Best Practices

Customer Experience Use Case Guide: Customer Care
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**Who this guide is for:**

Customer care teams including those who respond to social complaints, operational teams who fix customer issues, and (in particular) customer service managers seeking to add a strategic view to social care
OVERVIEW

Customer experience is the new frontier driving competitive advantage. Per a McKinsey study, “for every 10-percentage-point uptick in customer satisfaction, a company can increase revenues 2 percent to 3 percent.” Delivering customer satisfaction starts from brand awareness through to post-purchase and building loyalty.

Traditionally, social media analysis has focused on the care element of customer experience and that is a great place to start as it is tangible and creates immediate value. However, the digital experience has altered traditional customer journeys: 88% of consumers trust online reviews as much as personal recommendations and 92% of consumers trust peer recommendations over advertising. Increasingly, companies are using social data to inform the entire customer lifecycle (see example lifecycle below—your industry may be slightly different).

With the ever-growing number of touchpoints through the buying cycle, managing the entire customer digital lifecycle is key. When getting started with CX enhancements, take into account:

- **WHERE IN THE LIFECYCLE TO FOCUS:**
  - Brand Maturity & Competitive Set
  - Conversation Volume by Phase

- **WHAT’S FEASIBLE:**
  - Resourcing
  - Process/Policy Impacts

- **WHERE ARE THE GAPS/ WHERE CAN YOU MAKE THE BIGGEST IMPACT:**
  - Existing Data—what do you already know
  - Digital v. Operational—what experiences can you change?

As a quick reference, the chart below provides an overview of **ANALYSIS » ACTIONS » MEASUREMENT.**
This guide will walk through best practices and suggested analyses for Post-Purchase/Customer Care teams specifically.

For additional resources on how to improve the top part of the experience funnel, please see the Customer Experience: Customer Journey Guide.

**POST-PURCHASE**

We’ll start with the final stage in the lifecycle—Post-Purchase—as analysis of existing products and services helps to inform the remainder of the consumer journey. Most often, social listening is the domain of customer experience managers while engagement & publishing platforms are used by front-line agents. There are many good options to handle 1:1 interactions and manage customer care metrics (e.g. response times, issue closure, etc.). Adding listening to these engagement platforms enhances overall customer satisfaction by increasing macro understanding of customer pain points, measuring the effect of process changes and evaluating the performance of customer care over time.

Social Care teams know customer pain points more than most of the business. Social listening can quantify those issues to help the team socialize the data and bring about change through the organization:

- Company or team process
- Website or app improvements
- Product Development
- Operations
- Finance/Billing
- Marketing

With this potential it’s all the more important to be listening for the right conversations and act efficiently.
SCAPE THE POST-PURCHASE LANDSCAPE

Below is a high-level process for integrating social listening into your post-purchase analysis:

PHASE I: EVALUATE ISSUE TYPES, VOLUMES & RESOLUTION

- REQUIREMENTS GATHERING & METRICS
- CUSTOMER CARE LANDSCAPE
- DETAILED ISSUE ANALYSIS

RESOLVE IN CARE CENTER

PHASE II: ON-CHANNEL/OFF-CHANNEL ISSUE RESOLUTION

- LISTENING CONFIGURATION & DATA INTEGRATION
- WORKFLOW OPTIMIZATION

PHASE I: LANDSCAPE ANALYSIS

- Requirements Gathering and Evaluating the Care Landscape are particularly important or those new to social care
  - To conduct this analysis, build a brand topic (and potentially competitors for benchmarking)
  - Additionally, build themes for each issue type—filtering by keywords, sentiment (and potentially the channels you are considering responding on)
  - Suggested analysis include:
    - Overall volume, volume by period, volume trends
    - Sentiment overall, sentiment trends
    - Behaviors & Emotions—“why” do people feel the way they do
    - Top Authors—are their “serial” complainers
    - Owned vs. Earned—how much of the conversation is directly at you versus general negativity
  - For the first step, work with your social and/or customer care teams to solidify a few details
    - How are we currently measuring social care responses (if at all)? Are there any changes to existing metrics?
    - How do we want to “bucket” customer issues (use themes in NetBase to evaluate each bucket)?
      - Example—a restaurant company may break issues into cleanliness, service, product, and price
    - Will we create a separate customer service handle (Twitter is the most common channel for service, followed by Facebook)?
    - Will we respond to issues outside of our “owned” channels? (usually start on channel before considering off channel)
    - Do we have a script of approved responses?
    - How will we handle escalations?
After working out the requirements above, analyze your brand based on your customer care “buckets.” Use that analysis to determine:

» How large is the care conversation relative to our total brand?
» What is our average daily/weekly volume by issue type?
» Which issues lead customers to feel most negatively—measured by both sentiment and passion?
» When customers talk about “not buying,” “not using” or “switching” to a competitor—what is driving that behavior?
  • Note: these types of insights will be used to both improve care responses AND to drive insight for Consideration & Evaluation stages.

Finally, use that landscape analysis to determine:

» Optimal responses to individual issue types
» Number of resources required to handle issue volume
» Types of issues that can be responded by customer care versus those that are the domain of other parts of operations
  • Example—a CPG company may find that customers are complaining about packaging issues—something the product team can update.
  • NOTE: Frequently, brands will create social response teams that are unable to access CRM or other systems. Make sure to consider customer information required by your social care team to effectively resolve issues.

