



## Five Years of Social Customer Care:

The Pig Puts on Some Lipstick  
and the Fish Come Out to Play!

# Foreword:

## Time for More Social, Less Media

Guy Stephens asked some of the world's innovators and thought leaders for a five year retrospective on social customer care, and I'm honored to offer a few thoughts of my own to introduce this collection of articles.

Five years ago, we were at the height of social media hype. In 2010 I did my own “social business” study and found that social media was a veritable “Swiss army knife” of capabilities that could be used to socialize traditional CRM processes like marketing, sales, and yes, also customer service.

Of course, online support communities existed long before terms like Social CRM became the next big thing. But Twitter and Facebook opened up genuinely new ways for consumers to vent about their experiences and ask for help. For a few brave souls like Frank Eliason at Comcast and Guy Stephens at The Carphone Warehouse, these new social “channels” created opportunities to engage with, and care for, customers.

The real power of social media lies on the consumer side. Musician Dave Carroll (of “United Breaks Guitars” fame) put it brilliantly in a 2012 interview

with me: “No customer is statistically insignificant.” Our voices count, and it’s about time.

I’m sure that’s why my attempts to get help via social media have been mostly successful. One time I got a DSL problem escalated and fixed more quickly after tweeting about my frustration. Another time, I got help picking technology from Best Buy’s #Twelpforce. I sum up the past five years as a big win for consumers.

That said, many companies struggle to serve customers effectively via social media. Scaling social channels and integrating into a multi-channel approach is a work in progress, to put it mildly. Still, these technology challenges can and will be overcome. Just as contact centers have adopted web, email, and chat as normal service channels.

The key to real success, in my view, is to look beyond the automation and remember the first word of social customer care — “social”. And the last one — “care”.

If Social Customer Care is to rise above “lipstick on a pig” status, business leaders should not treat social as just another channel to cost optimize. Instead, use social customer care as an opportunity to engage human-to-human and show that a company really does care about its customers.

When that happy day arrives, we can go back to just calling it Customer Care.

*Bob Thompson*

**Bob Thompson**  
**CustomerThink Corp.**



**@Bob\_Thompson**

CustomerThink founder and global evangelist for customer-centric business. Buzzwords (CRM, CEM and Social Business) optional.

# Acknowledgements

I had been thinking about how to mark – celebrate even – five years of social customer care. As I reflected on the topic it struck me that the best way to celebrate was to invite those people I had come to know over the preceding five years to share that moment with me.

The “reflections” that follow are the result of that.

The retrospective, laid out in roughly chronological order of when I first met each person, reflects a variety of views, insights, and musings on social customer care. Some hopeful, others more realistic, yet I believe all are united

by a collective sense that social has been catalytic in disrupting the service landscape in some meaningful way. The “early years” of 2008 – 2009 were perhaps some of the most exhilarating times for all of us, and the hope is that this “exhilaration” can be translated beyond mere novelty value.

This group of people – explorers and pioneers perhaps – are, in my opinion, some of the most influential commentators and participants in this space, their opinions I value greatly, and for their involvement (and patience!) in this small project, I genuinely thank each one of them.

I would also like to thank Tighe Wall for his help editing and proofreading this document and Future Care Initiative for designing this retrospective.

**Guy Stephens | @guy1067**



Looking Ahead:  
The Margins  
Become the Centre  
**70**



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**My personal thanks to:**

Frank Eliason, Citibank: *@FrankEliason*

Richard Baker, Carlsberg Group: *@TheIntrapreneur*

Graeme Stoker, Freelance Digital Consultant: *@Graeme\_NCL*

John Bernier, Lubrication Technologies: *@BernierJohn*

Dr Natalie Petouhoff, Constellation Group: *@DrNatalie*

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Mitch Lieberman, DRI: *@MJayliebs*

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[So Where  
Are We Today?](#)

**Frank Eliason**

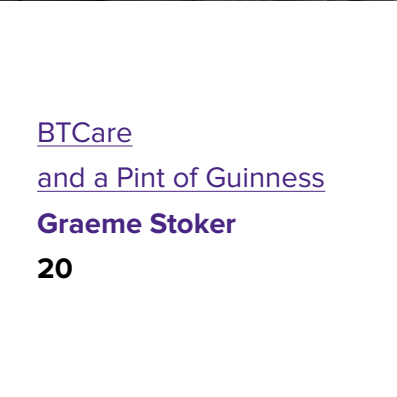
**11**



[Five Years On,  
Has Anything Really  
Changed?](#)

**Rich Baker MBA**

**14**



[BTCare  
and a Pint of Guinness](#)

**Graeme Stoker**

**20**



[#Twelpforce:  
What a Ride!](#)

**John Bernier**

**24**



[The First Five Years:  
What a Rush!](#)

**Esteban Kolsky**

**32**



[Seven Steps to  
Executive Business  
Success with Customer  
Experience and Social  
Media ROI](#)

**Dr Natalie Petouhoff**

**28**



[Social Customer Care?  
What Social Customer  
Care?](#)

**Colin Shaw**

**40**



[Where Do We Go  
From Here](#)

**Barry Dalton**

**36**

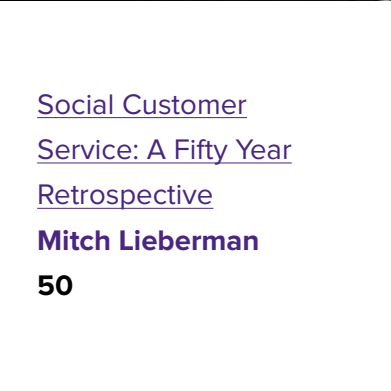




[Five Years On:  
An Amazing Journey](#)  
**Vincent Boon**  
43



[Community and  
Empowering  
the Social Customer](#)  
**Wendy Lea**  
47



[Social Customer  
Service: A Fifty Year  
Retrospective](#)  
**Mitch Lieberman**  
50



[Social Customer Service:  
You've Come A Long  
Way](#)  
**Kate Leggett**  
52



[A Story Only Just Begun](#)  
**Martin Hill-Wilson**  
59



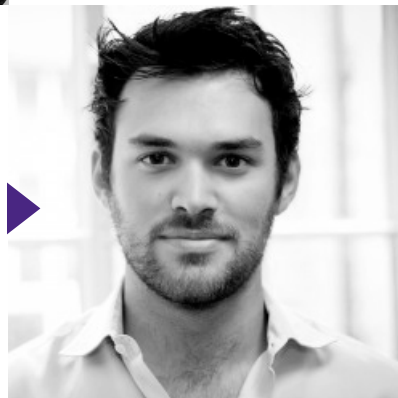
[Social Customer Care  
Four Years After "United  
Break Guitars"](#)  
**Dave Carroll**  
55



[From Advice  
to Direction:  
A Shift in Perception](#)  
**Joanne Jacobs**  
63



[A Fundamental Shift  
\(And In Your Pocket\)](#)  
**Joshua March**  
66



# Introduction: Five Years of Social Customer Care

It is over five years since Frank Eliason sent his first tweet. That one tweet has set in motion a transformative shift in the way customer service is delivered. Where Ford and Taylor embedded consistency and control into the service model, social has been the catalyst and means by which people – you, me, us – have returned a sense of intimacy, humanity and empathy to it.



Organisations willing and able to take that early leap of faith, looking beyond the names – Twitter, Facebook, YouTube – and understanding what this type of communication represented, have been able to navigate the disruptive landscape in a more open, collaborative, and trusting way. This does not mean that such organisations have not faced their own challenges in the eyes of both their customers and employees. The challenges will always exist, for at heart all organisations are made up of people. But it is the way in which those challenges have been and will be met that will set apart the leaders, the pioneers, the brave, and the courageous.

I have been involved in the social customer care space since 2008, as both @guy1067 and @guyatcarphone. I come to this space from the perspective of marketing, knowledge management, and customer service. A fortuitous combination, brought together by serendipity, which has served me well. Each has shown me how dependent one has become on the other. Each one an integral piece of the jigsaw. Clay Shirky perhaps encapsulates it best in his book Cognitive Surplus: “We are increasingly becoming one another’s infrastructure.”

An infrastructure founded on people. An infrastructure that is slowly remembering its humanity. An infrastructure that is gradually becoming more tolerant, more understanding, and more able to engage with those who inhabit it at the moment of greatest truth: Now. “The Cluetrain Manifesto” might refer to this “infrastructure” as the “marketplace,” where organisations are increasingly willing to “get down off that camel!”

*“This does not mean that such organisations have not faced their own challenges in the eyes of both their customers and employees. The challenges will always exist, for at heart all organisations are made up of people.”*

The infrastructure, or the marketplace, emerged at the margins, and it was here that social customer care evolved. It did not set out to destabilise, decentralise, or disrupt the existing service model; these were natural consequences. Social customer care simply served to remind all of us what customer service could be like again. It held up a mirror and rather than asking a question, made a statement: It is now time for you – the organisation – to deliver on your promise of customer-centricity.


As we move forward in to the next five years, my concern is that we simply ignore the opportunity that is at hand and end up with the same model, but with some social tendencies plastered over the top: We tried the experiment; it was fun, but now back to some proper work. And by the way, the pig still doesn't look great!

We are asking similar questions and making similar assumptions that we would for 'traditional' customer service. I have yet to see an organisation genuinely create a service model that recognises and integrates the unique characteristics of social. The closest to come to this perhaps (albeit in parts) over the last five years have been BT,

BestBuy, Dell, O2, Zappos, with the mantle perhaps now passing to organisations like KLM and Maxis. In the final assessment, social might be more about the way we communicate and engage with each other, rather than just a set of technologies delivering a three minute resolution. My hope is that we are able to make that transition.

Looking ahead to the next five years, however, I am seeing social customer care moving towards its traditional counterpart and the two coming together under the banner of digital service. If social has been the catalyst, then perhaps digital will be the foundation on which the next service transformation will take place.

**@guy1067**  
**July 2014**

A close-up portrait of a man with short, thinning brown hair and a slight smile. He is wearing a dark blue jacket over a light-colored collared shirt. The background is a blurred outdoor setting with a stone wall and a metal fence.

# So Where Are We Today?

**Frank Eliason**  [@FrankEliason](https://twitter.com/FrankEliason)

Formerly [@ComcastCares](https://twitter.com/ComcastCares), Author of [@YourService](https://twitter.com/YourService), Director Global Social Media for [@Citi](https://twitter.com/Citi) & board member for [@BBB\\_US](https://twitter.com/BBB_US) & [@Socap](https://twitter.com/Socap).

