



# SERVICE



## Deliver amazing customer experiences.

We all know what constitutes a good and a bad customer experience. Waiting on hold for half-an-hour to get rescheduled when your flight was canceled? Bad. Receiving a bottle of wine in your hotel room upon check-in? Great! And certainly no one in the business wants to deliver a negative experience or frustrate customers, so what makes the difference between the companies that deliver and the ones that don't meet the bar?

Amazing customer experiences happen when companies empower their employees to listen to, personalize interactions with, and engage with their customers across the product or service's life cycle. Revealing the human side of your business is one of the most important strategies in the era of the social and mobile customer. For customer service in particular, delivering amazing customer experiences on social has become an important way to brand your company, drive new sales, and keep existing customers happy.

In this social listening guide for customer service, we've reached out to some of the foremost thought leaders on the subject. Future publications will feature some of the research and data that we're uncovering by collaborating with the world's best companies, organizations, and governments. We'll also focus on social engagement at scale.

This first ebook on social listening for service also accompanies the launch of Microsoft Social Listening and Social Insights, powered by InsideView. Both are now available in Dynamics CRM at no additional cost and can be used by anyone with a professional license\*. This type of affordable, democratized social insights is set to change the game for our customers, and we've only just begun. With our recent acquisition of Parature, we're on a path to empower companies like never before. We hope you find this series valuable to your business, and we look forward to hearing about how you deliver amazing customer experiences on social.

Let's get our social on.

All my best,

*Fred Studer*

**GM, Microsoft Dynamics CRM**

<https://twitter.com/fredstuder>

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# SOCIAL AND MOBILE

*have changed everything*

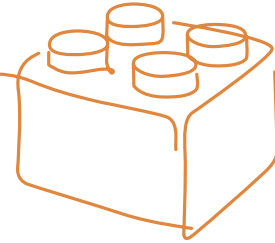
There are nearly 2 billion people on social\*. We use social every day to keep up with our friends and families. We use social to keep up with the global community, watching global events unfold from local perspectives. We use social to connect with businesses and brands that we feel loyal to.

As a result, we're sharing more than ever before on social channels. We upload and share more than 500M photos per day. In any given second, 5,000 tweets are broadcast across the world—the growth in these numbers over a short time is incredible.

More importantly, the conversations that used to happen offline with friends and contacts are increasingly shifting online. Consumers are responding to information and influence from within their social networks as they make decisions about purchases and brand loyalty.

For businesses, this is a new opportunity to engage in conversations that used to happen privately.

Delivering  
**WOW!**



Thanks for sending us an email!

We are very sorry to hear about you losing your Jay minifigure but it sounds like your dad might have been right about leaving it at home. It sounds like you are very sad about it too.

Normally we would ask that you pay for a new one if you lose one of your minifigures and need to have it replaced. My bosses told me I could not send you one out for free because you lost it but, I decided that I would put a call into Sensei Wu to see if he could help me.

Luka, I told Sensei Wu that losing your Jay minifigure was purely an accident and that you would never ever let it happen ever again. He told me to tell you, "Luka, your father seems like a very wise man. You must always protect your Ninjago minifigures like the dragons protect the Weapons of Spinjitzu!" Sensei Wu also told me it was okay if I sent you a new Jay and told me it would be okay if I included something extra for you because anyone that saves their Christmas money to buy the Ultrasonic Raider must be a really big Ninjago fan.

So, I hope you enjoy your Jay minifigure with all his weapons. You will actually have the only Jay minifigure that combines 3 different Jays into one! I am also going to send you a bad guy for him to fight!

Just remember, what Sensei Wu said: keep your minifigures protected like the Weapons of Spinjitzu! And of course, always listen to your dad.

You will see an envelope from LEGO within the next two weeks with your new minifigures. Please take good care of them, Luka. Remember that you promised to always leave them at home. Happy building!

Sincerely,

Richard  
LEGO Consumer Services

Perhaps more than any other department, your customer service team has the biggest role in creating amazing customer experiences. While customer service used to exist only at the counter or the call center, today it exists across the social web. Good customer service can drive extreme loyalty as well as create positive word-of-mouth from satisfied customers. This is why LEGO® has one of our favorite customer experience stories from 2013.

These types of amazing customer experiences influence buying decisions and, in turn, financial performance of companies. Watermark Consulting, a think tank, analyzed the five year performance of the Top 10 Leaders and Top 10 Laggards in the Forrester Customer Experience Index versus the broader S&P 500 Index between 2007 and 2011. The return of the Customer Experience Leaders portfolio was 128% higher than the Laggards, and 27% higher than the S&P 500. Their results shed light on how delivering amazing customer experiences can enhance a company's ability to outperform the market.

# Bad Customer Service = **BAD BUSINESS**



It should go without saying that customer service can make or break a business. When companies fail to meet service expectations from customers, they lose business. 78% of consumers have abandoned a transaction in the face of poor customer service.<sup>1</sup> It's six times more costly to win a new customer than it is to keep an existing one.<sup>2</sup>

Customers use social to vent frustrations over brands when something goes wrong. Examples include:

- Tweeting at an airline for a delayed or canceled flight
- Complaining about a promised shipment that never showed up
- Publicizing a product recall

Companies experience PR crises because of frustrated customers complaining via social media. Such crises, and their subsequent response (or lack thereof) can make or break a business. The cost of bad customer service should serve as a motivator to start listening to your target audiences. After all, consumers are twice as likely to discuss poor customer service experiences as they are the good ones.<sup>3</sup>

Having an agile social media strategy already in place is extremely beneficial in times of crisis. What's even more helpful? Never let a complaint become a crisis: instantly address a problem or complaint the moment it hits the airwaves—or Twitter feed.

