

# **Making Support Social: Turning Customer Engagement Into Customer Success**

WHITEPAPER

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## The Social Media Revolution

• The infrastructure of massive connection is now real. People around the world have cell phones. The first Internet generation is old enough to spend money, go to work and build companies. Industries are being built every day (and old ones are fading). The revolution is in full swing, and an entire generation is eager to change everything because of it. ••

- Seth Goden<sup>1</sup>

Social media is fundamentally changing how businesses and their customers interact.

According to Forrester's Social Technographics® research, more than four out of five U.S. online adults use social media at least once a month.<sup>2</sup> Most Internet users aren't passively consuming content; they're creating it: blogging, rating, commenting, debating and collaborating.

There are many reasons why the web is now social, but the most important reason is that online sharing is *useful*. Whether it's Wikipedia's ability to deliver information on essentially any topic, Yelp and TripAdvisor's trustworthy reviews, or Facebook and LinkedIn's ability to keep us connected with our friends and colleagues, we get value from information other people are sharing. Reciprocity, recognition, and a desire to have our voices be heard encourage us to contribute in kind. At its best, the social web fosters a virtuous cycle of participation and ongoing improvement.

Nowhere will the impact of the social web be stronger, or more beneficial, than in Service and Support. It's true that Marketing is pioneering the enterprise's involvement with the social web. But for them, it's a double-edged sword. Brands are no longer in the control of advertisers or PR flacks, but in the words, messages, and even music videos<sup>3</sup> of consumers.

Things are different for Service and Support—customers have always helped each other, and social technologies give them new, more scalable platforms for helping even more. Also, Service and Support owns the "use" part of the customer experience. Social media amplifies the voice of the customer, providing new ways to listen and learn from customers' real experiences. Social isn't a threat for service and support—it's a force multiplier.

In this paper, we'll examine some of the broad trends in social media, and then provide specific guidance on how to use social media to deliver support better, faster and cheaper.

### Breaking Barriers Between Producer and Consumer

The line between a product's creator and that product's user was once clear and unambiguous. GM made cars; we bought them. NBC broadcast shows, and we watched them. No one thought for a minute that they should be designing their own brakes or shooting their own videos.

Things are different now. Products and services of all kinds are configured, reskinned and mashed-up. Software is inherently customizable, so as more product features are implemented in software, product behavior is increasingly fluid, the result of decisions made by both the producer and user. Enterprise applications are delivered as a service (SaaS), easily customized by any business user with a web browser. Even that most old-school of manufactured goods, the automobile, is changing: cars like the Local Motors Rally Fighter are crowdsourced and collaboratively designed.

Innovative companies recognize that there's more expertise outside their walls than inside. Consumer products trailblazer P&G is sourcing 35% of new product ideas externally, taking advantage of a network of 140,000 "solvers" with specialized expertise.<sup>4</sup> Online movie rental company Netflix recently paid a winning team of non-employees one million dollars for an improved recommendation algorithm, a key competitive differentiator for Netflix. As CEO Reed Hastings said, the contest gave Netflix "Ph.D.s for a dollar an hour."<sup>5</sup>

Pioneered by Dell and Starbucks, ideation or "idea storming" provides online forums for suggesting, discussing and voting on ideas. Companies can act on these ideas with confidence that there's an enthusiastic target market. At the time of this paper's writing, Dell had received over 13,700 ideas; they had been discussed in 89,000 threads and voted on 700,000 times. Dell employs many smart people, but there's no way they could get this scale of brainpower without engaging their community.

Service and Support organizations can breathe a sign of relief. Customers are willing to be part of your extended team if you engage them the right way, as partners.

<sup>1</sup> Seth Goden, from his blog: [http://sethgodin.typepad.com/seths\\_blog/2010/01/welcome-to-the-frustration-decade-and-the-decade-of-change.html](http://sethgodin.typepad.com/seths_blog/2010/01/welcome-to-the-frustration-decade-and-the-decade-of-change.html)

<sup>2</sup> Forrester Research, *The Broad Reach of Social Technologies*, Sean Corcoran, August 2009

<sup>3</sup> Most famously, Dave Carroll's *United Breaks Guitars*, a tuneful complaint that has been watched nearly ten million times. See <http://www.youtube.com/watch?v=5YGc4zQqozo>

<sup>4</sup> *Wikinomics: How Mass Collaboration Changes Everything*. Don Tapscott, Anthony Williams. Portfolio Hardcover, 2006.

<sup>5</sup> The New York Times, *A \$1 Million Research Bargain for Netflix, and Maybe a Model for Others*. Steve Lohr, September 21, 2009.

