The Definitive Guide to Social, Digital Customer Service

Volume 5 | 2017–2018
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Introducing Conversocial’s Definitive Guide to Social, Digital Care Volume 5

One of the defining characteristics of the modern consumer is the extent to which they are in control of their message. Consumers now have a voice and a choice! They have a voice across messaging channels with their immediate friends and family and they have a voice with total strangers across public social media platforms.

Over the years, there has been a steady drumbeat of new options for consumers seeking support from the brands they prefer, as well as expressing their opinions about the brands that frustrate them. Customers used to write letters. Phones saw customers calling the “hotline” at a moment’s notice. Email followed. Web chat offered even more real time customer experience. But alongside this channel explosion, brands implemented rigid and structured scripting to ensure consistency and reputation management. Agents were coached on how best to answer the phone and email so as to minimize mistakes and protect the brand.

Then came social media

Social media forced brands to change their service model. Issues were broadcast across social channels for all to see. The airing of dirty laundry writ large. Social customer service started as an escalation channel. Consumers would use the public nature of social media to try and get resolution when they had already suffered a bad experience elsewhere, or were struggling to get an answer fast enough over more traditional channels—tweeting while they were also on the phone or waiting for an email response. But with the rise of private messaging, and increasing consumer awareness that issues can be resolved faster through these channels (often with a direct line to a more flexible agent, one empowered to resolve issues quickly by whatever means necessary), consumers increasingly choose to go to social messaging channels first.
Consumers with complaints (or praise) are going #SocialFirst
For the customer service leader, the fact that consumers now control the choice of channel—for either compliment or complaint—is what provides both the most opportunity and the most peril. With execs stressing about the potential negative impact of a social media incident—service teams have done as much as possible to ensure they are staying on top of any potential issues, while struggling to figure out how social fits into their wider customer service strategy.

Effortless customer engagements ARE the future
But social has also matured. While most companies are responding to customers over social, only a handful have been able to take social customer care from the initial “test-and-learn” phase to its status as a highly repeatable and profitable revenue generator. The future of customer service will be driven by delivering effortless engagement. Companies that are able to achieve this will reap fruitful gains, and companies that aren’t will continue to perceive their contact center as a cost center.

Our Definitive Guide to Social, Digital Care is an industry renowned publication. It will help you develop social customer service as a scalable and measurable operation, from planning through execution and measurement. The guide aims to address questions from CXOs first learning about the emerging field and from skilled social customer service practitioners alike, mixing high level strategy and market conditions with templates and tactics necessary to scale an operation.

Happy Reading!
Chapter 1

The Rise of In-the-Moment Customer Expectations
Your customers’ lives have gone social. But is your customer care stuck in the past?

Consumer expectations for service via digital channels only continue to increase. According to Mary Meeker’s Internet Trends Report, customers born after 1981 (today the largest generation, beating out even Baby Boomers) overwhelmingly prefer customer service via social and mobile channels to classic contact methods such as phone calls.

But while today’s customers are less likely to call a business, they’re actually more anchored than ever to their phones. In 2017, social and mobile are virtually inseparable, with over 80% of daily active Twitter users being mobile, and roughly the same for Facebook. Bank of America’s annual Trends in Consumer Mobility Report found that 91% of U.S. consumers say their mobile phone is just as important as their car and significantly more important than television (76%) and coffee (60%). Coffee! In other words, we’re living in an age when someone’s iPhone might be as important to them as their Toyota and their Samsung Galaxy even more important than their favorite TV show...or even their caffeine fix.

Those who call today’s social customers the “always-on” generation have a point: 38% of customers say they never disconnect from their mobile phones.

<table>
<thead>
<tr>
<th>Popularity of Business Contact Channels, By Age</th>
<th>1st Choice</th>
<th>2nd Choice</th>
<th>3rd Choice</th>
<th>4th Choice</th>
<th>5th Choice</th>
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</thead>
<tbody>
<tr>
<td>Internet/Web Chat</td>
<td>24% (1st choice)</td>
<td>24% (1st choice)</td>
<td>21% (3rd choice)</td>
<td>19% (4th choice)</td>
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<td>1% (4th choice)</td>
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<td>1% (5th choice)</td>
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</tr>
<tr>
<td>Telephone</td>
<td>2% (3rd choice)</td>
<td>1% (4th choice)</td>
<td>6% (2nd choice)</td>
<td>1% (5th choice)</td>
<td>90% (1st choice)</td>
</tr>
</tbody>
</table>
It would also be an understatement to say that consumer expectations for service are higher than ever. Two-thirds of adults feel the appropriate response time to a text is under an hour, with 43% citing under 10 minutes and 10% thinking it should be instant. Remember that these expectations include responses from friends; one might imagine even less patience when it comes to a pressing customer service issue.

And social is getting easier. In a study by Aspect Research, consumers rated service over Twitter as 2x less frustrating than email, and 5x less frustrating than phone. This ease and convenience for customers is one of the biggest drivers of the growth of social and messaging for service, and the resulting impact on customer loyalty a major benefit to companies who promote it.

Source: Aspect Research, “Consumer Experience Survey” via eMarketer, Feb 2016

Delivering In-Channel Resolution Wherever the Customer—the Maturation of the Social Customer

Ready for another twist in the social narrative? Buckle up. In-channel resolution is now critical to delivering a good social customer experience. McKinsey recently found that customers who start and end their service journey on social have a satisfaction rate 15 percentage points higher than those that are deflected from social to traditional channels.

The traditional approach to service has been to funnel service requests into the channels that are easiest and cheapest for companies to deliver—regardless of how easy or convenient they are for consumers. If you’re a monopoly provider then you may still be able to get away with offering limited phone support only, 9 to 5. But for everyone else, convenience is key—and this means delivering service in the channel from which they reach out to you.

Once customers started Tweeting complaints, the standard response from most companies was to ask them to contact customer service by email or phone. The thoughts and Tweets from consumers in return were...“What?! This is me contacting you!” Focusing on First Contact Resolution is irrelevant if you only offer this over the phone (and only after going through a painful phone tree to get to an agent). Deflecting customers from one channel to another is not only damaging to the customer relationship, but also means your agents must respond to the same issue on multiple channels, increasing complexity and expense.

Twitter is 2x less frustrating than email and 5x less frustrating than phone.
Enabling consumers to quickly and effortlessly get resolution in their original channel is critical, whatever channel that is. With the ability today to securely authenticate customers over social and messaging channels, there is no excuse to not deliver full resolution wherever your customers are. It is simply a matter of will and executive support.

**Making customer service “effortless”**

In order for service organizations to catch up, executives need to put “customer effort” at the core of their experience design. This is the key measure to ensure that service interactions are not driving disloyalty. Companies need to focus on making service easier, not more delightful, by reducing the amount of work required of customers to get their issues resolved. This includes avoiding their having to repeat information, having to repeatedly contact the company, switching channels, being transferred and being treated in a generic manner. In our own consumer research, more than two-thirds (67.8%) of respondents agree that the easier a customer service interaction is, the more likely he or she would be to engage the brand again.