The sheer volume of conversations can be daunting. Brands need to look beyond mentions of their handle or posts on their owned social properties. There are millions of blogs, forums, and news outlets that customers can mention your brand on—and they aren't always specifying @delta or @ups.

Social monitoring software and social listening tools can help you filter the social noise and proactively engage with your customers, and, more importantly, ensure you survive and thrive in a competitive consumer-driven world. Read on to discover how social listening can help you track and respond customer service issues (—and in the process avoid crises), get product feedback, and measure the benefit in customer satisfaction and loyalty.

<sup>1</sup> American Express Survey 2011

<sup>2</sup> White House Office of Consumer Affairs

<sup>3</sup> 2012 Global Customer Service Barometer

# Getting Started with Social Listening

## FOR CUSTOMER SERVICE



### 1. Build an integrated strategy

**across departments:** No single team should completely own customer interactions on social. It's important to work across departments to build an integrated strategy. That said, your customer service team has one of the most important seats at the table. Not only is it critical to respond to customers via social channels, it's essential to share the stories that make your employees and your company amazing.

### 2. Create a social media policy:

Many brands make poor choices on social media and, as a result, damage their credibility. Train your customer service and social team members thoroughly. Give them approved social media guidelines for reference. These guidelines should include ways to handle particular customer situations, what they can and can't post through the company's social media handles, and the names and emails of company management/experts to refer to for questions. Managers should feel comfortable empowering their employees with their brand's social media handles.

### 3. Find your customers' preferred channels—and listen in their preferred language:

Tracking customer service issues on social requires discovering where your customers are asking for help. From there, you can prioritize resources and give your customer service professionals the tools they need to quickly and efficiently help people out. Are you customers primarily on Twitter? Do they mostly leave comments or messages on Facebook? Which country are they in and in what language do they speak? Tracking this type of data helps you determine if your knowledge database should focus on 140 characters, videos, Spanish translations, or other types of visuals.

### 4. Create dedicated customer service accounts:

For all technical questions and troubleshooting, create separate customer service accounts on each social network your customers use. This will help ensure all customers receive answers to their individual problems. Save your brand's main social media account for positive customer interactions, handling large issues, and spreading marketing messages.

### 5. Get a sentiment baseline:

The most advanced customer service teams are leveraging advances in social listening technology not only to track mentions, but sentiment as well. By measuring social sentiment on your products and services, you can quickly identify upward and downward trends, their drivers, and the best way to respond.

### 6. Empower your employees:

Social listening technology can help every employee be more responsive to your customers. In fact, as these types of products become more accessible, many organizations are beginning to give all of their employees access to social listening and publishing tools directly within their CRM. Microsoft Dynamics CRM, for example, now offers social intelligence and social insights to anyone with a professional license.\*

### 7. Find your "LEGO" moment:

While giving away free products and services is sure-fire way to create amazing customer experiences, it's not realistic to do every time. However, creating the same type of targeted moments that LEGO created with the 7-year old boy can go a long way. Get your team to start thinking about your own "LEGO moment". It will inspire your employees to think creatively about how to exceed customer expectations, and it could inspire your customers and create loyal brand advocates for life.

Of course, tracking customer service issues is only half the battle. Savvy brands reach out to consumers on their platform of choice with a resolution. Social listening sets the stage for you to identify and solve problems quickly—and ensure you are supporting your customers across the entire product life cycle.

# Tracking and Responding to CUSTOMER SERVICE ISSUES



Social listening lets you spot customer satisfaction trends even if customers don't call or email you to complain.

## 1. Respond quickly and sincerely:

As soon as you spot the issue, respond right away, but don't offer up a pat answer. Showing customers you are truly listening requires a conversational approach in which you respond according to the individual's specific experience and on the channel that the customer reached out on.

**2. Keep it cool:** Treat what you write on the social web as if the entire world were watching. Don't respond to angry customers in kind, and consider taking the conversation private. Ask the customer for his/her email address, phone number or preferred method of contact so you can handle the complaint outside the social media spotlight.

**3. Remember to follow up:** Just because you issue a refund or replacement—or take some other action to satisfy the customer—doesn't mean your job is done. Follow up is critical. Revisit the social media forum where the original complaint was lodged, thank them for calling out the issue, and demonstrate to the masses that there was a positive resolution. Also take the opportunity to privately ask if they are satisfied with the resolution.

**4. Watch for trending topics:** A single complaint is one thing, a trend of positive or negative feedback about a specific aspect of your product or service is quite another. Use your social listening software to watch for trending topics so your customer service team can reach out with solutions and pass on what they've learned to product development and marketing before sales begin to decline.

**5. Focus on what matters:** Inevitably you'll encounter someone with nothing better to do than to harass people online. As you continue to build your social customer service skills, you'll get better at quickly identifying these types of interactions. At the end of the day you can't be all things to everyone, so it's important to pick and choose your battles. That being said, it's equally important not to let a genuine issue go ignored. Sometimes just a few quick seconds of research on someone can help identify patterns in a person's online behavior. If it walks like a troll and talks like a troll—it's a troll. Move on to bigger and better things.



# Best Practices for **PRODUCT FEEDBACK**



Armed with social intelligence, customer care teams are increasingly becoming key advisors for product development teams. Here are three quick tips to harnessing social insights to resolve issues and make better products.