## The Authenticity Imperative

The rise of social media is a strong message to companies: customers don't want to be "messed;" they want to be part of the conversation. Advertising is rapidly losing its power as word of mouth and social media sources increase in importance.<sup>6</sup> A full 77% of consumers use reviews when shopping online.<sup>7</sup> While marketers obsess about the danger of negative reviews, a recent study showed that four out of five reviews are positive—and the negative reviews that do exist were considered helpful by consumers, increasing the credibility of the site and their confidence in buying.<sup>8</sup>

In their recent book *Authenticity*, Gilmore and Pine argue that what customers are really craving is reality, rough edges and all.<sup>9</sup> Today's jaded buyers are more swayed by imperfectly written but resonant reviews than they are by slick marketing copy. And those reviews, blogs and tweets will just keep coming: as Clay Shirky notes in his keynote at the Web 2.0 conference, humanity has been sitting on an enormous "cognitive surplus" that is being unleashed as our passive behaviors—such as watching TV for over three hours a day, on average—morph into contributions to the social web.<sup>10</sup>

In Service and Support, we often fret that customers won't trust information unless it comes straight from us—the official source. In fact, customers often have higher faith in their peers. It's OK with customers if they get help from other customers, as long as they get help.

## Allowing Companies to Finally Hear the True Voice of the Customer

The secret of business success is delighting customers. To do this, we need to know what we're doing well, and where we're falling short of the mark. As Janelle Barlow reminds us, "a complaint is a gift."<sup>11</sup> It's hard enough for small companies to know what their customers think, even if they know all of them by name. It's far harder for large enterprises with thousands or millions of customers to understand customer sentiment systematically—suggestion boxes and surveys only go so far.

Social media is turning the whole Internet into a virtual suggestion box. Ratings and reviews provide immediate product feedback. Irate tweets and blog posts create opportunities for service recovery. In one illustrative anecdote, a Virgin America passenger used in-flight wifi

and Twitter to complain about a cold meal. Virgin America monitors Twitter and immediately notified the aircraft by radio, after which the cabin crew served him a hot meal... minutes after the original complaint.<sup>12</sup> The highly influential blog post *Dell Hell* indirectly led to the resignation of a Fortune 50 CEO.<sup>13</sup> Customers are talking; smart companies are listening and taking action.

Companies are launching Voice of the Customer initiatives and listening post technologies to track and categorize customer-generated content across the social web. It's important for support leaders to remind their executive counterparts that they've been listening to customers and performing service recovery all along. Engaging with the social web is a logical extension of Support's core mission.

## How Social Media Benefits Service and Support

Marketing has been leading the charge on social media in most companies. But the natural home of the ongoing customer conversation, and the functional area that will benefit the most, is service and support.

### Social Support Defined

There is still significant confusion about what makes service and support "social." Industry thought-leader David Kay of DB Kay & Associates defines what he calls Social Support as "Service and support offerings where voluntary customer actions meaningfully change the customer experience for other customers—either in support, or indirectly in the rest of the whole product."

In other words, support is social if:

- Customers can take action (like rating, commenting or submitting an idea)
- These actions make a difference in how other customers experience support (for example, if highly-rated content is moved higher in search results, or customers can edit product documentation)
- Or, those actions make a difference in how other customers experience the product (for example, if a popular suggestion in an ideation site is translated into a new feature)

<sup>6</sup> Forrester Research, *Consumer Technographics® 2003-2005 North American Benchmark Studies and NACTAS 2006 Benchmark Study*

<sup>7</sup> Jupiter Research, *Retail Marketing: Driving Sales Through Consumer-Created Content*. Patti Evans, 2006.

<sup>8</sup> Forrester Research, *How Damaging Are Negative Customer Reviews?* Sucharita Mulpuru et al. 2007

<sup>9</sup> *Authenticity: What Consumers Really Want*. B. Joseph Pine and James Gilmore, Harvard Business School Press, 2007.

<sup>10</sup> A transcript of Shirky's brief, entertaining, and informative presentation entitled *Gin, Television, and the Social Surplus* is on his blog at <http://www.shirky.com/hercomeseverybody/2008/04/looking-for-the-mouse.html>

<sup>11</sup> *A Complaint Is A Gift: Recovering Customer Loyalty When Things Go Wrong*. Janelle Barlow and Claus Moller, Berrett-Koehler Publishers, 2008.