It was September 2007. I just started a new job in an industry I was only familiar with as a customer. Little did I know at that time how the events over the next few weeks, months, and years would completely change my life. My new job was at Comcast and I would be managing the executive complaint department, or so I thought.

When we go into new jobs we have thoughts and dreams of the potential success. I never could have anticipated what the next few years would bring. Within a few days of starting the job, a NPR & AdAge writer (now with MediaPost) started Comcast Must Die. All of a sudden my job shifted and I was learning about reputation management, social media, public relations, and so much more.

We had a great team at Comcast and our efforts were truly a team effort, especially the corporate communications team. Now we were interacting with customers in all kinds of spaces on the internet. In February 2008, when I first saw Twitter (before there was a way to even search it), I had no clue how we could use it. Then search was born via a website called Tweet Scan and Twitter servicing could be born. On April 6, 2008 Michael Arrington published “Comcast, Twitter, and the Chicken (trust me I have a point)” after a Sunday afternoon after I contacted him because of tweets I saw. That is the day the ComcastCares Twitter handle was born.

So what has gone on since that day? After spending several years in the cable industry I returned to financial services at Citi three years ago. I have had the opportunity to work with countless businesses and organizations regarding social media. I am also the author of the book “@YourService” published by Wiley. We have watched an evolution in social media, mainly as a marketing force, but as more and more companies entered the space, they received engagement from their customers, but it was not always in the manner they envisioned. Customers were coming at them through every social media channel to complain about products or service. The marketers

*“They never wanted social service,  
they wanted to be treated right the first time.”*

responded! Their customers must want social servicing. The challenge is they were not fully listening to these complaining customers, and I am not sure companies are still doing a great job at that. They never wanted social service, they wanted to be treated right the first time. Companies started advertising their social servicing welcoming the public complaints of their customers.

They often treated them better than other channels, causing more customers to come to social media to blast the brand. We watched studies galore profess the need for social servicing and how the process turns these complainers into brand advocates. The problem is that is not the case and never was. That was spin based on someone thanking the company for the good service experience, but the reality is when they need help again they will first turn to blasting the brand to get the best help. The challenge is people did not see all the work companies like Comcast were doing to improve the actual customer experience.

I cannot talk about Comcast over the past three years, but while I was still there we implemented many new tools and new procedures based on the work of the social media team. The same is true during my time at

Citi. We recognize that customers just want the right experience the first time and we need to deliver that. Social media can help us listen to our customers, but so can so many other means in which we interact with our customers.

So where are we at today? I think we are at the beginning stages where businesses recognize the need to fix the customer experience. I am thrilled to finally see the message we have been delivering for years being seen by the leaders in these organizations. Companies are now starting to listen not just to social, but across all touch points. They are realizing the importance their front line team members are to the brand and the value they can offer to all facets of the business. Okay, maybe this has not fully gotten to this stage yet, but we are seeing organizations move in this direction. We are seeing more and more companies insource customer service and find ways to have top leaders closer to the customer. This was always the power of social media! We are in a new era that is more relationship driven than marketing or message driven like the 40 years prior. I think the next few years will be an incredible time for customer experience professionals and the rate of change that we will be able to lead! I look forward to doing this together. ■

A close-up portrait of a man with short, light-colored hair and a light beard, smiling warmly. He is wearing a light-colored, collared shirt. The background is a soft, out-of-focus grey.

**Five Years On:**

**Has Anything Really Changed?**

**Rich Baker**  [@TheIntrapreneur](https://twitter.com/TheIntrapreneur)

Engage or die! Intrapreneur, senior leader and communications expert.

Guy has been at the forefront of social customer service since we both started tweeting for business; him for The Carphone Warehouse and me for Virgin Trains. Along the years, we've kept in touch, and asked to facilitate events together.

So when Guy asked me to jot down some thoughts about the last five years I was happy to.

#### Here's my brief reflection

I started tweeting "properly" in mid 2009, whilst working for Virgin Trains. I remember thinking at the time I was taking a big risk; it wasn't sanctioned by the wider Group, and it so was new that there weren't any organisations doing social well enough to copy.

So whilst others may have had a master plan (although I doubt it), I largely made it up as I went along. Pinchot, the man who invented the term "intrapreneur" way back in the late 1970's said, "It's easier to ask for forgiveness than permission." And so it is.

My timing must have been perfect. Within a few short months the "Twitterati" were going crazy for us – no doubt as a result of the strength of the Virgin brand, and the fact that a large number of the early adopters worked in PR and marketing.

I was asked almost daily to speak at events, guest blog, do live Twitter interviews, and was the subject of a large number of articles and case studies. I was even featured in a best selling book "5 Star Customer Service."

#### Launching @virgintrains

Months passed, and as the popularity of the account continued to grow I launched the @virgintrains account.



Back then, there weren't as many people using Twitter as there are today, and so I wasn't inundated with queries from the travelling public.

I'd also taken the deliberate decision (something I feel strongly about) to give customers information that meant they wouldn't need to ask me basic questions in the future; they'd be able to find out for themselves.

For me, good social customer service is about empowering customers, not making them a slave to your channel. With the amount of information available to customers online, it makes good business sense to adopt a self-service model.

As well as it being easier to manage, it's much more cost effective.

Nonetheless, I was doing this in addition to my day job; a regional manager with over 180 people and thousands of passengers in my care every day. So I was very conscious of the time it took to manage.

As you would imagine, most of the conversations were about routine matters like, "Where's my train?", "Can you turn the heating down?", etc. Despite this, I got a huge amount of personal satisfaction from it. If you've ever worked in customer service you'll understand what I mean. The reward for helping people is immediate and can be a key driver of employee engagement all by itself.

*"As well as it being easier to manage, it's much more cost effective."*





## Celebs

Some of the people using our train service were very well known, and Stephen Fry caused a minor Twitterstorm one afternoon, complaining about a delayed train. (He later apologised when I explained, via DM, that it was due to a fatality.)

Perhaps one of my most memorable conversations was with the writer, actor, and director Kevin Smith. He was travelling to Scotland for a gig and wasn't expecting a response to his tweet:



You can probably tell, I loved it. Twitter for customer service/pr/marketing was new and exciting. People really responded well, and it was great to feel I was at the cutting edge of something that would change our lives.

## Making it sustainable

Based on the success of the @virgintrain's account, I was asked to help other Virgin companies find their feet with their own Twitter accounts – and had a few quiet conversations with Eurostar about their handling of social media, too. It seemed logical to me at the time that eventually I should transfer ownership of the Twitter account to our customer relations team.

*“The truth is, they never were  
in control, just the illusion of it.”*

At the time, there wasn't a roadmap for doing this, but I applied some principles around employer brand and tone of voice to create a plan.

I remember that lots of people involved in marketing and PR were arguing for ownership of social customer service, but I – and others – felt strongly that social customer service should be led by people who truly understand traditional customer service in the offline world.

And so my colleagues began tweeting using the same Virgin tone of voice and customer-focus people expected, using the now defunct – but excellent – CoTweet.

### **What's changed?**

Well, the direction of my career has for a start! Largely as a result of my experiences in Virgin, I now spend all my time working in communications and engagement. I'm passionate about enabling conversations that improve employee engagement and the customer experience.

However, I'm not sure social customer service has changed very much. And you could argue, it doesn't need to. The same rules apply now as they did then; treat people as humans. Be nice. Use the right tone of voice. Always try and fix things. And remember – EVERYONE IS WATCHING!

Perhaps what has changed is that with the growth of Twitter, things are more difficult to manage. And as a result the tools we use are more sophisticated. Today we can analyse tweets for sentiment (sort of), find influencers, track people, categorise them, link their tweets to their email accounts, and much more, all in real time.

But despite the prevalence of it today in our personal lives, I'm still seeing resistance to social media. Companies (and countries) are afraid of it, both as a customer service tool and as a way of engaging with employees and citizens.

I remember we used to talk passionately that this was going to change the world; make it easier for people to be heard who had no voice, to democratise self-expression.

However, we all know that there are few true social businesses; ones that dissolve the barrier between customer and employee, that simplify the way we do business, and use technology to (re)socialise people and commerce.

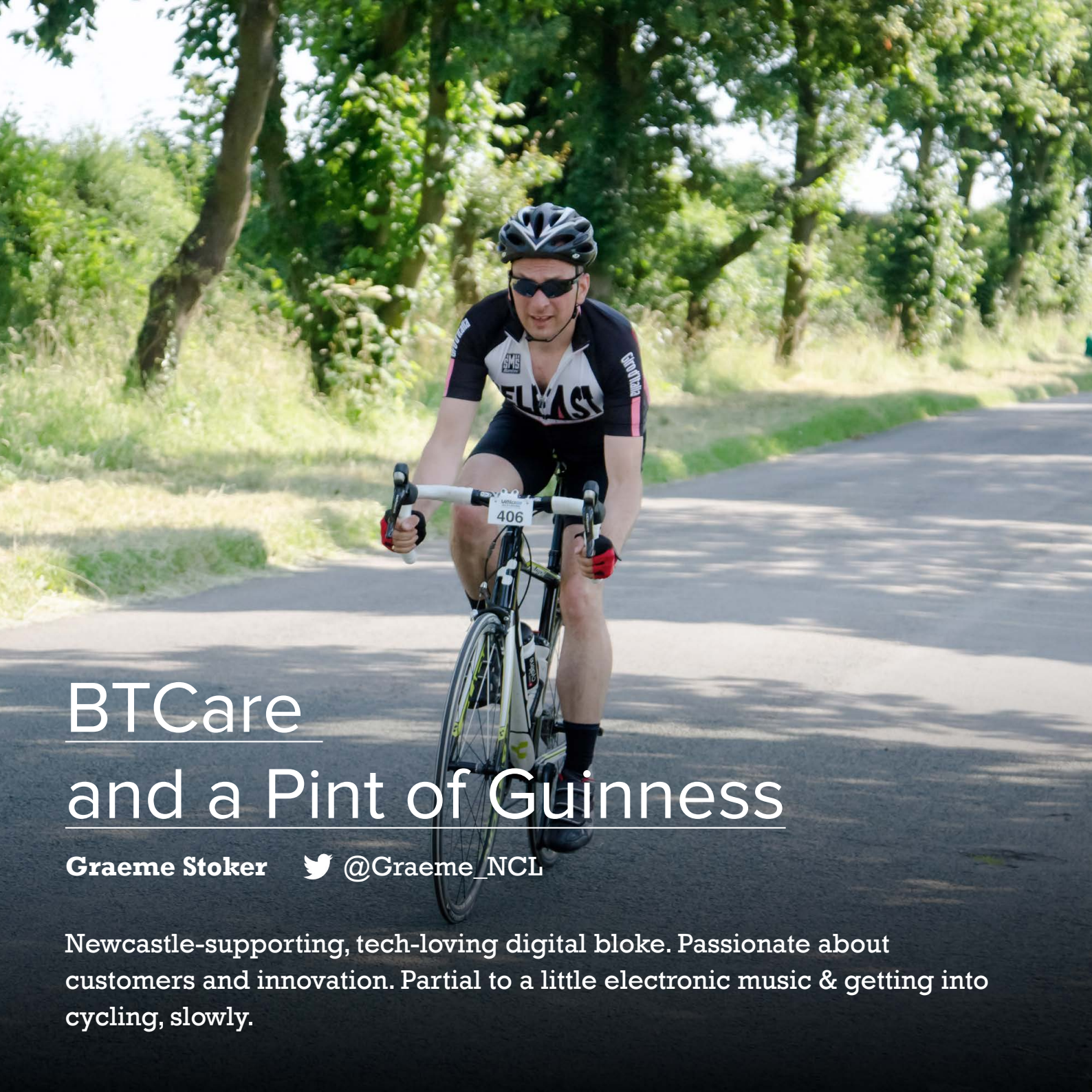
My personal opinion is that this may be linked to the wider issue of trust in our society. Many organisations still feel they need to control, rather than liberate. And that's out of step with today's workforce and how they want to be led.

