

# Social Media Technology Engages the Contact Center

Develop a strong technology plan to enable the people and processes to serve your social customers with excellence.

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**E**arlier this year, we reached out to *Contact Center Pipeline* readers to inquire about social media activities and plans as part of our 2012 Multichannel Customer Contact survey. Fifty-five percent of participants told us their companies support social media. More often than not, however, the marketing department rules the roost. We often find contact center leaders waiting for enough volume or true “customer care” activity in social media to cross the marketing boundary. The wait is over.

This article explores four areas in which contact centers can and should participate in social media, and the technology that enables activity across **marketing, voice of the customer, customer care** and **mass communication**. Of course, technology never stands alone, so we also highlight how the right people, processes and technologies come together to help companies effectively engage, respond to and learn from their “social” customers.

### Technology: Both New and Familiar

Social media can leverage many of the same technologies that support other contact center channels. Yet unlike traditional channels, most of the action on social networks revolves around the often casual exchange of information between individuals, their friends and family, communities, and organizations. As a result, we need something more from the technology to support this environment. On the “inbound” side, it all starts with the analysis of what is being “said” (see Figure 1).

Organizations need social media monitoring and analytics tools that can sift through an ocean of posts to find the useful insights and action items. Software applications from companies like Radian<sup>6</sup> and Buzzient, as well as some of the traditional contact center and CRM players, search millions of *public* websites—e.g., social networks, online news publications, blogs, forums, photo/video sharing—to find and extract content based on mentions of defined keywords. These sophisticated analytics engines process the data to identify:

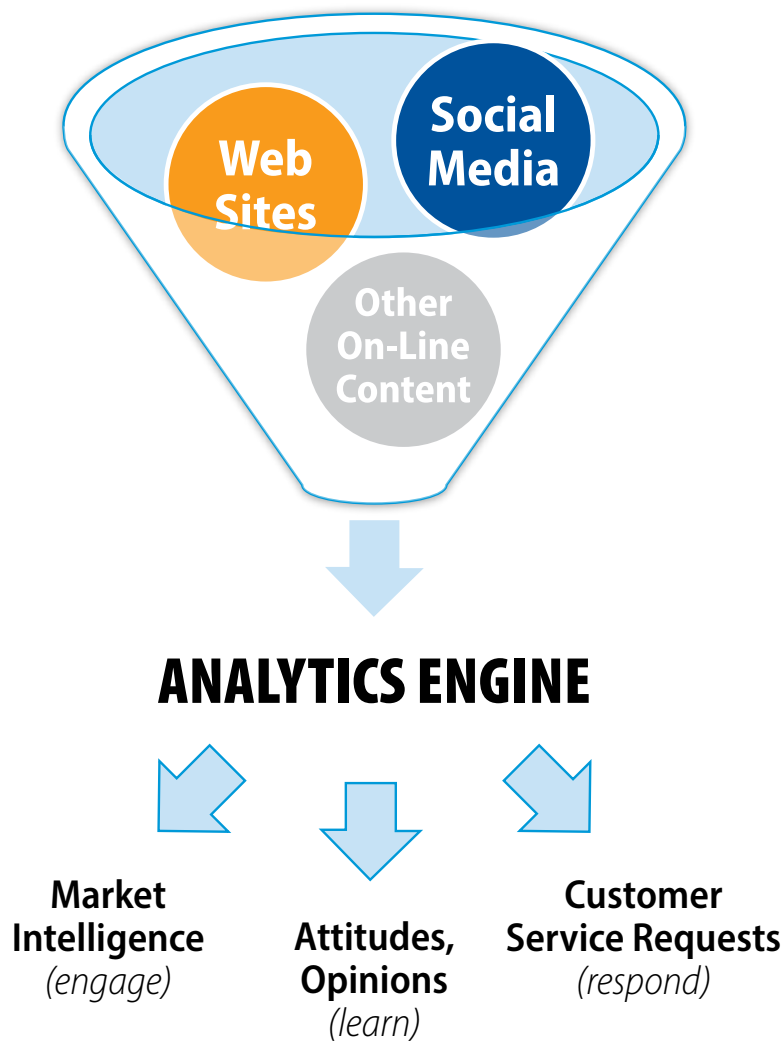
- The most important channels and influencers based on vote count, comment count, followers/friends, hyperlinks, views expressed.
- Public sentiment about products and services—positive, negative, neutral—based on customer-defined criteria.
- Attitudes toward competitor’s products and services.
- Topics and issues around which most comments focus.
- Individual posts that merit a direct and personalized response.