<sup>12</sup> Anecdote related by Porter Gale, VP of Marketing, Virgin America

<sup>13</sup> *Dell Hell* is a series of posts written by Jeff Jarvis in his BuzzMachine blog: <http://www.buzzmachine.com>, notably the entry dated June 21, 2005. In fairness to Dell, they have consulted with Jarvis and are in many ways a model for excellent customer engagement today. See, for example, Jarvis' column *Dell Learns to Listen*, *Business Week*, October 17, 2007.

## Fostering Customer Success

Support communities seem like just another kind of self-service. Both deflect incidents from the support center, and both satisfy demand for support that otherwise would have gone unsatisfied. But social support can address much harder issues.

Self-service is limited to solving known issues. If the knowledge isn't already in the knowledgebase, self-service won't help. As a result, self-service takes the easiest incidents out of the queue. As more people self-serve, managers are surprised to see time to resolution, escalation rates, and first contact resolution go the wrong way, but worsening operational metrics are a logical outcome of leaving only harder incidents in the caseload.

Social support is different. Peers can solve known issues, but community support really shines on hard questions, particularly in these two areas:

- **Business applications.** Support organizations know the nuts and bolts of their products, but it's other users who are the experts in applying the product to solve specific business problems. Is a user interested in the specifics of using test and measurement equipment to troubleshoot an engine control unit design, or how to run an Agile project with company-supplied project management software? Other users who have "btdt" (been there, done that) are likely to be more helpful than a support engineer or the service desk.
- **Multivendor issues.** Some of the thorniest issues to resolve are the ones involving multiple products from multiple vendors. In fact, one study found multivendor issues to be 17 times more expensive to solve.<sup>14</sup> They're also dissatisfying to customers, who get frustrated with vendors pointing fingers at each other. Technology vendors, digital service providers, and service desks all have access to some of the multivendor configurations they support, but they can't have every combination of hardware, software, networks and protocols—nor can they have deep expertise in all possible configurations. However, given a significant installed base, it's likely that some end user will have both the configuration and know-how. Crowdsourcing expertise on multivendor issues is a good bet.

The bottom line is that, unlike self-service, social support solves really hard problems, too. This makes it more effective in satisfying customers and reducing cost.

## Improving Efficiency

The social web makes service delivery more efficient. By deflecting difficult incidents, it lightens the load of support organizations. It also provides better knowledge for support professionals to use in solving customer problems.

When starting to work on a case, it's best practice for analysts or engineers to search—"early and often," as the Knowledge-Centered Support Practices Guide specifies.<sup>15</sup> In some cases, the answer will be in the knowledgebase. In others, they'll have to look in other repositories, too. Modern knowledge management systems (like Consona's) can automatically extend searches to other sources, notably social web assets like forums, blogs, and wikis with customer-contributed content. If there are valuable nuggets of information in these social sources, they speed time to resolution, and they give the support staffer a leg up in capturing and structuring the official answer in the knowledgebase.

Some organizations are concerned that social content hasn't been properly vetted and may contain errors. That's true, but the reality is that any content can have errors, can mislead the reader, or can simply become out of date. Support professionals must take responsibility for validating the information they deliver to customers, regardless of whether that information comes from a knowledgebase or a customer wiki. Even though content from any source can't be blindly trusted, it's still far better to start with some knowledge rather than a blank screen.

An area where social content really excels is in the identification of emerging issues. One Consona customer tells us that their customer-generated content areas are the biggest and fastest sources of bug reports submitted to Engineering. Customers using products "in the wild," with other platforms, are a *de facto* extended QA organization. If users discover a bug, social media provides an efficient way for the vendor to learn about them, validate them, and communicate their resolution.

## Driving Engagement and Loyalty

It's great that social support can deflect challenging incidents, provide content to speed resolution in the support center, and rapidly identify defects. But the word "social" is a clue that the real revolution isn't all about the numbers: it's about people.

<sup>14</sup> Patrick Bultema and Greg Oxtan, *Emerging Standards for the Support Industry*, Software Services Conference East, Nashville, TN, March 1997

<sup>15</sup> KCS<sup>SM</sup> Version 4.1: Knowledge-Centered Support Practices Guide, Melissa George, Barbara Kay, Greg Oxtan, Consortium for Service Innovation, 2006. [http://serviceinnovation.org/included/docs/kcs\\_practicesguide.pdf](http://serviceinnovation.org/included/docs/kcs_practicesguide.pdf)

Loyalty is the new currency of business. All enterprises seek to drive loyalty and engagement—attitudes and behaviors that run far deeper than the passing attraction of a catchy jingle. This is true for product companies, services companies, and even service desks inside a company that want to make employees more productive. Brands today don't want to flirt: they want a relationship. And relationships only happen when both parties see the benefit in involvement.

