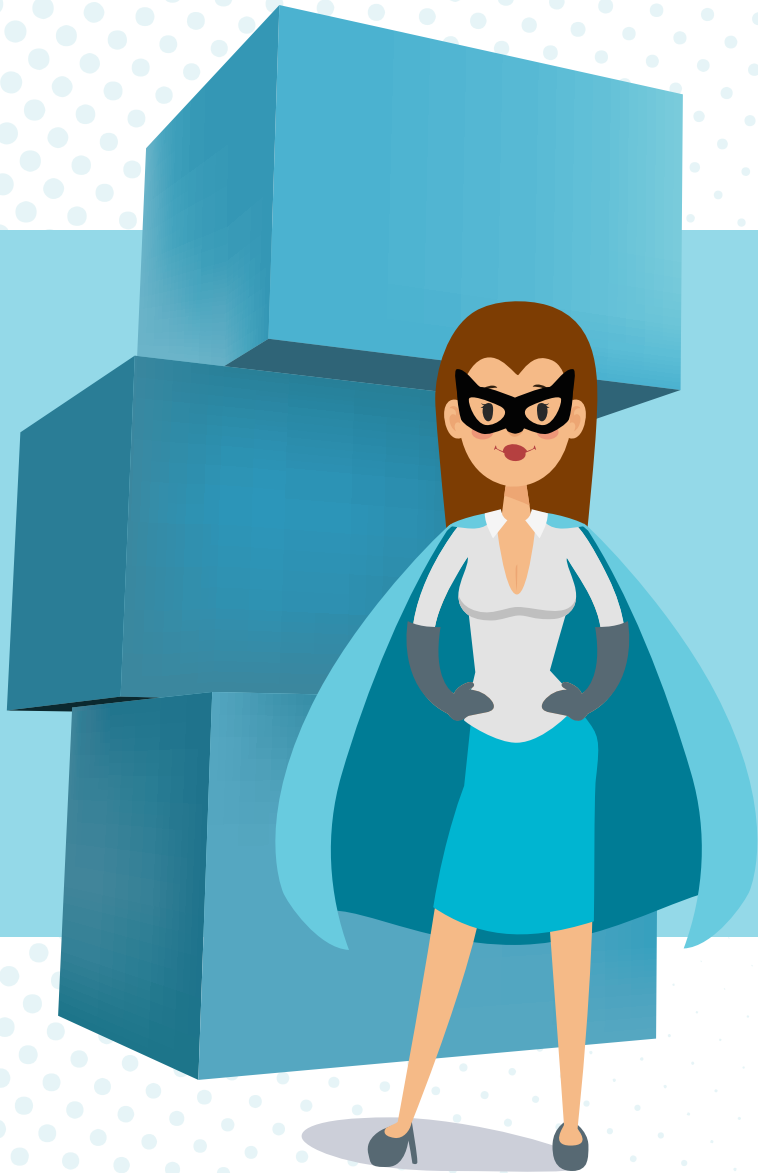
The Building Blocks of Your Social Customer Care Strategy:

Where, How, and Who

Where?

The real truth behind who should own social customer service is that it's actually the customer's territory. At the end of the day, the Voice of the Customer is so powerful that the customer decides how they want to be helped out and how they want to engage with your brand. Decide on who should own social customer service based on what's best for your customer, not on what's most convenient to your brand.

- **If you choose marketing, remember to connect into the customer care escalation procedures.**

- **If you choose customer care, remember to involve marketing in service situations that impact the brand.**

Where?

In 48%[3] of the organizations that have a social customer care program, it's the Marketing department's responsibility. On the other hand, in 26% of organizations the Customer Service department leads the program. No matter which you choose, both can work effectively. You can't really get it wrong if you decide for your Marketing or your Customer Service department to take on social customer care responsibilities.

If you're already active on social media, then customers are probably already contacting you through these channels for support. There's only one condition: you need to become best friends with other departments to prevent you from working in silos. It's obvious that your marketing and customer service department should work together. Think carefully about which workflows to set up to have both departments collaborate and communicate effectively with each other.

Remember: your customers don't care how your company is structured— they just want to be helped. Your social customer care program should provide processes and technology to stay ahead of the game. Spend more time figuring out "how" you should work, instead of getting caught up in "where" your customer care department is situated.

[3] Social Customer Care, Are Customers (Finally) Getting it - Aberdeen Group

How?

How?

Once you know where the social customer care team will sit within your company, you need to create a strategy for their day-to-day work.