## **1. Use social listening for product feedback:**

Leverage the power of social listening technology to tune in to customer reviews of your products and services. Compare notes and share if there are quick wins you can make with your product or marketing efforts.

## **2. Get to the root of the issue:**

Are the issues around a specific product? Is it a specific audience that's doing most of the complaining? Are certain comments, like "price too high" or "quality too low" consistently arising? You can't fix something you haven't identified. Social listening can help you identify the root issue quickly. Generally speaking, customers complain about three things: mistakes in processing the order, general dissatisfaction with the product or service, or poor customer service. What does the social chatter tell you? Now address them—and let your customers know they've been heard.

## **3. Get ahead of the competition:**

Listening to the conversations around your competitors' products is the perfect opportunity to fill a need that your competitors cannot. That type of competitive intelligence could also lead you to new product offerings and potential new product features.

# Key Metrics for your Social Listening CUSTOMER SERVICE PROGRAM



**1. Response time:** The time it takes you to respond to customer service requests from your audience. Social listening can help you identify those queries and respond faster.

**2. Time-to-resolution or first-contact resolution:** How long did it take from the time the customer reached out to the time you resolved the issue? Social listening helps you find issues you may not have otherwise known about.

**3. Response rate:** The percentage of customer inquiries your team responds to within a given time frame. Again, social listening can help you find more inquiries more quickly, leading to more efficient and more thorough customer service.

**4. Activity by hour:** How your responsiveness changes from morning, noon, night and late night. This metric can help you determine when your social network is most active so you can amp up staff during those hours.

**5. Activity by week:** How your responsiveness changes from Monday through Sunday. This metric can help you determine what days your social network is most active so you can amp up staff during those days.

**6. Number of issues identified:** How many issues are you clearing up through your social listening and responses? How does that compare to other channels? If your social media customer service is growing over time, you need to adjust your strategy.

# Insights FROM THE EXPERTS



We published these responses from some of the world's most influential social thought leaders, raw and unfiltered. While the views expressed here may not necessarily reflect the views of Microsoft or endorse Microsoft's products, we are all about diversity of opinion and open dialogue. We believe this is the best way we can support our customers.

As we continue to build on this series to discover how companies are creating amazing customer experiences on social, we'd love to hear from you.

Who should we reach out to?  
How should we look at this differently?  
Let us know at [@MSFTDynamics](https://twitter.com/MSFTDynamics).

Regards,

The Microsoft Dynamics CRM Team

# TRICIA MORRIS

PR & Communications Manager at **Parature**  
@DessertContent



## What are three key elements of an effective social strategy?

While there are a host of key elements that go into an effective social strategy, three that our brand and that I personally believe are must-haves are (1) developing and defining a monitoring, response and escalation process, (2) having the right staff representing your brand and brand voice on social media, and (3) centralizing social media and especially customer service with your other support and communication channels.

## How has engaging your customers on social benefited your company or your clients?

For Parature, our company strives both to deliver impressive customer service software and impressive customer service. Engaging customers and followers on social media lets our customers and prospects know that we care and are interested in their brand or organization, that we're listening no matter what channel they want to reach out on, and that our own social monitoring and response solution works well.

Engaging authentically and in a timely manner also increases trust in our company and has helped to build Parature's reputation as a customer service provider and thought leader. Instead of a one-way push of sales and promotional tweets and posts through our social media channels, Parature chooses to actively engage and participate in the social conversation, sharing customer service best practices of our own, as well as those of others. In 2013, our social product and our approach to social customer service and engagement paid off in the receipt of Frost & Sullivan's North American Social Customer Service Applications Customer Value Enhancement Award. This was a truly meaningful recognition for us.

## What are some tips on dealing with negative sentiment on social?

One of the best tips is don't fire back. While it's natural to want to offer a rapid response, and social media demands a quick reply, take some time to think through the reply you're offering on behalf of your brand to make sure it's polite and cannot in any way be misconstrued or misunderstood.

Never use an auto-response; you can tweak a scripted response from your brand, but never offer the same reply over and over or provide a reply that sounds robotic. Brands such as American Airlines and Bank of America have learned this lesson the hard way. Social media is just that, social. Customers and followers want an authentic and human response.

Do not delete a negative post or tweet unless it's offensive. Deleting complaints and questions can lead to even more social backlash and a tarnished PR reputation, at least for a while, as many major organizations and brand have learned.

A professional and polite response is always the best course of action with helpful and proactive follow-up, taking the matter off social media if needed to avoid further conflict and to deliver a satisfying response and customer service experience. Probably one of the most famous recent examples of what not to do in response to a negative tweet or post came in 2012 when Sir Patrick Stewart tweeted to Time Warner Cable that he had lost the will to live after trying to set up a new account. While the social customer service rep tried to be helpful and had an amazing response time, they assured Stewart they were going to take care of the issue on social but didn't offline, and the whole service conversation played out in the public view on Twitter. Follow-through is key.