These findings provide clear and compelling guidance for service leaders. Consumers expect service to be easy and easy is defined as fast, convenient, and delivered in the original channel (don’t ask customers to phone or email when they message or Tweet you!).

It’s pretty simple really, your customers are on social and therefore you must be too. Obviously this easier said than done, and you still need the right foundations for success. Luckily, this guide is designed to help you deliver social customer service from within your organization as a standardized, scalable and ROI-positive operation that lives up to your organization’s promise of quality service.

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**Platforms continue to grow**

1.9B Facebook
1.2B WhatsApp
1.2B Messenger
889M WeChat
700M Instagram
328M Twitter

**Social has broadened avenues for brands to do better customer support**

- Twitter introduced DM Dispatcher
- Messenger 2.1 introduced NLP for chatbots
- Social care grew from public ranting to private resolution
- Legacy service vehicles such as live chat and email are seeing a shift in tone and engagement from Social customers
Chapter 2

The Opportunities & Challenges of Social Customer Service
While the opportunities in social customer service are tremendous, they also present new challenges for corporations.

In today’s on-demand society where social, mobile consumers expect instant service and immediate results, it is more vital than ever that businesses take the same approach when it comes to delivering effective customer service.

To succeed, social customer engagement must be effortless, enabling consumers and brands to interact over all digital channels, with ease and at scale. Advances in the power of mobile devices, everpresent high-speed internet, and an increasingly centralized social media culture are rapidly shifting approaches to brand-customer engagement and issue resolution.

**But corporations are yet to get social care perfect**

**Brands need to be more responsive and timely:** 27.5% of respondents who have contacted a brand on social for customer service never received any response and 30% waited over 30 minutes for the brand to reply.

**Customers expect social customer service to be effortless:** 100% of respondents considered “Ease of Use” a key aspect of social customer service, with 45% qualifying it as the most important aspect.

**Private messaging is now the preferred social channel for brand-customer interactions:** 50.3% of respondents prefer to interact with brands via private message, compared with just 39.3% mentioning a brand in a public post and 38.7% posting directly to a brand’s public page.

**And your customers demand that it is**

**Social customer service is convenient for customers:** 42.1% and 41.5% of respondents preferred social media because it allowed them to multi-task while awaiting issue resolution and proved more convenient, respectively.

**Customers prefer social messaging channels:** Over half of respondents (54.4%) preferred new messaging channels—such as SMS, Facebook Messenger, Twitter, and WhatsApp—as their primary form of communication with brands over legacy channels such as email, phone, and web chat.
Done right the opportunities outweigh the challenges

Effortless customer service drives brand loyalty: More than two-thirds (67.8%) of respondents agree that the easier a customer service interaction is, the more likely he or she would be to engage that brand again.

High-earners are more open to social customer service: Nearly half of respondents (47.1%) earning over $150K a year have used social customer service. 86% of respondents earning over $150K a year were more likely to be more loyal to a brand that engaged them on social.

But social remains a hectic channel, full of noise. Especially for managing at scale...

In today’s saturated markets, customer experience is THE competitive advantage. Businesses should take stock of the fact that future generations of customers are going to be much more engaged with brands on social and digital channels, with their loyalty depending upon how engaged those brands are in return. There is little margin for error.

They should also realize that today’s high-value customer is engaged in, and open to, brand communication on social channels, so businesses should not wait to start a conversation to build recognition and loyalty with what could be their most profitable customers. Most importantly, businesses should heed customer sentiment and preferences for engagement on social channels by prioritizing ease of use, quality of service, and timely response. First and foremost, this means being present, accessible, and responsive on social channels. To do this, brands need to be able to organize, delegate, and respond to social mentions effectively, at scale. Furthermore, it means bringing humanity to all customer touch points by arming front line staff, breaking down internal silos, and allowing social to inform business decisions so that social queries can be resolved in-the-moment with a personalized touch.

4 to 8x
Social agents are able to handle four to eight times more issues per hour than phone agents (Gartner).

less than $1
Social costs less than $1 per interaction, compared to $6 per phone call (NM Incite).

*Conversocial conducted a Google Consumer Survey, which polled over 1500 participants in the United States on the Google Surveys publisher network. We sort a representative sample of the general population in the United States, taking into account social activity and demographics including age, gender, geography and income.
Agents face challenges in delivering the best social customer service

**Noisy:** Unlike other channels, agents must sift through a lot of content in order to identify customer service issues on social.

**Confusing:** Multiple public and private messages from a single customer are hard to track, and can get lost between agents.

**Slow processes:** Lack of efficient approval workflows mean slow, rigid and manual process with extra complexity when resolving an issue that requires involvement from other departments.

**High stakes:** A single error can result in a full-blown social media crisis.

Managers also struggle to track KPIs or resource properly

- Social customer care teams are getting bigger, but managers are stuck with slow and laborious processes to understand team performance.

- Systems that focus on individual messages rather than the full conversation make ticket-based analytics impossible. Metrics including First Response Time, Customer Satisfaction Scores and Average Handling Time are essential for resource planning and team management.

- Lack of security and approval tools requiring agents to slow down in order to follow inefficient reporting processes—such as tracking all activities in spreadsheets—negatively impacts SLAs and reduces quality of care.

"Train your agents to be an extension of your brand’s voice."
Chapter 3

Creating a Social Customer Service Playbook
A social customer service playbook details processes for how different departments should transfer knowledge seamlessly to one another, and how service agents should engage securely in social conversations with customers. An effective service book should include the most common scenarios seen in social media inquiries and how to respond appropriately. The playbook provides consistency across your team and creates processes that can be measured, refined and scaled.

A playbook should be a go-to resource for agents, both trained and newly hired. Businesses that embrace a playbook have a higher potential to succeed when it comes to social customer service. It acts as a safety net for customer care agents, setting parameters whilst giving agents enough freedom to show initiative and craft their own unique responses to incoming queries and questions. It is there as a guide to give internal cohesion around customer engagement. Stray away from a service playbook however and you risk getting it wrong for your customers. The repercussions have the potential to create a PR disaster—tarnishing your brand image and losing brand advocates.

"A great customer service playbook should be simple, concise and tailored to your brand."

This customer service playbook should be a go-to resource for agents

Your team:

- Align their work with your objectives and values
- Refer to real examples for tone of voice and engagement
- Rely on a go-to resource for any situation they may face
- Garner the confidence to use their initiative within defined parameters

Your business:

- Develop a better understanding of shared objectives and goals
- Rest assured of a secured public reputation, with crisis security measures in place
- Benefit from a defined route for collaboration
Defining your vision for Social Customer Service

Before you aim to create a blueprint for Social Customer Service, ask yourself:

- What are my objectives?
- What do I hope to achieve for my brand?
- What is my vision?