STEP 1: Prepare. Listen to your customers and analyze carefully the data you're tracking. Determine the workload based on the volume of mentions you're pulling in that need a reply. Have a closer look at the type of messages you're tracking (e.g. to get a grip on the languages and type of questions you're getting). Find out when your social customer care team needs to be active, adjust your business hours accordingly, and communicate your hours on your social channels. Remember: the best tools will help your team work from anywhere, anytime by offering mobile social care capabilities.

STEP 2: Set up workflows. Once you've figured out who's going to staff your team, determine which other departments you want to involve. Set up efficient workflows to ensure collaboration to quickly route messages and share information with other departments.

How?

STEP 3: Create a plan for crisis situations & volume peaks. Preparing for a crisis situation isn't typically the first thing that comes to mind when you start to create a social customer care team. That doesn't make it less important. When there's a big peak in volume, it's a key moment of truth. Should you call upon an extra pair of hands or do you need to have a plan to handle a significantly higher workload?

Volume spikes are either predictable (e.g. when launching a killer marketing campaign) or happen out of the blue as a crisis erupts. To help you prepare for the latter, take control of the situation and manage customer sentiment. Make sure your team is up for the challenge by taking the right actions:

- Create canned responses for a wide variety of scenarios

- Build a status page to easily direct your customers to up-to-date information

- Set up alarms to help notify key stakeholders in case of sudden volume peaks

- Enable team chat to quickly pass on information to other parts of the business that can help calm the flames and create an action plan

How?

STEP 4: Plan to host frequent, company-wide meetings. Employees in large organizations often have the feeling they're working in silos and struggle to share relevant information gathered through social media with the right people. When it comes to your social customer care efforts, it's key to involve every department within your organization to align goals. Create a code of conduct to explain clearly in which cases you should reach out to other departments.

It's a simple, yet effective tactic to host regular meetings and discuss your activities. Sit down with the other teams and discuss when you expect peaks in volume. Make the exercise for your company and keep in mind:

- Which department has a direct impact on your social customer care team

- How often you should come together for collaboration (e.g. on a weekly, monthly basis)

- Which type of information and reports you should share across the company

Beyond hosting regular meetings, share insights relevant for other departments through your internal communication channels to keep everyone in the loop.

How?

It would be a pity to let customer feedback gathered through social media go to waste. In the Age of the Customer, it's key to implement the feedback you collect through social and share it across your organization to prove the value of social media and your social customer care efforts. You might learn there are things you are doing as a business that your customers love. Share that so you keep doing it. You might learn there are inefficiencies. Highlight them and lead change. And so on…

STEP 5: Establish clear goals & streamline the use of a tool. If you build a social customer care team from the ground up, you need to know what your goals are to be successful. Unfortunately, when your team is starting to expand, you often deal with growing pains. That's why you need to get into the nitty gritty from the start and focus on the small details too. Be transparent about your targets and give each team member an overview of the individual and team goals. Share monthly reports on your KPIs with people outside of the customer care team.

ENGAGOR

Who?

Who?

Internal or external? Figure out who should staff your social media team. Based on our experience with over 300 large brands, we've seen that most companies tend to recruit team agents internally. Training people to respond on social media isn't rocket science and can be easily achieved. However, coaching people on specific product knowledge proves to be a little more challenging. That's why many companies are eager to recruit within the traditional customer service department (e.g. phone, mail, chat, etc.).

Agent or team leader? Delegate and give every team member individual responsibilities.

Make a clear distinction between 'social customer care agent' (i.e. operator) and 'team leader'. Operators have granular access to a social media tool whereas team leaders are usually the administrators of a social customer care team. Team leaders report, in most situations, to the Director of Customer Service or Director of Customer Experience.

If you have a customer engagement tool, establish user roles to define access for each agent and clearly establish their roles within the team, completely tailored to your organization's needs. Enagor User roles are incredibly flexible to use and can be changed easily. Define permissions for junior agents and more experienced care team members. Also, make sure you determine who has admin rights during the weekend and holidays.

ENGAGOR

Who?