For the (relatively few) posts that require customer care, companies need to reach out to the originators, leveraging familiar contact center tools along with social media-specific workflow tools. A social media workflow tool uses business rules to determine when and how to transform an individual post into a “contact” requiring a response. Then, that “contact” can leverage familiar routing and handling tools that assign posts to the appropriate groups or individuals for response. For example, the contact center may handle typical service or product information inquiries, while marketing handles public relations inquiries. In the contact center, a knowledge management tool provides information to support first contact resolution, and a library of pre-approved responses helps process transactions efficiently and consistently. Social CRM (offered by every CRM player of note) captures the interaction for tracking and cross-channel follow up.

As with other channels, social media should factor into performance management processes and technologies. Workforce management ensures effective volume forecasting and

**Social Content Analysis  
feeds Engagement,  
Learning, and Response**

Figure 1, right



scheduling to meet response time goals, while quality monitoring and customer satisfaction surveys ensure that customers secure responsive service that meets their needs. Reporting and analytics tools track activity and assess results and trends. Table 1, on page 7, shows the social media requirements for various tools.

The technology can be procured from contact center or specialty vendors and be deployed as stand-alone or integrated with your contact center applications. You'll probably share responsibility for use with other departments—notably marketing and/or public relations. You'll need to work together to ensure that everyone has access to the features, functions and information to manage their respective responsibilities. Collaboration is a prerequisite to social media success.

With this understanding of the underlying technologies, let's take a look at the integration of the contact center with social media across four disciplines.

Social Media and Marketing

If you were to take a stroll through the Twitter and Facebook pages of most corporations, you might come away with the impression that social media is purely a marketing play. Corporate brands with the highest followings according to FanPageList ([http://fanpagelist.com/category/corporate\\_brands/](http://fanpagelist.com/category/corporate_brands/))—e.g., Coca-Cola, Disney, MTV, Starbucks, Converse, Red Bull, McDonalds, Victoria’s Secret—demonstrate a clear penchant for cultivating brand interest and loyalty. Their posts engage and entertain users through promotional offers, contests, celebrity product placements, opinion polls, video links and the like. It seems to work. Fifty-three percent of active adult social networkers follow a brand (Nielson’s “State of the Media: The Social Media Report, Q3 2011”).

So what does the contact center have to do with all this? When customers and prospects connect with you, they expect staff to be as interested in and knowledgeable about your company’s public presence as they are. You can meet their expectations by:

- Delivering an overview of your organization’s social media strategy during new employee orientation.
- Keeping the front line informed of social media content for which customers may have inquiries or comments.
- Providing access to Facebook, Twitter and other sites (*your* pages, at least) so staff can observe what’s happening during filler time between calls.

Of course, the workforce management team needs to be informed about major social media marketing initiatives. These promotions could have a significant impact on contact center volume and staffing.

Outbound Contact: Social and Individual

Outbound notification enables companies to anticipate customers’ needs and reach out with useful and timely information. Both social media and individual proactive outbound notification can serve this purpose, but with key differences.

Social Media (e.g., Facebook, Twitter, YouTube and RSS Feeds)	Proactive Outbound Notification
Customers opt to follow public messages on select channels	Customers or Company decide what triggers a contact, when, on which channels
Generic posts	Personalized notices
Passively available; users need to log in or “follow” for delivery	Actively delivered messages using user-preferred channel(s)
Public user reactions	Private customer reactions
Posts may link to web self-service	Messages link to IVR or web self-service
Users may request contact with an agent (and hope one responds)	Customers can readily transfer to an agent for assistance

### Social Media and the Voice of the Customer

Customers have always shared their experiences and opinions about products and services with family, friends and acquaintances. With social networking, they've got access to a global party line with millions of opinion-makers and hundreds of millions of listeners. What is "said" impacts your company's reputation and perceptions of product quality and service. And because these opinions affect purchase decisions, there's a direct, bottomline impact.

As protectors of the corporate brand, your marketing and public relations department should be clued into the public buzz about your company. Hopefully, they're already leveraging social media monitoring tools to unearth positive and negative feedback based on the key words and phrases that interest them. It's time for the contact center to jump onboard to uncover opinions about customer service.

Many of you already have a quality monitoring program and voice of the customer surveys in place to assess performance and secure customer feedback. Both are necessary resources to optimize performance and identify trends which reveal opportunities to change processes, training, and systems. Social media monitoring leverages analytics tools and brings a slightly different vantage point.

- The feedback is unsolicited, raw, real-time and all the time.
- Comments aren't confined to topics about which you choose to ask.
- You can choose to monitor comments about your competitors to see how your performance stacks up against theirs.

In our opinion, social media won't—and shouldn't—replace your existing quality and voice of the customer programs. But social media offers the opportunity for trending and quality calibration at volumes exceeding the other programs.