The truth is, they never were in control, just the illusion of it.

In 2010 I wrote "Twitter (for customer service) belongs to everyone in the organisation who cares a jot about their customers. That requires more fundamental changes inside organisations to make sure departments are talking to each other."

Five years on, it seems we're making some steps in the right direction, but we've still got a great deal of work to do. ■

*“Many organisations still feel they need to control, rather than liberate.”*



# BTCare and a Pint of Guinness

**Graeme Stoker**  [@Graeme\\_NCL](https://twitter.com/Graeme_NCL)

Newcastle-supporting, tech-loving digital bloke. Passionate about customers and innovation. Partial to a little electronic music & getting into cycling, slowly.

**Social Media Customer Service. Social CRM. Social Relationship Management. Online Social Engagement. eCRM. And so on. Over the past five years I've come across no end of buzzwords to describe how service is delivered online, but I'm not sure the name is important. What is important is how brands interact with their customers rapidly, effectively and genuinely, turning negatives to positives, engaging with and pleasing their customers.**

Back in 2009 the brave new world of social suddenly came of age. Over the pond Frank Eliason and the team at Comcast were doing really cool things with Twitter, and it didn't go unnoticed over here. A handful of us in the UK watched eagerly at the effect that Comcast were having and thought, 'could we do that?' EasyJet, The Carphone Warehouse, Virgin Trains and my employer at that time BT all separately saw the opportunity and decided that the impact of not being involved was simply too high to risk. And so the adventure began.

At that time I was leading a customer service team in BT Retail, the company's UK consumer and SME business. As a bit of a tech nerd myself I've always frequented the outer-edges of the Internet and I found Twitter in particular to be fascinating. I can distinctly remember how what we now know as BTCare came about. Warren Buckley – BT's MD of Customer Service – and I were on a trip to Belfast and had gone out for dinner. I'd been bugging him about Twitter and Comcast and such like for a few weeks, but it was the first time I'd had a chance to pitch the idea properly. "We could interact directly with our customers and solve their problems there and then," I said.

"Imagine what the ever-bashing Daily Mail would make of that!"

But as it went, it wasn't a difficult pitch at all. Warren was keen to reach out to his customers in any way possible and as a bit of a geek himself he could see the opportunity. And so, over a couple of pints of Guinness, @BTCare was born.

It didn't take us long at all to take the idea and get up and running. In a customer service business of over 10k people we were able to "borrow" a couple of people who knew a bit about social media and in a bit of a whirlwind, we were there on Twitter, ready to interact with our customers. It was all a bit raw and without a doubt we were winging it a fair bit, but serve our customers we did. And they were amazed! The BTCare story has been well documented already so I won't dwell on it here other than to say that our aims of the time – to interact with our customers in their domain, using language both appropriate to the medium and representative of our brand, to take ownership of problems and not farm them out to others to sort – were all achieved. Twitter expanded to forums – initially others like Money Saving Expert, and later

the BTCare Community itself – and then on to YouTube and doubtless many more social channels since. And I think it's fair to say that our little pilot into social back in 2009 had a massive impact both within BT and as a catalyst for other brands to sit up and take social seriously themselves.

Five years ago I'm not sure that many of us really appreciated how much of a fundamental channel shift social would be for customer service. We all knew it was cool and that we could reach a certain group of customers that way, but the extent to which social has now become firmly rooted as a primary service channel for pretty much every company with any sense has been staggering. When I started playing with Twitter I didn't see it becoming the mainstream medium that it is now. The idea of a broadcast short message service becoming a seriously important service environment was I thought an ambition too far. We all knew it would work for the niche of us trying out Twitter, but would it ever become mainstream?

Of course that is precisely what has happened. Social has become not just a service channel but a really important customer engagement

tool – and I'm not talking about direct selling here. If a brand is criticised via social and chooses not to respond, or maintains a purely defensive position – indeed offensive in some cases – then the channel itself will start to take over and the power of the RT or population of the community will rapidly lead to brand-damaging chaos. So savvy companies have rightly seized the opportunity to not only deal with service issues but to also surprise and delight their customers in other ways.

To embrace the new opportunity that social gives them. To become less of a faceless monolith and more of a personality. These for me are some of the biggest opportunities of social media and ones which now are widely understood and adopted. Yet still five years on not everyone gets it. I still see companies blindly tweeting inappropriate PR messages, links to articles that few will follow, ignoring their customers' cries for help or just behaving as they always have. And here's the rub. Social done badly, without care and attention to detail, can be more damaging than helpful. Whilst many companies have the best of intentions there are still far too many 'dad in the disco' moments

*“Five years ago I'm not sure that many of us really appreciated how much of a fundamental channel shift social would be for customer service.”*

where the messaging, the tone or the approach is just totally wrong. Thankfully though, more and more now get it, and whilst back in 2009 there were just a handful of us engaging in this exciting new world, now there are thousands. A whole new industry has sprung up around social and as the market matures, customers' expectations continue to become ever-more demanding.

It's a while since I worked for BT but as I look back at what we created with BTCare, and look at how BT still continue to innovate in the way that they interact with customers over social media, I can't help but feel proud. Way younger and way smarter people than me have taken what we created and continued to innovate, continued to find new

ways to connect with customers, to surprise and please them. Social is no longer niche – it is now firmly embedded in the mainstream. But what is next? Have we already reached the peak of how social fits into the service mix? I think not.

Technology continues to grow, new social media appear, they grow and innovate and the sector overall continues to thrive from both a technology and capability perspective and at the same time the volume of people using social media has gone stratospheric. But for me it will more so be how the media is used that brings the real innovation. Retro-fitting traditional service models to a new channel is do-able – we all proved that – but building the service

model from the ground up around the customer and their preferred channel mix, that is where the real opportunity lies. What GiffGaff did with their purely online service model really excited me but it's just the start, and as brands bravely step away from their traditional call centre voice-dominated vertically organised structures they will reap the benefits that digital service – for it isn't all about social any more – brings.

The next five years promises to be even more exciting than the last! ■

*“But what is next? Have we already reached the peak of how social fits into the service mix? I think not.”*



**#Twelpforce:**

**What a Ride!**

**John Bernier**  [@BernierJohn](https://twitter.com/BernierJohn)

By Day: MarComm and Tech at Lube-Tech MN, Idea Connector, Naturally Curious Tech junkie. At Home: Husband, Father and Coach, reader, learner



As with most things, the idea was small, but a core group of people believed it had potential. Just how much potential was a big question mark, and whether we could build something meaningful and useful was also up for grabs. But we had people who were willing to believe in the idea and support it with their actions and their budgets. We also had timing on our side. The company culture was ready (if not willing) for a game-changer, and the risk seemed appropriately small at the time.

**What we were solving for was:**

How to make sure any customer (ours or not) knew all we knew, as quickly as we could share it.

**What we were aiming for was:**

A way to leverage the knowledge stored across a vast network of employees to meet an ever growing demand for real-time interaction.

**What we came up with was:**

The @twelpforce program. Real-time customer service via Twitter, staffed by nearly 3,000 registered “Twelpers” across the country.

For over four years, @twelpforce ran day and night, 7 days a week. Associates, agents, executives, and regular old corporate employees provided answers to over 65,000 questions, and did it in as close to real-time as possible. We had heroes emerge who became our power users. We had newbies, pop-ins, and seasonal employees who got in on the action. We had passion, momentum, and desire...and we had something everyone wants: availability and answers.

*“Associates, agents, executives, and regular old corporate employees provided answers to over 65,000 questions, and did it in as close to real-time as possible.”*

*“Many of us were putting in 60–70 hours of work in for weeks in a row, and while it was hard, it was worth it, too.”*

**Some thoughts on the program:**

When I recall the launch of the program, I can admit now that we had some hiccups out of the gate that we got fixed pretty quickly. I wrote a blog post called “Getting dressed in a glass house” (<https://bbyopen.com/2009/07/getting-dressed-in-a-glass-house>) that detailed some of the things we learned after the first week of launching the program. It’s pretty funny to look back and see just how EARLY we were on our journey at that time.

Regardless, a lot of people said we were crazy, or that we’d fail. Those people were great motivation. Barry Judge, our CMO at the time called me while I was at O’Hare Airport coming back from a funeral to remind me that we can’t screw this up (He did not use those words though.), and that we needed to be all over the launch to react left and right to what happened. He was also a good motivator since he signed my checks...