My task or yours? Beyond messages that are relevant across different departments, divide and conquer within your social media team! Split up the workflows based on skills: the level of product knowledge and language capabilities is a great starting point. Set up special folders that trigger automatic actions when an incoming message talks about a specific product and/or in a specific language. To reply seamlessly to mentions, provide context to each mention by labelling conversations (which then get routed automatically to the right person) and determine who's best fit within your social customer care team to reply to it.
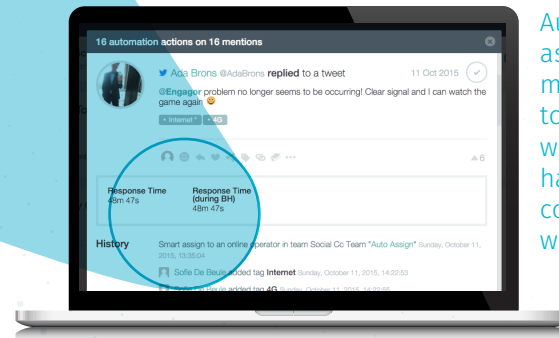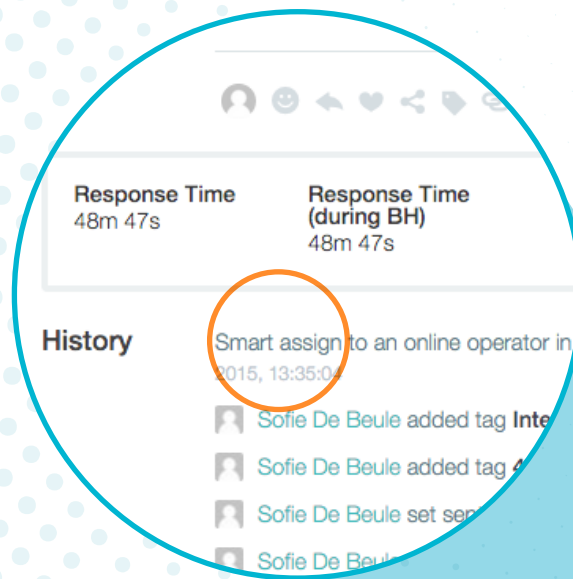
Automatically assign new messages to an agent who recently handled the conversation with a customer.

Managing Large, Distributed Social Media Teams

Social customer care can be a tough nut to crack if you have a very active customer service unit or if your brand operates globally. In both cases, social customer care team managers have to make sure there is a smooth cooperation and workflow. Just like you provide follow-the-sun customer support, you will want to consider offering follow-the-sun social care.

Below are key action items to make sure your team is able to operate on a global scale:

1. Have a plan to swiftly adjust your engagement strategy

As a team manager, there are some important elements you should keep a close eye on. If anything is out of the ordinary, you should be able to adapt your strategy or plan.

- How is your team handling incoming messages? Regularly take a look at the type of replies to check the tone of voice and make sure your agents are responding on-message across the globe to ensure a consistent customer experience.

- Monitor the total workload. Is there a sudden increase in volume? Are you able to detect a pattern in volume spikes? Optimize your entire team planning to meet the needs of your community.

- Compare. Is your response time what you want it to be? Compare month by month to see if you can spot progress.

- Keep track of how many unique customers you've helped out through social media. If this number continues to grow, you may want to consider hiring extra staff.

ENGAGOR

2. Automate your team's workflow and simplify tasks

Once your team is fully established, there are plenty of ways to optimize your social customer care efforts. Make sure you have a clear overview of all the actions your social media team is performing. To increase your team's efficiency, trigger automatic actions to lighten the load. If you look at each action individually, you can further determine whether you're able to automate this action to deliver even quicker response times.

Make a list of the top 10 questions your customers ask on social. Have a look at your online knowledge center (or FAQ) and make sure it already provides an answer to these questions. This way you can easily redirect your customers to it through relevant links and optimize response times. Regularly updating your online knowledge hub is not only useful for your social customer care team, but for other customer care channels (email, live chat, etc.) too!

3. Coach individual team members and delegate tasks

Are you keeping track of the productivity of individual team members? How are you motivating and coaching your agents? In a social customer care environment, it's essential to delegate tasks, clearly document responsibilities, and manage the expectations of your care agents. Make sure they know when they're reaching their target, especially when it comes to response time, handling time, and the number of unique customers you've helped out through a certain time period.

Make sure you're able to answer questions like:

- **How much time does it take team members to handle a specific mention?**

- **How many customers did a team member help out during a certain period in time?**

- **How is a team member performing compared to the performance of your team?**

Connecting the Dots: Measuring Your Team's Success

To ensure continuous improvement, it's important to have metrics in place that align to goals. Ongoing feedback from metrics will also keep your agents motivated so they can engage with confidence.

Measuring your team's success comes in two parts:

1. **On a team level:** Have a look at the total volume of mentions, see which percentage of mentions received an action (i.e. reply), and look into how much time it takes your team on average to take action. Create useful dashboards based on the KPIs that are important to you and email them across the company.

2. **On an individual level:** Drill down in the individual performance and check for tone of voice to coach your team members. Have a close look at how each agent is replying. Analyze further into detail and evaluate every action.

> **Tip:** Do you feel like it's time to reward your agents with new responsibilities? Give them new rights (and adjust their user roles) to have them take on new responsibilities.

