



CUSTOMER SERVICE ON TWITTER

2015 EDITION

By the Twitter for Customer Service Team

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Attn: Twitter for Customer Service team, 1355 Market Street, Suite 900, San Francisco, CA 94103



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EXECUTIVE SUMMARY

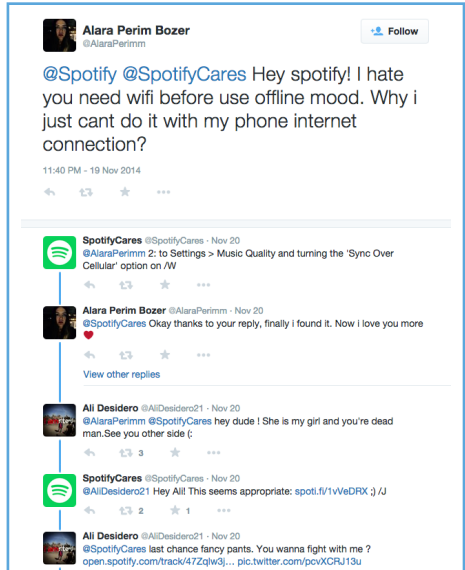
INTRODUCTION

One simple conversation and suddenly a moment of annoyance becomes a moment of delight as an issue is resolved in a public display of exceptional customer service.

Spotify's Twitter conversations—often trademarked with a cleverly-chosen song or playlist—represent a fundamental shift in how customers and companies interact publically, conversationally and in real-time—all for a fraction of the cost of other channels.

Welcome to the era of “customer service on Twitter.” Customers are engaging with companies on Twitter to solve their customer service issues, and brands are responding in innovative ways. Companies now have the tools to match ever-loftier customer expectations, with personalized service that's faster, more efficient and more relevant.

Drawing on expert interviews, lessons learned profiling customer and brand behaviors and company case studies, this Playbook is your guide for how to accelerate impact with customer service on Twitter, delighting them and creating a differentiated customer experience.



THE NEXT FRONTIER OF PERSONALIZED CUSTOMER ENGAGEMENT

Fifty years ago, the 1-800 number revolutionized customer service. Customers suddenly had a free, live connection to companies from the comfort of their homes. We are at a similar inflection point for how brands deliver customer service: today, people are contacting brands via Twitter with the expectation of a helpful and human response; all on stage for the world to see.

As your brand seeks new ways to create meaningful connections with customers, Twitter can help. Twitter is not just a platform for people to connect with each other; it is also a place for people to connect with brands. This enables companies to deliver differentiated, scalable customer experiences with:

- **Unparalleled reach and amplification**

- **through one-to-one-to-many interactions:**

- Delighting customers on Twitter has outsized impact—conversations are open for the world to see and can be shared across the platform and embedded across other mediums.

“We started on Twitter as a one-way dialogue... lo and behold, what was most surprising is that our customers wanted to speak to us!”

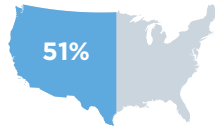
-Michael Maeman
@BrooksBrothers

- **Real-time conversation with customers:** Like never before, brands can have a dialogue with customers, resolving their issues while demonstrating their brand voice.
- **Unprecedented insight into what customers really want and how they behave:** Twitter is the world’s best focus group — enabling you to gather real-time insight from the voice of your customer, informing the way you serve them as well as broader strategy and product decisions.
- **Enhanced operational efficiency.** Interactions on Twitter improve your ability to deliver exceptional customer service efficiently; agents can respond more quickly and cheaply, often at a cost that’s 80 percent less

per interaction than by the phone.

CUSTOMER SERVICE ON TWITTER IS TRENDING

Customer service is the most important driver of customer satisfaction, and when it comes to satisfaction, customers are voting with their wallets: Almost two thirds of customers with a poor experience actually reduce their spending with a brand¹.



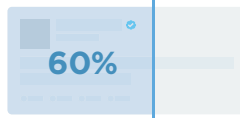
51% of Americans have reported switching service providers due to poor customer service.

Not only is customer service important – it's everywhere! Your customers are increasingly on Twitter; the platform hosts more than 316M monthly active users, over 500M Tweets per day². Not only



Tweets at leading B2C brands are growing by over 50% per year.

that, customers are expecting brands to meet them there. It is reported that 47



Leading B2C companies are responding to about 60% of Tweets directed at their service accounts.