*More ahead >*

## TRICIA MORRIS (continued)

### Who are the top 5 people you follow on social?

- Paul Greenberg: @pgreenbe  
The godfather of CRM, Paul Greenberg is the Managing Principal of The 56 Group, LLC, and authors "Social CRM: The Conversation" for the CBS-owned technology media property, ZDNET. Paul is the author of CRM at the Speed of Light: Social CRM Strategies, Tools and Techniques for Engaging Your Customers, which has been used as primary text by more than 70 universities. Need to know what analysts think about social customer service, social CRM, and its future? Follow Paul's fascinating predictions, insights and conversations with fellow analysts like Esteban Kolsky, Brent Leary and more on Twitter. He is leader; never a follower.
- Econsultancy: @Econsultancy  
I use Econsultancy as a go-to source for reputable statistics to back up social customer service and social media trends, best practices and to get key highlights from top polls.
- Zappos Service: @Zappos\_Service  
The Twitter handle for Zappos Customer Service is always on and always responsive. This is a terrific example of a company that takes social customer care serious and offers an authentic brand voice on social media. You will never get an auto response from these social customer service leaders.
- Brian Solis: @briansolis  
Brian is the Principal Analyst at Altimeter Group and is globally recognized as one of the most prominent thought leaders and published authors in new media. A digital analyst, sociologist, and futurist, Solis has studied and influenced the effects of emerging media on business, marketing, publishing, customer service and culture. His book, Engage, is regarded as the industry reference guide to build and measure success in the social web.
- Frank Eliason: @FrankEliason  
Referred to as "the most famous customer service manager in the US and possibly the world" by BusinessWeek for his social customer service and the man behind the twitter handle @ComcastCares, Eliason is best known for developing the use of social media in the practice of customer relations. He is now Global Director of Social Media at Citi, and remains a sought-out social customer service thought leader.

### What are your top 3 tips on how to get up to speed on social?

- 1) Watch others before you participate, Not just to learn the rules, but to learn what leaders in your industry with large follower counts are doing right or differently.
- 2) Read up on social media best practices and trends.
- 3) Learn the nuances of each channel.

### How important is social listening to your marketing team?

Extremely. For Parature, social listening is extremely important to our marketing team to monitor brand reputation, share customer service best practices, know what analysts are saying about us (as well as key trends and competitors in our industry), and to interact with influencers, partners, customers and members of the #custserv community.

### How important is social listening to your service team?

Extremely. For Parature, social listening is extremely important to our company, not only to use social as the canary in the coal mine to notify us of any potential customer or product issues, but also to answer customer questions, respond to feedback and entertain product development and improvement ideas. For Parature, it's especially important that we listen and respond, as our customers know we offer and use our own social monitoring and response solution. It needs to work.

# STÉPHANE SAMSON

Group Brand Director, Lotus F1 Team  
@stephanesamson



## What are three key elements of an effective social strategy?

The first key element, for Lotus, would have to be the interaction with the fans. We never look at the raw figures but at our engagement rate. We, first of all, want to create a genuine community, and not one of the diluted, monstrous army of “fans” who finally do not really care about your brand. This is the reason why we never fell into the paid campaigns on Facebook to grow drastically our fan base, for example.

Secondly, creativity is really important too: you need to surprise and entertain your fans, you want to go viral from time to time. Lotus often gets close to the line, but it's part of the game.

Finally, you need to be responsive. Answers and re-tweets have to be sent instantly, not two days after the original message was posted. It helps to humanize your social presence, which is key in building a strong and engaged community.

## How has engaging your customers on social benefited your company or your clients?

It has actually helped us build the brand the way we wanted to. Lotus F1 Team is all about being approachable, but also cheeky and sometimes disruptive. We've always been honest and transparent too. This is something that our fans liked a lot, especially compared to our rivals' approach. Engaging with customers has helped Lotus F1 Team establish itself as a new race team, as everybody today seems to have forgotten about Renault.

## What are some tips on dealing with negative sentiment on social?

As we said before, we never deny if the negative sentiment is generated by a true story. We sometimes acknowledge, we even apologize when we have to. Of course, some people will always go too far and their messages will require moderation if not appropriate. But it does not happen that often.

## Who are the top 5 people you follow on social?

- Usain Bolt: [@usainbolt](https://www.facebook.com/usainbolt)
- Manchester City: <https://www.facebook.com/mcfcofficial>
- Element: [instagram.com/elementusa](https://www.instagram.com/elementusa)
- LeBron James: <https://www.facebook.com/LeBron>
- Mashable: <https://www.facebook.com/mashable>

## What are your top 3 tips on how to get up to speed on social?

Be responsive, be daring, be honest.  
Listen, monitor and engage.

## How important is social listening to your marketing team or marketing teams in general?

Extremely. We're part of the same team, building a brand. In this respect we need to be fully in line.

## How important is social listening to your sales team or sales teams in general?

Not very. Social media are not used to please our sponsors, but we always show them a lot of respect.

# JESSICA SMITH

Senior Marketing Director **FlexJobs.com**

@JessicaNow



## What are three key elements of an effective social strategy?

- Defining what success looks like and being able to clearly articulate it to the organization.
- Setting a baseline and then mapping metrics to that success so the team can pivot and optimize appropriately.
- Developing tactics to support and then testing, measuring, and tweaking those tactics to reach established goals and benchmarks.

## How has engaging your customers on social benefited your company or your clients?

A job search can be very personal for a lot of people so we identify their pain points and address them through a robust content strategy that aims to be helpful but still respects that this is a personal experience for them. By measuring engagement, we have also realized that jobseekers like to hear first-hand experiences of other jobseekers so we regularly featured job seeker success stories. These get a lot of great responses across our social channels. The benefits of having strong content and different voices represented is that our content is shared across various social channels. Unlike other job boards, our paying customer is the jobseeker versus the employers, so our conversations and content are based on what they, the jobseekers, want and what they have expressed that they need.

