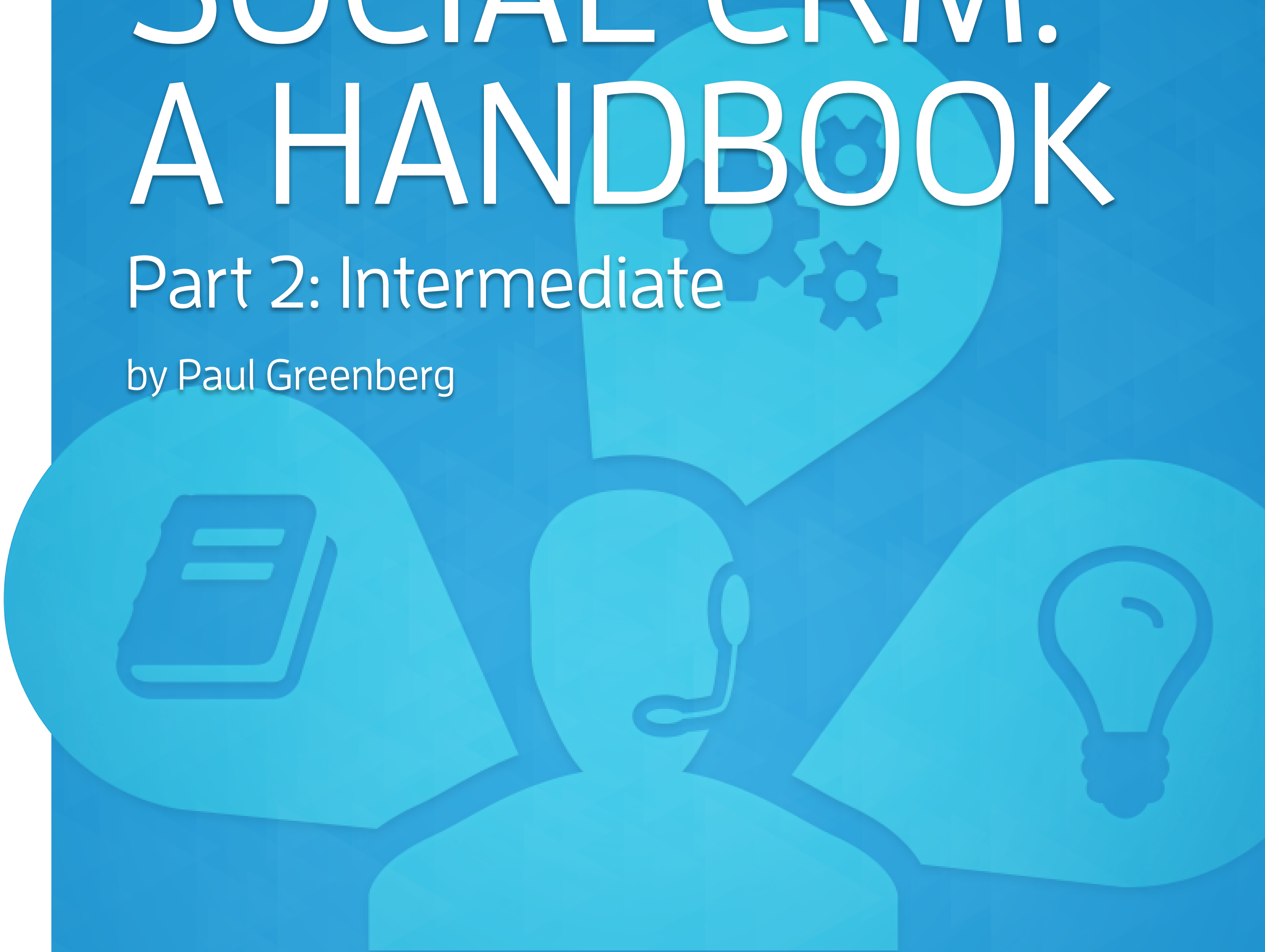
coveo™

The second installment of a comprehensive, four-part guide to creating and fostering a customer-centric organization through knowledge management transformation.