This most fundamental of stages requires the involvement of every stakeholder. Reaching consensus on these core values will help you communicate your vision to your team and inform priorities, process and protocol as you build them out. In order for a playbook to succeed, social customer service should not be isolated to purely the customer service team. Great customer care comes from collaboration across all sectors and positions within the company. Whether you are an agent or CEO, working together is the key to success. A playbook is where a customer care strategy is brought to life in the contact center and should be widely embraced to ensure knock-out customer care is delivered by all agents.

What’s your company’s mission?
- Are you hoping to protect a good reputation?
- Or to salvage a damaged one?
- Are you aiming to transform internal cohesion around customer communications?
- Are you looking to create a new customer experience?

What are your business goals?
Is interacting with customers’ issues on social media primarily about crisis prevention, customer engagement, delivering service in a cost effective way, generating new business, or retaining your existing customers?

What are your agents’ goals?
Agents should be empowered to deliver the best possible customer experience. How do your top-level objectives for social customer service channel down to goals for your team? As your team are most regular users of your playbook, you need to translate your company vision and values into practicable ideals they can strive for every day.
CHECKLIST

What to include in a social customer service playbook

✅ **Overall goals, objectives and vision of social media.** Social customer service needs to align with your high level business goals and your playbook should explain that this initiative is an important one. Agents need to be trusted with flexibility to manage an ever-changing channel with limited time to act, but that doesn’t mean you shouldn’t provide guidance. Key motivators and priorities will help empower your team to make the best judgment while delivering fast service to your customers.

✅ **Introduction to social platforms.** If you’re bringing in agents from other areas of the contact center, it is best to include details of your goals for the different platforms you are using and to explain how customer service over public channels differs from what they may be used to. SLAs need to be clearly outlined for agents in the social customer care team as they are likely to be different to the contact center as a whole—think legacy channels. This will avoid confusion over service targets and ensure all agents understand what they need to achieve to reach a high level of service.

✅ **Processes agents should be following.** Clearly explain the steps for processing a customer message, including:
  - How to respond
  - What data to record, such as sentiment and categories
  - When to archive

Document response escalation and crisis processes so they are accessible to every agent. A clear pathway for resolution allows agents to confidently take initiative with every interaction and avoid confusion which could lead to responses that misrepresent brand values.

✅ **Tone of voice.** Your tone of voice can make or break a service interaction. Describe the brand personality you’d like agents to convey—in line with your mission statement—during their engagement with customers to form a guiding principle.
**Do's and don'ts for engagement.** Give explicit examples of the kinds of responses that fit your brand’s tone, and likewise share the responses that DO NOT fit. A playbook is there to empower agents to be personable with customers yet remain within brand guidelines. Responses to common customer issues can help your team understand how to craft their own. It is important that agents use these guides in conjunction with tone-of-voice guidelines, rather than templates to be copied directly. Due to the public nature of social, customers will notice if agents are copying and pasting their responses. Authenticity is essential for a good customer experience.

**A list of resources to find support information.** Your agents’ go-to resource should include anything from knowledge-base articles to how-to videos to posted community solutions. Linking to this existing content can help your team shorten response times and remain relevant.

**Contact details for relevant internal stakeholders.** Ensure that the playbook has a complete directory of stakeholders that may need to be involved in different customer service needs or social situations. Promote a mission statement that is clear, inclusive and reverberates with all employees. A brand's mission statement should become the mantra of everyday social interactions across the entire business; it will align everyone with the common goal of ensuring a consistent service and will promote digital care as a team effort.
Chapter 4

Building a Team for Social Customer Service Success
It’s rare to come across a customer service team that is perfectly suited for the demands of social media.

On top of the skill sets needed to be a great agent over traditional channels like phone and email, on social, agents become brand ambassadors and, therefore, need to possess all the skills that a public-facing role demands.

Great social customer service agents should:

**Be personable:** During the interview process, assess whether the candidate can actually hold a conversation about a particular issue. Create a problem-solving scenario that involves a back-and-forth conversation; this can be the best way to judge how affable a person is.

**Agent Hiring Tips:** Give the agents some sample tweets or a post to reply to under timed conditions. You’re checking not only for skills such as writing to a time limit, spelling and grammar, but also for personality in responses and seeing if the agent understands the nuances of the social channel.

Ensure during face-to-face interviews that you ask questions which reveal the agents’ thinking about customer service. Find people who can show empathy and place themselves in the customer’s shoes.

You’re giving these agents one of your most public channels. If you wouldn’t mind their responses being posted in the Daily Mail, then they are the right agents for you!
**Be confident:** Content on social media can vary greatly not only in terms of topic but also in the action needed from the agent. Some messages might be answered easily, while others might require escalation to another department. Very likely, many of the mentions might not include actionable customer service issues at all. Great social customer service agents must have the confidence to trust their instincts to quickly assess the context of a message and then be able to take the appropriate action. This should be tested alongside the “personable” actions.

**Agent Hiring Tip:** Interpersonal skills are essential for a social customer agent. Here are some examples of the types of skills our customers recruit for: empathy, self awareness, calm under pressured conditions, can-do attitude, proactive, ability to multi-task.

**Be curious:** Whether recruiting internally or externally, it is essential that social customer service agents have the eagerness not only to learn new tools but also to know the industry inside-out. The best indicator for this is how well the potential social agents have up-skilled themselves in previous roles, and the extent to which they are interested in developing the social customer care function.

**Agent Hiring Tip:** Are these agents already using social media channels in their spare time? What are they doing every day to improve their knowledge of these rapidly evolving channels?

**Be articulate through writing:** Social agents must be able to succinctly and effectively answer customer service queries in 140 characters. Good spelling and word choice is also important; minor errors can tarnish the brand’s appearance and damage credibility with the customer.

**Agent Hiring Tip:** Taking a team from the phones doesn’t always equate to good social agents.

**Be resilient:** No matter the context, social agents must be able to react calmly, assess a situation and respond to the customer. They must be able to show not only patience, but also an ability to “roll with the punches” by responding professionally in any scenario.

**Agent Hiring Tip:** You can teach crisis management, but agents managing social need to keep a cool head in a crisis. Ask questions in the interview about how the agent has coped with an irate customer, what negotiation techniques they’ve learned or ask for examples of how they’ve turned a negative customer experience into a positive customer experience.

**Have real empathy for the customer:** Every action an agent takes must revolve around making the customer happy. Make sure potential employees have this focus and talk about the customer during the interview process through practical scenarios.

**Agent Hiring Tip:** You need agents that can put themselves in the customer’s shoes. During the interview, ask agents if they can give you an example of where they’ve built a relationship with a customer or built a rapport in order to resolve a query for that customer.
Empowering agents for social customer service success
Before agents start posting from branded accounts, deliver training to establish the right social customer service processes. Training will not only prepare them for different situations, but will also empower agents to take ownership of any social media eventuality.