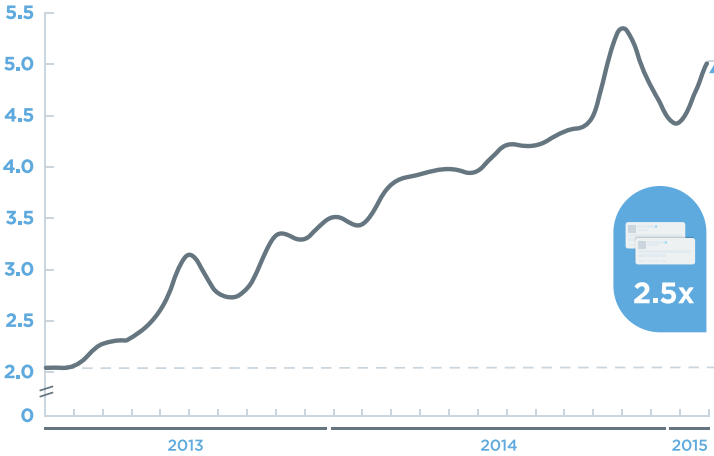
percent of social media users have used social care, and this is growing across all age groups³.

Unique insights generated from Twitter data support this trend: Tweets targeted at leading brands' customer service Twitter usernames are up 2.5x over the past two years.

Consumers are Trying to Engage With Brands

Tweets directed at leading B2C companies, brand and service accounts

Number of Tweets per month, millions
24 months between Mar 2013 – Feb 2015



Not only are customers taking to Twitter for customer service, they are becoming more particular about the service they receive. Customers want freedom and flexibility on how, where and when they are served, demanding a more personal experience and 24/7 availability.

Customer service is getting more difficult. Twitter enables you to meet ever-increasing customer expectations with a tailored, one-to-one experience.

IT PAYS TO DO SERVICE ON TWITTER

Customer service teams are frequently tasked to balance the seemingly impossible: reduce operating costs, generate revenue and improve customer satisfaction. We see that on Twitter, companies can make improvements along all three of these.

Brands that take full advantage of customer service on Twitter see a range of benefits:

- **Improved customer**

- **experience and satisfaction:**

- A majority of companies list “increased customer satisfaction” as a top reason for offering customer service on Twitter. They have a good reason for doing so; 85 percent of customers who have a satisfactory interaction are likely to recommend the brand to others.

“Twitter, unlike anything else, afforded us an opportunity to honor our vision of hospitality, at any time around the globe.”

-Vanessa Sain-Diequez,
Hilton

- **Operational savings:** Twitter customer service can save up to 80 percent per interaction compared to phone calls. Preemptive service can answer many questions with content, before the customer even asks.
- **New service-to-sales and revenue opportunities:** Twitter fundamentally shifts the economics of proactively engaging customers, yielding new, more targeted opportunities for meeting customer needs.
- **Continuous insight and analytics:** Twitter is the voice of your customer, providing real-time data that reflects the needs, desires and behaviors of your customers, which brands can use to generate insights on strategy.
- **Brand building and earned media:** Twitter offers a one-to-one-to-many interaction which allows the broader community to form an opinion on your service interaction. Tweets are conversational and public.

Capturing the value of customer service on Twitter comes with challenges—companies commonly find that responding to Twitter requests is more than a simple extension of existing customer service capabilities. The challenges include:



- **Proliferating customer touch-points:** With new, lower-friction interactions, customer requests often increase and are more difficult to track and prioritize. And these interactions are now occurring in public.
- **Setting up the capability:** You'll need to create a personalized customer experience, define who owns it, build a team, choose metrics, refine your service process for Twitter and select and implement the right platform and tools.

“We saw our requests jump by 230% from 2013 to 2014. We were like, ‘Bloody Hell.’”

-Delfin Vassallo,
Microsoft

Brands have demonstrated that these challenges are solvable—and that companies that overcome them create a differentiated customer experience and are able to capture significant value.

OVERVIEW

This playbook is your guide to developing customer service on Twitter. Read it cover-to-cover or use the sections that are most relevant to you. As you chart your journey, look to this book for tips and suggestions, as well as success stories of companies that have already cracked the code.

A company's journey to customer service on Twitter is critical to its ability to create meaningful engagement with its customers. Our research and interviews have uncovered 7 steps to effective customer service on Twitter that will take you on your journey from setting the strategy to defining your goals to implementing and scaling your new customer service operation.