## What are some tips on dealing with negative sentiment on social?

There are varying degrees of negative sentiment that companies will deal with on social. For example, a customer complaint that is easily and quickly resolved is a lot different than a crisis situation where the impact to business is large and hard to contain. Here are 5 things I recommend when faced with negative sentiment on social.

- Even if you don't have an immediate answer or solution, acknowledge the frustration/anger/disappointment immediately so that the person (or people) know they have been heard and that it's being addressed. Do this publicly on the social channel where the negative sentiment was initiated.

- Next step is to have them privately send you their preferred method of direct contact information such as a phone number or email so that you can take the conversation offline. You will accomplish more one on one.
- With that said, remember that anything you say through private channels can easily be relayed via social. Be especially careful with what you send via email as screenshots can be taken and shared within minutes.
- Make sure every communication you have demonstrates your commitment to resolution.
- If the person or people insist on continuing the conversation via the social channel versus one-on-one, don't panic. Use this as an opportunity to show the public how well your organization handles their customer experience and how responsive you are via social.
- Sometimes you will run into people who do not want to resolve the issue and really just want to drag your name through the mud. This is unfortunate but not unusual. Take the high road, offer reasonable solutions, and be clear and concise in your communication. If you remain reasonable and fair, you will find that you will come out more respected by your existing fans and might pick up a few new ones because of your professionalism.

## Who are the top 5 people you follow on social?

- John Andrews: [www.linkedin.com/in/katadhin](http://www.linkedin.com/in/katadhin)
- David Meerman Scott: [www.linkedin.com/in/davidmeermanscott](http://www.linkedin.com/in/davidmeermanscott)
- Maggie McGary: [www.linkedin.com/in/maggiemcgary](http://www.linkedin.com/in/maggiemcgary)
- Amy Vernon: [www.linkedin.com/in/amyvernon](http://www.linkedin.com/in/amyvernon)
- Don Bartholomew: [www.linkedin.com/in/donbartholomew](http://www.linkedin.com/in/donbartholomew)

## What are your top 3 tips on how to get up to speed on social?

- Don't overthink it. Just remember it's two-way communication, so don't use it like a bullhorn.
- Think about your personal favorite brands, and see how they are using social.
- Be active on LinkedIn; there are lots of really good influencers sharing their expertise.

# BRIAN CARTER

CEO, Lead Consultant, Keynote Speaker **The Carter Group**  
@briancarter



## What are three key elements of an effective social strategy?

- A budget for social ads
- Consistent creation of high quality content
- Using the first two to build the size and diversity of your owned media lists (email, fans, followers, group members, retargeting audiences)

## How has engaging your customers on social benefited your company or your clients?

Pretty incalculable. First, the ROI of networking is impossible to anticipate and very hard to quantify. I've met several people who've changed my career in good ways. Engagement on Facebook is critical to remaining visible and top of mind while reducing how much you have to spend to do so. Also, it's important to engage non-customers too, if you want lead gen and new customers.

## What are some tips on dealing with negative sentiment on social?

First, if it's true, fix your company. Beyond that, I believe in being proactive and owning the space in which you distribute content and lead conversations - that could be a Facebook page or group or a LinkedIn group. I believe you should be clear about the behavior you want to see, what kind of comments are unacceptable and what will get people banned. I don't worry about eliminating those people, because my best customers are not the trolls or the people who dislike me anyway.

## Who are the top 5 people you follow on social?

I mainly use Facebook (on Twitter, I follow too many people to use my stream) and don't typically follow people on Facebook that I'm not friends with - but I am friends and fellow group members with some folks who are both fun and smart:

- Jason Miller of LinkedIn: <https://www.facebook.com/Jasonmillerca>. He's amazing at content marketing.
- Merry Morud of AIMClear: <https://www.facebook.com/merry.morud>. She's a Facebook ad guru.

- Jay Baer of Convince & Convert: <https://www.facebook.com/jaybaer>. Probably the classiest social media speaker.
- Michael Stelzner of Social Media Examiner: <https://www.facebook.com/stelzner>. Amazing at business having grown an agency, a white paper business and now SME and the Social Media Marketing World conference.
- Jeff Widman of Unified: <https://www.facebook.com/jeffwidman>. Super smart on stats and analyzing social media.

## What are your top 3 tips on how to get up to speed on social?

I can't do just three! It's such a huge amount of learning... Buy books, go to conferences, get into good discussion groups, network with experts and gurus in person, and set up a Google blog alert on the topics you're trying to learn.

## How important is social listening to your marketing team or marketing teams in general?

I think it's more valuable to PR and customer service than to "direct" (results-oriented) social marketing. The other side is competitive intel like InfiniGraph does, and psychometric market research like Facebook Graph Search. I'd much rather understand my prospects and customers that way than read the typical SM listening reports on people who mention my company. The people who talk about companies aren't always the customers, so it's more of a PR thing to me.

## How important is social listening to your sales team or sales teams in general?

I believe sales and marketing should collaborate, and this is more of a marketing/PR function. However, anywhere the complaints heard in social listening echo what salespeople hear in objections? That's important and needs to be addressed.

## How important is social listening to your customer service team or teams in general?

Your customer service team definitely needs to be paying attention for cries for help via social.



# CLARA SHIH

CEO & Founder **Hearsay Social**, board member of **Starbucks**, author of *The Facebook Era*  
@clarashih



## What are three key elements of an effective social strategy?

- Focus on customer rather than on functional silos
- Clear business goals and metrics
- Executive sponsorship

## How has engaging your customers on social benefited your company or your clients?

- Product ideas and feedback
- Word of mouth
- Close connection with the customer voice and stories which are incredibly compelling to all of our employees

## What are some tips on dealing with negative sentiment on social?

Be honest and responsive. Diffuse and move the conversation offline if possible. View it as an opportunity to get even better.

