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# Customer Care in a Social World: Are We There Yet?

## Introduction

Social media is adding octane to the fuel of organizational customer experience imperatives. However, today customer engagement through social media is splintered across departments, resulting in inconsistent and poor customer experiences. For many years, customer service organizations, and the contact center in particular, have been focused on developing a 360-degree view of the customer and providing a consistent customer experience across interaction channels—including such channels as phone, Web, and chat. Poor customer experiences result when channels and processes remain separate silos.

Social media is no different from this perspective—it must be treated as an integrated customer engagement channel. This is one of the key roles and characteristics of the social contact center. In particular, enablement of the social contact center requires three primary capabilities. They are the ability to

- **Listen and respond.** Treat social media as a channel.
- **Be where your customers are.** Take advantage of Facebook and similar services.
- **Build and leverage community.** Connect to your customer and growing knowledge processes.

Most organizations today are at the early adopter stage of the social contact center maturity model, attempting to “bolt on” social media as an ancillary process. For this reason, most organizations have been unable to realize any tangible returns on their social media investments and are probably experiencing higher costs and poor and inconsistent customer experiences as a result of not articulating a clear social strategy.

To fully leverage the transformational nature of social media in which the financial and customer experience benefits become tangible, measurable, and repeatable, organizations

must migrate to a mature enablement model. In this model, a culture of transparency empowers customer-facing employees to engage in meaningful and measurable ways. More importantly, social media becomes tightly woven into existing customer engagement processes, a shift that requires a technology platform that seamlessly manages customer interaction across all channels, including social channels, and accounts for social media within existing knowledge management processes.

## Customer Care in a Social World

Social media is transforming customer care as we know it. The change really began with the shift in focus from customer care as a case triage tool to customer care as a strategic vehicle for delivering excellent customer experiences. Social media has accelerated this transformation.

The majority of social conversations are not germane to an organization (in other words, they are “noise”). Other conversation topics are relevant to different parts of the organization, such as marketing and customer service. The problem is that organizations don’t know how to reconcile these conversations. Historically, marketing has taken the lead on monitoring them, but when the topic is customer-service-related, they are ill-equipped to deliver the level of support needed. This results in a splintered, disjointed customer experience.

The bottom line is that service isn’t a silo. Organizations need to leverage social channels for the delivery of customer care, and customer care extends beyond the customer service department. At the same time, your brand extends beyond marketing—customer service *is* your brand.

Organizations must respond to the splintering of conversations across service, marketing, and other departments by enabling the commingling of customer conversations. The most effective philosophy can be summed up as the following: one voice, one brand, one experience. To implement this philosophy, organizations need to recognize three aspects of the social world:

1. **Social media is a channel.** It is a collection of channels, really—but one that is not unlike traditional interaction channels. As in traditional channels, customer experience consistency is key. What that means is that, just as with traditional channels, social media needs to be woven into a unified customer engagement process.
2. **Social media is not a silo.** The enablement of that single voice and unified brand experience—and the resultant ROI—requires true cross-functional ownership of social initiatives.
3. **Social media requires a social mindset.** The core tenet of this mindset is transparency. The level of organizational transparency will dictate to a large degree not only the level of social adoption but also which types of social engagement fit into which parts of the organization.

“Regardless of the specific channel, if your company has established a presence in social media, your customers don’t care which department ‘owns’ it. If they come to you for help on your established social media channel, you can’t say: ‘Sorry, we can’t help you. We’re in marketing, not support, and marketing owns our company’s Facebook page.’”

— Shaun Santos, TSIA Research<sup>1</sup>

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<sup>1</sup> Shaun Santos, Technology Services Industry Association, “Social Media 2011: The Technology Services Landscape,” December 2010.

## The Social Contact Center

As the primary hub of customer interactions, the contact center is critical to any customer experience strategy. The social contact center reaches out for customer engagement and relevant insights from social media to achieve consistent, engaging, and timely interaction across all channels.

Yet contact centers are struggling to harness the social phenomenon. As consumers increasingly embrace social media to look for help, make purchasing decisions, and voice their opinions, organizations can get shut out of those conversations. As the epicenter of customer interaction, the contact center is a key player for getting back into the customer conversation—and social media is the catalyst.

