Design Your Social Media Strategy to Support Customer Engagement

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Jenny Sussin

Social media has become a critical channel for engaging customers in many industries. IT leaders supporting social media must overcome several significant challenges to provide active, emotional, rational and ethical social customer engagement.

Overview

Key Challenges

- Most companies wait for social media posts to appear on their Facebook walls or to mention their Twitter handles before they recognize the need to respond.
- Most companies attempt to host online communities of interest versus recognizing that there are customer engagement opportunities on existing social sites.
- Social media engagement calls for immediate customer interaction and long review cycles, coupled with an inability to identify internal subject matter experts, delaying time to value.
- Social media has enabled more employees to serve as customer touchpoints, and companies struggle to provide guidance on maintaining a consistent message.

Recommendations

- Provide clients with the ability to access the business via multiple social channels to increase active customer engagement.
- Enable proactive customer outreach on social media to develop emotional customer engagement.
- Spark rational social customer engagement by participating in communities of interest.
- Ensure honesty and accuracy on social channels to perpetuate ethical customer engagement.

Introduction

Gartner defines customer engagement management as the attraction and influencing of customers to hold their attention and induce them to participate in a relationship at length.

All organizations in the private and public sector engage with customers, most often through their marketing, sales and customer service departments. However, in many cases, these organizations aren't engaging with the customer; instead, they've been disengaging for a decade to lower costs. Furthermore, relatively few have an enterprisewide approach to engaging with customers. Gartner estimates that customer engagement initiatives are underway at approximately 15% of Global 1000 organizations, run by leaders such as the chief innovation officer, CEO, CIO, head of digital marketing or chief customer officer.

The customer engagement initiative is rooted in a cross-enterprise reconsideration of engagement that involves employees, partners and customers. Five core drivers

affecting organizations have caused Gartner to elevate the engagement initiative (see "Use the Engagement Initiative to Respond to Critical Changes in the Workplace" and "Maverick* Research: Pivoting from Silicon Systems to Human Systems — The New IT Charter"):

- **Consumerization —** This involves the gap between the business computing environment and the consumer computing environment.
- **Changing Employee Demographics —** This affects the ways millennial workforces will map their Internet skills and preferences for business purposes.
- **The Rise of Shadow IT —** Business users are increasingly bypassing internal IT resources in favor of third-party services. IT leaders must define the IT role and its contribution to the business and optimize a mix of internal and external IT services.
- **The Changing Nature of Work —** There is a shift in IT focus toward tools and services that facilitate employee autonomy, information access and rich interactions beyond the firewall. New ways of work, such as crowdsourcing and talent exchanges, also demand attention from the IT leaders.
- **HR-Led Employee Engagement Efforts —** These initiatives identify prospective candidates who are digitally savvy — i.e., they use technology to navigate and make sense of the digital environment. They have the skills to work with data analytics tools and collaborate inside and outside of the formal organizations they're a part of. Although they're passionate about the digital world, they may not understand all the goals of a business, even though their collaboration ideas are ideally suited to creating customer engagement strategies and processes.

These five influences affect the way businesses interact with customers in the aggregate; however, to understand the specifics of customer engagement, Gartner has further refined the attributes of a successful engagement program. Engagement is usually measured by its causal impact — that is, the customer's likelihood to respond to a campaign, purchase a product, remain a customer or recommend the brand. However, these outcomes are not engagement metrics. Measuring the level of engagement itself is complex and requires an examination of the active, emotional, rational and ethical attributes that determine the organization's brand/values, including its culture and policies (see Figure 1).