Many of us were putting in 60–70 hours of work in for weeks in a row, and while it was hard, it was worth it, too. Getting employees on board was pretty easy; we’re tech people after all, and the technology behind the service was solid. What was uncomfortable to some was not knowing what to expect. We also didn’t know what to measure. We knew metrics would fall out of running the service for a while, but we just needed time to figure out what was important to measure. All along I kept telling people I believed we were exceeding some of those undefined expectations, and thankfully people believed me.

Once we had it running for a while, people started to notice, and they still called us crazy for trying it. But they also called us bold, and fearless, and disruptive...

Yes, it did take a little bit of crazy to do something no one else had done before. And yes, we failed a bit too. Detractors asked us what we'd do if one of our employees went off the deep end, or what we'd do if an answer turned out to be wrong, or whether our vendor partners would be mad if we recommended one product or brand over another. In truth, all these things happened, and the world is still spinning. Imagine that?

It went great for a while, but like they say, all good things must come to an end. We recently shut down the program because we saw that as time passed, more and more people just simply became used to talking directly to a brand by their handle. @bestbuy tweets were steadily climbing, and @twelpforce questions had slowed down to a trickle. It was time. While the experiment had taught us a ton, it was time to close up shop.

The last @twelpforce tweet went out 5/7/13. RIP @twelpforce.

What a ride. ■

*“We recently  
shut down  
the program  
because we  
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and more people  
just simply  
became used to  
talking directly  
to a brand by  
their handle.”*



# Seven Steps To Executive Business Success With Customer Experience and Social Media ROI

**Dr. Natalie Petouhoff**  @DrNatalie

Constellation Research Analyst / Sport & Media Institute UCLA Anderson /  
Margaret Mead of Tech Being the change I want to C in world /

There is mounting pressure on organizations to improve the customer experience. Customers are empowered by the internet, social media, and mobile technologies to quickly find and share company products, services, and pricing information whenever and wherever they want.

With these choices, customers are more demanding of businesses than ever.

Most companies are not prepared to provide great customer experiences over multiple channels (phone, email, web, social media, mobile devices, and in-store locations). As a result, businesses are finding it extremely difficult to track and manage all customer interactions. Social media provides customers with a giant megaphone to publically broadcast how poorly they are treated, and has a one-to-millions multiplier effect, spreading bad-word-of-mouth quicker than ever. To describe the effect on business, I created the term the “Witness Factor.” I wanted something that encapsulated the fact that for the first time in history – how a company treats their customers is publically and permanently displayed for customers (current, past, and potential) as well as competitors to see. This online “inking” of customer’s experience is affecting every aspect of business. Companies realize the public nature of customers and their experience

means something needs to change. But exactly what it is, is alluding many.

Most companies started in social media with a tactical approach. Creating a Twitter handle and a Facebook page, they said, “Happy Monday and buy our stuff,” and were disappointed in the business results. Why? Most companies don’t have a point of reference to know if what they are doing will drive better business results in Customer Service, Marketing... I often get asked, “How do I...”

- Do more of the right things & make smarter decisions?
- Reduce the politics, get alignment; come to consensus on best next steps?
- Justify the plan to senior leadership?
- Track the progress?
- Have the investment in social media deliver real, accelerated business results?

### **Hype Reduction and A Structured Approach To Social Media**

While the pre-chasm adopters (innovators and early adopters)\* have been on board for a while, the real impact of social awaits the adoption by the early majority/pragmatists.\* To enroll them? They want to know how social impacts the bottom-line. That’s why I developed a 7-step process & ROI models that show how social initiatives, integrated with traditional business operations, provide real results. My goal?

Clear up the hype about social and show executives how it drives business results like never before.

## Step 1: Insights

Most people start at what I call Step 5: Interaction. But they need to start by gaining insight (Step 1) into their audience, their competitors and how their company is perceived. Companies with negative sentiment find out quickly when they launch into social and it results in a field of #fail messages from customers. You can't sell to people who are mad, so you have to listen to figure out what's right, what's wrong and what would be better if...

## Step 2: Benchmark

Social media innovators didn't ask for permission; they asked for forgiveness. But today the only way to get, keep, or expand budget is to provide a business case. Senior leadership wants to know, "Why you want more money for WHAT?" Budgets are stuck; social software vendors jockey for position with similar promises. It's confusing at best.

Companies need to benchmark themselves compared to their competitors, best practices and set up business goals and measurements. (Step 2). The key? Giving attribution to how social is affecting traditional business metrics. Without it, companies can't explain why they need (more) resources and budget for social.

## Step 3: Target Audience and Step 4: Content

Part of the value of social is the relevant, exponential reach of customers and brand ambassadors (Step 3) who share content (Step 4) with your key audiences that drives awareness, lead conversation rates,

*“Companies need to benchmark themselves compared to their competitors, best practices and set up business goals and measurements.”*

and solves customers' problems; done well it creates—advocacy, referrals, and loyalty. But to do Steps 3 & 4 well means you've done a great job with Steps 1 & 2.

## Step 5: Interactions

Without Steps 1–4, knowing how to personify the benefits of your products via storytelling content to drive social engagement, interactions are dull, ineffective, and don't hit business goals. But companies who do follow this type of structured strategy and choose the right technology to scale interactions are delivering ROI and business results.

## Step 6: Organizational Alignment

Corporate politics? They should simply be a white-collar crime. They waste money, time, and resources. The issue? CEOs are delegating social down into their organization. Politics are thick; who should interact with the social customer is more complicated than ever. Businesses need strong leadership and organizational change management so that Steps 1–5 don't end up in political quagmires and stalemates.

## Step 7: Iterate and Pivot

Without a clear plan in place and a way to evaluate its success, it can be difficult to iterate and pivot (Step 7) so that the business can do more of the right things, real-time.

## **Don't Fall Behind**

The idea of listening and change isn't new. Scholars like Edward Deming said it over 30 years ago. "The Cluetrain Manifesto" authors predicted in 1999 there'd be a time when the customer and employee's voice would matter. That time is now. Consider a company that is listening to its customers and employees and making changes. Then consider one that isn't. Over five years, the first type of company will have innovated its products and services. The second type? It will become the DECs, Tower Records, and Circuit City's of the future. Social Business is as simple as that. Which type of company are you going to be?

\*Geoffrey Moore's "Technology Adoption Curve" ■

*"The Cluetrain Manifesto  
authors predicted in 1999  
there'd be a time when  
the customer and  
employee's voice would  
matter. That time is now."*



The First Five Years:  
What a Rush!

**Esteban Kolsky**  [@EKolsky](https://twitter.com/EKolsky)

If you think of #DigitalTransformation as The Matrix you are missing the point...



## What a rush!

Five years or so doing customer service over social channels.

I still remember my first piece on this subject – back in 2003 I wrote for Gartner about the three coming models for Customer Service: Customer Interaction Hub, Collaborative Service, and Secret Customer Service.

The first two are a reality, while the third one – No, I won't spoil the fun. You will have to wait another 3–4 years before that one becomes reality. Back in the early days of the “social movement” we did not foresee Twitter, could not conceive that a replacement for Second Life or MySpace would have real commercial applications, nor did we preview the customer becoming more controlling of the interactions. Alas, in front of our eyes our little baby has all grown up and become Social Customer Care.

What it means to me? **Two things.**

**First,** I'm very happy that the predictions from over 10 years ago are becoming reality. We could see a lot of value in the early days of collaborative customer service on how to become more customer-centric, how to offload the contact center, and how to provide better value via communities. I still do, if you know me or read what I write – since 2007 I have been saying that the “Social Customer Care Revolution” (SCCR – Nah, doesn't work.) will happen via communities – not social networks.

I think there is a lot of value to explore and understand in how communities can change the way the world works and interacts. I even created the ultimate model to do this; the experience continuum where communities become the ruling components and collective knowledge replaces virtually all of our current customer service solutions.

**Second**, I'm very sad.

The hype surrounding Social Customer Care is making organizations and individuals blind to the amazing waste of resources (people, time, and money) that it has become. True, whenever a new channel has something to offer it takes some time to take hold. It happened to email, chat, SMS, and web self-service as well as kiosks and other channels. Alas, the adoption rates those channels saw were directly related to use cases and potential. Today email is used almost as much as the phone for customer service, with chat and other channels taking lower single-digit adoption rates based on how few use cases they can SUCCESSFULLY service.

Even at the hype of those “new” channels, we never saw as much adoption as we are seeing today. I don't have the latest statistics handy, I am sure that one of my fellow authors will push them out, but nearly 80% of organizations have adopted one or more of Twitter and Facebook for Social Customer Care. (They are the most used channels; nothing even comes close.) However, very few of them have implemented social-aware or social-centric processes, instead

using the traditional processes and a hodgepodge of models to integrate data flows (not always well done, usually done manually). And how about the results? Again, I am sure you can find the real numbers and sources from one of my fellow authors, but nearly half of interactions in Twitter that require assistance are NEVER answered, and close to 2/3 of the similar ones in Facebook also get no answer. Even when they do, on average those answered take between 8–10 hours to be resolved – and more than 90% of them end up being escalated. Yes, there are exceptions to this rule – just like there are exceptions to any rule and channel and there are organizations that provide all support via email, for example.

When you compare those numbers with the standard channel for customer service today, the telephone, there is nowhere to find solace. Customer Service interactions over the phone end up being solved between six and eight minutes, with an overall FCR or nearly 90% of calls never escalated. Of course there is a drop rate for telephone based customer service – but it is so small, it's probably not worth mentioning.

*“Even when they do, on average those answered take between 8–10 hours to be resolved – and more than 90% of them end up being escalated.”*

As I have written before, any organization looking to implement Social Customer Care would be better served to allocate the resources to improving telephone or any other channel resolution rates.

Does this mean I am against Social Customer Care? No. As with ANY other channel, it has its appropriate uses. Triaging customer service and automating responses via social channels has a lot of promise: The interactions are short, concise, and pretty much on target as to what they need in few words that are usually easier to understand. If you can find the right function and channel combination, it is definitely worth exploring as long as automation is a critical part of it.

Take for example password resets. In the old days of help desks, it would take nearly 1/3 of the technician's time to reset passwords. This also happened for websites as well as corporations. Smart vendors found a way (well, many ways actually) to securely automate the resetting of the passwords – and the rest is history. By finding the specific function (password reset) and channel (most of them, but initially via telephone or email as well as web self-service), the help desk claimed back the time it spent in over 99% of those password reset calls.

Wouldn't you like to be able to do the same on Twitter? Facebook?