To enable the social contact center, your organization needs to be able to carry out the following three principal activities.

### 1. Listen and Respond

Effective enablement of social media within the contact center requires a systematic, proactive, and intelligent approach to listening to and engaging in conversations occurring on social networks and channels such as Twitter, Facebook, and YouTube.

From a best practices perspective, this can be distilled into five key processes:

- **Listen.** Get access to conversations across social media channels—preferably in a way that enables you to search and aggregate across those channels.

"[Oracle] empowers our contact center operations by enabling our agents to join customer conversations that are happening on social sites like Twitter and Facebook and integrate those conversations into our overall multichannel customer engagement processes."

— Lisa Larson, Drugstore.com

- **Funnel.** Find the conversations that matter to your brand: you want to be able to discern intent and sentiment to sort through the noise. In addition, you want a straightforward process for moving the relevant conversations you find into case creation.
- **Route.** Get the important conversations to qualified company representatives, ideally filtered by the intent and sentiment of the conversations. You want to match the item (a conversation) to the person (such as a contact center agent) who is appropriately skilled and available to provide resolution action in the most relevant, efficient manner possible.
- **Engage.** Provide representatives with a simple means of engaging with relevant knowledge and guidance—that is, put it at their fingertips. Your organization also needs the ability to seamlessly “change the channel,” because, depending on the issue, traditional channels such as phone or chat may be more appropriate for following up and addressing it.

- **Record.** As with phone and other channels, it is important to monitor and measure social media key performance indicators (KPIs) to improve quality and performance. Recording can be as basic as tracking the interaction in the central customer record or as sophisticated as using high-quality monitoring systems.



Figure 1. Best practices for enabling social media include these five key processes.

From a technology perspective, organizations with legacy agent desktop software will struggle to retrofit these new processes, for which the legacy software was never designed. It may be time to consider next-generation desktop solutions that inherently enable these social processes in the context of overall multichannel customer engagement.

## 2. Be Where Your Customers Are: The Facebook Phenomenon



Figure 2. It has become essential for organizations to manage Facebook social content as part of the customer experience strategy.

With 845 million Facebook users and counting, Facebook has become an essential piece of any organization's customer experience strategy. It represents a unique opportunity to reach consumers on their own turf and deliver exceptional customer care.

To deliver a quality customer experience from your Facebook presence, it is important for your organization to offer the same full set of interaction options to which your customers are accustomed, including self-service, crowd (peer-to-peer) service, and agent-assisted service—directly from a customer service tab on your Facebook page.

You'll want a solution that leverages a common knowledge foundation and supports workflow and escalation, community moderation tools, and reporting and analytics. All Facebook interactions should be captured in a common record alongside interaction from other channels. This fully integrated approach means that you benefit from a single view of consumer interactions from both Facebook and other channels and that consumers have consistent experiences and enjoy seamless transitions as they traverse interaction channels. By taking this approach, your organization will

- Avoid public meltdowns on your wall
- Easily manage growing volumes while capturing valuable customer knowledge
- Amplify good customer experiences, enabling your contact center to contribute to the brand experience
- Maintain a single knowledgebase that can be accessed by customers through multiple channels, such as your Website and your Facebook page

### 3. Build and Leverage Community

Your customers are an extensive source of knowledge about your products and services. In many cases, they have more in-depth knowledge of your products and business processes than your call center agents! So you want to be able to leverage this expertise and extend your service by enabling customers to help each other. However, if the community does not answer a question in a reasonable amount of time, the thread should be routed to a contact center agent who can then address it.

To fully leverage crowd knowledge, such customer-driven interactions need to be unified with existing customer engagement and knowledge management processes. This is where the social contact center comes in.

With a socially enabled contact center, social content is seamlessly tied to the contact center through the common contact record and incident/case management process, with integration points for the knowledgebase (these enable you to include community posts in corporate answers).