## Who are the top 5 people you follow on social?

- Aaron Levie: @levie
- Jeff Weiner: @jeffweiner
- Bill Murray: @billmurray (parody account)
- Linda Descano: <http://www.linkedin.com/influencer/204274949>
- Mohamed El-Erian: <http://www.linkedin.com/today/influencer?authorId=34334392>

## What are your top 3 tips on how to get up to speed on social?

- 1) Use social like a consumer first to learn the etiquette, lingo, and customer perspective, and only then start using it for business.
- 2) See how the best companies do it and adapt the best ideas for your business (e.g. Starbucks, AXA, Lululemon).
- 3) Start small and keep iterating. Social media is a long-term commitment, not a one-off campaign. Don't be afraid of failure or not getting it exactly right the first time around.

## How important is social listening to your marketing team or marketing teams in general?

Extremely important to listen first before responding or taking other action.

## How important is social listening to your sales team or sales teams in general?

Extremely important. Sales is the next frontier of social business. At Hearsay Social, we started our entire company on this premise and have seen record growth year after year since we founded the company in early 2010.

## How important is social listening to your customer service team or teams in general?

Very important. Depends on the industry you are in and whether your customers want to be serviced through social media channels.

## MICHAEL BRITO

Group Director, Content & Engagement **The W2O Group**  
@britopian



### What are three key elements of an effective social strategy?

I would say that the three elements of a social strategy consist of analytics, content and engagement. Analytics will give you a 360-degree view of your customer and what they truly care about. In addition, looking at historical content performance is key to better understanding how and when they like to consume content. These variables will help deliver a more effective brand story (content) that will break through the clutter and reach consumers with game-changing content. The last is engagement. What's the point of creating awesome content if you aren't going to prove that the brand is human and engage in a conversation.

### How has engaging your customers on social benefited your company or your clients?

Engagement equals brand love. When brands prove that they are human, solve customer problems and/or provide helpful information, they naturally create brand advocates. An advocate is someone who will promote or defend the brand without being asked to do so. This is good for all brands.

### What are some tips on dealing with negative sentiment on social?

The first tip is to ensure that the sentiment data is actually accurate. Sentiment analysis still has a long way to go before it can be substantiated as a good measurement framework. That said, the second tip is to "only" engage in negative conversations if you are actually planning on having a resolution. If you aren't prepared to manage negativity, then I would say that social media may not be the right channel for you to engage in quite yet.

### Who are the top 5 people you follow on social?

- Jeremiah Owyang: @jowyang
- Jacob Morgan: @jacobm
- Dave Berkowitz: @dberkowitz
- Brian Solis: @briansolis
- Jay Baer: @jaybaer

### What are your top 3 tips on how to get up to speed on social?

- 1) Just do it. Stop procrastinating. You will make mistakes and learn from them.
- 2) Read a lot. There are several blog posts and resources for you.
- 3) Participate: Use the tools personally so you can learn how to apply them professionally.

### How important is social listening to your marketing team or marketing teams in general?

Extremely. Just like any relationship, the majority of what you should be doing is listening.

### How important is social listening to your sales team or sales teams in general?

Extremely. For the same reasons above.

### How important is social listening to your customer service team or teams in general?

Extremely.

# JASON MILLER

Senior Content Marketing and Social Media Manager, LinkedIn Marketing Solutions, **LinkedIn**  
@JasonMillerCA



## What are three key elements of an effective social strategy?

Good question. From my experience it would be:

- Social Intelligence (Listening). Having the right tools in place to monitor conversations around your brand, where they are happening, and who's saying what is essential. Taking it up a notch to measure sentiment, share of voice and share of conversation is where some of the best insights can happen.
- Continual Source of Content (Fuel). Content fuels social; without it, your business objectives will likely fail.
- Budget to Promote (Extend Reach/ Targeting). 2014 is the year of pay to play. If you are serious about social media, then you need to have a serious budget in place to support both headcount and native advertising, with an emphasis on mobile.

## How has engaging your customers on social benefited your company or your clients?

First and foremost it shows that your company is paying attention and communicating with them where they choose to be. Social has changed everything in terms of how customers and prospects buy. They are now in control of their journey and will go on it with or without your company being involved. Engaging in social very early on is essential for building relationships with these folks and staying top of mind so that when they are ready to buy, your company will likely be their first choice.

## What are some tips on dealing with negative sentiment on social?

It's all about responding promptly and sincerely. Social media gives everyone an equal voice for both praise and complaints. Many times they simply want to know that they are being heard, and responding quickly and offering to help can very often turn a negative mention into a positive one.

## Who are the top 5 people you follow on social?

- Ann Handley: <http://www.linkedin.com/in/annhandley>
- Brian Clark: <http://www.linkedin.com/pub/brian-clark/8/606/b5a>
- Mike Stelzner: <http://www.linkedin.com/in/stelzner>
- Jay Baer: [www.linkedin.com/in/jasonbaer](http://www.linkedin.com/in/jasonbaer)
- Nichole Kelly: [www.linkedin.com/in/nicholekelly](http://www.linkedin.com/in/nicholekelly)

## What are your top 3 tips on how to get up to speed on social?

- 1) Put together a plan. Have a 30-60-90 day plan in place so that you don't get overwhelmed up front and give up before you start to see results, and stick with it. Social media success does not happen overnight.
- 2) Set Your goals. List the goals that you are looking to achieve with social: lead gen, brand awareness, customer service etc. They should be aligned and support your overall business goals.
- 3) Don't overcomplicate things. It's going to take time, effort, budget and headcount but you don't have to do it alone. There are a ton of great consultants and agencies that can help you get your social strategy up and running and into a good place where it will be delivering value.