That is the best way to look at Social Customer Care: not the solution to be everywhere and do everything across all channels, but the opportunity to find the pair function-channel that works best for social channels – including nothing for customer care if it comes to that. ■

*“If you can find the right function and channel combination, it is definitely worth exploring as long as automation is a critical part of it.”*



# Where Do We Go From Here?

**Barry Dalton**  @BSDalton

#custserv, leadership, #crm, #scrm #socbiz & enterprise collaboration.  
Host of @SMAddicts podcast w @sethgoldstein.

When Guy first approached me with this project, I jumped at the chance. For this is the absolute perfect time to address this question. And while I'm not much of a rearview mirror kind of guy, this is an opportunity to do a bit of reflection in order to course-correct on the road ahead.

So, when I look back on this whole social customer care topic over the past five years or so, I think there are plenty of lessons from which to learn and get smarter today and tomorrow.

First, it's probably important to set the context for my thoughts by sharing a bit of my approach to addressing big, strategy business challenges. It's a simple process, but it has served me fairly well over the years. At the very start, I always ask three questions. And the order in which these questions are addressed is critical. Those questions are:

1. What are we solving for?

2. Does this even need solving?

3. How are we going to solve it?

Now, when I look back at the progression of social customer care, in most instances, we've jumped right to question #3. When word started to circulate about Comcast Cares, The Carphone Warehouse, and other organizations that were engaging with customers to provide customer care primarily via Twitter, a sort of collective panic set in. And organizations began setting up Twitter handles and Facebook support pages. Technology firms began developing applications to deliver customer support via these platforms. And to frame this in some context with which we are comfortable, to not become overwhelmed, I've heard this over and over:

*"Twitter/Facebook is just another channel"*

*“Real change  
is being  
demanded.  
And ‘social’ is  
the catalyst for  
this change.”*

This gave customer service organizations a context within which to apply traditional business models to social customer care. This helped us all collectively sleep better through the turmoil. But has it created incremental value for the business? For the customer? This certainly isn't an indictment by any means. It's not an uncommon progression of decision-making. In fact, the original days of CRM were driven by similar thought processes.

So, now is a great time to go back and address those first two questions, and the answers to those questions are going to result in significantly different answers to question #3. It's now the time, if social customer care is going to evolve, to address enterprise strategic mission, engagement strategy, operational KPIs, workflows, knowledge management, financial measures, talent & skill development, data management, analytics, channel mix, and workforce management.

Harder work than simply creating a Twitter handle, but critically necessary to create enterprise and customer value.

### **Looking Forward: The Bigger Opportunity**

Let's face it: Customer service as an enterprise business function hasn't changed all that much in the 30 years since the introduction of ACD (automated call distribution) technology. This is when it became practical and cost effective to deliver customer service at massive scale.

For the ensuing three decades or so, the overall focus of customer service has been centered on responding to customer issues with greater efficiency, greater scale, and greater speed at lower and lower cost.

There's no doubt there has been noticeable innovation in technology and in the introduction of expanding communications channels through which to deliver the service. That includes those social channels such as Facebook, Twitter, community forums, and other peer-to-peer networking sites. And there have certainly been shining examples of companies that do customer service better than the rest.

But the point is that it's the same service, the same function, driven by the same mission and measured by the same performance metrics

as a generation ago.

Customer service as an enterprise function is at an inflection point. Real change is needed. Real change is possible. Real change is being demanded. And “social” is the catalyst for this change. And, trust me when I say, I’m not a hype advocate, zealot, nor pushing any social media agenda. For as knee deep as I am in social media, I’m probably more pragmatic than most when it comes to adoption and business value, particularly in huge, risk-averse enterprises.

That said, social media is driving profound change in social consciousness, political debate, medicine, government oversight, and virtually every other aspect of human endeavor. The reasons why social media is so able to

affect change differ in all these scenarios. But one thing they all have in common is this: The veil of secrecy has been obliterated. And information, accurate or not, now proliferates at the speed of light.

The really big opportunity is for enterprises to leverage this social media wave as a catalyst to move customer service from efficient reaction to value-creating proactivity. Instead of reactively continuing to answer the same customer questions over and over through more and more channels, value will be created when organizations get smarter via the use of voice-of-the customer big data and harness social platforms to transform into proactive vehicles that enhance customer value in the jobs they need to get done. ■

*“But one thing they all have in common is this: The veil of secrecy has been obliterated. And information, accurate or not, now proliferates at the speed of light.”*

A portrait of Colin Shaw, a middle-aged man with short brown hair, wearing a dark suit jacket over a white collared shirt. He is looking directly at the camera with a neutral expression. The background is a plain, light-colored wall.

# Social Customer Care?

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# What Social Care?

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**Colin Shaw**  [@ColinShaw\\_CX](https://twitter.com/ColinShaw_CX)

Founder, Beyond Philosophy, Customer Experience Consultancy |  
LinkedIn Top 150 Business Influencer | Best-Selling Author | Luton Town  
FC Supporter | Family man



I am a technology geek. I love social media and I'm always using it, but here is the strange thing – I am 56 years of age, so I guess I am unusual, or that's what my adult kids tell me! Why do I tell you this?

When I started to look back on the evolution of Social Customer Care over the last five years the first thing that came to my mind is that most people would say, "What is Social Customer Care?" I think the reality is it's not seen as a "real" channel or something serious yet, and as a result it's still being ignored by the vast majority of organizations today.

I spend my life talking with "C suite" executives about how they can improve their customer experience and Social Customer Care is never raised by them. When I talk about it they look at me as if to say, "Oh, you are one of the strange geeks that I now must humor." The problem Social Customer Care faces is most of those who run organizations are people of my age group and they don't use social anything! Too many of them still think it's a fad that will go away. But we all know it won't...

When I wrote my last book "Customer Experience: Future Trends and Insights", I made the observation that technology is not driving social media – it is the fact that people are social; the technology is just enabling the natural human behaviour. The understanding of human behaviour in most

*"I made the observation that technology is not driving social media – it is the fact that people are social; the technology is just enabling the natural human behaviour."*

organizations is not very high, thus it is not understood nor embraced and therefore again they don't see the power of this.

In the last five years it has been mainly an uphill battle to show that Social Customer Care is here to stay. It won't go away, and it is just going to get bigger. You can decide to be like King Canute and order the tide to stop rising, but it won't. You have to embrace it.

The big issue with embracing it means losing control, and people of my generation are scared of that. Only the other day I was listening to the "United Breaks Guitars" song and it reminded me of how slowly United responded to this. I am sure that many "C level" execs were shocked by how quickly this happened, and if they were honest realised this could have happened to them as well.

A few days ago I wrote a piece called "The Latest Social Media Gaff: What Were They Thinking," about how the social experience can go so wrong when people of my generation start to play with things they don't understand. The CEO of Ryanair, Michael O'Leary, created a Twitter storm with his sexist tweets and showing his naivety when it comes to this space. He did not even know what a hashtag was! This again just reinforces the CEOs wont to run and hide and hope it goes away.

In my view we will quickly get to the point where people who have a high social influence will receive better customer service than those who don't as organizations realise that they can make a significant dent in the reputation to help promote them. I wrote about the fact that "More Social Influence equals a better Customer Experience." We are already seeing

*"Only the other day I was listening to the 'United Breaks Guitars' song and it reminded me of how slowly United responded to this."*

celebrities being paid for tweets, and offering a better level of service to people with a high social influence is not new. Many organizations jump higher and faster if someone of influence wants them to do something. Social just increases the number of people that have this impact and through things like Klout can see who has influence.

Social Customer Care has just about come of age but is still in its infancy. I look forward to seeing companies embrace this more as I for one think it's a vital channel. ■

A portrait of Vincent Boon, a man with shoulder-length brown hair, a beard, and glasses, smiling. He is wearing a dark t-shirt. The background is a blurred indoor setting with colorful lights.

**Five Years On:**  
**An Amazing Journey**

**Vincent Boon**  **@VincentBoon**

Chief Community Officer at Standing On Giants

**Well, it's certainly been an amazing journey, and it has been very interesting to see many initiatives being created, all attempting to crack the nut of customer service on different channels. Some of which I rate highly, others... not so much.**

But before I take a deeper look at some of the general trends, I would just like to take a moment and express my excitement on seeing the wider industry wake up and take notice of the value a forum community can bring to a company. Whereas previously this value was almost solely recognised by the computer games industry, it has been good to see many other companies and industries getting involved in running communities. And I think it is this incorporation of communities within a business, when done well, which is going to shape so many businesses for the better, now and in the future.

Seeing companies listen to their customers and getting them to see the value of the feedback and input their customers can have, is in my opinion the game changer for those companies that do it well. Now for me there are two very distinct groups in Social Customer Care; one is doing customer care on Social Media sites, such as Twitter and Facebook, and the other is doing Social Customer Care within a forum community setting. And when done well, one is highly scalable and the other unfortunately is not.

For me there is a clear cut case for a company to invest in a forum type community. The benefits one can derive from these types of communities range from Customer Service, Increased Sales, Product and Service Development, increased Brand Advocacy, Marketing and PR, all the way through to Market Research. And I've seen measurable examples of this working in practise in many of the forum communities I run. The beauty of a forum community is of course that you as a company own the platform.

You can schedule your own updates, you don't have to worry about the direction the service is taking because it's all in your hands. On top of which, if you link the forum accounts with your customer accounts, you can see exactly which of your customers use your community and you can compare the differences between them. In this way we can see for example that those customers involved in forum communities cost less, churn later, spend more, have a higher lifetime value, and bring more new customers on board. And that is not even counting the value they bring from helping out other customers or bringing fresh ideas into your company.

*“My experience has been that you only need a very small group of dedicated people to make this work, and the more people start using the community, the faster that group grows.”*

The scalability comes from the community itself. If managed well, a brand can have an army of advocates helping out and chipping in where needed. When a company invests the time and resources to a dedicated community, and works with their customers to create a productive environment that stimulates discussions about itself and how they work, their customers can relatively quickly be convinced and be invited to participate in the business, from solving problems, to helping out to garner new customers, all the way through to answering customer service queries other customers might have. My experience has been that you only need a very small group of dedicated people to make this work, and the more people start using the community, the faster that group grows.

If done well, a company does not need many one-to-one relationships with their customers but can leverage their existing pool of talented customers to help out where needed. This way your staff count does not scale in direct line with the growth of the community. This is of course very important if you want to maintain a scalable solution that is not creating yet another team of customer service agents.