SOCIAL CRM: A HANDBOOK

Part 2: Intermediate

by Paul Greenberg



Introduction

Welcome to the second installment of our four-part ebook on creating and fostering the Customer Company, through better use of the knowledge that is available to each and every organization.

Today, CRM IS social, as author and industry legend Paul Greenberg notes; it is also mobile, and it is dependent on information within and external to companies.

However, not many organizations are able to capture and act on the information and knowledge necessary to make every customer experience, every product, every interaction one that centers on and exceeds your customers' needs, interests and desires.

Coveo is committed to helping organizations transform their approach to CRM and Knowledge Management by opening the doors to information from any and every system, effectively transforming the customer experience. While companies struggle with fragmented data across social, mobile, enterprise and cloud systems, Coveo brings it all together, quickly, easily and effectively.

We've partnered with Paul Greenberg to write this four part ebook, from Beginner through Uber, to help make your company a Customer Company.

Subscribe to the eBook series here, and you'll receive each installment as it is published.

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Overview

Part 2: Intermediate

You've had some success with your CRM program.

You have the basic CRM strategies and programs in place; the operational aspects of CRM – the processes and some rudimentary business rules and workflows are working.

Your customer records are capturing all the transactional data such as the purchase histories, customer service case records; marketing campaign responses and a myriad of other pieces of operational data.

You have your sales teams working to make the salesforce automation work and the customer service department is now using automated case management to handle customer problems and queries.

Marketing is still struggling a little to understand the new customer but has the basic marketing automation functionality built in.

You have seen some real growth in your company (I'm not suggesting it's strictly because of CRM, but there is probably some correlation) and scale is now an issue. As is personalization while you are scaling.

Caveats

1. This is not a cut and dried process or set of activities. Even though we are assuming a somewhat linear order, it can be that some of the beginner's stuff isn't there and some of what will be suggested as intermediate here is. Also, this is a set of guidelines that is meant to be just that – guidelines which you will use to trigger ideas and actions specific to your organization.

2. Intermediate v. beginner v. advanced is a combination of maturity and scale. Consequently, rather than a linear process, it is a highly personal one; meaning, the company that you represent as mature enough to be intermediate might not be at that level somewhere else even with the exact same level of execution and functionality.

So what do we do now?

Steps to Take Rinse, Repeat

There are some obvious resemblances to the beginning steps here because you are, in the words of gamers, "leveling up" and that requires asking some of the questions that you asked when you were just starting out.

Let's start by assessing where we are. We need to ask ourselves a lot of questions before we start thinking about taking actions to get us to the next level.

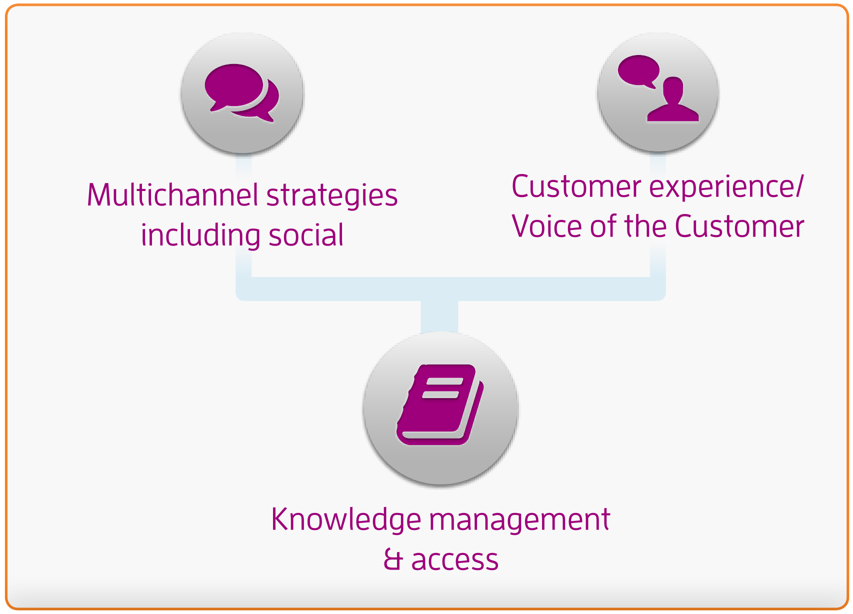
1. **What do we have in place?** Break down the elements of customer-facing strategy, programs, processes and rules that are your "as is" state.
2. **Conduct stakeholder interviews** – Remember that your customers are your stakeholders as well as your internal staff. What's worked so far? What hasn't? What works but needs improvement? Where do we scale up? Pare down?
3. **Decide what you want your "to be" objectives, well, to be** – This is where you decide what you want to improve or replace or add. The reasons and decisions can be strategic or tactical.