## What are your top 3 favorite educational resources for social listening?

Social Media Examiner, Social Media Explorer, and the Hootsuite Blog.

## How important is social listening to your marketing team or marketing teams in general?

Extremely. Customers and prospects expect responses in near real time. Arriving late to the conversation means you have missed your opportunity.

## How important is social listening to your sales team or sales teams in general?

Extremely. Again, I cannot stress this point enough. These are not only conversations, but opportunities for both sales and marketers to interact with customers and prospects. If you are not listening, you are simply missing opportunities, and ultimately sales.

## How important is social listening to your customer service team or customer service teams in general?

Extremely. The voice of the customer is bigger and louder than ever before. Social is their telephone which can quickly turn into a megaphone. If your customer service team is not monitoring the conversations closely and responding promptly then your brand/ product and or service will suffer.

# RYAN HOLMES

CEO, HootSuite  
@invoker



## What are three key elements of an effective social strategy?

- **Planning and goal-setting.** What goals are you trying to achieve as an organization? Who are your customers, and what is most important to them? What level of social empowerment are you looking to achieve—team, department, or organization-wide? Are you in a regulated industry, such as healthcare or financial services, where there are communication restrictions?

Consider how social media can help your company achieve its most important objectives and then set some goals. Next, identify the resources necessary to manage your social media efforts, set guidelines for how employees should engage in social media, and provide training to encourage active participation that is aligned with company goals.

- **Active listening and engagement.** Start by monitoring for mentions—the good, the bad and the ugly—of your brand. Also listen for cues and trends in your industry and on your competitors. Next, follow the conversations and the people that are relevant to your business. Then begin to engage in conversations with content that is interesting, relevant or useful to your audience. Retweet posts you find interesting and use hashtags to increase the discoverability of your content.
- **Measure results.** Provide visibility on how your social programs are moving the needle. If you are just kick-starting your social media strategy, start with tracking the Like, @ mention, Retweet or Follow activity. As your social strategy becomes more advanced, build the capacity to measure every social action, and link to key business goals, such as brand sentiment, revenue and customer satisfaction. One way to do this is to use a URL shortener (like ow.ly), to track your click-throughs and leverage analytics to measure on-site conversions. You can even drill into location-specific data to develop geographic insights on your social efforts.

## How has engaging your customers on social benefited your company or your clients?

Social media is an integral part of our entire organization—from customer support, to marketing and sales.

Our customers move at the speed of social. When they reach out to us, we need to respond quickly. It also allows us to be proactive with our clients. We use our own platform to constantly listen to online conversations about our product so we can spot and respond to positive and negative feedback as quickly as possible and respond accordingly. Our support department—a 17-person team that supports 8 million users—uses social media daily to engage with our clients more effectively online. This allows us to be more available, deliver faster responses, and engage with our clients by being where they are. Thanks in large part to social media, HootSuite boasts a customer support satisfaction rate that exceeds industry standards.

Every customer matters, and their experience with your company determines not just whether they will continue to be a loyal customer, but whether they will advocate your product or service to their followers. At HootSuite, more than half of our Enterprise clients started out by using our Free product. These customers increased their investment in HootSuite over time because they grew to trust and depend on our product, and because they appreciate that we valued them even before establishing a financial relationship. We use social media to connect with these customers and support them on their social journey.

Our sales department uses social media to identify prospects who express purchase intent or indicate that they are in a position to buy. These buying signals are visible, in real-time on social networks such as Twitter, LinkedIn Groups, as well as blogs and forums. By proactively reaching out to buyers who are looking to purchase, our sales team is able to have meaningful conversations directly with the decision maker.

Read on >

# RYAN HOLMES (continued)

## What are some tips on dealing with negative sentiment on social?

Nielson has reported that more than half of all U.S. consumers now turn to social media to air questions and complaints about products and services. The good news: The majority of consumers who experience a quick and effective brand response on social media are likely to recommend that brand to others.

So it's important to spot negative comments about your brand quickly and then address them immediately and effectively. If the negative sentiment is based on misinformation, correct the misinformation publicly in the social channel. When a customer complaint is a matter of opinion, acknowledge the concern and then make arrangements to connect with them privately to resolve the concern.

At HootSuite, we see every complaint as a golden opportunity. When a customer reaches out to us we see it as a chance to engage with them and also learn from their feedback.

## Who are the top 5 people you follow on social?

- Jeremiah Owyang: @jowyang  
Chief Catalyst at Crowd Companies. His career mission: to help corporations connect with customers using web technologies
- Sree Sreenivasan: @Sree  
One of the earliest and most thoughtful social media evangelists, formerly of Columbia University, now Chief Digital Officer at the Metropolitan Museum of Art
- Charlene Li: @charleneli  
Founder of the Altimeter Group - thought leader in all things social Enterprise
- John Legere: @johnlegere  
Outspoken CEO of T-Mobile who is leveraging social to shake up the industry
- Peter Aceto: @PeterAceto  
CEO of ING Direct Canada and a truly social CEO

## What are your top 3 tips on how to get up to speed on social?

Getting up to speed on social at an enterprise level requires a holistic approach that includes change management, technology adoption, and security considerations:

- 1) Educate employees on the appropriate use of social media in a professional setting, along with the best practices on building deep relationships with customers over social channels. According to Altimeter, only 18% of companies said that their employees have a good or very good understanding of their social media policies. At HootSuite, we have mandatory social media training for all of our new employees.