And so I come to my point of Social Customer Service on social media platforms. I worry about any company which focuses too heavily on trying to provide customer service on platforms like Twitter or Facebook. I feel they are generating a lot of cost for very little benefit to the customer as well as the company itself. In terms of Twitter, it is nigh-on impossible to solve anyone's customer service issues in 140 characters. It is always a one-to-one relationship, and almost impossible to leverage any sense of brand related community whereby your customers start helping others out.

That's not to say it isn't happening on Twitter, but the examples are few and far between. So most of what we see happening on this platform is customer service agents picking up those people who shout the loudest and passing them off to another team that can actually handle their query. This then still happens through traditional mediums like email or phone. So now we've added an additional team that doesn't actually solve anything directly, aside from picking up people with issues that do not go through your dedicated channels and that needs to scale according to demand. And this demand

is cultivated and growing because these teams pick up people who through social media are trying to circumvent the traditional methods and so effectively jump the queue. Word gets around that this is possible and more people start posting their messages on Twitter. This happens similarly on Facebook of course and because neither platform is built to have lasting conversations, previous answers you have given are not searchable, meaning a lot of self help opportunities are being lost.

As conversations and discussions on Facebook for example are transient, it also does not lend itself particularly well to in depth discussions about your brand, service, or product. Due to the nature of comments, and the way the pages are laid out, it is very hard to create a sense of discussion where people read other replies and take those into consideration before commenting themselves. And without the ownership of the platform, any changes made to that platform could quickly throw whatever strategy you have in place out the window.

All in all, I think we've moved forward in leaps and bounds when it comes to getting closer to our customers and meeting them where they are, but at the same time I think businesses need to make strong decisions on where their customer service takes place and how they would like to embrace and bring their customers into the fold. It is clear we are in an online world, where a lot of our social interactions takes place on the web, and looking at which platforms are suited for what type of interaction is key to being a strong and efficient organisation that serves its customers well. ■

*“I feel they are generating a lot of cost for very little benefit to the customer as well as the company itself.”*

A black and white portrait of a woman with long, wavy hair, looking slightly to the right. The background is a blurred outdoor setting.

# Community and Empowering the Social Customer

Wendy Lea  @WendySLea

Girl with deep southern roots; Executive Chair @GetSatisfaction.

**In 2007, Get Satisfaction launched under the premise that “Customer Service is the New Marketing.” Taking that stance at that time was bold – considering that cutting edge brands were only just beginning to use social networking sites like Facebook and Twitter to connect and interact with customers.**

Back then, brands still maintained tight control of their message, while customers listened. But the idea of customers taking control of the brand was just beginning to creep into the minds of marketers.

At Get Satisfaction, however, we knew that social networks were limited in their ability to facilitate the creation of lasting relationships between brands, customers, and prospects. As a result, we created a platform where companies could actually engage and collaborate with their customers – and in turn, generate authentic marketing content, benefit from vetted sales leads, and reduce pressure and the amount of resources needed across the support department, while at the same time getting access to innovative product ideas.

While even the savviest of businesses didn't fully understand the mechanics of becoming a social enterprise at the time (and to be honest, that manual is still being written today), they knew that they needed to use every social tool available to effectively position themselves for the coming sea-change in customer experience. The most perceptive of these businesses understood from the beginning that the social tools at

their disposal created communities that would affect – and in many ways completely transform – the approach they took across marketing, support, sales, and product.

We've come a long way in the past five years. With the benefit of some time and reflection, we've finally cleared what I call the period of “Social Haze.” That period was defined by companies' collective frenzy to amass as many friends, followers, and Likes as possible – despite the often unclear ROI. And while many of these companies achieved their social goals in terms of building audience size, the quality of these social interactions was unclear. I think most brands today have realized that building genuine relationships with customers requires more than a simple Twitter handle or Facebook page; compelling customer experiences require vigorous and engaged approaches across websites, mobile, and other channels.

Fast forward several years and “The ClueTrain Manifesto” – the prediction that customers would eventually take control of the brand – has largely proven true. But this isn't a bad thing if you welcome and



leverage it. Most companies that have cultivated their own customer communities have seen that their communities have been engines that fuel marketing, support, sales, and product teams – what Get Satisfaction calls the “Community Effect.” Businesses that have embraced and effectively leveraged the Community Effect across the organization have transformed into more customer-oriented companies.

Forward-looking companies today realize that customer communities can create cultures that change their organizations for the better. As a result, they are more agile, responsive, modern, and engaging. By breaking down the silos between customers and companies,


the Community Effect permeates company culture all the way to how its brand is experienced.

We’ve also seen that marketing has evolved hand-in-hand with the adoption of community building. The communities themselves had produced great leads and a stage to build an audience, which has led to creative and unexpected collaboration with customers. One of our customers, Prezi, truly illustrated this next-gen collaboration when they hired some of their biggest customer champions to their support team. Five years ago, this type of serendipitous customer-company interaction was rare. Today, these moments of customer-company alignment are just the result of

forward thinking companies reaping the benefits of their established community strategies. And this is just the beginning.

We’ve come a long way since the birth of social customer care. We’re still learning the best practices that create truly special customer experiences; creating thriving communities is as much art as it is science. But one thing that I’m struck by is the axiom: “The more things change the more they stay the same.” The most successful brands today are those that truly and passionately want to embrace the customers’ needs and grow together through excellent customer experiences. It looks like everything old is new again. ■

*“As a result, they are more agile, responsive, modern, and engaging.”*

A close-up portrait of a middle-aged man with grey hair and glasses, smiling. He is wearing a light-colored shirt and a dark tie. The background consists of dark, textured foliage.

# Social Customer Service: A 50 Year Retrospective

**Mitch Lieberman**  [@MJayliebs](https://twitter.com/MJayliebs)

Customer Experience Architect and Strategist; Customer Service, Contact Centers, CRM and Social CRM. Runner, Hiker, Photographer - Dad

No, it is not an error in the title, just an extra zero. Service with a smile is nothing new. When it is one on one with an individual, it is straightforward, scalable, and natural. Here is some text taken from the in-flight brochure for Pan Am airlines circa 1962.

“There is another requirement that isn’t so easy to define, and it has to do with personality. We don’t have to be downright beautiful, but we do have to be easy to look at, and we have to be agreeable, tactful, and poised – but positive.”

While the tactics have changed a bit, the goals are not really that different. What has changed is the company’s ability to scale and to present that same sort of feeling (experience?) using digital channels. What is new is not the social element; it is the digital element – we spent 10,000 years communicating without it, 5 years is simply not enough time to get it right. We have some work to do...

### **The question asked: A 5 year retrospective**

What have we learned in the past 5 years? For one, Digital is not one channel; it is every channel except in-person and partially phone by voice. Marketers learned that digital is a two way street – surprise! Brands learned that transparency is not a choice, policies, procedures and expectations are simply known to a much greater audience. I am not convinced that we truly understand social. What is social? Is social the combination of digital communications and brand transparency displayed on open networks?

*Social is about people trying to be human using a method of communication that is new, where the rules of engagement are open to interpretation by each individual.*

What we have been trying to figure out during the past 5 years is how to scale digital conversations so... well, so they feel real. Some might choose to call this “engagement.” Not only are we still trying to figure out whom to pay attention to but also when does one channel take priority over another (digital or real), one person over another (loyalty programs be damned).

Whether it is Social Business, Social CRM, Big Data, or some other buzzword that we try to define and then we redefine – the core job has not changed. Businesses need customers, customers need to be loved, as personal as we think it is, it is business.

There are organizational challenges that are still relatively new, the CMO has battled the VP of Sales, then the CIO and the CEO is confused. Where does customer service report in the organization – this is the most major change! Metrics drive behavior and the metrics are all over the map. We have a Chief Customer Officer and Chief Experience Officer. So, while the academics are off fighting about definitions, the organizations are creating new roles and departments to follow suit.

Where are we? We are just figuring it all out. Each team, each company, and each person is moving from what and why to how. The ones who are in the trenches are working to solve problems. Blogging is slowing in this space because the early thought leaders are now needed to get it done. Really, we are just getting started. ■

A close-up portrait of a woman with shoulder-length, wavy, light brown hair and blue eyes. She is smiling slightly and looking directly at the camera. The background is a solid, muted blue color.

# Social Customer Service: You've Come A Long Way

**Kate Leggett**  @KateLeggett

Principal Analyst at Forrester Research for CRM and Customer Service -  
market trends, research, opinions, best practices, technologies

**Social customer service – service offered via the social channels of Facebook, Twitter, blogs and communities, and including social listening solutions – has come a long way in the last five years. When companies initially invested in social technologies, it was the marketing department that purchased solutions for brand management, rather than resolving inquiries over social channels.**

Social channels had not reached the widespread adoption that we see today, and social traffic was fairly low, without a clear ROI model. When inquiries were received, they were handled manually, by marketing, often without the input of customer service.

What this resulted in was a fractured experience for the customers that requested help over social channels. Social technologies were not integrated into the overall customer engagement ecosystem, and marketing personnel had no knowledge of customer service processes and policies, were unable to tap into the customer service knowledge base of established answers, and had no information on the interaction and purchase history of customers.

Two scenarios unfolded: Marketing was either unable to solve the customer's questions or these

channels became back-door channels into a company, bypassing established processes. In both cases, the engagement experience that a customer received over these social channels was far different from what the customer would receive over the voice, digital (email, chat), or web experience.

In spite of poor satisfaction ratings of social customer care, customers have continued to engage on these channels. Forrester data supports this statement – in a survey of over 7,000 North American customers, customer adoption of communities for customer service has risen from 23% in 2009 to 32% in 2012. In the same three years, Twitter usage has increased from 11% to 22%. Community support and Twitter are most widely adopted among younger consumers, with an average of 42% of Gen Z, Y, and X online adults using communities and an average of 31% using Twitter as a form of social support.

But 33% of US online Gen Xers (ages 33 to 46) and 23% of US online Younger Boomers (ages 47 to 56) also use community support.