Example: You've achieved some modest successes with your Twitter customer service channel. You've got a two-hour response time to all queries. Your protocols for dealing with problems are in place to maintain that response time regardless of the severity of the problem – at least in most cases. But you are a victim of your own success. There have been two somewhat unexpected results of that success. Because word has spread, more and more people are taking to the social channels to interact with customer service, requiring more personnel and driving up costs. Also, for the same reason, the expectation of service response time is now two hours in all channels, placing a great deal of strain on your contact center, since it isn't engineered for that kind of response. Please be aware that while the onboarding costs and the costs of failure are low; the cost of success is high and the impact on other areas of the company can be dramatic.

Strategic/ Programmatic Considerations

Once you've done your assessment and made some decisions on the objectives that matter to you, where can you take this? What are some of the more useful possibilities for you to consider?

Arguably, knowledge management & access underlies Multichannel strategies and customer experience. Customer experience cannot generally be addressed successfully without attention paid to information and knowledge.



After all, you have to know the customer before you can enhance the experience in a meaningful way, and to know the customer you need information. When you implement a multichannel strategy, it becomes even more important to truly understand your customer across all of those channels, and to show them that you do.

Strategic/
Programmatic Considerations

Multichannel Strategies Including Social

Just to be clear, what I'm NOT talking about is a social strategy. There is no need for a purely social strategy anymore. "Social" a.k.a. social media is now mainstream; what isn't necessary here is a "social media" or just plain "social" strategy.

While the strategy has to incorporate social channels and the appropriate protocols for channel outreach, business decisions have to be made on which channels you want to incorporate into your multichannel approach.

For example, with one exception, if your customers don't communicate in social channels, you don't have to invest in that channel. If they do, you do. The one exception is if, for some reason, you want to move people to a channel they don't actively participate in already.

However, you can't ignore the traditional channels that have been used for more than 70 years. Phone, email, SMS, in person meetings, social channels; blog posts, etc. are all still valid places to communicate with customers and will continue to be for many years to come.

"Social" a.k.a. social media is now mainstream; what isn't necessary here is a "social media" or just plain "social" strategy."

Strategic/
Programmatic Considerations

Multichannel Strategies Including Social

1. **Identify** – where your customers are communicating with you, and about you and among themselves.

2. **Assess** – each channel. What kind of volume of activity is going on in that channel? The cost of an interaction? The nature of the communications? The accessibility of the channel? Etc.

3. **Decide** – your strategy. Do you want to communicate with your customers in just a single channel? In all the channels? In selective channels? What kind of interactions do you want in each? Service? Marketing? All? What are the protocols you need to follow for each channel?

Example: You know that since you've been successful with your Twitter customer service channel and it is impacting other channels and getting increasing traffic, that you are going to have to "up the game" in order to keep responding in a timely and useful way to your customers in multiple channels.

In order to both resolve the expectations crisis – all channels will have a KPI for a response time driven by the best of the channels – under two hours. More importantly, you empower the staff in the social media and the contact center to be able to compensate complaining customers at their discretion up to a certain level.

