EMEA Mobile Providers & Social Customer Care:

What Good Looks Like

conversocial

Serving the Social Customer™

Contents

- Introduction
- Twitter customer care performance
- Analysis
- Closing thoughts

Introduction

The UK's communication industry is on the verge of a major shakeup, not only due to the probable takeover of EE by telecoms giant, BT, but also due to the evolving needs of consumers. Market convergence has led to increased offerings of 'quadplay' bundles, offering TV, mobile, home phone and broadband but, for individuals who still seek a best in class service, single offering companies can still make their mark.

In the case of mobile network providers, determination to simply stay in the race will prove crucial over the coming years; EU price controls, increased usage of IM platforms like WhatsApp and Facebook Messenger, and increased wireless coverage in general have led to a decline in revenues. With most providers switching to 4G (meaning product differentiation diminishes), these companies will need to prioritise their customer service; adapting to the needs of a mobile, social generation that is well-informed and willing to switch provider with little provocation. This report takes a look at a selection of UK mobile providers and measures their social customer service performance.
Everything Everywhere is the most popular by subscriber number, but how does it rank in terms of the care it shows to subscribers? According to review website, www.which.co.uk ('*Best and Worst Brands for Customer Service: Call Centres*') the ranking order would change:

Table 1: No. of Subscribers (millions):		*Which?* ranking:
EE	28m	Tesco Mobile (5 Stars)
O2	23m	O2 (4 Stars)
Vodafone	20m	Virgin Mobile (4 Stars)
Three Mobile	8m	EE (2 Stars)
Tesco Mobile	4m	Three Mobile (2 stars)
Virgin Mobile	3m	Vodafone (2 stars)

Introduction

At Conversocial, we champion customer service over social media and how it works as part of the contact center. We champion **Social First**™.

#SocialFirst is about adopting social customer service and adapting to its culture with confidence at scale to meet your customers where they are, on the first channel they own. With **#SocialFirst**, real service means real engagement that will disrupt markets and diminish competitors.

Using our custom built Twitter Tracker tool, we analysed the Twitter activity of some leading US wireless providers and also added some Social First indicators. We measured:

- What volume they see on a weekly basis
- How responsive the Twitter account is
- How long on average they take to respond
- Does the operation strive to achieve in-channel resolution
- Does the company show proactive support for service over social

The Five Pillars of Social First:

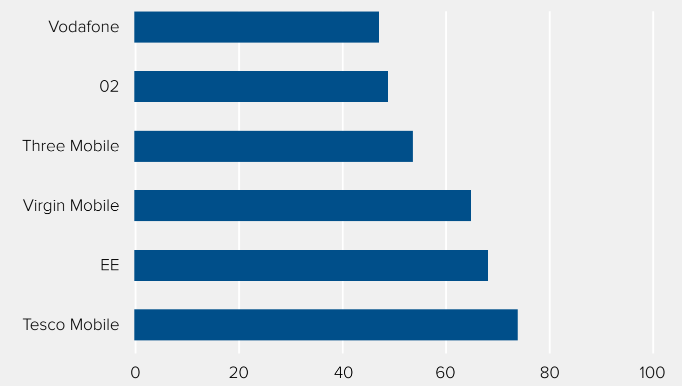
1. Proactive engagement on the preferred channel of the social, mobile customer
2. Going above and beyond customer expectations
3. Making service on social channels accessible and known
4. Connecting with your customers on a personal and emotional level
5. Leveraging social's public nature to maximize brand equity

We used the Twitter Search API to find mentions (up to 2001 max) of each Twitter handle in July 2015. We then gathered and matched the replies to those mentions and calculated the time taken in each case, excluding the slowest 5% of tweets (which can otherwise disproportionately affect the results). Please contact us if you would like more information on the Conversocial Twitter Tracker.

Handles measured: @tescomobilecare, @EE, @virginmedia, @ThreeUKSupport, @O2, @VodafoneUKhelp

Results

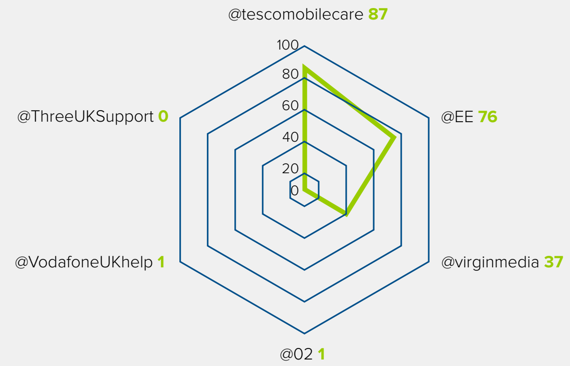
Chart 1: Responsiveness (%)



Most Responsive: **Tesco Mobile**

Least Responsive: **Vodafone**

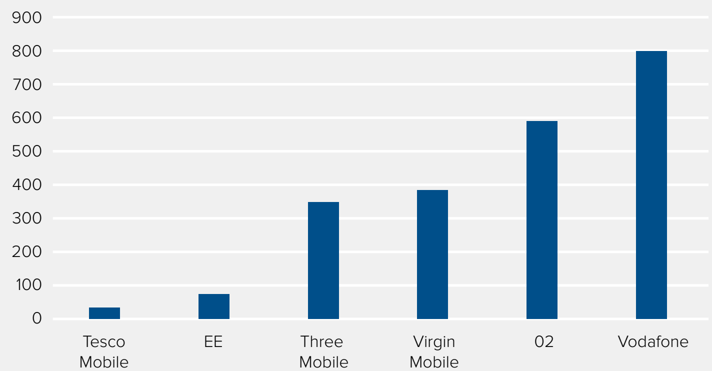
Chart 3: Responses under 1 hour (%)