This increased use in social channels is putting pressure on more companies to adopt mature business processes, technologies and organizational structure that have evolved for social customer care in the last five years. These best processes include, but are not limited to:


- **Strategy:** Your social customer care strategy should be aligned to your company strategy, and aligned to your overall customer service strategy. Companies should invest in communication touchpoints – social or otherwise – that resonate with their customers and their brand, and implement them in a way that supports major customer journeys.
- **Organizational restructuring:** Social customer care should be managed within customer service, not marketing. Often agents are dedicated solely to social channels and follow the same processes as agents dedicated to voice and digital channels. They also have access to the customer’s order history, interaction history, and agent-facing knowledge base. However, as social channels are public, we see marketing working with customer service to craft answers that are aligned to the voice and brand of the company.
- **Processes:** Social customer care processes must parallel processes that are used for voice and digital channels. This means consistent routing, queuing of inquiries, establishing and communicating SLAs for social inquiries, and the use of automated tools such as canned responses and text analytics to extract

sentiment data from social conversations. Companies must also use standard reporting, dashboarding, and analytics for all inquiry types which include social interactions, and any conversation over social channels must be captured and appended to the customer record.

- **Technology:** There are many best-in-breed technologies for managing social interactions. Many customer service vendors also offer end-to-end solutions that allow the consistent management of inquiries of all types. Whether you choose a best-in-breed solution, or a suite solution, make sure that technologies are integrated to support the overall customer journey. These technologies must also interface with your workforce management and quality monitoring solutions so that these channels can be properly staffed and monitored.

As companies further invest in customer service in order to differentiate their offerings and gain a competitive advantage, we predict that companies will be more focused on providing exceptional service on social channels. ■

*“Companies should invest in communication touchpoints”*



Social Customer Care  
Four Years After  
“United Breaks Guitars”

**Dave Carroll**  @DaveCarroll

Musician behind United Breaks Guitars, Speaker, Published Author  
& Co-Founder of @Gripevine with @Harbour128

**On July 6, 2009 I posted a music video to YouTube that my friends and I had created on a shoestring budget of \$150.**

The song was called “United Breaks Guitars” and told the story of my experience as a travelling musician and a broken Taylor guitar that was witnessed being mishandled by United Airlines baggage handlers in Chicago.

I had promised the airline a trilogy of videos that have since all been produced and are alive and well on YouTube, with a goal of reaching one million combined hits in one year. The first one has been the workhorse of the three, and immediately became a viral sensation reaching one million views in only four days.

The result of that happening, at that early period in the history of social media, meant that I was thrown into an international media frenzy. BBC news reported that my video was responsible for a \$180 million market capitalization loss to United Airlines and, although I don't believe the entire drop was due to my video, I think it's commonly agreed it had some impact. More important, the general perception was that it did have the full \$180 million dollar negative effect on their brand and, today more than ever, perception is reality.

Even today consumers, educators, and business leaders around the world refer to UBG as a powerful example of how every customer today has a voice and as a metaphor for why companies must engage with customers wherever they are spending time.

Today billions of people are communicating online using social media, and that was not the case a few short years ago.

When UBG went viral it became news because the video was getting millions of hits with no real social media strategy or manipulation of the system. One person shared one direct message to all of his Facebook friends and about 300 people in his Outlook Express email database, and over 150 million people heard his story.

In July of 2009 I had heard about Twitter but didn't have an account until after the video went viral. I was an early adopter and managed to get the coveted @DaveCarroll address ahead of all the other Dave Carrolls I discovered exist out there. In fact I was tweeting before I knew what a tweet was and disliked the 140-character limit. Companies were equally as fresh, and I was told a summer student was managing United's Twitter account in 2009 (although may be urban myth).

Fast-forward four years. Today everyone has at least a respect for what social media can do. 140 character tweets are a mainstay of communicating people's messages from every walk of life, and immense effort is being devoted to getting people to “like” us on Facebook.



*“Big and small companies today listen like never before. The question is whether they are “hearing” any better.”*

I recently flew with United in the US and tweeted to thank them for a pleasant flight, because it was. A friend in the social media space told me that they responded to that tweet in less than 10 seconds. United’s commitment to social media has improved dramatically in the last 4 years, but they are not alone.

Big and small companies today listen like never before. The question is whether they are “hearing” any better than they did five years ago, before social media became so relevant to their business? The answer depends on the company in question and the culture they embrace and foster.

Since UBG, I have co-founded a customer service resolution

platform called Gripevine, which amplifies the voice of consumers in a fair manner to facilitate engagement, and so I hear about a lot of customer complaints nowadays. I’m finding that certain companies are slow to grasp that the power has shifted toward the customer to some degree. Out of these companies, some ignore the new reality and ignore complaints made on social media. Others have invested in social listening tools so they can know what’s being said but react only to “credible threats” (people with a lot of followers, social media credibility, or momentum behind a complaint).

Where I find reason to be optimistic though is in the growing number of companies which realize that every customer is important,

*“I’m finding that certain companies are slow to grasp that the power has shifted toward the customer to some degree.”*

and that social media has given every consumer a voice. Accepting this has led these types of companies to shoot for 100% satisfaction, 100% of the time. These companies understand that perfection is elusive but that great customer care is the cheapest solution. You can’t disguise poor service with a glitzy ad campaign the way you used to, and social media is holding companies more accountable to consumers. And that is good for everyone.

Today’s most relevant businesses understand that engagement is key and that consumers want to decide how communication will occur.

While there is still some convincing left to do on many major brands around the world, the difference between now and five years ago is that today there is more than enough evidence to prove that good social customer care is what consumers are demanding and that it is a wise investment in your company.

As an early adopter to Twitter in July of 2009, the writing was on the wall that Twitter, or something like it, would become a key tool of communication. Likewise, social media is here to stay, and therefore

good social customer care will have to improve to meet the demand from all of the world’s customers who’ve come to expect it.

In 2008 the question of how relevant social media would be to business was yet to be answered but, in 2013, when everyone has a smartphone and depends on it more often than ever, I foresee the entire business community reorganizing and fine-tuning their service models to include effective social customer care. If you’re in business, you have to be where your customers are both physically and mentally. That’s always been the case and I don’t see that changing anytime soon. ■



Martin Hill-Wilson  
Consultant  
Brainfood Training

# A Story Only Just Begun

**Martin Hill-Wilson**  @MartinHW

Customer Service & Social Business Strategist - Author, Keynote Speaker -  
Tweets on #custserv #cx #socbiz - Delivers A Pretty Mean Workshop Too!

**Digging through my client files tells me my first public gig on social customer service was to a Polish audience in 2010. Evidently by that point I had developed enough confidence to weave together stories and insight for an hour's keynote.**

Looking at the presentation now, most of its key messages holds true for today's audiences. The main difference is that the rhetoric has shifted from theory to live examples. And maybe some of the aspirational vision espoused back then has been sanded down to fit operational realities.

In all my 30+ years of experience challenging the beast (aka, the corporate mindset), I think customer inspired social interaction has given me the most fun.

For a start, it is easy to frighten those who usually sit above the cloud line with tales of consumer activism and warnings that socially triggered crises are a matter of "if not when." Even the alpha male mind can join the dots and understand personal consequences. I'm so beyond caring what makes them honest that I'll take self interest and fear as legitimate motivators!

It is also fun to rattle the silos. As the evolutionary arc has transitioned social customer service from an embedded marketing/PR activity to a customer

service one, the impact that this organisational straightjacket has had on "rounded" customer education is laid bare.

Marketing, sales, and service know so little about each other's involvement in the common task of customer engagement. It's been a constant surprise to witness the knowledge gaps in either a marketing or service-centric audience. I guess that is to be expected. But it has also taught me that explicit "paint by numbers" style advice has been the best received in helping both sides evolve.

The relationship between these customer facing teams has been a major theme right from the start. Early on the debate was focussed on ownership. Marketing and PR were clearly the landlords at that point. The main tools of the trade (social monitoring) were most likely in the hands of their agencies. At that point customer service seldom had a look in, stymied by a reputation for efficiency over effectiveness and quantity over quality.

That relatively short period when a fresh set of minds ran service interactions was highly creative and valuable. The human touch came back into focus, and

*“Social  
customer  
service is  
driven by  
customer  
service.”*

a consciousness around the brand value of an interaction (now public of course) was natural to a marketing mind.

Of course this could not last. Customer service became jealous and marketing had its own emerging issues around scaling to meet the nutty demands of “content marketing.” Let alone deal with the operational responsibilities of social customer service.

So the debate moved on. The new answer became no single function owned social, it was everyone. Of course that still required cross functional co-ordination. Altimeter research tells us that the hub and spoke or “dandelion” configuration has proved most popular to-date as the best way to balance centralised and distributed involvement.

So now we have a situation that is probably typical for the majority of organisations. Social customer service is driven by customer service. Marketing has left their brand instructions in the kitchen drawer in the hope of influencing how many eggs get broken cooking the omelette.

In response, customer service has probably adopted their age old model of a siloed skills based group to manage inbound traffic. As we all know, integrated multi-channel infrastructure – aka cross-channel – remains a vendor fantasy in the face of the pragmatic point solution purchasing that has characterised the last 25 years in service infrastructure investment.

This is a real issue and for me helps explain the currently woeful level of responsiveness that characterises service over social bar the very few exceptions. Headcount cannot be blamed. It is not yet

an issue given current volumes. What is cronky is how organisations have tried to patch together listening solutions with routing and escalation workflow. Or deal with the complexities of bobbing between public and private channels (e.g. Twitter and Chat) and leveraging CRM functionality.

Admittedly there is a new generation of vendors already chomping at the bit with service specific solutions. As are the legacy brigade who have now polished up their social channel stories. But my guess is that something new is going to have to enter the space if a repetition of old habits is to be avoided.

Maybe the combined impact of social engagement, cloud solutions, and the emerging game plans of CX teams for “seamless” experiences will catalyse new decisions. But certainly this is going to be the challenge moving forward. Integration of purpose, process, and playbooks will mark success from failure.


For my money, customer social engagement is so much better leveraged and responded to when all customer facing teams work together in the context of a lifecycle

perspective of the opportunities. This is why we are at the dawn of Customer Engagement Hubs, or whatever you choose to call them. These provide the framework to blend activity across the customer facing teams and thereafter much further into middle and back office areas. They could prove a major success in acting as an organising principle to covert the analogue business model into its digital equivalent over the next few years.

Strategically I think we can say that social customer service has reached its first milestone. It's up and running. However neither customers nor service directors are entirely comfortable with what to expect. Nonetheless this is not a question of rebottling the genie.

Socially savvy, mobile minded customers are the new black. NPS, revenues, and reputations will rise and fall according to how well organisations adapt to this challenge.