This means that the CSRs don't have to resort as much to going up the chain to get a satisfactory resolution to a problem.

Strategic/Programmatic Considerations

Knowledge Management & Access

Because you are scaling your program to meet the needs of an increasing volume of customer interactions with the service department, you are also in a position where two things are occurring:

1. More and more customers are coming to your customer service department about something;
2. You have to either maintain or reduce the time to needed to answer those customers regardless.

So you need to start thinking about how you are going to provide your agents with the information they need at their fingertips and/or provide the customers with the same answers via self-service.

Either way, that may require a knowledgebase approach that is drawing information initially from internal sources but as the sophistication of the data builds and the customer base becomes more and more active on the social web, it requires the ability to aggregate data/information quickly and organize it so that the agents or the party interested (self-service) can have that answer in as close to real time as possible.

The state of KM for Service & Support

The Technology Services Industry Association (TSIA) reports that less than one-third of its member companies are using a traditional knowledgebase in customer support. In a poll, members said:

87% of respondents said they are not even close to getting the most from all of their knowledge assets, across systems, the web and social media

11% said they are

2% said they didn't have the knowledge to answer

92% said they are working on a knowledge management initiative currently

6% said they are not

2% didn't have the knowledge to answer

65% said they feel like they are ALWAYS working on a knowledge management initiative

33% said they didn't feel that way

2% didn't have the knowledge to answer

Watch the recorded webinar with TSIA on Knowledge Management

Strategic/Programmatic Considerations

Knowledge Management & Access

That means considering technologies that can both do enterprise internal and external search and that can aggregate structured (transactional) and unstructured data in an easily consumable way for both the customer and the agent.

But it also means that you have to make decisions on what information you want to expose to the customer. In other words, you might not want to let the customer find out something that involves a trade secret that might answer their question via a self-service channel but might be willing to expose that information to the agent so that they will be able to craft the answer to the customer according to the guidelines that you've set up for the agents when it comes to answering these sensitive questions. This means the security functionality of the system you choose needs to be strong, deep and yet flexible and configurable enough so that someone – other than the system – can decide whether to expose information or not.

Depending on the kind of company you are, the aggregation, distribution and forms of consumption of knowledge might depend on the service level agreements that you have with your customers. So there also might be priorities that you have to establish in terms of who gets what associated with the SLAs.

Example: Now that you've empowered your employees to compensate complainants, reducing the time that's required to resolve an issue, you institute self-service and access to the knowledge ecosystem for the customers so that many of the ordinary queries they have don't ever even get to the social media teams or the contact center.

That way the volume of queries is reduced, allowing your CSRs to focus on the issues that need resolution or the more complex queries. In other words, you've added another channel, which goes to multichannel strategy and knowledge management. I told you this wasn't cut and dried.

Strategic/Programmatic Considerations

Customer Experience/ Voice of the Customer

Arguably, you could have done a voice of the customer program (VOC) in the beginning stages and if you created a customer advisory board/committee, you would have approximated one.

But there is much more to consider than just that kind of program at this phase, given the social customer's impact on all customer-company relationships at this stage of the 21st century. My assumption that you are pretty well set with the basic operational and some social capabilities for your CRM system and processes; and are willing to re-examine your programs and strategies.

It is around this time, you might want to begin considering what your customer thinks of his/her experience with you. That means begin to understand all the places, regardless of location – online, via mobile device, on Twitter, in a physical store, that the customer interacts with you and the kind of experience that they have at each touchpoint in each channel.

Strategic/Programmatic Considerations

Customer Experience/ Voice of the Customer

You need to think about mapping that customer journey and how the customer thinks about it at each stop along the way. There are four things to find out in customer journey mapping:

1. **What are the touchpoints in each and every channel?** If it's a contact center, it could be the greeting on the phone; the time to an agent response; the quality of the sound.
2. **What is the expectation of the customer at each of these touchpoints?** "I expected the greeting to be short..."
3. **Did the interaction meet the customer's expectations? Exceed them? Fall below them?** "...but it was long and asked me to repeat information I had already given. That got me irritated".
4. **How important was the result to the customer?** "It bugged me for the rest of my call."