The social web is all about voluntary relationships, fostered by two very human traits: we tend to follow others, and our beliefs follow our behavior.<sup>16</sup> As we see other customers writing reviews, sharing knowledge, and submitting ideas, we get the sense that this is simply what people do. The more people participate, the more pressure for others to participate. The “critical mass” analogy from nuclear reactions is apt.

By the same token, the more we personally contribute to a social community, the more valuable we perceive it to be. As avid players of Farmville, Mafia Wars, and other social games come to realize, participation and advancement become an imperative that is far more compelling than the gameplay itself. The same dynamic occurs in every social system.

The bottom line is that social support works not only practically, but also emotionally. Marketing teams can only dream of the engagement that naturally happens among users who are helping each other be successful. This emotional engagement, fostered by social support, is the most powerful possible force for sustaining and growing a business.

## Social Technologies That Can Transform Support

There is a seemingly-endless stream of new social technologies. People are talking about blogging, microblogging, wikis, forums, idea storms, rating systems, collaborative bookmarking, social networking, tag clouds, folksonomies, and more. These technologies are being incorporated into familiar websites—for example, the reviews and wikis on Amazon product pages—as well as enterprise applications.

Essentially all social technologies are pioneered by individual general-purpose websites, as shown in the table below. Before considering how to apply new social technology in service and support, it's useful to get hands-on experience with them through sites like these.

Technology	Pioneers
Tagging and folksonomies	Flickr, del.icio.us (now delicious)
Expert location for question answering	Aardvark (vark.com)
Blogging	WordPress, Blogger, TypePad
Microblogging	Twitter
Social networking	Facebook, Myspace, LinkedIn
Wikis <sup>17</sup>	Wikipedia, Investopia
Ratings and feedback	TripAdvisor, Yelp
Forums and communities	(Historical) CompuServe, Prodigy, AOL, Usenet <sup>18</sup>
Ideation	Dell IdeaStorm, My Starbucks Idea
Location-based personalization	Foursquare, Gowalla <sup>19</sup>
User-Generated Media	YouTube, SlideShare

<sup>16</sup> For a highly readable discussion of these traits, the research that supports them, and how they're used, see the chapters on *Social Proof and Commitment and Consistency in Influence: The Psychology of Persuasion*, Robert Cialdini, HarperCollins 2006.

<sup>17</sup> Unlike many of the other technologies here, wikis used inside the firewall have a very different way of working than large public wikis like Wikipedia. Relative to the other technology categories, you'll learn less about wikis by using these public ones.

<sup>18</sup> It speaks to the relative maturity of forums that their pioneers are either out of business or significantly transformed. Most active forums today are associated either with a company (e.g., Novell) or a particular topic area (e.g., CrackBerry).

<sup>19</sup> While location-based services aren't directly applicable to service and support today, they point to the kind of contextually-aware personalization that Consona believes is key to automating highly satisfying support experiences. Like location-based services, support sites should tune themselves to your situation (whether location or system configuration) and those with whom you are connected, whether friend or colleague.

### Support Communities

Support communities or support forums<sup>20</sup> are, by far, the most popular social technology for service and support. In many cases, forums trace their history back to public services like CompuServe or Usenet in the early to mid-1980s. The success of support communities is excellent evidence to convince wary colleagues that social media really works.

Unfortunately, most support communities are not well integrated into other pieces of the support or service desk website. As a result, they're used less than they should be and are seen as an alternative to self-service and assisted support, not a complement. Any time a site makes a customer wonder, "Should I search the knowledgebase? Open a support incident? Or go to the community?" that is a counterproductive step in the customer experience.

Integration of support communities means:

- A single search can return results from a knowledgebase, from community discussions, and from any other relevant resource
- A common authentication and identity model exists so customers need to log in only once to access all support services—although they may use a handle or nickname rather than their true name in the community
- Users can move easily among channels—for example, using a search query as the start of a new community question, or allowing a question in the community to escalate into a support incident automatically if it's not timely resolved
- Community content can be easily structured and added to the knowledgebase
- Community questions and support incident submissions can automatically trigger a knowledgebase search

In other words, customers and staff don't need to think about the channel; they can just focus on resolving issues.

Support organizations have established many best practices for nurturing and measuring communities. Providing reputation to users and content (including star ratings, "resolved" flags, and activity-based badges or levels for contributors) can motivate quality participation while giving users insights into the credibility of content. To the extent possible, the community itself should own the structure and organization of the community, at least below the top-level categories.