1 Take social back to basics
Even if agents are already using social media personally, start from the ground up.

2 Keep training simple
Keep it as simple as possible at the start, then expand as confidence and experience grow.

3 Review content and responses
Regularly review agents’ responses and give feedback, even after training is over.

4 Discuss successful engagements
Show best practice examples for social care to highlight their positive aspects.

5 Train as a team
Rather than one-to-one sessions, build a close-knit team by involving everyone.

6 Set clear targets
Lay out expectations so your team knows that social is as important as other channels.

Is it best to promote agents internally or to hire new agents for social?
While great agents can come from both sources, we generally recommend promoting from within whenever possible for the following reasons:
• You are able to identify agents who already have both strong writing skills and a great rapport with customers
• The agents will already be familiar with your core contact center operations, allowing you to focus on social training
• Joining the social team should be a reward for excellent work. Social agents are typically seen as the ‘elite’ team within the contact center

• Since social customer service is a relatively young field, there is currently a very small pool of agents that have social on their resume, giving outside recruitment little advantage

Companies sometimes think that only “Generation Y” social media natives can be social agents—but we have seen great success in training agents of all ages in social media, so don’t see this as an obstacle to recruitment. Social media knowledge can be taught; the personality traits that make for a great agent are harder to find.
Management and Team Feedback

Once a month or quarter, take time with your agents as a team to review responses together:

- What worked well? What could have been done better?
- Is there improvement needed in the tone of voice?
- How can you ensure that you can take a neutral customer to a very satisfied customer? Was there more you could have done?

Ask your agents what would make their job easier to manage:

- Do they need more empowerment and autonomy to deliver quicker responses?
- Do they need team leader support to resolve in-channel or check their responses?
- Do they need access to other systems in the business to efficiently resolve in channel?

TRAINING MODULE

How to resolve a customer query on social customer service channels

Listen: Social is a passive channel in that a customer posts something and might not reply for a few hours. That doesn’t mean that you shouldn’t give customers the opportunity to tell their complete, uninterrupted story.

Empathize: Empathy creates an emotional connection, a trust that is crucial to demonstrating an authentic willingness and ability to help the customer. Consider using such phrases as “If I were in your shoes...” and “Your reactions are completely normal...” to validate the customer’s feelings. Have a bank of these phrases ready in a playbook for agents to refer to.

Personalize Responses: Sometimes, this is all the customer is looking for, a personal reply and acknowledgment of a problem. The power of a sincere apology if a customer feels aggrieved should never be underestimated. You must take ownership and remember, the manner in which you apologize matters greatly—apologies cannot be scripted.

Resolve: Speed is critical to recovery especially on social channels and is best achieved when the maximum amount of authority possible is delegated.

Diagnose: Seek perfection, and settle for excellence. Remove any personal guilt as an agent and examine the processes related to the service failure. Returning customers will appreciate your efforts to improve the experience.

Management tips

- Regularly check the quality of responses
- Resource volumes appropriately: mistakes on social usually originate from overworked agents
- Be dynamic with social customer care
- Have an approval procedure in place for social media crises
Chapter 5

Creating Your Social Customer Service Processes
Not all customer service issues are created equal.

There are a number of unique requirements for a successful social customer service program that are not encountered within a traditional customer service setting.

**Prioritization**
Filtering through social messages is a major challenge for any brand receiving even a moderate volume of customer interactions.

Unlike private service channels, social media consist of many messages and interactions that may not require an immediate response.

It’s important for managers to define a criteria for what their team should respond to first.

• What is high priority?
• What messages are actionable? What are noise?
• What should be always guaranteed to receive a response?

**Resolution**
Social customer service is all about resolving customer issues wherever, whenever and however those customers choose to interact.

**Know who you’re talking to**
When customers reach out to you on social media they want to carry on their existing conversations with you, not start fresh or from scratch or anew. This is a major challenge in a multi-channel customer service environment, but if you get it right you can offer a much better customer experience.

Make sure that your team has full visibility of your customers’ social history.

• Are you already in the middle of a conversation?
• Have you had similar conversations in the past?
• Has the customer previously had a positive or negative relationship with your company?
• Which agent dealt with that customer before?
As your team gets fully integrated into the customer service environment, they should have access to systems that hold customer records from other channels (their email, chat and phone systems), as well as core customer information in your CRM system. Getting the data to flow across these systems is the most important step towards a single view of the customer.

**Redirection is not good customer service**

Customers know that social media offers a different customer experience to traditional channels. They have chosen to speak with your company there, as it is convenient and human. They might have even exhausted and lost confidence in other channels, such as the call center.

Redirecting customers away from their chosen support channel is one of the worst customer service experiences possible, forcing customers to interact in a form they have not chosen.

By offering in-channel resolution whenever possible, you provide the consumer with the interaction they were looking for, and the brand can publicly display any thanks the customer gives. Anxiousness about dealing with sensitive customer information publicly can usually be resolved by using private messaging. This protects both the brand and customer whilst avoiding redirection and a manipulated experience. If it becomes necessary to take the issue to another channel (e.g. for regulatory reasons), keep it on social for as long as possible. And even if an agent resolves an issue privately or on another channel, be sure to take it back to social media to show public resolution. Just a “thank you” to customers for their time and patience can suffice.

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**Framework for Classifying Issues of Varying Urgency**

**First-tier priority:**
- A customer asking the company a direct question
- A customer expressing dissatisfaction
- A customer that has an urgent product or service need
- Potential crisis issues

**Second-tier priority:**
- General references of the company’s products and services
- Positive experiences of the company’s products and services
- Indirect references that are relevant to the company’s industry
Creating a Crisis Escalation Plan

Whether you are dealing with sensitive, detailed customer issues that require escalation to another team member or a mass notification of a service outage, it’s important to have clear processes in place so that your agents can easily handle incoming messages without confusion or delay.

**An effective escalation map should include:**
- Clear guidelines explaining which messages agents can respond to.
- A comprehensive breakdown of the types of messages frontline agents can’t immediately respond to, and the team responsible for each type.
- A quick method for escalating messages, along with the full case history and context, to the relevant team.

Follow our Escalation Guide
Escalate the Smart Way
Brands that are smart about crisis management have an organized process in place and have practiced dealing with emergencies within their organization. Inter-department communication is on point and there is clear ownership. Be smarter in a crisis.

- Share with your team real-life examples of messages that do and don’t need a response
- Make the first level of escalation the agent’s team leader
- Track the ongoing performance of your agents
- Connect your team to PR and experts in other areas of the business
- Transform your escalation map into a “living document”

For extremely sensitive issues, when formulating a response, your front line agents should be equipped with a continually updated list of topics that will need PR approval.

The Consequences of Ignoring Social Customer Service

Customers who have a good experience over social will **spend 40% more money** with a brand (Bain & Co).

96% of customers who had **high-effort experiences** reported being **disloyal** (Effortless Experience, CEB).

**66% of global consumers stopped doing business** with a provider due to poor service experience (Accenture).

71% of customers who experience **positive social customer care** are **likely to recommend** the brand to others (NM Incite).

71% of customers say that **valuing their time** is the **most important** thing a company can do to provide good service (Forrester).

66% of consumers **expect a response** on social media within the hour. More than half want a response **within 30 minutes** (Ovum).
Chapter 6

The Importance of Proactive Customer Service
The rise of social media has fundamentally changed the notion of proactive customer service.