Example: You do customer journey mapping on the service experience your customer has with you on your Twitter channel, your contact center, at your stores and via the self-service channel you just set up.

You find that despite your measurable success, there are a few things that your customers think haven't met expectations – the search capabilities in the self service channel; some of the personal interactions in the contact center; the inability to find your Twitter channel easily.

You didn't know any of this, because all in all you've been successful so these were masked by that success. But the customers you interviewed not only felt that the results in these areas fell below their expectations, but that they were important issues.

Other things you found out, like a couple of user experience issues with your mobile app, are issues but not important to customers at this point.

You now have decisions to make on how much and what you want to invest in addressing these concerns.

Strategic/Programmatic Considerations

Extending the Engines: Business Rules, Workflows, Processes, and Technologies

If you've proceeded on any of the aspects mentioned, there is likely impact on your current set of business processes and workflows.

Keep in mind, as we scale up, the ability to provide a set of institutionalized, repeatable processes and a strong set of business rules driving those processes, becomes increasingly important. Automation of this through technology is equally important. No one wants to sort through thousands of results manually to decide on what to do.

Example: You've now reached the point that you are big enough to get thousands of service queries a day – not millions or even tens of thousands, but thousands. That still necessitates a significant amount of checking each day.

Your objective is to "keep the ordinary, ordinary." To explain: 90% of all service queries are just that – queries. They aren't complaints.

The complication is that the queries are coming through a variety of channels so the answers to the queries have to be available in whatever channels you communicate with customers. Plus, among the 90% are the 10% that are complaints.

This is a place for you to set up the appropriate triggers and alerts based on the queries/complaints that require action.

Strategic/Programmatic Considerations

Listening

Because your customer base is increasing in size and because you are more aware of your brand than ever, a scaled up social media monitoring effort (if your customers communicate in these channels) is now appropriate – if there are thousands of mentions of your brand across the social web.

But just listening, i.e. watching comments and thinking about them as data points on a graph to plot trends is far from sufficient.

For those of you who understand that data needs to become information that needs to become knowledge that needs to become actionable insight, there are two options that you might consider.

1. **Capturing the data, identifying the customer and placing the information in the customer record.** This isn't as easy as it seems since it isn't entirely clear that the twitter handle of someone commenting on you can be tied to a customer record you have. Arguably, having the customer authenticate with her/her social credentials in either a marketing or service area could solve this.

2. **Responding to the communication** – look at setting up the systems that will allow communication/interaction with the customers who are chatting on the social channel.

   To do this, though, it's necessary to have the communication protocols in place. It's also necessary to make sure that the ability to open up a case (and all the associated workflow etc.) is there as is the ability to turn the conversation into data.

Strategic/Programmatic Considerations

Introduction of Analytics

But even interacting with your customers via social channels and capturing unstructured data isn't enough. It's probably time to get to know your individual customers (since you're well beyond the time you knew them personally) to see what their interests are, to better target your campaigns, products, and service.

At this point, to do that, you have to rely on the transactional data that you already have in your CRM system's database.

But that conversational data on the social web from the same customers can enrich your knowledge of individual customers, even if you have thousands. This allows you to focus on not just demographic segments, but also target customers who are "like me" – meaning they have similar interests and thoughts as other customers – which also means it allows you to craft programs that are based on the similar interests – which can then be refined and personalized.

Start Small Think Bigger

There are several programs that can be worth an initial look at this stage and as you continue to grow; expanding these to full blown efforts, pending their success at the pilot level, would be worthwhile.

The three that I'm thinking you might consider are loyalty programs, sales optimization efforts and content marketing as part of a larger overall marketing effort. When we reach an advanced stage, we'll see what it takes to go all in. But remember, there is nothing that stops you from implementing any of this completely and wholeheartedly at the intermediate stage either.