Figure 1. The Four Key Attributes of Customer Engagement
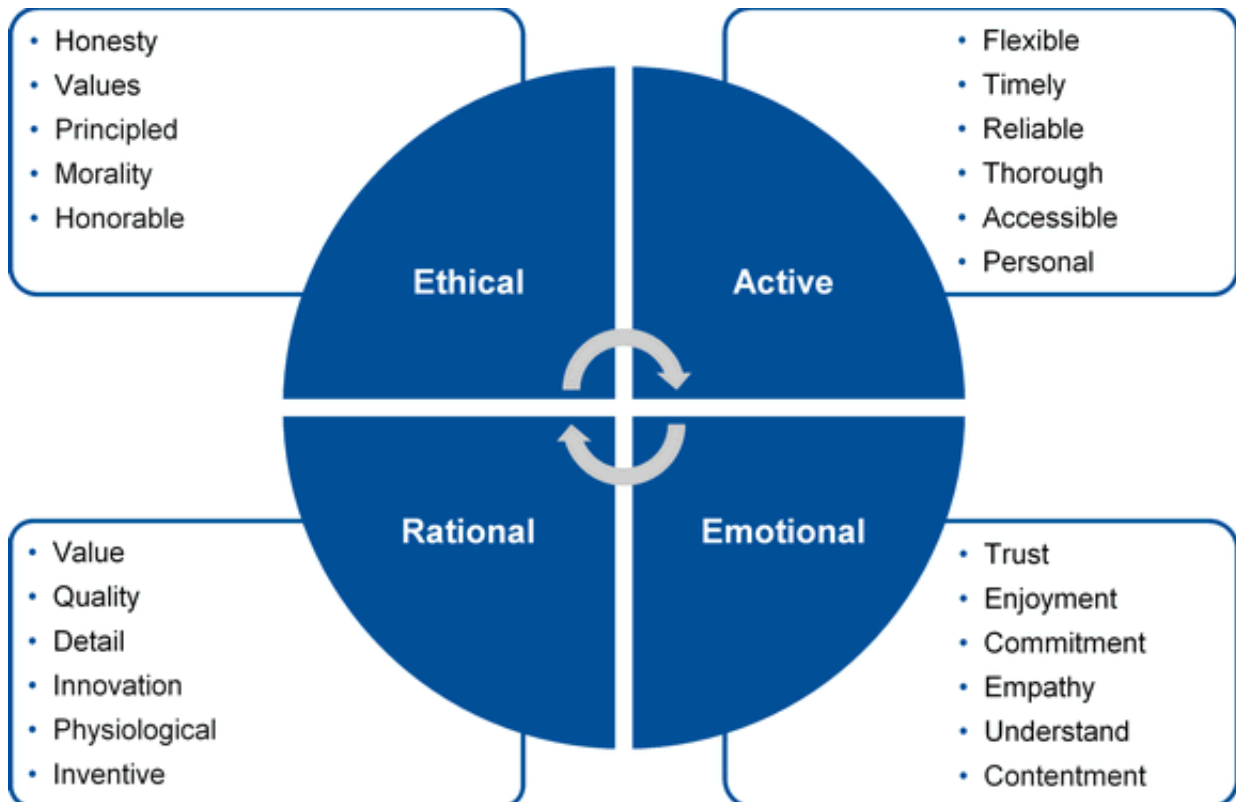
Source: Gartner (October 2013)

By first trying to understand these attributes, we can then strive to measure them. A successful social customer engagement strategy involves all four attributes, so a holistic approach is essential.

Analysis

Provide Clients Access to the Business via Social Channels

To have active customer engagement over social media, businesses need to establish an active social media presence on their customers' preferred communities and/or social networks. Businesses must be able to aggregate social feeds and enable marketers, service agents or sellers to engage with their customers in a timely manner.

IT leaders must build or invest in a social media application for monitoring and engagement to enable marketers, service agents and/or sellers to streamline their discussions with customers. Establish a response plan: Identify the types of posts that require a response (e.g., questions, problems, incorrect statement about products and issues), criteria and processes for escalation, and the appropriate response times for each time of post.

People: Active customer engagement over social media requires cross-business and IT collaboration. For example, IT leaders in support of CRM are responsible for building or investing in social media engagement applications that support multiple social channels and support queues and filters. Directors of social media are responsible for identifying the appropriate social channels for a business presence. Customer service agents are responsible for handling posts related to support that build up in social media queues.

Process: For active customer engagement to exist over social media, IT leaders must enable a response workflow in which social posts can be prioritized, assigned and escalated based on content and author. This response workflow keeps social customer engagement timely, reliable and consistent.

Technology: Social media applications supporting customer engagement might include social media engagement solutions for marketing or customer service. They may even include something like peer-to-peer community software supporting crowdsourced ideation or peer-provided customer support.

Enable Proactive Customer Outreach on Social Media

Active engagement on social media — having an active and multinetwork presence — enables customers to proactively and reactively engage with a business and develop an opt-in relationship with that business — i.e., an emotional engagement. Social media humanizes businesses, and customers who develop a rapport with a business are more likely to advocate for and defend the business in times of success, as well as during crises.

IT leaders should enable marketing, customer service and sales to proactively reach out to customers that mention your business or your industry. Such a dialogue should encourage positive relationships to form. Enable multiple employees to speak on behalf of the organization or as ambassadors of the organization to give customers the perception that your enterprise is authentic, open and understanding.

