



By Linda Dickerhoof

## Best Practices for Incorporating Social Media Into the Contact Center

**M**any organizations that are implementing social-media programs struggle with where social media should “live.” Marketing departments often start using social-media tools, such as Facebook and Twitter, for promotional purposes. When customers discover that a company has a social-media presence, however, they expect to be able to communicate via social media, which can quickly exceed the monitoring and response capacity of the marketing department.

In many organizations, the marketing department manages the use of social media to distribute promotional messaging and company news. However, the ideal place to manage customer-focused social-media monitoring and response is often the customer contact center. How organizations monitor and respond to customers via social-media varies widely based on their needs. According to Todd Carpenter, social media manager with the National Association of Realtors, “There is no right or wrong way. ... Social media is really about customizing for your customer—it’s not one-size fits all. Build your plan based on your customer needs.”

These guidelines, taken from *The Best Practices Guidebook for WOM in the Contact Center*, will help you craft a made-to-order social-media program.

Regardless of program specifics, there are three universal benefits to incorporating social media into the contact center:

1. **Immediate response.** No matter an organization's industry, size or business model, it is vital that social-media response occurs in as close to real time as possible. Many contact centers are already staffed 24/7, aligning with the always-on nature of social media.
2. **Consistent customer experience.** Customers expect a consistent service experience at every touch point. Contact centers already have the processes and procedures in place to guide customer interactions, and can easily extrapolate these to social media.
3. **Centralized feedback.** A central repository for customer data simplifies the process of compilation and review of customer feedback. This ensures that complete records of every customer interaction are captured. This also guarantees that if there is an unintended upswing of customer complaints—regardless of the communication channel—identification of a problem and development of a solution can happen swiftly.

### Goals and Metrics

Social media has changed the dynamics of communication between businesses and consumers. While it is easy to get caught up in the excitement surrounding this paradigm shift, at the end of the day there must be a true business purpose for an organization to incorporate social media into its existing customer service function.

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technology and customer service—should be involved in the planning process from the beginning. The resulting support is necessary to ensure that the goals of the social customer program mirror the long-term goals of the organization.

It is necessary to establish a set of over-arching goals and metrics that will be used to measure program success. Publishers Clearing House has established both short- and long-term goals for social-media participation, while Quicken Loans has identified specific metrics for each social-media channel it uses, depending on the purpose for which the channel is utilized and the desired results. As is the case with most aspects of a social customer program, goals and metrics aren't “one size fits all,” rather they should be customized for each organization.

### Staffing

How an organization decides to staff its social-media response team is dependent on many factors including:

- size of the organization
- number of customers and its social-media activity level
- size of the existing customer service team
- amount of resources that can be diverted from other customer service functions

Two options are assigning social-media monitoring and response to a team of dedicated agents that only responds to communication via social-media channels, or utilizing multi-function agents who divide their time between phone calls, emails, and social media.

Another staffing concern is accurately determining the number of social customer service reps that are required. Unlike traditional channels, it can be difficult to forecast the number of CSRs that you might need based on historical trends and patterns. Looking at what organizations in your industry are doing can be a good guide, but isn't 100 percent accurate. For instance, two telecommunications companies that are both leaders in the integration of social media and customer care have very different staffing levels: AT&T has 21 social CSRs, while Qwest Communications has five.

The best approach to filling positions on the social-media customer support team is to look within your organization for current CSRs or other employees with knowledge of or an interest in social media. There are three main benefits to utilizing existing employees:

- They already know the ins and outs of your business structure, people and practices within the organization, and know the flow of consumer inquires.
- Due to the vital importance of ensuring that all information distributed by social CSRs is both accurate and in tune with the overall goals and objectives of the organization, existing employees have the background and understanding of your company that allows for the

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- greatest opportunity for success as social CSRs.
- Often times, people are excited to work in this new space and view being selected as a social CSR as an honor. Publishers Clearing House discovered that utilizing existing CSRs for social media was a good morale boost.

Alternatively, you can go outside of your organization to find skilled individuals. New employees will lack the knowledge of your business and standard practices, so you must make a point to get ahead in some other areas, such as expertise in the social space. Warner Brothers makes it a practice to look at the existing social-networking footprint of all of applicants for social CSR positions.

Whatever approach you decide to take, the qualities you are looking for will remain the same: comfort with social-media tools, norms and protocols; extremely strong written and verbal communication skills; and familiarity with the company (or at least the industry). Publishers Clearing House has discovered that utilizing CSRs who are already responding to emails from customers had the easiest transition to social media.

## Training and Management

Training social CSRs is not that different from training traditional agents—the basic skills and principles remain the same. However, training specific to the social space is a must. Although AT&T's CSRs all have an extensive customer service background, they go through a minimum of one week of training to ensure that all communications are handled appropriately. Warner Brothers' CSRs also go through a thorough training process combining a manual with hands-on training.

A big challenge for many managers with contact center experience is the lack of control they have over social CSRs compared with traditional agents. For instance, many contact centers exercise a common practice of providing CSRs with messaging scripts. This doesn't translate in social media, meaning that CSRs must be trusted to represent the organization in social media without scripted messaging. When United Services Automobile Association (USAA) launched its social-media presence, CSRs were initially provided with "canned" responses. Utilizing these canned responses did not allow CSRs to reflect the empathy that the company is known for, so agents now craft their own responses.