Trusted community members should be recognized and designated with a special title, such as Microsoft's "Most Valuable Professional" or Novell's "Novell Knowledge Partner"; they should be provided with special access to product teams, pre-release products, and back-line support. Knowledge inside the communities should be harvested for the knowledgebase as support professionals use it to solve customer problems. And company employees should have a lightweight, respectful, but visible presence in the community: letting customers shine, never being defensive, but adding their voice to the conversation when it can bring clarity or closure to topics.

### Support Blogs

Blogs are another easy way for service and support organizations to deliver information while building relationships. Most support content is impersonal: knowledgebase articles, FAQs, and technical documentation is deliberately corporate in its feel. Blogs, on the other hand, reflect the voice, style, and (to a certain extent) the opinions of an individual, generally an executive or subject matter expert. As such, they humanize the support experience for customers, making support less transactional and more conversational.

That's because blogs are conversational in their nature. Blogs allow and encourage responses. An important blog post, perhaps describing a painful bug or service interruption, can stimulate passionate discussion. While the possibility of very public customer confrontations makes support organizations nervous, the reality is that people will talk about the things that concern them, so companies participate in and learn from the conversation. (In rare cases, customers need to be addressed offline 1:1; bloggers should have a process for getting them the attention they need. And while it's fine for customers to express frustration, expect and demand that they act with civility, using appropriate language and avoiding personal comments or threats.)

In fact, blogs are the perfect way to make difficult or controversial announcements: they're attributable to a person, generally with authority, rather than the company overall. The personal nature of the communication often makes it easier for customers to listen.

<sup>20</sup> The terms "forums" and "communities" are often used interchangeably. In our view, forums are basic systems where one can post or reply to a thread; communities add additional capability, such as user profiles and reputation. By this definition, most modern implementations and commercial products are "communities."

Blogs are also great for addressing high-priority emerging issues. Blog postings can be easily shared with a “permalink,” so users can spread the word on their own blogs, status updates or forum postings. Popular blogs score high in Internet search engine page ranking algorithms, giving them much more prominence than a knowledgebase article.

They’re also excellent for addressing how-to or value-added topics: “did you know you could do this?” This kind of content encourages users to subscribe to the blog to keep themselves up to date with the latest useful tips.

### **Social Networks: Affinity Groups and Status Feeds**

Users who keep up with their extended networks on Twitter or Facebook generally have to leave whatever work they’re doing and go to a special site or application to do so. But what if the same functionality was available from inside the user’s workflow?

Status feeds integrated into knowledge management and incident management applications can turbocharge productivity. Sure, it’s nice to hear from your friend on Facebook that “Snuffles had a great day at the dog park,” but wouldn’t it be better if a colleague’s status is “I just figured out how to work around the data dump bug in version 3.3?” Especially if you’re working on exactly the same problem? Instead of links to viral videos, wouldn’t it be more productive to receive recently updated links to knowledgebase articles? No offense to Snuffles, but we think the answer is an unequivocal “yes.”

Another component of social networking that is valuable to the enterprise is groups and affinities. It’s nice to become a fan of the Dallas Symphony Orchestra, but more helpful to become a fan of a new release of the product you support, letting you see all team status updates and have access to team calendars, documentation and blogs.

People are people first, and employees second. The integration of social networking into enterprise applications—“social in the workflow”—provides an informal communication channel that is crucial to real team building. This is especially true with global teams and work-from-home staff—social in the workflow is replacing the disappearing water cooler.

### **Ideation**

We’ve mentioned ideation sites (“idea storms”) earlier, and at first blush, they might seem to be squarely in Marketing’s domain—new product ideas, positioning concepts and so on. And Marketing should absolutely have a seat at the table.

But if you read ideation sites carefully, most of the proposals aren’t revolutionary. Most of the time, customers are discussing the details of product—its (mis)behavior and how-to issues. In other words, most of the time they’re talking support.

Most support organizations already have a process for providing product feedback to development teams through defects, enhancement requests, and root cause analysis of their caseload (“problem management,” in ITIL terms.) By hosting ideation, they have a new, broader source of input for that process. And because ideation feedback comes directly from customers, in their own words, product development teams are often more willing to respond than they are to requests generated by Support.