SET YOUR STRATEGY

A clear strategy is critical to delighting your customers. Here are the steps that can help you get it right:

- **Step 1: Set your vision:**
Companies that create competitive advantage with customer service on Twitter align their vision for the experience they hope to create with their brand strategy. For example, Zappos uses playful, humorous Twitter interactions to fulfill its mission to “WOW” customers through service and deliver “fun and a little

Seven Steps to Customer Service on Twitter

Set Your Strategy

- Step 1: Set your vision
- Step 2: Size and prioritize your opportunities
- Step 3: Define the customer service experience

Define Goals and Measurement

- Step 4: Set goals for performance metrics
- Step 5: Establish the measurement mechanism

Move to Action

- Step 6: Operationalize your strategy

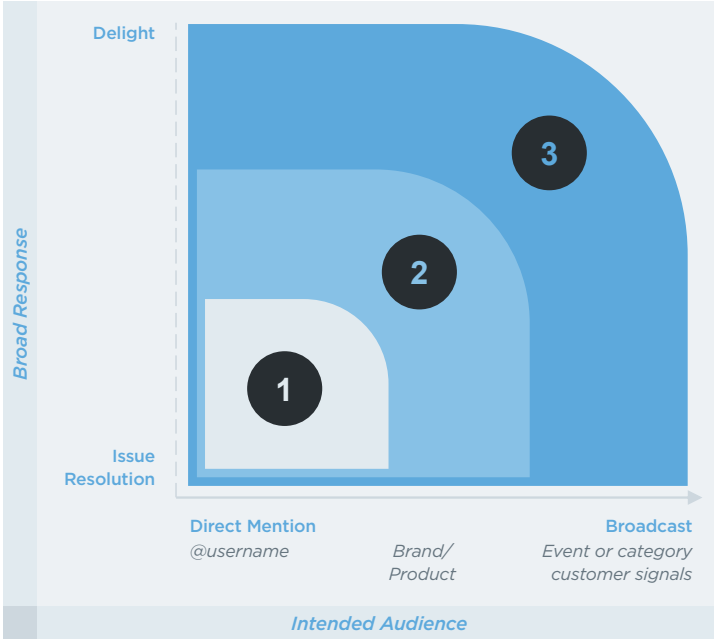
Build Capabilities to Scale

- Step 7: Iterate and innovate



weirdness.” Our research has uncovered stages for how companies evolve to deliver service on Twitter, which can be used to set your vision.

The Stages of Customer Service on Twitter



STAGE 1

Direct Mention Issue Resolution:

Resolves issues directed at @brand and @care usernames

STAGE 2

Broad Issue Resolution:

Resolves all stage 1 issues and those with brand / product mentions, responding to every Tweet that seeks resolution in a quick and effective manner

STAGE 3

Proactive Engagement:

Spans the universe of Tweets from direct to broadcasts, and responds with issue resolution or delight, when appropriate

- **Step 2: Size and prioritize your opportunities:** Twitter provides unprecedented insight into the way your customers are talking about you and the potential value of addressing them on Twitter; you can use what customers are saying about you to help profile the opportunity for engagement. As you profile the opportunity, you'll want to prioritize which metrics matter, calculate the ROI and make the business case.
- **Step 3: Define the customer service experience:** How do you want your customers to feel as you engage them on Twitter? What should your brand voice sound like? Defining the customer service experience consists of five components: establishing the brand voice, delivering relevant content, optimizing response timing and establishing community.

DEFINE GOALS AND MEASUREMENT

Companies that succeed in customer service on Twitter clearly define success and understand that establishing and tracking performance metrics will enable continuous improvement.

- **Step 4: Set goals for performance metrics:** Metrics fit within four categories: customer satisfaction, operational efficiency, sales opportunity and brand building. As you define success, you'll want to decide which strategic tradeoffs make sense for the customer experience you want to deliver.
- **Step 5: Establish the measurement mechanism:** Set up your performance tracking, share key metrics across the organization and create a culture of continuous improvement. You may need to build new capabilities with buy-in from key stakeholders, including IT, marketing and operations.

MOVE TO ACTION

Where do you begin? There are a number of best practices—from setting up your account to responding to Tweets—that can help your brand succeed on Twitter.