## Hours of Operation and Response Times

Because social-media interactions happen 24/7, organizations should continuously monitor and capture all social-media mentions; automated tools can assist with that. It is not mission-critical for most companies to respond in real-time, so 24/7 coverage with CSRs isn't required in most situations. It is necessary, however, to determine hours of operation and then communicate this with your customers.

Many organizations respond to social media during the same hours that the customer contact center is already staffed. The National Association of Realtors and USAA reply to social-media messages during regular customer service hours of 7 a.m. to 7 p.m., Monday through Friday. Publishers Clearing House has social CSRs on duty Monday through Saturday, and AT&T has someone on call at all times.

It should be noted that there are occasions in which a large amount of social-media traffic can be predicted, such as during a product launch or special event. When this is anticipated, it is advised to expand hours of operation as necessary. Warner Brothers, for instance, generally replies to social-media messages between standard business hours of 9 a.m. to 6 p.m. During a special event, however, the company monitors social media around the clock.

As a general rule, companies try to respond to a customer via social media within one business day or 24 hours. This varies, however, depending on the organization's manpower and capabilities. Publishers Clearing House and Quicken Loans have social-media response times of less than two hours; Spiceworks and USAA have response times of approximately 24 hours, or one business day. Developing corporate guidelines for response times is recommended, and whatever is decided must be clear and transparent so that customers' expectations are met.

## Response Protocols and Escalation Process

Developing organization-wide response protocols outlining what types of questions and comments should be responded to and which should be ignored is a must. This cannot be left to the individual representative. Response protocols should be determined on an organizational basis. Some prefer to respond to everything, some prefer to

respond minimally; the correct answer is probably somewhere in the middle. Take the example of AT&T. It is mentioned approximately 10,000 times a day in social media, making it virtually impossible for its CSRs to respond to every mention of the brand. Protocol dictates that they first respond to every inquiry that comes in through their social-media channels, then try to respond to as many mentions as possible outside of their own channels.

It's also necessary to have a predetermined escalation process in place before one is needed. Even if you have the utmost confidence in your social CSRs, there will be situations that should be handled by upper management. CSRs should know from the start what should be escalated and how.

Most customers who are upset don't require escalation, but do require offline communication. If a consumer has a serious issue, send him a direct message or call him. Do not try to solve the problem publicly for several reasons:

1. Often problems cannot be addressed in shorthand form, such as the 140 characters that Twitter provides.
2. Many conversations should happen out of the public eye.
3. Every effort should be made to protect confidential customer information.
4. You need to stay in control of the conversation as much as possible.
5. When taking a conversation offline, a good rule of thumb is to respond to it publicly in addition to sending private communications. This ensures that other interested parties who might be watching the conversation are aware that you are responding to and addressing issues as they arise.

### Quality Assurance

Customer interactions need to be monitored and reviewed often to ensure the highest quality of customer service is being delivered. The social quality assurance process should be an extension of the existing QA protocols for other channels. To ensure compliance with company guidance, USAA regularly audits its CSRs social-media responses. Qwest also monitors all of its social-media channels for quality assurance, while Oakland Christian School utilizes a director of communications to ensure that all communications are consistent across every channel.

### Customer Engagement

Unsuccessful participants in the social space are those that announced their presence, but then never engaged their audience. One of the most important things you can do to keep your social community engaged is to simply let them know that you are listening and observing. Even the unhappiest customers will appreciate the opportunity to air their concerns, regardless of the outcome.

Many organizations also show respect for their customers' comments and concerns by not deleting postings

unless absolutely necessary. That said, something obscene, offensive, confidential or otherwise problematic should be removed. Publishers Clearing House has a policy to leave—but respond to—all messages that are factually incorrect, but will remove messages that are seriously negative or problematic.

Proper tone of messaging is another way to engage your customers. The challenge is that some companies have difficulty realizing that this new space can be a little less formal and a little more fun than traditional channels. Most companies try to humanize themselves through informal language and personalization of social CSRs. Qwest CSRs, for instance, change the Twitter bio every time someone new comes on duty—a personal touch that allows consumers the opportunity to know who they are communicating with.

Social media is the next evolution of contact center support. There are no official rules for incorporating social media into the customer service function of your organization—what works in one industry or for a company of one size may not work for another. However there are best practices that other organizations have learned by trial and error that can guide others as they launch their own social customer program. **CRM**



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*The Best Practices Guidebook for WOM in the Contact Center features best practices and suggestions for implementation of a social customer care program. It features a series of case studies outlining how 11 organizations—the American Society of Health Systems Pharmacists, AT&T, the National Association of Realtors, NefApp, Oakland Christian School, Publishers Clearing House, Quicken Loans, Qwest, Spiceworks, USAA and Warner Brothers—got to where they are today. For more information on the guidebook, go to the Word of Mouth Marketing Association's website at [www.womma.org](http://www.womma.org).*