### Social Media and Customer Care

When an individual post needs attention, it requires tracking from "receipt" through resolution. Business rules built into the social media search and workflow tool differentiate service issues from general comments and then determine appropriate routing for resolution. They'll also need a smooth process to effect transitions from one channel to another—e.g., from a Tweet to a phone call—when the need arises. These scenarios tap the contact routing and handling described earlier. As there are several technology platforms that could handle the monitoring, routing and contact history functions, the center and IT leaders will need to define which technology plays which role and how all the pieces come together, much as they've had to do with email and chat.

For proactive customer care, the center can monitor online forums for self service, tapping the entire community for the ultimate in "first-contact resolution." The community trusts their peers. In the right circumstance, it's a win-win opportunity:

- You don't have the capacity to be aware of every possible use of your products and services.
- Someone, somewhere has been there, done that and gladly shares their experience and lessons learned.
- Customers gain a comprehensive resource.
- You gain a host of volunteers (free labor!) who reduce response time on customer inquiries and divert volume from traditional contact channels.

Social media vendors such as Jive or Lithium provide collaboration tools that support forums, wikis and/or blog functions with monitoring, workflow and administration tools for your internal moderator.

### Social Media and Mass Communication

The contact center can tie into marketing's social media mass communication to help deflect agent-assisted contacts. It also allows you to communicate in the channel of choice for customers who treat social networks as their "go to" information resource. However, you need to make sure that you have the technology and processes in place to address individual contact requirements (see the sidebar on page 4).


Social media is a *proactive* mass communication tool that drives sales and loyalty. For example, you can share links and information about your self-service channels to encourage followers to leverage those tools for an insurance quote, a healthy living program or an energy efficiency plan. Inform them about all the great stuff they can do without contacting you!

Social media can also serve as a *reactive* mass communication tool for unanticipated events—e.g., utility outage, air traffic delay, shortages/back orders on "hot" consumer goods. These channels can serve as one of many broadcast venues to provide updates and relieve pressure on the contact center.

### Get Your Technology Plan Together

As you prepare to engage in your corporate social media program, you'll need to develop a plan with a technology strategy to enable it. Consider:

- Which elements of social media activity your center will engage in and how it fits with what marketing or others are or will be doing.
- How social media impacts and works with your current channels and technology.
- The tools you already own and what your existing vendors offer.
- The gaps you need to fill to meet all requirements.
- The role(s) that each tool will play.

Of course, the best tools in the world won't get the job done if you haven't got the people and processes in place to leverage them. With a strong technology blueprint, you'll have a foundation for serving your social customers in excellence. 

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Contact center technology considerations with social media, Table 1, below

Technology	Social Media Considerations
<b>Multimedia Routing and Reporting (MMRR)</b>	Route social media under specified conditions to agents with appropriate skills, and then report on performance. Generally requires real-time or near real-time response. MMRR can also leverage response libraries for common inquiries (e.g., those used for email and/or chat).
<b>Self Service</b>	Add community input as a source of self-service information through forums and other public interactions.
<b>Computer Telephony Integration (CTI)</b>	Integrate information from social media contact to impact routing, screen pops and/or information capture.
<b>Outbound Dialing</b>	Contact customers whose messages indicate a conversation is required to address issues. Triggering these calls requires customer-supplied numbers or mapping into customer database through another identifier.
<b>Workforce Management</b>	Forecast volume and handle time on social contacts that require customer care. Leverage “what if” models to assess potential impact of “viral” activity driving unexpected volume.
<b>Quality Monitoring</b>	Apply QM processes to social media interactions consistent with other text contacts (e.g., email, chat).
<b>Voice of the Customer</b>	Incorporate potentially high volume of unsolicited customer experience input using social media assessment tools.
<b>Analytics</b>	Leverage social media search and analysis tools to drive insights and actions based on trends, competition, etc.
<b>Customer Relationship Management (CRM)</b>	Capture social contacts for trending, interaction history, customer profiles and cross-channel insights.
<b>Knowledge Management (KM)</b>	Use KM for social media responses and add content based on social media activity.
<b>Instant Messaging/ Presence</b>	Tap marketing in real-time as subject-matter experts (SMEs) and collaborators on trends, updates and proactive communication

### About Contact Center Pipeline

Contact Center Pipeline is a monthly instructional journal focused on driving business success through effective contact center direction and decisions. Each issue contains informative articles, case studies, best practices, research and coverage of trends that impact the customer experience. Our writers and contributors are well-known industry experts with a unique understanding of how to optimize resources and maximize the value the organization provides to its customers.

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Online Resource

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