PHASE II: ISSUE RESOLUTION AND INTEGRATION

Once you have completed your macro analysis of the issue landscape, consider integrating your listening and engagement platforms. The benefits of this integration include:

» Optimized streams based on each issue type
» Ability to capture multiple channels (and off-channel if desired)
» Ability to optimize stream based on sentiment, follower count, verified, and other author filters

In addition to integrating listening on the front end, consider pushing customer care audiences back to NetBase including the various meta data from customer responses. This unique integration allows for:

» Measurement of customer care effectiveness (what was customer sentiment before, during, after the interaction)
» Retargeting of customers based on care responses
» Audience analysis by issue type

Ongoing Customer Care Monitoring

Effective Customer Care monitoring consists of 5 key functions both within NetBase and overall process:

1. Dashboards—for monitoring and reporting
2. Pulses—for real-time monitoring and crisis management
3. Alerts—for early warning on issues
4. Escalation Process & Procedures—to quickly act on the results
5. Measurement—how is customer care impacting results
Dashboards
Dashboards are a collection of NetBase widgets curated and organized in a way to help you answer specific business questions such as how are customers talking to us or how is this crisis impacting our brand.

Their purpose can be one or both of the following:
✓ **Starting point for your analyst.** This approach can help you holistically look at the conversation and more easily spot what might be worth digging into a little more.
✓ **Scheduled Reports.** You can set up daily, weekly, monthly, etc reports that can automatically be sent to you or any other an email automatically (NOTE: it is recommended however that if you’re reporting this data out to other teams or executives that you convert dashboards into Powerpoint/Keynote)

**REAL WORLD:** A QSR client has a weekly dashboard that breaks out the mentions on their social care Twitter handle by key operational themes such as cleanliness, staff experience, and order accuracy.

Pulses
Pulses are real time analytics that you display on TV screens, in a War Room during a crisis or campaign, or on an ongoing basis in your dedicated social command center.

They help people in and outside of your team
✓ **Acquaint themselves with social data in a simple, user friendly way**
✓ **Get a better understanding of what your social norms are, more easily spot deviation, and act quicker.**

**REAL WORLD:** A telecom client has a pulse dedicated to network outages, so they can quickly compare social data to cell tower performance. It helps them better prioritize in real time if and when they’ll inspect the towers. The inevitable decision might lead to fixing or replacing the specific tower(s).

Alerts
Alerts are emails containing verbatims triggered from specific saved analyses.

They are broken out into two types:
  * **Any Mention:** anytime the specific analysis is triggered I want to be emailed.
  * **Any Metric:**

**REAL WORLD:** A client had a crisis with their brand. They used NetBase audience themes (NOTE: themes of up to 500,000 authors) to gather people talking about the crisis. They then set up alerts to notify them when people who previously mentioned the crisis made a threat to switch to a competitor. They then were able to quickly identify, prioritize, and engage these users to try to win back their favorability.

Escalations and Process
Escalations are a complicated thing. You don’t want to pass along just anything to an executive or even your boss.
✓ **What are the areas you’ve been asked to escalate?**
✓ **Have you looked historically at what you’ve escalated in the past and what the feedback was from the recipient?**
✓ If you see something, do you know who to send it to?
✓ What are the quantitative/qualitative variables to get them to act? This will help you gather all the necessary supportive evidence to pass along.
✓ What are the potential cost or saving implications of your escalation?
✓ How will you track progression of this issue/concern? What topics, themes, alerts, and dashboard might you need to create?

Having the conversations early will help you create a process that’s smooth and efficient.

An effective process could:
  • Calm an irate customer before it gets worse
  • Prevent a crisis from going viral
  • Improve the operations of your product launch to drive additional savings or revenue

**REAL WORLD:** An airline client noticed people complaining about the quality of the music onboard the aircrafts, so they escalated it to the Personal Entertainment team who decided to purchase additional music. It resulted in press coverage and positive feedback from customers. The cost to the airline was greater than the value to the customer.

**Measurement**
At the end of the day after you’ve put out all the fires and tried to improve the lives of your customers, everything comes down to two key things:

✓ What impact has my team had on the health of the brand? How can that impact be leveraged for increased budget/staffing?
  o Useful measurements: Have we reduced cost by shifting to social (reducing phone or other more expensive channels)? Have we increased overall sentiment towards the brand before, during, and after? Are we resolving more cases than before?
✓ What policies and operational improvements are necessary to helping my team do their job better? What is the best way to convey this to my executives?

**CLOSING**
Customer Care is the backbone of many successful organizations. And with an estimated 67% of consumers now turning to Twitter and Facebook for customer service, major brands aren’t just adopting social care, they’re making it a major priority.

With an effective social analytics program, Customer Care organizations can measure the magnitude of customer facing problems and even identify previously unreported issues in real-time, allowing the care teams to get out in front of issues before impacting the call center and other customer care channels. Social analytics enables you to hear everything that your customers are sharing about your brand with their peers, including brand mentions that aren’t specifically addressed to your company’s social care channels. This level of insight allows Customer Care to be more proactive, delivering service that’s faster and more relevant to its customers.

With a comprehensive social analytics strategy, customer care organizations can improve responsiveness, lower costs, and deliver service “above and beyond” your customers’ wildest expectations.
NetBase is the social analytics platform that global companies use to run brands, build businesses, and connect with consumers every second. Its platform processes millions of social media posts daily for actionable business insights for marketing, research, customer service, sales, PR and product innovation.

NetBase is recognized by analysts and customers as the leader in Social Analytics. NetBase was rated a category leader by Forrester in the “Forrester Wave: Enterprise Social Listening Platforms, Q1 2016” report. NetBase was also named a top rated social media management platform by software users on TrustRadius and a market leader by G2 Crowd.