What was once considered simply reaching out to the customer has shifted to a comprehensive customer engagement strategy.

Before the rise of social customer service, companies concocted ways of solving customer issues before the customer reached out, mainly in order to reduce call volume. Many of these methods worked: a report from Enkata found that preemptive service can reduce call volumes by as much as 30%, while increasing customer retention rates by 3 to 5% (Enkata).

Traditional proactive customer service can take a number of forms, from FAQs and forums to knowledge bases and instructional videos.

Proactive customer service over social media, however, means something completely different. This is mainly due to the public nature of most social content. Twitter, for example, allows companies to reach out to customers when they’ve directly or indirectly mentioned a brand or used a key term relating to that brand. With Twitter, you’re not just listening or monitoring; you are engaging with the customers who need you most.

Here are five tips for effective proactive customer service that will not just satisfy your customers, they will help you provide service that will strengthen customer loyalty, increase brand awareness and most importantly, drive tangible results.

1. **See every issue—not just the ones with @ mentions of your brand**

Access to the Twitter fire-hose is a must-have to gain real-time access to consumer conversations. It’s important to understand how to filter data based on keywords, location, and language to help quickly direct the customer issues to the right member of your team. Simply put, you can’t afford to leave your customers unanswered, even if they’re posting about you indirectly.
2 Know there's a problem? Tell your customers you're fixing it

It's always better for customers to hear about a problem from you directly instead of realizing the product or service doesn't deliver. Maintain control of potentially volatile situations by confronting problems head-on, which helps build customer trust and avoid damaging brand recognition. Tell your customers what you're doing to figure out a solution and ensure the problem doesn’t happen again. Or make sure customers know who to contact if they have further questions or feedback.

3 Measure success with customer service KPIs

It's important to make proactive outreach accountable with real customer service analytics and reporting. Demand volumes, customer sentiment and issue categorization should be measured to determine your brand and your team's ability to make a difference.

With good social customer service analytics, it's easy to quantify the results of proactive service, such as increased call deflection and profitability.

4 Don’t just reach out when something is wrong

No relationship is sustainable if you communicate only when something is wrong. When those relationships are with a rapidly growing customer base, social media is an efficient way to stay in touch with a large audience through individual conversations.

Companies now need to be proactive, rather than just reactive, over social. They should be calling out to their customers—engaging with them—even when things aren’t necessarily deemed a customer service issue as of yet. This will add an element of “surprise and delight” for customers, turning them quickly into brand advocates.

5 Reward Customer Loyalty with Discounts and Offers

Speaking of “surprise and delight,” is there anything quite as delightful as a coupon or gift from your favorite brand? Let your customers and community know how much you value them with tangible rewards. This powerful gesture has proven time and again to build customer loyalty and positive sentiment.

Loyalty programs are your goodwill bridge to your customers, and when you take that extra step to proactively offer these special rewards, you amplify the power of these interactions and build stronger relationships.
Social customer service is not merely an added channel to the service ecosystem, but rather the catalyst that’s redefining how legacy channels interact with their audience.

**What Does Success Look Like to You?**

Customers’ expectations have changed, as have their patience, options and communication styles. Archaic phone, IVR, and email functionality will no longer cut it. Don’t misunderstand, your customers may still defer to these older channels, but when they do, how they interact with you is different.

Social has grown up and the units of measurement have evolved beyond the “softer” numbers that we evaluated with social’s inception. ART (Average Response Time), FRT (First Response Time), AHT (Average Handling Time) are the expected benchmarks in social media customer service. However, social brings an entirely new level of expectation evaluation that the older channels simply could not measure well—customer sentiment.

Sentiment is all about context. The humanity that drives every service engagement is not binary and cannot be measured accurately as such. There is a difference between a customer who was on hold for 30 minutes, re-channeled four times and had to fight to get resolution and a customer who was handled quickly, efficiently and received even more than they expected from a brand. It all comes down to sentiment.

Forrester reports that companies struggle to provide consistent cross-channel experiences, with only 23% rating their ability to do so as “effective” or “extremely effective.” This suggests that a large number of companies have not yet applied measurements that can be used across channels as a benchmark, or are not yet using a dedicated social customer service platform for analysis.

This chapter outlines the most important metrics to measure.
**Volume**

**Inbound volume:** Count of incoming messages on all social channels. Allows you to understand the bigger picture, and to calculate the percent of customer service issues compared to the total number of social inbound messages.

**Response volume:** Count of responses issued by your brand.

**Volume by category:** Count of messages by interaction type. This includes broad categories such as marketing messages, PR messages, and customer service messages. It also includes subcategories within these such as the number of issues related to deliveries, product, website, etc. Make sure that this categorization matches your organization’s existing system used in the contact center for other channels such as phone and email, enabling you to match “apples to apples.”

**Case/conversation volume:** Count of groupings of messages pertaining to individual customer issues. By grouping messages into meaningful customer conversations, it is possible to count how many customers the agents are interacting with, as opposed to just how many messages they have responded to. Focusing on customer issues versus individual messages makes metrics like handling time and sentiment conversion far more meaningful.

**WHY IT’S IMPORTANT**

Measuring volumes makes other key performance indicators (KPIs) meaningful; however, volume does not constitute KPIs on its own, as it does not measure performance.

You cannot control inbound volumes or your volumes by category. Rather, these metrics are important for providing a baseline from which to understand your other metrics. 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.

**Sentiment**

**Sentiment:** Qualitative assessment of customer satisfaction based on the tone and content of messages.

**Sentiment Conversion:** Change in sentiment as a result of brand interaction. While individual sentiment is important to track, it doesn’t give you a story to tell. The story comes from being able to actually see and quantify the conversion rate from negative to positive.

**WHY IT’S IMPORTANT**

Measuring sentiment conversion enables you to analyze the level of service you’re delivering, as well as the impact of any changes implemented, such as releasing a new tone-of-voice guide. Sentiment can also contribute to an ROI model, enabling you to measure revenue protected by improving customer sentiment.
Response Time

**Average Response Time (ART):** Average time elapsed between all customer messages and agent replies.

**First Response Time (FRT):** Average time elapsed between initial customer messages and initial agent replies. This can be compared with the metric of Average Speed of Answer (ASA) on traditional channels.

To illustrate the difference between the two, it’s helpful to look at the timeline of an interaction between an agent and a customer.

**WHY IT’S IMPORTANT**

Regardless of channel, response time is a key driver of customer satisfaction, with FRT particularly important over social. Even when an issue cannot be resolved immediately, it is important that an agent show the customer—and everyone who might see the post—that the company has heard the message and is working on a solution.

Because of ART’s and FRT’s close relationship to customer satisfaction, these two metrics typically provide the foundation of your Service Level Agreement (SLA). A strong internal SLA for response time ensures consistency across the team by providing a clear target for response time—both amongst agents and for your social customer service operations as a whole.

It is crucial that you be able to measure these 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.