Conclusion

You can't afford to ignore social customer care. If you're going to invest in it, make sure you do it right. Think carefully about your strategy, assemble the right people, and then empower them with the right tools—solutions that let them capture all social channels in real-time while reducing noise, alerting you to the issues you care about, and helping you to manage the queue. Look for robust text analytics to help you understand the sentiment behind every post.

The right process, the right people, and the right products. This is the recipe for the best social customer care team, and the most social customer care success.

Checklist of Top Social Customer Care Team Best Practices

❑ **Align goals across the company.** Before you start, make sure your goals are closely aligned with other departments. Build out a social customer care team based on your customers' needs.

❑ **Recruit people internally.** Look for social media-savvy employees in your company that already posses a level of product knowledge. In a later stage, you can expand your team and/or optimize workflows as your workload increases.

❑ **Divide the workload.** Depending on what's most useful to your company, make the distinction between first and second-line social customer care. First-line social customer care agents have a general product knowledge. Second-line care agents process more technical background knowledge. When a question or complaint exceeds the know-how of first-line social customer care, second-line customer care will step in.

❑ **Lighten your team's workload.** Analyze the incoming messages in your inbox. Define which actions you can automate to allow you to focus on what really matters.

❑ **Route messages to the right person.** Delegate the workload and capitalize on each employee's skills based on product knowledge and language capabilities.

❑ **Implement customer feedback.** Close the loop with your customers. Build out your FAQ and online knowledge hub to further lighten the load.

❑ **Identify & resolve pain points.** Clearly communicate your team's target and be as transparent as possible on the goals each team member needs to achieve. Document these goals and manage your team members' expectations.

❑ **Coach your team members.** Measure your team's performance on an individual and team level. Build strong dashboards to keep an overview of the evolution of your KPIs.

❑ **Pick the right tools.** Select solutions that will help manage the workflow, alert you to problems, and provide robust analysis.

REQUEST A DEMO

Find out how your social customer care team can quickly and efficiently respond to incoming customer questions and issues. Call 866.761.5661 for a free demo of Engagor.
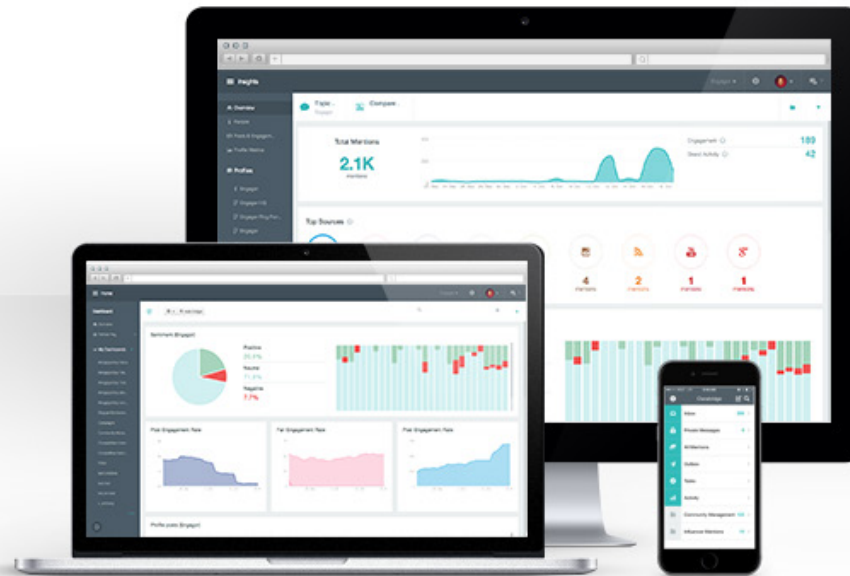
Engagor, a Clarabridge company, is the most comprehensive platform for real-time social customer service and engagement. Engagor's solution operationalizes customer analytics and helps business leaders present a more attuned organization—one that not only listens, but also adjusts to customer desires. With Engagor, businesses can track all conversations relating to their brand, filter out the noise, streamline engagement, and respond to what matters most to customers.

ENGAGOR
A Clarabridge Company

Clarabridge helps hundreds of the world's leading brands understand and improve the customer experience. Powered by the industry's most sophisticated customer analytics engine, Clarabridge collects and transforms all forms of customer feedback into intelligence, allowing businesses to activate the voice of the customer across the enterprise.

Clarabridge serves over 800 businesses including PetSmart, Verizon, United Airlines, L'Oréal USA, Orbitz.com, Virgin Active, Rackspace, DIRECTV, and ADP. Founded in 2006, Clarabridge is privately held with offices in Washington D.C., San Francisco, London, Singapore, and Barcelona.

For more information, visit **www.clarabridge.com**.
Blog | **Facebook** | **Twitter** | **LinkedIn**

CLARABRIDGE