Personally. I love it. It's a real-time corporate mirror that tells the truth when asked “who is the fairest of them all?” Smart organisations will do what's necessary to receive the answer they want to hear. ■

A close-up portrait of Joanne Jacobs, a woman with short, wavy, light brown hair and blue eyes. She is wearing a dark blazer and a gold necklace. The background is dark and out of focus.

# From Advice to Direction: A Shift in Perception

**Joanne Jacobs**  [@JoanneJacobs](https://twitter.com/JoanneJacobs)

Commentator on digital business strategy, marketing, online and games based learning, IT transformation.

## It's probably been twenty years in the making, but over the past five years we're seeing a significant shift in perceptions about customer care, facilitated by social technologies.

As I see it, the shift is from customer care being about organisations informing their customers about the options for servicing, to customers telling organisations what they want and expecting the organisations to respond to those directions. The shift from advice to direction is significant, not just because customers are well-informed and informing each other about goods and services, but because the onus is on customer support officers adapting the way they work, rather than customers adapting to the processes and protocols of organisations.

What's been fascinating about this shift for me has been how subtly it has developed. As someone who started in academia and saw social media as a revolutionary tool (in a political sense, rather than an innovation as such), I expected social customer care to be a source of monumental disruption to business practice generally, and marketing specifically. The reality of the spread of social technologies in customer care has been more of a slow motion transition. The disruption is still happening, but it is doing so at such a calm pace that businesses are more surprised by the outcome rather than actually noticing the changes of consumer behaviour taking place.

So instead of being a bloody and rapid revolution, it's been an evolutionary change. And while governing

forces might be able to quash a revolution, they can only adapt to evolutionary change.

But as both an observer and a participant in this evolutionary change (I've been a researcher, commentator, consultant, and run social technology production houses as well as social engagement agencies), it's been almost amusing to me to watch the attempts of the traditional marketing sector to "control the message."

Even today we see daily attempts by marketing agencies to generate positivity around brands and organisations that fundamentally miss the point of social technologies. Instead of capitalising on the conversations that indicate an issue to be resolved, or a gap in the market, firms are still assuming they need to be a friend with their customers on social channels and to share positive imagery around a company or brand.

And this kind of classic PR behaviour almost always fails in an era where social customer care is characterised by customers controlling the message. Two recent examples of this kind of marketing are the #AskJPMorgan hashtag incident where JP Morgan wanted to present itself as an open and transparent organisation by having an online Q&A with the VC of the organisation. The hashtag was flooded with people



complaining about poor customer service, questionable business tactics, and a perceived lack of customer service in the organisation. A similar fail occurred with the #MyNYPD campaign, where the New York City Police Department wanted individuals to post photos of themselves with police officers. Instead of happy snaps with police officers, people shared pictures of police brutality and stories of poor citizen care.

Both organisations were apparently astonished that their attempts to present their services in a positive light were so profoundly disrupted by an angry customer base that was determined to be heard.

The evolution in social customer care had happened without their noticing; the customers didn't want to be their friends or to play along with the artificial attempts to flood social conversations with positivity.

They wanted service on their terms, and they expected the firms to comply quickly and efficiently. Or at the very least, they wanted to highlight that the firm should be focused on customer care rather than promotional activities.

I keep coming across traditional advertising and marketing firms and large corporate entities trying the same kind of terribly old-fashioned promotional approaches without understanding that customer behaviour has changed, permanently. And I expect this lag in understanding will probably continue for another five to ten years until the decision makers about these promotional campaigns either die off or go out of business.

There will always be a place for promotion in marketing, but it cannot be at the expense of social customer care. The last five years has seen social technologies appropriated by consumers in order to direct the focus of firms to customer experience and customer care. The next five years will determine which firms are prepared to listen and respond to customer needs, and which firms will be mired by their trust in outdated and increasingly irrelevant traditional marketing practice. ■

*“It’s been almost amusing to me to watch the attempts of the traditional marketing sector to ‘control the message.’”*

A close-up portrait of a man with dark, wavy hair and a light beard, looking directly at the camera with a neutral expression. The background is softly blurred, showing what appears to be a window with light coming through.

# A Fundamental Shift (and in Your Pocket)

**Joshua March**  [@JoshuaMarch](https://twitter.com/JoshuaMarch)

Founder & CEO of Conversocial

**I built my first Facebook application in 2007, weeks after Facebook first launched their platform. I was hugely excited by the potential for brands to engage with their customers through social networks in a way that had never been possible before.**

Communication was moving away from anonymous, private, one-to-one channels (from a phone or desktop computer) toward public, social channels that are linked to real identity and always-on (and in your pocket). I realized that this shift was fundamentally going to change how companies were communicating with their customers – and vice versa.

Methods for managing traditional channels no longer work when you have to deal with a customer in the public sphere – with the whole world watching. The real time nature of social media means that consumers expect responses in hours or even minutes – not days. They communicate with companies when it's best for them – not necessarily during the times companies decide it's most convenient or cost effective. And the ease of a tweet or

a Facebook post made with a few clicks on a smartphone means that the barrier to communicating with a company has been significantly lowered, opening up the door for an increase in both the volume of communication and the types of things that people are getting in touch with companies about. With the launch of Facebook pages, and the growing popularity of Twitter, the effect of these changes started to become a hard reality for companies. Once companies stood up and laid down the welcome mat on social networks, consumers started treading roughshod over the carefully crafted messaging and marketing campaigns by shouting out the real issues and complaints they had. Consumers had found their voice and they weren't going to be shut up (or deleted). Customer service was no longer a hidden part of the company that could be managed purely as a cost center;

just keep shifting the customers around through automated voice prompts until they give up and accept their broken products, and if they do get through to a person, do whatever it takes to get them off the phone as quickly as possible.

Instead, social media meant bad cases of customer service were not only public, they could go viral. Other customers could see and add their voice to the chorus until it was so widespread blogs and mainstream media would report on it. With one short step, a company could become a laughing stock. A customer complaint could make its way directly to the CEO's desk and heads could roll. At first, a lot of companies tried to stick their head in the sand and just ignore social customer service complaints (a fact that led Altimeter to assess that 75% of the social media crises

between 2001 and 2011 could have been prevented with proper training and responses). Fast forward to 2013, and most companies recognize the need for timely, in-channel resolution of customer queries. A growing number of leading brands have embraced social as an official customer service channel and have created sizable teams of agents who resolve real issues within social media.

But there are still too many companies who are responding by redirecting customers to traditional channels (like phone and email) whenever the customer expresses a real customer service query. This can't continue. Redirection means a terrible experience for the customer, who has to repeat their same problem to another person through a different channel that they didn't choose. Decades of

customer service research shows that first contact resolution is one of the most important aspects of a good service experience. Redirection means a greater expense for the company: Gartner estimates that social agents can handle 4–8 times the volume of issues than a phone agent; and it requires twice as many resources – one who responds on social and another who responds and resolves on a traditional channel. And finally, redirection means a significantly worse public reflection of the brand – the rest of the world sees the upset customer and complaint but not the resolution. Our customers have found that if they deliver a great service experience within social channels, up to 50% of consumers will post publicly about how happy they were that the issue was resolved. It's a huge opportunity to turn detractors into real brand advocates.

*“Decades of customer service research shows that first contact resolution is one of the most important aspects of a good service experience.”*

In the last five years, social care has emerged as a real discipline and has become a clear consumer expectation. But there is still a long way to go. Even for the most innovative brands, social care data is still relatively siloed from the rest of the contact centre. Too many companies are still flailing while trying to do social care natively or with social media management systems that are built for marketing, and not delivering the prioritization, workflow, or analytics needed to manage a real social customer service operation in the contact centre.

Looking ahead over the next five years, companies will widely accept social as a mainstream customer care channel, and ignoring a tweet

or comment will be just as bad (or worse) than not picking up the phone. The rise of widespread, always on social identity will allow companies to realize the pipe dream of a real single view of the customer – whatever the channel, whatever the time. Customer service will have emerged from its murky past to become the front line of all customer engagement, with the insight from the constant, real-time public customer conversations becoming the bedrock of customer insight, permeating the entire business from the board and CEO down. The public nature and real impact on brand will mean that every company will have to become customer-centric to thrive – or even to survive. ■

*“Even for the most innovative brands, social care data is still relatively siloed from the rest of the contact centre.”*

A close-up portrait of a man with short dark hair, smiling slightly. He is wearing a dark suit jacket over a light-colored collared shirt. The background is a plain, light-colored wall.

# Looking Ahead: The Margins Become the Centre

**Guy Stephens**  @guy1067

Trying to understand this thing called #SocialCustCare.  
Named HuffPost Top 100 #CustServ. Views mine.  
#IBMer #commandcentres #digitalliteracy #coys #Wolfson.

The first five years have drawn to a close. In that time we've seen – the first social customer care tweet from @ComcastCares, #Twelpforce, Kachi Wachi, United Breaks Guitars, Giffgaff, Groubal, “How To” videos on YouTube, the emergence of enterprise social networks, and command centres from Gatorade and Dell.

All of these examples have created new and different boundaries, new and different expectations, new and different literacies. Each in turn has questioned the legacy of what came before it. Each in turn has challenged the status quo. Each in turn points to what the future holds. And yet, as we look ahead to the next five years, all that we can be certain of is that change will continue to be a cornerstone of what is to come.

The degree to which an organisation is able to allow its employees the freedom to adapt to that change – freedom within a framework – will determine its likely success. As will the degree to which its employees, more often than not those lone voices, are willing to take on the challenge.

Thankfully, if nothing else, social is teaching organisations to become more tolerant, more understanding, more open to the increasingly serendipitous nature of business

Yet even as we continue our journey of familiarisation with our emerging surroundings, more questions inevitably arise:

- *What will customer service look like in five years time?*

- *What will the contact centre look like?*
- *What will the service model look like?*
- *How will resolutions be delivered? Who will deliver them? Create them? Curate them? Validate them?*
- *What tools will organisations be using?*
- *Which vendors will still be around?*

As boundaries continue to be reset, as the underlying service model continues to be disrupted and decentralised, the margins will increasingly become the centre ground from which a new service model will emerge or perhaps, converge.

So, as I look to the next five years, the question I ask myself is this: What do applications like Snapchat, Google Hangouts, or Waze tell us about the future of customer engagement and how it will be provided? ■