People: Customer service agents and marketing managers are blurring lines, as customer service agents start to proactively engage with customers to grow brand affinity and marketers attempt to quell the concerns of other passionate customers. IT leaders must provide these cross-departmental teams with a space to collaborate around social posts.

Process: Customer service agents and social media managers will need to feel empowered to engage with customers in real time over social media. IT leaders must ensure that an adequate review workflow is in place, so that stylized posts — reflecting empathy or showing humor — can be rapidly reviewed by management or senior employees before being publicly posted.

Technology: Social media engagement applications for customer service and marketing are critical in enabling emotional customer engagement. Social media analytics applications that are optimized for market research can help detect sentiment around specific topics. This can help customer service agents or social media managers adjust

their tone and messaging based on immediate public perceptions.

Spark Rational Social Customer Engagement Using Communities of Interest

A business that partakes in rational customer engagement is perceived as a thought leader in various social media communities. Rationally engaging businesses will not just host their own conversations on their own Facebook pages or online communities; they will reach out via existing communities and participate in conversations with other experts. This enables businesses to respond to rational issues customers may have during their journeys and influence purchasing decisions throughout the buying cycle. Many businesses have taken to reaching out to customers on product and service review sites as a way of rationally engaging.

IT leaders need to help businesses determine whether there are communities to join where they can discuss relevant topics, and assert their expertise. If there are no existing communities, businesses will need to identify a means for communicating about an issue where they have knowledge to educate customers and potential customers, and attract them to new communities.

People: Community managers and internal subject matter experts are the most critical people in successfully engaging customers in logical and rational conversations over social media. IT leaders must ensure that community managers can properly identify relevant communities and relevant discussions happening over social media so that they can properly plan for the business's outreach.

Process: To provide rational customer engagement over social media, internal subject matter experts need to be trained on social media policy and engagement approaches. Workflow needs to be in place to alert subject matter experts when there is a post that needs their attention or when it is time for them to take the initiative and contribute to a community. Community managers should have the option of being able to review subject matter expert's posts before they are published — although this might not always be something that's in a business's strategy.

Technology: Social campaign management applications are necessary in rational customer engagement, because they can store repositories of content on a specific topic, they can provide a social editorial calendar, and they can manage permissions around content and workflow to enable subject matter expert engagement, while providing community managers with visibility into what is being posted. Social media analytics applications are also critical in determining the optimal times for posts to be seen and engaged with, and the venues for which various topics are being discussed.

Ensure Honesty and Accuracy on Social Channels

Ethical customer engagement is more than just communicating about green initiatives. On social media, it requires integrity — customers engaging with you must know that what you have said over social media is the actual word of the company and not just something that is said to make a company look good in the public eye. Social media managers and customer service agents need clear training on how to extend their traditional customer engagement practices over social media (see "Categorize Employees When Creating Enterprise Social Policy").

Internally, corporate processes and messaging must be clear to enable employees to engage on social media to reply accurately and ensure that the company is honest and is willing to stand by its principles.

People: Although social media managers, customer service agents and community managers are the employees actually engaging with customers, ethical customer engagement needs to be something that is encouraged and enabled by the C-suite. The C-suite must stand by the company's principles and values so that these principles are reflected honestly and accurately on social media.

Process: When engaging on social media on behalf of the company, employees must understand corporate policy so that they can communicate it, and they must be ready for public backlash on corporate policy. Consistent, honest and principled engagement will ensure ethical customer engagement over social media.

Technology: Social campaign management applications with the ability to host compliance modules, specifically corporate policy documents, are useful for employees looking to ensure that their social customer engagement reflects corporate policy.

Gartner Recommended Reading

"Best Practices in Business Etiquette for Social CRM"

"Handling Social Media Issues Appropriately Requires Preplanning"

"Don't Let Customers See the Cracks in Your Social Media Presence"

"The Four Attributes of Customer Engagement"

"Understanding How Customer Engagement Drives a Positive Customer Experience"

"Marketing Technology Enables Your Customer Engagement IT Strategy"

"How Customer Service Drives Loyalty Through Customer Engagements"

"Ten New Realities of Customer Engagement to Account for When Developing a Digital Strategy"

"Use the Sales Organization to Set the Stage for Customer Engagements"

Related Research

This is part of an in-depth collection of research. See the collection:

- Adopt Customer Engagement Strategies to Drive Growth