Response Time and First Response Time also enable you to compare your team’s performance in and out of operating hours. Many operations, especially in their nascency, are not able to scale to 24/7 social customer service. As a result you want to be sure that your hours of operation match customer expectations; if you see that your response time in business hours is wildly off from your overall response time, that can present a business case to shift or expand your hours to be more in line with customer expectation.

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@SuperStore Please tell me why your service is so bad!

2:30 PM

@SuperStore You need to have more cashiers open in NYC!

3:00 PM

So sorry to hear you're having a bad experience. What can we do help? ^EL

2:40 PM

Thanks for your helpful feedback. We’ll contact the NYC store to remedy this. ^EL

4:00 PM

**FRT:** 10 minutes  **ART:** 10 minutes

**FRT:** No change  **ART:** 35 minutes
Handling Time

Handling Time (HT): Amount of time agents spend processing an issue. Handling time covers all activity, including elements such as reading, tagging, marking sentiment, looking up customer account info, making notes and drafting responses.

Average Handling Time (AHT): Average amount of time agents spend processing issues over a given period. AHT can be measured for individual agents or multiple agents if they’re handling the same issue (i.e. not re-routed, frequent shift changes, assignments, etc.).

Total Handling Time (THT): Total time agents spend processing issues over a given period.

AHT is slightly different for social than for more traditional channels, in which one issue is dealt with at a time. On social, you might respond to one tweet and not return to an issue until the customer tweets back hours later.

WHY IT’S IMPORTANT

Handling Time is one of the first truly cross-channel metrics for social customer service, enabling you to compare the performance of social against other channels. If it takes 10 minutes to resolve an issue via email and five minutes to resolve an issue on social, you have a solid justification for the ROI of your social customer service operation.

Handling Time is an important measurement in evaluating agent performance. If you have an agent whose AHT is significantly off from his peers, that might mean it is time for some coaching from the manager. Handling Time also enables you to measure the effect of process changes you have made in your organization. For example, if you want to add an approval workflow for your agents—in which a manager spot checks 20% of all issues—you can track and benchmark its impact on your Handling Time.

Agent EL spends 2 minutes reading the message and writing an empathetic reply. She tags the message appropriately and hits reply.

HT: 2 minutes

Agent EL spends 5 minutes talking with the store manager. She leaves to work on another task and doesn’t action anything. She returns and spends 2 minutes reading and writing the answer then hits reply.

HT: 7 minutes
Proving the ROI of Social Customer Service

The Untapped Cost-Savings of Social Customer Care

The Total Economic Impact of Conversocial Study conducted by Forrester on behalf of Conversocial found that there is potential for huge savings and increased revenue for brands by promoting social and messaging as primary customer service channels. In fact, the composite organization in the report saved close to $1.5 million in reduced customer care costs and simultaneously increased sales by approximately $1 million over a three-year risk-adjusted period. As it stands today, brands are not taking full advantage of the untapped value found in social customer engagement.

In addition to effortless social customer care driving repeat customers and increased revenue, the efficiency of social pays handsome dividends. The same report found that one employee dedicated to social care is able to reach a significantly greater number of customers than one dedicated to voice care—one social agent could reach an estimated 15,000 customers, whereas a voice agent could reach only 5,610—the former outperforming their legacy cohorts by 167%.

For our composite organization, the use of social agents also results in a reduced cost per contact of 62.6% over a three-year period and the risk adjusted cost for one social contact averaged $2.30 versus $6.15 for one voice contact. Along with brand loyalty, social customer service offers businesses a significant return on investment over traditional channels such as phone and email. A significant aspect of delivering an effortless experience begins with technology—the software platform or platforms—that businesses are employing to engage their customers over social, messaging, and chat. Businesses using Conversocial versus a legacy or alternative platform that requires third-party services and supplemental software to mirror similar functionality saw cost avoidances of $53,716 over three years. Brands need to be armed with the best-in-class solution that enables them to respond to, and engage with, customers effectively, effortlessly, and at scale.

1. Within three years of implementing a social customer service solution
2. The Total Economic Impact Report conducted by Forrester on behalf of Conversocial
Chapter 8

The Social Customer Service Maturity Index
The social customer has grown and evolved in the manner and tone in which they connect with peers on social media. This evolution is also evident by brand/customer interactions on these channels.

**Are You Customer Focused?**

It’s important to have a strategy in place that can answer your socially-savvy customers who expect speedy, warm-blooded resolution in-channel. However, don’t let the idea of “Social Maturity” be misconstrued. It’s not something only for the biggest brands who already have an established customer service machine. Even smaller, lesser-known brands should shoot for a mature customer service experience on social.

**Social Maturity is NOT determined by:**

**Social volumes:** Even with relatively low volumes of queries via social, maturity is not measured by volume. Rather, compare the ratio of queries submitted via social compared to other channels.

**Brand equity:** Having a “well-known” brand is not necessary either. Even for more obscure, niche brands, social customer maturity is not only attainable but truly obligatory.

**Trendiness:** Some brands are naturally social and quickly build up a strong rapport with their audiences on social channels. However, just being “edgy” or cultivating a strong following does not necessarily deem your organization socially mature.

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The Conversocial Social Maturity Index

- **Conservative**
  - Restricted agents
  - Risk-averse policy
  - Formal personality
  - Legacy technology

- **Leader**
  - Empowered agents
  - Adaptive policy
  - Genuine personality
  - Integrated technology solutions

- **Observer**
  - Casual agents
  - Ambiguous policy
  - Rigid personality
  - Marketing/native tools

- **Contender**
  - Ambitious agents
  - Visionary policy
  - Inspiring personality
  - Innovative technology
Ask yourself the following questions to determine your brand’s social maturity:

Is Customer experience a priority across all channels? Brands that have not yet grasped the brevity of a powerful customer experience are figuratively not even in the game yet. Unless your social media customer service strategy is powered by an underlying drive to provide exceptional customer experience, you aren’t built on the right foundation for social customer maturity.

Is Customer Service driving your social initiative rather than Marketing? As we mentioned earlier, business on social media was primarily marketing driven in the inception of the social age. In the age of the mature social customer, social media is a viable resolution channel and not just a bullhorn to spread marketing messages.

Have you invested in a dedicated social customer care solution? Be warned: not all solutions claiming to do social customer care are created equal. Just because you have employed a technology to support you on social does not mean it is equipping you to answer social media customer queries at scale. A viable solution turns the chaos and noise of social media chatter into streamlined threads and queues that are easy to manage and ensure best in class customer service.

Conversocial’s Stairway to Heaven

Becoming a socially mature brand doesn’t just happen overnight. It is a systematic process that needs planning and long-term commitment—but the outcome is worth it. Socially mature brands such as Hyatt, witness higher customer retention rates, improved customer value and boosted credibility driven by full engagement of a dedicated digital customer care team.