When you enable your customers to help each other—and tie their answers and solutions into your core processes—your contact center and organization can reap tangible benefits, as a result of the ability to

- Provide the lowest-cost support channel for high-volume, medium-complexity customer issues
- Improve speed and quality of service
- Create reusable knowledge “at the speed of social media”
- Turn a good service experience into brand-building
- Increase stickiness for higher customer lifetime value
- Boost search engine optimization (SEO) for increased Website traffic
- Uncover more up-sell and cross-sell opportunities

- Increase customer satisfaction and loyalty
- Devise better products more quickly
- Identify ways to make it easier for customers to do business with you

## Social Contact Center Maturity Models

Although many organizations have begun to deploy elements of social media across individual departments, there is a significant lack of ability to operationalize this contact into existing infrastructures and business processes. This is due to Band-Aid, reactive approaches to social media and misalignments with an overarching customer experience strategy.

Research has shown a clear spectrum of maturity models of social enablement and adoption within contact centers. This is a reflection of a combination of

- People and culture – the culture and behavior of the people and organization with regard to social media
- Processes – the organizational processes by which contact via social media is achieved and managed
- Technology – the technologies being utilized to create and support a social-media-enabled contact center

"There is strong corporate awareness, including at corporate executive levels, of social networks and their potential impact on corporate brand management and customer service perception. The high-profile nature of social networks and social CRM for customer service, along with awareness of its potential impacts, is expected to rapidly advance adoption from early adopter to mainstream deployments despite the volatile and rapid evolution of social networks in general."

— Drew Kraus, Gartner<sup>2</sup>

Although organizations fall along a spectrum of enablement, the maturity model of organizations with regard to social media within their contact and customer care centers can generally be mapped into two main categories:

- Early adoption model (common state)
- Mature enablement model (transformational state)

### Early Adoption Model (Common State)

Most organizations are in the early adoption stage today. This stage in the maturity model is defined by the following sets of characteristics.

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<sup>2</sup> Drew Kraus, Gartner, "Emerging Technology Analysis: Social CRM for Customer Service," January 28, 2011.

### People/Culture

The following is true of the people and culture of these organizations:

- The customer experience may be recognized as important, but the approach is more lip service than execution.
- The contact center is still viewed primarily as a cost center and a customer triage tool.
- KPIs are still focused on traditional metrics such as average handle time (AHT).
- The organizational culture leans toward a rigid “command and control” environment in which empowerment is hierarchical, versus a more transparent environment in which employees at all levels are empowered.
- Social media management is achieved in departments that remain in separate silos, and such management is usually owned by marketing.
- The customer care center is not actively monitoring social media. When the contact center does get involved in a social interaction, the response is purely reactive.

### Processes

The following is true of the processes of these organizations:

- Social interactions are not integrated across the organization, and there is no way to share business processes across departments.
- Social interactions constitute a process ancillary to existing contact center customer processes. Social management is either completely separate or poorly “bolted on.”

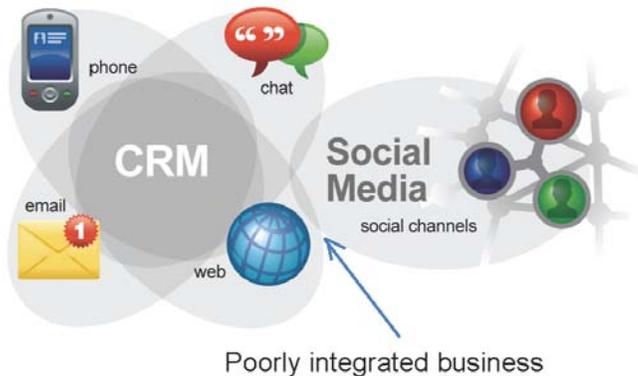


Figure 3. Poorly integrated businesses exclude social media from the customer relationship management (CRM) system.

"With only 8 percent of companies integrating social media interactions with CRM systems, it's safe to say that the '360-degree view' of the customer is simply not possible for most companies that engage customers in social channels."

