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5 Reasons to Use Social CRM for Support and Services

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As I wrote last week, I'll take value engineering and reliability over cool technology any day. Social media, of course, has all the marks of the most ephemeral cool tech.

So this article may come as something of a surprise, as I'm going to be beating the drums about social CRM again, this time for the service and support organization. Why? Social networks give you the quickest access to customers where they already are.

Almost anybody you want to do business with is *somewhere* on Facebook or LinkedIn or product-review networks, at least in the United States. More importantly, these networks are the cauldron that brews the buzz about your products. Social gives you access to new kinds of information and real-time feedback for critical parts of the service, support, training and professional services business processes.

I'm not pumping products here—I'm pointing to business processes that need to evolve to improve profitability. Here are five ways social CRM can help.

1. You Can't Make Support Access Too Easy.

Making it easier for customers to find the specific support resource they need is half the battle of making support feel easy to use. Customers are easily overwhelmed by large companies' websites, online resources and call center processes. (Ironically, these were the mechanisms intended to make the customer experience *better*.)

There are just too many pages to navigate, and the customer may not use the same vocabulary you do, so both search and ontological approaches may lead to nothing but frustration. The simple act of having familiar Facebook and LinkedIn pages for each of your products can make customers' lives easier. The same idea applies to product-review and professionally-focused networks specific to your industry.

Tip: How Social Customer Support Brings Social Media Beyond Marketing

There are two underlying principles here—getting to customers where they already are, rather than making them switch media, and shortening the distance to answers by providing multiple streamlined routes. To harness the power of these relationships, support's social network conversations should be linked—better yet, threaded—with the CRM software's Case, Contact, Account and Opportunity records.

2. You Can Make Self-Support Work Better.

Many support organizations for technical products depend upon user self-support, as the community is "on the air" 24/7 and can often provide answers faster than the support team. Even if the user base cannot provide the answers, it can certainly generate the widest range of test cases and real-world workarounds. If the economics of your support depend upon the community—where the "customer experts" become an active part of the knowledge base—then the CRM system needs to make community dynamics work better.

Within each social media channel, identify and profile the local customer heroes—presenting only a Twitter handle within a Facebook page doesn't cut it). Customer heroes should have credibility scores based on the number of posts they have, and those scores should be part of that person's Contact record in the CRM. When it's time for new product introductions, both marketing and engineering will want to know the heroes in each channel for early testimonials and testbeds, respectively.

3. Extinguish the Fire Before It's a Firestorm.

Internet discussion boards and social networks collect and foment customer reactions at light speed. You don't want to be blindsided by a firestorm of negatives, particularly if Google News happens to notice it and alerts your competitors.

Support, then, needs real-time monitoring for sentiment of customer posts and questions in social networks and the blogosphere. While a range of products conduct reputation monitoring, most tend to focus on the corporate brand. What's needed for support and service is a sharper focus on particular product names and keywords that relate to areas where defects could be suspected—"Volt" and "battery fire," for a completely innocuous example.

Case Study: How Citibank Uses Twitter to Improve Customer Service

When the social network monitoring engine identifies a new trending issue, the CRM cases should be queried to match against tags and keywords. In this way, support becomes an active part of the early warning system—and can provide information to help put out the fire—right in the medium where the situation is developing.

Part of the puzzle is identifying the mavens and what they are saying. Because mavens have the widest reach, you need to identify who has the loudest voices when it comes to your products. This requires a lot of data mining, but it can be automated and correlated with CRM data to improve your company's leverage within the community. For example, if you find a key customer who's a maven, you can auto-create a case for any of her Tweets and automatically escalate the case following that customer's SLA—even before that customer has even contacted your support team.

Of course, all these goodies don't come off the shelf from any vendor. For the next few quarters, this is integration and coding territory.

4. Support Is the New Sales.

Support staff have more continuous conversations with customers than sales reps do. Your best intelligence on emerging needs and therefore upsells will come from the support, training and consulting teams.

How-to: Get Customer-Driven Data From Your CRM System

To reap the benefits of these "zero-cost sales cycles," make support, services and training conversations with customers easy and natural in the social media. Make those conversations visible within the relevant CRM records, too.

5. Without Organization, Social Media Is Just Noise.

Simplistic support CRM systems use your internal effort as the organizing principle. Your people create the cases, the solutions and the articles that feed the knowledge base.

There's nothing wrong with that—but social networks are known for producing user-generated content. If your community managers are doing their job, the amount and coverage of UGC (particularly videos) can be significantly larger than your formal KB.

The problem is, customer conversations about symptoms won't use the same terms you do. Is the customer's question about a network drive, a file share or a NAS server? All that extra content may just be adding confusion. Consequently, searches and navigation of the UGC needs to be unified with the formal KB documents, at the very least with liberal use of tags, aliases and hyperlinks.

On the flip side is your support problem: correlating apparently disparate symptoms with solutions. To make the noise meaningful, social media conversations need to be fully threaded with the formal incident/case and bug/solution records in your CRM system.

The support and customer service departments were the original pioneers of early CRM, and the underlying concepts and metrics of those systems were oriented mainly toward reducing queue depth, time to respond and time to resolve. Essentially, the focus was on reducing costs.

Today's opportunity with social media, on the other hand, is to make service and support the fulcrum for new revenues by improving customer loyalty, improving renewal rates and more quickly grabbing upsells of your products. Leveraging social CRM can bring those goals into sight.

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