- 2) Deploy a social relationship platform to empower your employees to share company content over social channels. This helps them to build their credibility with customers by being seen as industry experts. The right technology can help you do this at scale with capabilities like delegation and approvals to enforce process, and workflow and assignments to help teams collaborate on social. An open platform capable of integrating with existing line of business applications is essential for a seamless user experience.
- 3) Secure and protect your social presence. As you scale your social media strategy across the organization, involving more and more employees to support your social business goals, the chance of a mistake or a full-blown crisis can increase exponentially. By following a few basic social media security best practices, you can substantially decrease the risks many associate with these channels. These include centralizing control of social media accounts, creating complex passwords and using Single Sign-On technology.

## How important is social listening to your marketing team?

Social listening is extremely important across our marketing team, and is incorporated into activities such as campaign measurement, demand generation, reputation management and influencer marketing. We rely on social listening to create campaigns that resonate with our community. For example, our demand generation team uses social media to identify top-performing keywords that are applied to search engine optimization, pay-per-click advertising, and content marketing. Our corporate communication team relies on social listening to track brand sentiment and engagement with top influencers.

## How important is social listening to your sales team?

Social listening is an integral part of our sales process. Our sales team regularly listens to clients and prospective clients for buying signals over networks like Twitter or LinkedIn, and come in at the right time with an ice breaker to engage prospects. We use social media as "the thin edge of the wedge": a way to open up discussions with decision makers. We've found that social media is an effective and personal way to open doors.

## How important is social listening to your service team?

Our customer service team pro-actively tracks @mentions and keywords that may not have reached our specific customer service accounts. This allows us the opportunity to respond and mitigate even more customer inquiries than a typical inbound approach.

# JOHN ANDREWS

President, **The Katadhin Group**  
@katadhin



## What are three key elements of an effective social strategy?

- Clear, measurable objectives
- Content plan (curation, original, user)
- Communication guardrails (delivering a message without controlling the message)

## How has engaging your customers on social benefited your company or your clients?

It's created real relationships with clients and customers alike that resulted in:

- 1) Better communication
- 2) Higher levels of customer interaction
- 3) Measured conversion and sales impact

## What are some tips on dealing with negative sentiment on social?

- Be positive, deal with the issue not the emotion.
- If you're wrong, apologize.
- Ignore haters, Haters Hate—most people realize the difference between legitimate complaints and brand bashing.

## Who are the top 5 people you follow on social?

- Ted Rubin: @TedRubin
- Umang Shah: @UmangShah
- Zach West: @ZachDWest
- Robert Moore: @MediaLabRat
- Jim Tobin: @Jtobin

## What are your top 3 tips on how to get up to speed on social?

- Get involved—use the tools to understand them
- Be flexible—the landscape is changing quickly
- Measure everything

## How important is social listening to your marketing team or marketing teams in general?

Extremely. The lack of engagement is a good sign that no one cares what you have to say. Figure out what types of things elicit interaction and do more of those!

## How important is social listening to your sales team or sales teams in general?

Extremely. What are your customers and fans saying (or not) about them and their competitors? What conversations do they want to own?

## How important is social listening to your customer service team or teams in general?

Extremely. If there were one area to excel at, social service would be it. There is no bigger fail than having an active social stream and producing crickets when someone has a problem or question.

## BRIAN SOLIS

Principal Analyst at **Altimeter Group** and author of *What's the Future of Business (WTF)*  
@briansolis



### What are three key elements of an effective social strategy?

In a recent Altimeter Group report published by Charlene Li and me, we found that only 17% of companies identify their social strategy as mature. Just 60% feel their social strategy is connected to actual business goals.

After all of these years, the evolution of social media is not as far along as many would like to believe.

1) In our research, we also learned that just over one-third of businesses look at metrics beyond likes, followers, and comments to measure the impact on the company bottom line. This means that most businesses are looking at tactical numbers and not the bigger picture. These engagement metrics only represent activity and not necessarily movement toward something more meaningful or important.

An effective social strategy starts with defining what it is your social strategy is designed to do. Believe it or not, this is something that most businesses miss. Aligning social media strategies with business goals from the onset helps organizations begin a meaningful journey toward becoming a social business.

2) Your social media strategy must set out to do something meaningful. Unfortunately, organizations jump into social without thinking of the greater benefits for the brand and for customers and employees. Everything starts with defining a vision and purpose for your social media strategy. It must articulate what customer relationships and experiences will look like.

- What will you improve?
- What is your mission?
- How will you add value?
- How would your customers confirm that your social strategy is brilliant?
- What would they say?

This is your North Star.

3) A true social strategy also looks beyond marketing. Yet today, most social media strategies are run by the marketing team, which creates a silo. While marketing is important, an effective social strategy considers the customer lifecycle. A mere 28% of businesses we studied felt that they had a holistic approach to social media, where lines of business and business functions operate in a unified and complementary fashion.

Consider how marketing, service, HR, and lines of business can work together to meet the needs and expectations of prospects and customers. The only way to break down silos is to work together.

# REACH OUT TO LEARN MORE :)



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