Conversocial’s stairway to heaven provides five steps that can help propel a brand to reaching a #SocialFirst status. #SocialFirst is a vision for brands that sets out social as the primary pathway to better service customers in the fastest and most convenient way for resolution. Conversocial has analyzed and defined the key problems often faced by brands as well as the associated steps needed to overcome and progress through the pathway. The stairway is a timeline for progression and each step lays a solid foundation to progress to the next. Each brand’s journey can be specifically mapped out accordingly—it is entirely unique and tailored depending on the brand.
What Defines a Socially Mature Brand?

**Do you resolve in-channel on social?** It’s best practice for digital customer service as a whole to include resolving in-channel, forgoing new escalation paths on the road to resolution. Social is no different. If your agents aren’t equipped, either by the technology you employ or the training you embrace, to resolve immediately in-channel when faced with customer questions and demands on social, you are far from a fully social mature brand.

**Does your business recognize Social as an equally important service channel to legacy channels?** If your digital customer service architecture has social media as a footnote in the grand scheme, you are missing a fundamental understanding of today’s social, mobile customers. Social media is increasingly not only a foundational channel your customer turn to for help, but also slowly overtaking the pillars of what have been considered the mainstays of modern customer service.

**Is the tone of your responses more personal than mechanical?** If your social media customer interactions sound more like a blaring foghorn that is producing the same monotone sound for every customer, you’re doing it wrong. Your audience on social media can smell a fake a mile away. You will only minimize your effectiveness if you try to feed a corporate, stuffy tone into channels that are designed for authentic and personal engagements.

**Do you collaborate with other departments when building your social media strategy?** Companies that do not have cross-departmental line of communication run the real risk of alienating themselves from their customer base. With social offering the very real market opinion into your goods and services, you need to use what you hear on social to impact your product, your marketing campaigns and even your corporate image. The solution also is not to try to combine departments to make one massive department that deals with customers.

**Is your Executive Team practicing social media maturity?** When your company’s leadership are the first adopters of a mature social outlook, this is a sign of a progressive brand. One of the best examples of this is Hyatt’s senior management team CEO, who very early on acknowledged and understood the value of social care by giving the company the freedom b a market leader. This can account for Hyatt being one of the earliest adopters of one of the most mature social channels available—Facebook Messenger.

Learn more about Conversocial’s Social Maturity Index and how you can propel your brand from Social Complacency to Social Maturity.

See where you are on The Social Maturity Index.

Take quiz now
Chapter 9

A Customer Service Experience for the Social, Digital Customer
Improving social customer service is the most pressing short-term priority for contact centers in the US and UK according to a study conducted by Forrester Consulting.

Is Your Social Care Best-in-Class?
More than half of the companies surveyed believe that social will continue to grow in importance. It is now a given that brands must not only offer social channels as viable service options, but these experiences must be premium-level. Brands employing best-in-class Social Customer Care have reached beyond CSAT to VSAT. Instead of striving for a “good” customer satisfaction score, the bar has been raised, and brands know that because of the human, empathetic element of Social, they can leave their customers very satisfied.

Keeping this in mind, it’s important to note that currently only 33% of the social customer service solutions being used by those surveyed were actually selected by the Customer Service team. That means that Marketing is making the majority of decisions when it comes to Social Media.

The result is often in a disconnect between Customer Service and Marketing, with the former stuck using Social Media Management Suites (SMMS) for Customer Service. These suites are often great for Marketing but insufficient for the complex needs of a Customer Service department. This leads to organizations having to make unplanned investments to fix the social customer service problem.
Ultimately, dedicated solutions allow customer service teams to do what they do best—serve the customer. These teams are not focused on reaching as many people as possible, building brand awareness or adding subscribers like their Marketing colleagues, and as such require a different tool.

Dedicated social customer service solutions provide the tools to deliver what contact center teams actually want:

- A timely and awe-inspiring social customer experience
- An increase in operational efficiency and cost-savings
- A well-managed and limited risk organization
- A platform that fits seamlessly and effortlessly into existing contact center systems

To deliver the service at scale a customer service team needs, it is essential for social media to be fully integrated into the contact center. This allows agents to be managed and resourced properly, with the same efficiency metrics as other channels; and with integration of data across different channels allowing a customer to move seamlessly between social, email and phone if necessary.

"Dedicated solutions allow customer service teams to do what they do best—serve the customer."

**What to Look for in a Social Customer Service Solution**

Delivering customer service over social media presents an opportunity to delight customers and improve brand reputation, while significantly reducing the cost per interaction. At the same time, the public nature of social media carries a number of unique challenges, and minimizes the margin for error. An effective, secure, and scalable social customer service program starts with a dedicated solution that provides:

**Context:** Social customer service software needs to provide prior interaction history to give agents full context of the customer’s issue. Threaded conversations of both private and public messages gives your agents more information about the customer’s outreach, resulting in more educated engagement and issue resolution.

**Prioritization:** Social media is full of noise, making it difficult for agents to identify sensitive issues that matter to your organization. Ensure your social customer service software applies intelligent prioritization to incoming messages, enabling agents to respond to “higher risk” issues first.

**Real-time analytics:** Real-time analytics are key to continually monitoring the SLA and KPI attainment of agents, as well as providing an early indicator for issues that might require involvement of other departments. Additionally, social customer service software should provide historical insights into trends over time to deliver actionable insight for your business.
**Security:** Regardless of industry, comprehensive safeguards need to be in place to ensure information security and regulatory compliance. Look for a software that provides role-based permissions, an approval workflow, IP locking and a fully searchable, exportable archive.

**Integration:** In order to achieve a single view of the customer, it is vital to choose a social customer service software with a full set of APIs, which allows you to surface social information through your CRM systems and contact center technologies.

**Proactive customer service:** Brands using tools that only process @mentions are likely to miss service issues, or potential sales opportunities. A tool that provides proactive searches over social media will broaden your scope for engagement, meaning you don’t miss out on valuable conversation opportunities.

**Workflow:** With the high incoming message volume social brings, agents and managers need to work seamlessly to balance workload and avoid duplication of effort. Choose a social customer service software that enables you to add a layer of automation, providing a smart workflow for large-scale customer service teams, and empowering your agents to deliver better and faster social customer service.

**Expertise:** Choose a social customer service partner capable of helping you implement a scalable operation that aligns with business requirements and industry best practices.
Chapter 10

The Future of Customer Service

By Joshua March
Founder and CEO, Conversocial
This Definitive Guide is just the tip of the iceberg when it comes to providing effortless customer service on social, digital channels.

There have been many changes in the social customer service landscape over the last year—and even the last few months—which are helping to define how brands engage with their customers.

Welcome to a new digital landscape. But, what does this new landscape have in store?