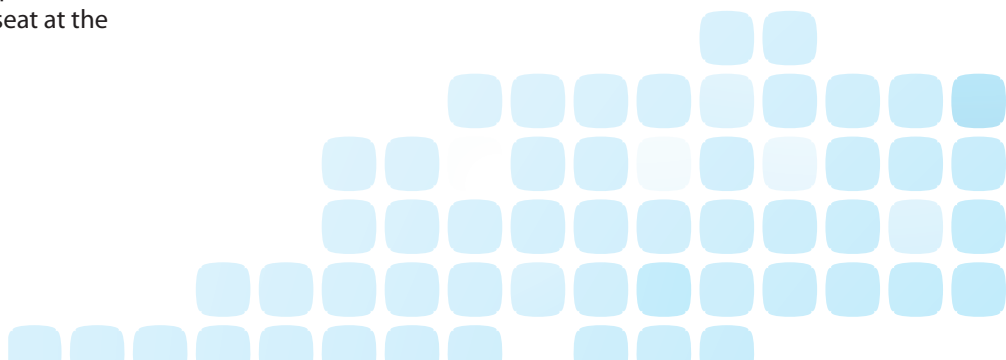
Also, in some cases, idea submissions really are disguised support incidents. Maybe the product already does something, but the customer just needs to know how. Or, maybe the behavior being described is a defect. With support listening carefully to ideation, these “ideas” can get the attention they deserve, educating other customers in the process.

### **Customer-Generated Media**

We’ve gone from three channels of broadcast media controlled by media conglomerates to millions of videos on YouTube, the vast majority of which are contributed by individuals who are volunteering their creativity to the world. Much of it is pretty bad, though the same could be said of Alf and Mr. Ed. But a small percentage of YouTube is brilliant. And a small percentage of a very large number is still a large number.

The same creativity can help your customers solve their problems.

Most knowledge management teams we talk with would like to create multimedia like how-to videos. But budget pressures and a lack of appropriate skills often make it hard for them to do as much as they’d like. This is where customers can jump in.



Support organizations should make it easy for customers and users to contribute:

- Tips and tricks
- Code samples, sample configurations, or other aids to implementing the product
- Knowledge articles and documentation
- Multimedia how-tos and training
- Fun things: music videos, Downfall parodies<sup>21</sup>, fake ads and the like

A number of companies are now putting documentation and support content in customer-editable wikis. As with Wikipedia, broad visibility and accessibility draws in a critical mass of contributors and editors to help clarify, expand on, and improve content under the watchful eye of high-reputation customers and company staff, who can undo mistakes or vandalism with a single click.

Superficially, this sounds like a support community. The primary difference is that support communities generate threads—back and forth discussions that a user must sort through to get the point. Wikis, on the other hand, create a final product: the wiki page is edited to deliver the message concisely, without all the history. (In many cases, background conversation is maintained in an associated discussion page.) So, for the reader, wiki pages can be immediately more helpful than community threads.

Multimedia or code contributions should also be tied closely to the community, and highly-rated contributions should improve the user's reputation, or move them closer to a higher level or a new badge.

## Getting Started: The Social Support Action Plan

Support organizations stand to gain the most from using social technologies to break down the walls that separate enterprises from their users and liberate the passion, expertise, and value of an inspired customer base. With all the technology options, it's hard to decide what to do first and how to go about sparking the revolution. To close this paper, we present five suggestions for moving forward and taking action.

### 1. Start With the Right Mindset

The first thing to remember about social support is that you're not doing it **to** your customers; you're doing it **with** them. This represents a mindset shift from traditional support operations, which usually manage explicit us/them commitments like SLAs.

But what does this mean in practical terms?

- **It's OK for people to complain**—even if they're wrong. Never delete customer-generated content because you disagree with it or think it reflects badly on you. (Of course, deal with inappropriate language or personal attacks.) It's far better to let other customers stand up for you, and if you're in the right, they will. Most people who participate in social media do so because they want to share in the company's success, not because they want to tear it down. But stifling dissent will turn the whole community against you.
- **Give others their turn.** Even if you know the answer, or you want to correct an important detail to a customer contribution, act with restraint. The only way that community leaders will emerge is if you let them and allow them to be recognized for their contributions. Again, balance is in order: if someone has posted something actively dangerous or completely wrong, consider stepping in—but see if the community will take care of it for you first. Being Johnny-on-the-spot sounds like good customer service, but it actually damages what you're trying to foster.
- **Be transparent.** If your employees are involved, make it obvious they're employees, even if they're seeding questions or creating initial content. If you're wrong, say so. Don't be defensive; you can explain the company's reasoning about an unpopular decision or issue, but let others have their say without arguing the point. (If you actually agree with your customers, it might be best to keep silent—but email the discussion to the internal decision makers.) Have a clear social media policy that explains what employees must disclose, disclaim and acknowledge.

<sup>21</sup> A YouTube staple of arguable taste but enormous popularity, based on a scene from the German film Downfall. In these clips, an apoplectic Hitler in his bunker is creatively subtitled to complain about products, cars, retail stores, people—and even the proliferation of Downfall parodies on YouTube.