- **Step 6: Operationalize your strategy:** Set up your account, pick the team, choose the right tools and develop process and triage policies.
 - **Establish the face of your business:** Companies create dedicated customer service usernames or decide to use a brand username. These service usernames include logos, photos and general branding consistent with the primary brand Twitter username.
 - **Get the team started:** Customer service agents on Twitter should be strong writers, savvy about technology and social media and empathetic. Start with an initial Twitter SWAT team. Look both inside and outside the company—it's all about finding the right people.
 - **Select the right tools:** As you begin to respond to Tweets at scale, your tools, including your platform for managing, triaging and measuring Tweets, are critical. We've seen instances where adopting a tool boosted a company's ability to respond to Tweets by 10X within one month.
 - **Develop your workflow processes and triage:** Prioritizing customers and issues is difficult, but it's critical to your success. Responding to customer service requests, particularly in the public sphere, requires collaboration among various functions, including operations, marketing, legal and public relations. In addition, you'll need to prioritize Tweets, whether by customer importance or issue.

BUILD CAPABILITIES TO SCALE

Diving into customer service on Twitter is not a one-time event; it is an ongoing evolution, and companies will need to carefully consider the strategic decisions that will be required to bring the capability to scale.

- **Step 7: Iterate and innovate:** An agile approach is the quickest, most effective way to develop the capabilities that will support your customer service on Twitter at scale. Don't let perfect be the enemy of good. A test-

and-learn approach helps you to focus on top priorities as you proceed.

TWITTER IS A GAME-CHANGING PLATFORM

Twitter's unique properties transform how companies and customers engage.

- **Conversational:** Users express themselves and interact with the world, including other users, influential people and organizations. Importantly, these interactions occur in public view, creating an opportunity for all users to follow and participate.
- **Public:** It's where your customers are, and the fact that it's in public provides the opportunity to create one-to-many customer service relationships, allowing you to build your reputation with many as you solve a problem for one.
- **Real-Time:** Like no other platform, Twitter occurs in real-time.
- **Distributed:** Tweets are highly visible; they are distributed across the platform through replies and Retweets and can be embedded / featured on platforms outside of Twitter, creating unprecedented reach for your customer service team.

GO, CREATE POSITIVE ENGAGEMENT

Remember, at its core, Twitter is about engagement. Companies that succeed in customer service on Twitter follow these principles, which can guide you as you get started.

- **Be authentic:** The more you can make your interactions human, the more your customers will appreciate the effort. This includes using the users real name in the reply, signing the Tweet with the agents name and using informal language. Eighty-three percent of customers with a personalized interaction were satisfied by their customer service experience on Twitter. Seventy-seven percent were likely to recommend the brand to others⁴.



- **Be responsive:** Customers are most concerned that companies value their time⁵. They expect responses, and they expect them fast. Whether it is not responding or a slow response, often, brands fail to meet customer expectations.
- **Be solution-oriented:** If a customer contacts you with a problem via Twitter, responding in a playful tone may be inappropriate if you're not actually solving the problem. Of those seeking help on Twitter, 90 percent were satisfied when their issue was resolved, compared to an overall satisfaction rate of only 68 percent⁶.
- **Develop rich content.** Content can help expand your ability to respond beyond 140 characters and answer service questions before they're asked. Companies we have spoken with emphasize the importance of a content development strategy, including Twitter videos, Periscope script, infographics, images, blog posts, YouTube videos and other rich media that can help answer customer questions before they're even asked.
- **Put Twitter first.** To realize all the benefits of customer service on Twitter compared to other channels position Twitter as the preferred channel for customers to reach you. In order to be successful with customer service on Twitter you need to make an investment and ensure that you have the resources to handle the volume of requests.

Welcome to a new era of engagement with your customers on Twitter. Go. Create meaningful experiences that differentiate your brand. And use this playbook as your guide.





1. INTRODUCTION AND TRENDS

- 1.1 SHIFTING CUSTOMER BEHAVIORS AND EXPECTATIONS
- 1.2 EVOLVING ROLE OF CUSTOMER SERVICE

1. INTRODUCTION AND TRENDS

50 years ago, the 1-800 number revolutionized customer service. Customers suddenly had a free, live connection to a real person from the comfort of their homes. Since then, email, chat, IVR⁷ and customer support over mobile have been significant extensions of the ability to engage with a brand from anywhere in the world. Customer service on Twitter is the next evolution as consumers – not just current customers – connect with brands online, publicly and in real time.

Consumers are seizing the opportunity and increasingly adopting Twitter for customer service. Leading brands are following the trend and meeting their customers on Twitter. They understand that people seek engagement with their brands in new ways– and for 47 percent of social media users that means through social care⁸.

Due to the public nature of the platform, customer requests on Twitter require that brands engage and meet the expectation for a timely response. Responding on Twitter provides companies the opportunity to solve customer service issues publically, providing a new window of transparency into a brand and serving as real time sources of insight. After a successful conversation, many of those consumers will spread the word, becoming brand champions.