**Messaging is becoming the dominant communication paradigm.**

Messaging—which includes both the private messaging capabilities of the major social networks, as well as standalone platforms like WhatsApp—is quickly becoming the default way that everyone communicates. Indeed, Activate predict that by 2018 at least 3.6 billion people will have at least one messaging app on their smartphone, catching up with the total number of internet users, and eclipsing pure social media users.
Just as consumers have shifted more of their attention to private messaging, they’ve also shifted their interactions with businesses. While social media customer care started in response to public complaints on Twitter and Facebook, for many brands the majority of questions and complaints have now shifted almost completely to private messaging channels. We observed this shift happen for many of our biggest customers over the last 12 months. A key factor is that this shift happens for brands that are actively promoting their private channels for service—brands that don’t do this continue to get a high volume of public complaints. One Conversocial customer that has been promoting “Message Us” buttons on their website, mobile app and emails for the last two years now receives 98% of all their Facebook volume privately, with only a tiny percentage of public posts. Promoting social care in the right way will actually decrease the amount of public complaints about you!

But the shift to private messaging is much more important than just reducing public complaints. Messaging combines full live-chat functionality with persistent identity and mobile notifications—combining all of the best elements of the traditional digital care channels, purpose-built for the mobile era:

- Real-time (in many you can even see when the other person is typing)
- Asynchronous (you can go away and continue the conversation later)
- Persistent identity (and easy to link to a customer record)
- Connected to smartphone notifications

Although businesses have been using the private messaging functionality of Facebook Pages and Twitter accounts for years, the lack of real-time messaging and typing indicators meant that these operated more like email, and weren’t as useful for in-the-moment service. The new functionality inside Messenger and Twitter fix these issues—as well as providing a canvas for automation, opening up a whole new world of opportunities for improving service efficiency and speed.

The combination of functionality in modern messaging apps mean they are extremely convenient for consumers to use for service, as well as delivering big benefits for businesses in terms of efficiency. If consumers are confident they will get a real-time response to their issues, they will message instead of phoning. This makes messaging the first digital care channel that has the potential to replace a significant percentage of phone calls—something that will have a massively positive impact on the customer experience while decreasing the high costs that businesses spend on phone calls every year.

The Bots Are Coming

While the launch of the bot platforms in 2016 caused a lot of hype (and a lot of bots that turned out to not be very useful at all) we’re now starting to see brands figure out how to use the bot platforms to add real value to customers. In the commerce world, simple transactional bots (for example, enabling customers to order flowers or book an appointment) have proven successful. In the customer service domain it’s much harder to automate full conversations—there are just too many variables that a customer could ask. Instead, automation should be used carefully to augment human agents.
A great first place to start is to use the automation capabilities within the messaging platforms to build a “Visual IVR” system. In any service conversation, the first few messages are generally used to identify the type of issue the customer is facing, and then to collect relevant information needed to resolve the issue. Generally, this routing and data collection is incredibly simple to automate, without needing to make use of any natural language processing that could go wrong.

Both Messenger and Twitter enable you to have automated welcome messages with button navigation options (instead of a keyboard). This functionality can be used to discover what kind of issue the customer has, then ask them for relevant information—and only then take them to an agent. A Visual IVR like the one above can immediately save 15-20% of messaging volumes—a huge saving in agent time—while improving routing accuracy, and accelerating resolution time for the customer.

**The development of AI**

While Natural Language Processing has been used for many years to provide sentiment analysis and trend insight, big developments in Deep Learning capabilities over the past few years mean we’re now starting to shift into an era when AI can be implemented to augment natural-language conversations without the frustration caused by the previous generation of chatbots.

With the shift in customer service interactions to digital channels, companies and platforms are now starting to build massive datasets of customer service conversations which can be used to train Deep Learning algorithms. Conversocial, for example, has a database of hundreds of millions of conversations that its clients have had over social media and messaging platforms.
Messaging is particularly suited to deep learning because of the concise nature of the conversations happening between customers and brands. Unlike web chat, which is generally made up of many one-line interactions (“Hi,” “I’m having a problem” etc.), Messaging, like SMS, generally is made up of complete questions and complete responses—a format that is much easier to use to train a Deep Learning system.

More importantly, the asynchronous nature of messaging (where you don’t need an instant response) means that you can seamlessly combine human agents with AI systems in the same conversation. Rather than having a conversation with a standalone chatbot that will at some point fail to understand you (and then do a painful handover to a human agent to help), in messaging you can have either a human or AI system respond to each individual message depending on the contents. In the near future, a combination of fully automated responses (for simple questions), suggested answers (with human agents approving responses to more complex questions), and fully human responses (for more emotional or unrecognized questions) will be the norm, drastically improving the speed to resolution and decreasing the amount of agents needed to handle the same number of queries.

This combination of human and machine customer service, delivered through messaging, will drive brand loyalty, increase agent efficiency and offer faster resolution for an overall more effortless customer experience.

With the digital landscape changing beyond recognition, what does the future of social care have in store? Below is an excerpt taken from “Message Me: The Future of Customer Service in the Era of Social Messaging and Artificial Intelligence” by Joshua March, Conversocial CEO & Founder, a new book being released this fall.

The Six Pillars for the Future of Customer Service

In a world where:

- Great service is all about speed and effort
- Any negative experience is one tweet away from going viral, and
- Every customer is mobile, and prefer to engage you in messaging channels

Companies need to rethink their approach to service. By adopting these pillars, companies can shift their service model away from having large numbers of relatively low-skilled agents mainly on the phone, to having a smaller number of highly skilled agents, supported and augmented by AI, delivering service over social messaging. The result will be a more effortless experience for customers (driving loyalty and repeat purchases), and reduced service costs.
The six pillars

1. **Be prepared for crises in the Social Era.** We live in a world where social crises are now the new norm of doing business. Ensure that you are prepared to ride the storm and maintain customer sentiment when things go wrong.

2. **Lean-in to the power of messaging.** Messaging is a paradigm shift that fundamentally alters the ability of companies to deliver effortless and seamless service experiences. Learn how to manage messaging in the best way for service, and how to turn it into a primary service channel for your customers.

3. **Make effective use of bot technology.** New bot technology in Messenger and Twitter can backfire if you try to create standalone, rule-based chatbots that just get in the way. But used the right way, this functionality can simplify transactions for customers and act as a Social IVR, increasing the efficiency of your agents and speeding up resolution for customers.

4. **Deploy AI effectively.** Applying machine learning and AI to messaging-powered customer service has the potential to completely disrupt the customer service model. Take an iterative approach with a constantly improving system to gradually automate more and more, without negatively impacting the customer experience.

5. **Adopt a messaging approach to all digital channels.** The benefits of combining AI and human agents in the same conversation are enormous, but only possible messaging. If you can’t switch all of your service queries into social messaging channels, then instead shift your other digital channels into the asynchronous messaging paradigm.

6. **Use social agents as the model for future customer service teams.** Customer service teams of the future will be smaller, with most service volume coming through messaging channels, supported by automation and AI. With human agents reserved for escalation, they will need to be more highly trained and given more freedom than most agents today. This model closely resembles how social care teams are already operating.

STAY TUNED

To carry on the conversation with us on social customer service best practices, tweet us @conversocial, join the discussion on our blog, or subscribe to our email newsletter.

If you’d like to find out more about how Conversocial can help you develop an effective social customer service program, get in touch with us at hello@conversocial.com.