## 2. Understand Your Users

There actually is a Jitterbug® phone forum—but it's not very active.<sup>22</sup> Before investing in social support, it's important to find out...if you build it, will they come?

For most technology products or digital services, the answer is clear. As long as the product is visible to the intended user, and there are more than a handful of those users, critical mass should be an achievable goal. By "intended user," we mean someone who would benefit from support interactions: the average PC user won't contribute to a memory chip manufacturer's social support efforts, but a motherboard designer might.

Still, there are levels of engagement, and it's worth thinking about where your customers are likely to fall<sup>23</sup>. We think about social support options on a continuum from "easy" to "advanced:"

- *Document ratings and feedback*—almost every site will get at least some feedback on knowledgebase articles
- *Comments on documents*
- *Support communities*—the easiest social support model that requires registration
- *Ideation*—a littler harder. We love coffee, and we love social media, but we haven't suggested a new latte to Starbucks. (Many people have, however.)
- *Customer-contributed content*—only companies with customers who wake up thinking about their products, and define their jobs or leisure time in terms of them, are likely to benefit from this "Wikipedia effect"
- *Customer-contributed multimedia*—reserved for the most engaged customers

In addition to these customer-facing channels, support blogs and social in the workflow are designed for employees. Employee motivation can't be assumed; prudent support leaders will undertake an ongoing communication effort—and bring a large dose of patience.<sup>24</sup>

## 3. Dream Big, but Implement Small

We were recently made aware of a company who put their social media experiments on hold while they took six months to create "a global social media strategy." It sounds good, but we're too early in the process for that. Social support is new and constantly changing. So rather than a strategy, may we suggest a vision?

The vision will tell you what you're trying to accomplish, even if the "how" is somewhat undefined. And the vision will align with the overall vision for your organization. What's most important—retention and lower churn? Higher lifetime value? More use of the software? Scalability? Margin? The answer to this question will help you understand what the future state of social looks like.

With a vision in place, it's time to start experiments along the lines suggested by this paper. It's OK to fail, as long as the failure happens quickly and learning comes from it. As specific capabilities gain traction they expand their reach. For example, some organizations send a personal thank-you note to newly active users, giving them a link to put on their status messages that notifies their friends about their activity.

Like other business transformations, the integration of social media into support won't be finished after a six-month project. Vision, determination, and a willingness to try new things are better tools for the job than a "global social media strategy."

## 4. Build From the Core, and Engage the Fringe

Social media operates on a tipping point model: a handful of visible active participants eventually pave the way for a groundswell of activity. Organizations that want to develop participation in social media must simultaneously build up the core, and use the value created by the core to entice others.

Successful support communities recognize their high reputation contributors. This practice should be adopted in all aspects of social support. Amazon has demonstrated the power of reputation for even as simple an activity as

<sup>22</sup> Jitterbug is a brand of easy-to-use mobile phone designed with big keys, large fonts, and few features. It's designed for older users who—like many of the rest of us—are completely flummoxed by rampantly over-featured wireless devices. Needless to say, Jitterbug users are not in the "sweet spot" of the social web. Jitterbug forums are at [https://www.phonescoop.com/phones/p\\_forum.php?ff=940](https://www.phonescoop.com/phones/p_forum.php?ff=940)

<sup>23</sup> This concept is at the heart of Groundswell, which describes Forrester Technographics, six general classes of social activity. We believe Groundswell got many things right, but we're concerned that it may discourage people with the cost and complexity of Technographics research. Groundswell: Winning in a World Transformed by Social Technologies, Charlene Li and Josh Bernoff, 2008

<sup>24</sup> Reasons for the slower-than-expected adoption of social technologies within the enterprise, along with an analysis of their benefits, are explained in Enterprise 2.0: New Collaborative Tools for Your Organization's Toughest Challenges, Andrew McAfee, Harvard Business School Press, 2009.

ratings: participants are recognized for writing helpful reviews, for being a Top 100 reviewer, and even for using their real names, which adds credibility to their opinions. Points, levels, virtual badges, company swag, a highly visible profile page, and even an email that says “thank you” can all help motivate ongoing contribution by the most valuable participants. They, in turn create value to sustain the whole ecosystem, turning lurkers into members. More participants are converted as social experiences pervade every aspect of the service and support experience from logging cases, downloading software, searching for answers, and to using the product itself.