Industry Leader: **Tesco Mobile**

Industry Lagger: **Three Mobile**

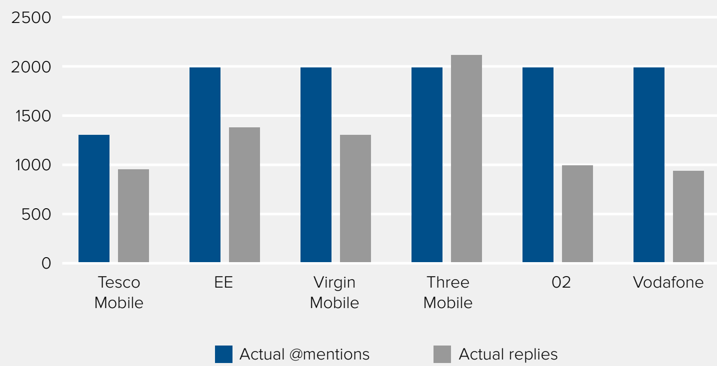
Chart 2: Mean Response Time (mins)



Quickest Responder: **Tesco Mobile**

Slowest Responder: **Vodafone**

Chart 4: Actual @mentions and replies measured



Closer analysis

Responsiveness (chart 1)

Making service on social channels accessible and known: How responsive a brand is plays a huge part in this Social First tenet. If a customer glances over a business social account and sees regular responses, they will feel more confident in reaching out over that channel. Companies can increase that confidence by actively directing customers to its social channels. In a simple exercise, we visited the main ‘Contact us’ page on each of the brand websites in order to see how obvious it is that social can be used as a first point of contact. Tesco Mobile = very obvious. EE, Virgin Mobile, Three Mobile, O2, Vodafone = not obvious. All except for Tesco Mobile favoured forums and communities over promoting social media networks as contact channels.

‘Indeed, after learning that social media can become a vehicle for a fast response from businesses, many customers are turning to social first, as a way of self-optimizing their experience. Social is maturing from a channel of last resort to one that customers actively seek out.’

Ovum 2015

Speed of response (chart 2)

Leveraging social’s public nature to maximize brand equity: Being responsive is just the first step; regardless of channel, response speed is a key driver of customer satisfaction. Even when an issue cannot be resolved immediately, it is important that a service representative show the customer — and everyone who might see the post — that the company has heard the message and is working on a solution. From these results, Tesco Mobile has clearly adopted a ‘rapid response’ strategy, while customers of the next fastest responder, EE, would be waiting double the time (on average) to hear back on a query.

Industry leaders (chart 3)

Going above and beyond customer expectations: Consumers have increasingly high expectations around reply time on social media - a response within one hour is considered the mark of a leading brand. Teams that can achieve this on a regular basis open doors to increasing brand equity on social. For example, Dutch airline KLM increases the profile of its care team by posting the speed of its response on cover image of the Twitter account @KLM. For the brands in this report, Tesco Mobile (87% < 1 hour) and EE (76% < 1 hour) would be most confident in adopting that tactic, while O2, Vodafone and Three Mobile failed to respond to more than 1% of messages in under an hour.

Volume management (chart 4)

Understanding your volume in terms of quantity and content allows you to understand the bigger picture. For example, calculating the percentage of customer service issues compared to the total number of social inbound messages. Count of messages by interaction type could include subcategories such as the number of issues related to deliveries, product and website. It’s hard to understand what a change in handling or response time means unless you can match them up with changes in volume over social channels. It is crucial that you are able to measure metrics and performance against SLAs in real-time. If you have a sudden spike in volume, you need to be able to reallocate resources in order to bring the SLA down to baseline.

Volume measurement here also highlights the difference in operational scale when looking at these top brands - outstanding performer Tesco Mobile may benefit from the fact that is sees significantly less incoming volume that the others.

Conclusion

When we look at the social media feeds of large brands, we see an aggregate of the best and worst case scenarios from that company. This report has focused on raw data, but there is certainly more that could be interpreted about the social customer service offerings these companies provide.

Many questions relate to account specific issues and as a result, most of the brands are unable to resolve issues in-channel. In fact, apart from Tesco Mobile, people seeking answers are often pushed to website support pages and community forums. It's unlikely that consumers would pick this up as negative service differentiator but consider the following from a strategic perspective: By encouraging people to complete conversations on another channel, you diminish the probability that other observers will see the result (negative or positive) - essentially removing the benefits that completely public interactions can bring. Additionally, Tesco Mobile's strategy of giving the appearance of completely in-channel resolution (whether they are capable of it or not) lays a strong foundation for the development of a critical social media asset: Trust.

Each brand assessed in this report show strong progress on the path to social customer service excellence. Delivering a best-in-class customer experience requires a fundamental shift in how companies serve their social customers. Our approach to helping businesses extend their customer engagement capability on social from Reach to Resolution is called Social First.

Do you meet the **#SocialFirst** standard?

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