These are suggested approaches and guidelines, not rigid efforts. The idea is to trigger thinking about possibilities that might benefit you and to situate them based on the scale and maturity of your existing customer-facing activities.

Start Small
Think Bigger

Initial Sales Optimization

There is some leeway here, and this could also be advanced; however, it might be time to start a pilot around sales optimization – with a full-blown effort in the more advanced stages.

For those of you who are unclear what sales optimization is, it's a combination of several things.

1. **Collaborative selling** – This isn't team selling, which is ordinarily a joint action among several sales people. This is the engagement of many of the employees in supporting the sales efforts via collaborative tools. It could the be identification of a subject matter expert needed to support a deal; it could be a piece of vital intelligence that might be the difference between success and failure. Tools are made available to the employees that (with permission, of course) allow them to participate in particular opportunities. These might be activity streams or wikis or enterprise search/unified indexing or all of the above. For Salesforce users, it could be Chatter. But make sure your teams have access to the great info in the Chatter streams, via a unified index.

2. **Next best action** – This is a highly specific suggestion to a sales person that is based on multiple factors including the state of the opportunity, the history of deals like it; the specific profile of the sales person etc. This could include recommendations automatically populated in a deal record.

3. **Sales intelligence** – Information specific to the accounts that are being sold to. It involves information like competitive intelligence; changes in management; significant occurrences related to the account. Information can be aggregated from both the internal data and the unstructured data from the social web.

4. **Analytics for success** – Algorithms of a pretty sophisticated level take a look at the deal-in-progress and identify the likelihood of success and with the knowledge returned allow a sales person to figure out how to optimize the chances to win. That would include what presentations, case studies, videos, etc., are most likely to resonate with the prospect.

Getting ready for the advanced stages

Okay, you've done a few things here. Your company is moving forward. With some fits and starts you should have some good results. Now it's time for the next stage if you want to invest in it. You're ready.

Click here to subscribe to the series.

About Paul Greenberg

Considered a thought leader in CRM, Paul has been published in numerous industry and business publications over the years. He was elected to CRM magazine's CRM Hall of Fame in 2010 – the first nonvendor related thought leader in its history. He is known particularly for his work on using social media, such as blogs, podcasts and wikis and social networks in CRM as tools for customer collaboration. His blog, PGreenblog, has been #1 rated by multiple groups from 2005-10. He now also writes the CRM blog for high profile technology media property, ZDNET.

In addition to being the author of the best-selling CRM at the Speed of Light, Paul Greenberg is President of The 56 Group, LLC, a consulting firm, focused on CRM and Social CRM strategic services. He is also a founding partner of BPT Partners, a training and consulting venture composed of a number of CRM luminaries.

Paul also serves as Executive Vice President of the CRM Association and is currently is the Chairman of the Board of Advisors of the University of Toronto's Rotman School of Management CRM Centre of Excellence. He has been a Board of Advisors member of the Baylor University MBA Program for CRM majors, and the co-chairman of Rutgers University's CRM Research Center. Paul has developed strategies and helped define CRM and social CRM products for all the major vendors in CRM and in social media.

He has developed broad CRM strategies and programs for a significant number of larger enterprises and worked with them from inception of the idea of a CRM strategy through vendor selection when needed.

About Coveo

Coveo brings to market a highly advanced, Unified Indexing and Insight platform that redefines how people access and share fragmented knowledge around the customer-focused enterprise.

Coveo connects people to contextual content, and through content, to relevant people. This enables more efficient customer service, increased sales, shorter sales cycles, faster innovation for better product development and increased profitability.

Coveo's advanced, Unified Indexing and Insight platform securely connects with and crawls all systems to create a virtual integration layer, by federating and enriching structured and unstructured information.

The Company's lines of business inject existing knowledge into every Customer Service interaction, personalize online customer experiences within high-end websites, and increase overall return on knowledge by making the collective knowledge easily accessible, so that all employees can stop reinventing the wheel. More than 2,000,000 people globally and more than 500 companies use Coveo to achieve their business goals.