An especially effective technique for engaging new, passionate members of the community is to monitor the Internet for customers who need help, even if they're unhappy. While it sounds counterintuitive to engage detractors, “there's no zealot like the convert.” Bringing people who need help into a place where help is freely available provides vivid proof of the value of community—and the value of engagement. It also takes complainers out of the echo chamber of their own blog or Twitter stream and into an environment of advocacy, where real problems will be addressed and baseless complaints will be challenged.

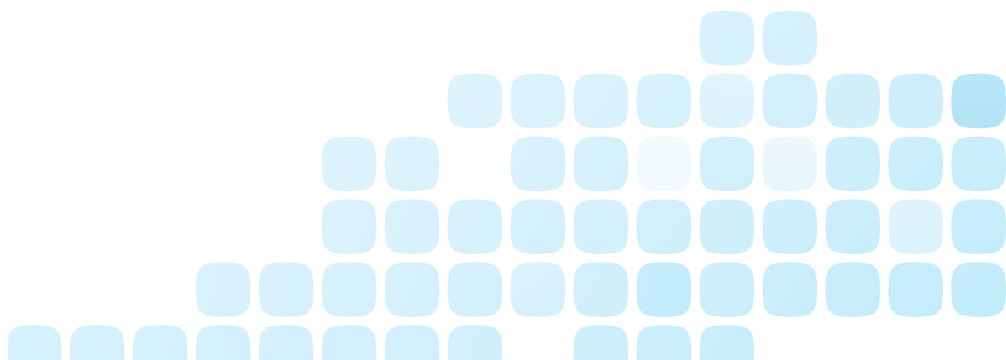
### 5. Measure and Manage

Based on our experience measuring knowledge management, we are confident the same principles apply to social support:

- **Use a balanced scorecard.** There will be no single key performance indicator for social media; rather, leaders will need to use a series of measures of activity, value, and quality to assess performance.
- **Identify indicators of engagement and success.** For example, track the number of registered users, the number of posts, the percentage of posts answered after two days, the percentage of users who rate or provide feedback, the number of ideas or multimedia files submitted, the ratio of high-reputation users to registered users to lurkers, and so on. Depending on your specific strategy and the maturity of your implementation, different indicators will be more important than others.
- **Correlate engagement and success with business outcomes:** contact rates (CPx), loyalty, repurchase, relationship survey satisfaction, Net Promoter Score, and the like. The indicators that most influence the business outcomes should become your focus, at least in the near term.

Implementing this kind of iterative, exploratory approach to metrics requires a flexible, fast, and scalable platform for business analytics. Opening the floodgates of user contributions can generate an incredibly large volume of data, so make sure your solution can produce ad-hoc reports with your expected data volumes.

**The revolution will not be televised. *But it may be on YouTube.*** Good luck.



## About the Authors

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Since its founding in 2002, DB Kay & Associates has provided thought-leading consulting services to the customer service and support market. DB Kay customers include Cisco, Openwave, QUALCOMM, Research In Motion, TI, Tektronix, VeriSign, Sun, Alcatel-Lucent, Intuit, and IBM. DB Kay is the industry's leading independent provider of Knowledge-Centered Support workshops and consulting.

Its principal, David Kay, is a frequent speaker at industry events. He was recognized as an innovator by the Consortium for Service Innovation, and has been certified as a Knowledge-Centered Support trainer. He held leadership roles at an innovative knowledge management technology provider from 1998 through 2002, and has been granted six patents for knowledge management technology. Kay co-authored the first book on knowledge management for service and support, *Collective Wisdom: Transforming Support with Knowledge*, which is available on Amazon.com.

Tim Hines

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Tim Hines joined Consona in 2006 and serves as vice president of product management for Consona CRM. In this role, Hines guides the product roadmap and functionality across all of Consona CRM's product lines.

Hines has been involved in the CRM industry since 1995. He began his career at AOL as a tech support representative. He was a user and eventually manager of Vantive, Witness and TCS. Hines also worked in Andersen Consulting's CRM internal practice, where he focused on Remedy. After leading implementation efforts with marketing automation vendors, he joined the Onyx product management team in 2002.

Hines holds a bachelor's of business administration in information technology from the University of Phoenix and a Master of Science degree in information technology from American Intercontinental University (AIU). He is currently working on a Ph.D. in information technology.

## Learn More

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## About Consona

With a comprehensive set of solutions spanning self-service, customer management, chat, communities and proactive, just-in-time marketing and support—all fueled by a patented, best-of-breed knowledge management platform and backed by advanced analytics—Consona's KCS *Verified* tools are the choice for integrated, multi-channel customer service and support. The only CRM vendor focused entirely on service and support, Consona helps the Global 2000 control costs while providing a superior customer experience.

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**Problem: Solved!**