— **Shaun Santos**, TSIA Research<sup>3</sup>

### **Technology**

The following is true of the technology of these organizations:

- The organization may be using basic (and free) tools such as TweetDeck to monitor social interactions.
- The organization may be using a single-purpose standalone social media content tool that is not well integrated into the existing customer management solution.
- Knowledge captured from social interactions is separate from existing knowledge repositories.

### **Bottom Line**

Early adopters fail to fully leverage the value of social media within the contact center, because it is not tied back to any customer experience objectives and is not integrated with existing enterprise processes. In fact, the results are higher costs due to redundant processes, staffing, and knowledge; poor and inconsistent customer experiences that lower CSAT (customer satisfaction) scores and loyalty rates; lack of accountability from an inability to plan or measure outcomes; and the inability to scale, because of nonintegrated processes. For this reason, most organizations in this current state of adoption have been unable to realize any tangible returns on their social media investments.

"Social CRM for customer service is still in the early stages of adoption, and as a result the business processes and policies for handling these interactions are still being determined."

— **Drew Kraus**, Gartner<sup>4</sup>

### **Mature Enablement Model (Transformational State)**

A mature enablement model for social media within the contact center is a goal that relatively few organizations today have reached. But the ones that have attained this level stand out, because it differentiates their businesses from most others.

Although what constitutes a mature enablement model continues to evolve rapidly, the following characteristics have become the new foundational pillars of the organization.

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<sup>3</sup> Shaun Santos, Technology Services Industry Association, "Social Media 2011: The Technology Services Landscape," December 2010.

<sup>4</sup> Drew Kraus, Gartner, "Emerging Technology Analysis: Social CRM for Customer Service," January 28, 2011.

## People/Culture

The following is true of the people and culture of these organizations:

- The customer experience is an executive imperative designed to create competitive advantage and business value.
- The contact center is recognized as a strategic element for delivering customer experience excellence.
- KPIs transition toward customer experience metrics, including social media–specific KPIs.
- Organizational culture is transparent when employees at all levels are empowered.
- Social media is an organizationwide imperative.
- The contact center proactively engages in the monitoring and management of social media interactions.

"While it is critical to track conversations faster and alleviate any negative customer issues happening in the social atmosphere immediately, it doesn't truly add value to the customer experience unless it integrates into everything else we are doing."

— Maryellen Abreu, iRobot

## Processes

The following is true of the processes of these organizations:

- Social media is fully operationalized within existing organization-wide customer management processes.
- Social media is viewed and managed as an engagement channel not unlike other traditional channels.

## Technology

The following is true of the technology of these organizations:

- A unified customer experience solution seamlessly manages customer interactions across all channels, including social channels.
- The technology is able to intelligently route relevant social interactions, according to intent and sentiment, to the appropriate resource in the organization.
- Social media content is infused within existing knowledge management processes. It is a unified part of the organization's knowledge foundation.

## Bottom Line

In a mature enablement model, leveraging social media in the contact center as an engagement channel is a linchpin for upholding brand value and fulfilling corporatewide customer experience objectives. Organizations are able to enjoy tangible, measurable benefits and ROI by fully operationalizing and scaling social media within their existing customer engagement and knowledge management processes.

## Conclusion

As consumers increasingly turn to social channels to seek information and advice and to express opinions, there is no question that organizations must engage with those channels to deliver appropriate customer care and ensure positive experiences. As the epicenter of multichannel customer engagement, the contact center is a key strategic focal point for customer engagement via social channels. Enablement of the social contact center requires the organization to be able to

1. Listen and respond
2. Be where your customers are
3. Build and leverage community

Lessons learned from these early forays into social engagement have us taught that it cannot be an ancillary “bolted-on” customer process. With hindsight, we now know definitively that to reap the full benefits of social engagement, organizations must skip over these failed Band-Aid approaches and set their sights on a mature engagement model. This mature model is characterized by a unified customer engagement platform that infuses and seamlessly manages customer interaction across all channels, including social channels. It is also characterized by a corporate culture of transparency in which social media is an organizationwide imperative and employees at all levels are empowered.

The resultant benefits include greater cost savings from operational efficiencies, improved customer satisfaction and retention rates, and revenue increased through greater cross-sell and up-sell opportunities.



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