1.1 SHIFTING CUSTOMER BEHAVIORS AND EXPECTATIONS

Consumers today are spending more time on mobile, with a significant portion on social networks. They're not only connecting with friends, they're also engaging with companies. Over 95 percent of consumers say they are influenced by what other people say about companies on social media⁹.



Naturally, increased time spent on Twitter, combined with ever-heightening expectations for customer care, has led to demand for Twitter customer service.

MORE TIME ON MOBILE AND SOCIAL

Consumers are spending, on average, 4.4 hours a day on the internet and 2.7 hours a day on mobile¹⁰. Access to data networks and smartphone usage are expanding the amount of time people spend on the internet; with nearly a full work week per month on their smartphones!

Social affinity also tells a compelling story, with the average social media user spending 2.4 hours per day on social media; nearly half of smartphone users check social media every day¹¹.

BRAND INTERACTIONS ONLINE

Consumer perception of brands is increasingly being influenced online, and on Twitter in particular. In a recent survey, more than 46 percent of individuals indicated an internet touch point as the biggest influence in their initial consideration of a brand.

The relationship continues to evolve. The number of Americans who follow retailers on Twitter is up more than 50 percent since 2013 and the opportunity will only get bigger; 40 percent of consumers say they want more engagement from brands online¹².

CUSTOMER SERVICE ON TWITTER AND THE WIDER SHIFT IN CUSTOMER EXPECTATIONS

Customers now expect brands to be instantly available at every point in their consumer journey—including customer service.

Customer service, which is the biggest factor in overall satisfaction, has never been more important. In fact, customer service is 30 percent more important to consumers than the brand and 52 percent more important than “value for

money” in driving customer satisfaction.

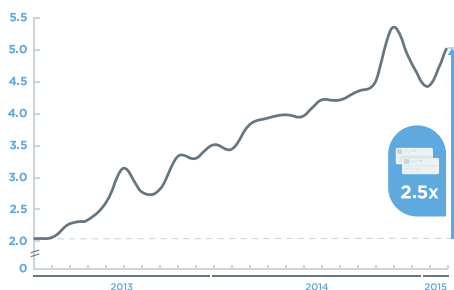
Consumers are becoming increasingly particular about how they receive this service too. They want freedom and flexibility in how, where and when they are served, demanding more personal experiences, 24/7 availability and higher levels of service.

Naturally, customer service on Twitter is growing rapidly.

Consumers are Trying to Engage With Brands

Tweets directed at leading B2C companies, brand, and service accounts

Number of Tweets per month, millions
24 months between Mar 2013 – Feb 2015



Key Takeaways

- Consumer engagement with brands on Twitter grew 2.5x in two years.
- Month over month growth, while volatile, has averaged 4.2% resulting in a 56% annual growth rate

Data shows that in the past two years the number of Tweets directed at leading brands' customer service usernames has grown by 2.5x and the number of monthly unique users requesting help grew 54 percent year-over-year¹³.

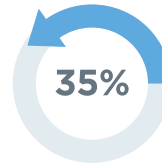


1.2 EVOLVING ROLE OF CUSTOMER SERVICE

As consumer behavior and demands shift, customer service has evolved to address them, especially by becoming more digital. But in many ways customer expectations have outpaced the capabilities of companies. This has created a new opportunity for companies to differentiate themselves and create strategic advantages through the service they provide on Twitter.



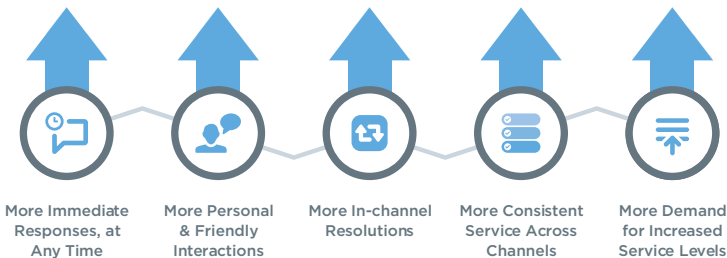
10-20% reduction in call center volume.



Up to 35% reduction in industry ombudsman complaints.

CUSTOMER SERVICE EVOLUTION

Companies are trying hard to keep up as they continue to invest in digital customer service. Today, nearly 90 percent of every customer service experience has a digital component. And for good reason. Digital-only care beats non-digital care by 19 percentage points in customer satisfaction surveys. But it's not easy to provide. Companies need to respond quickly; nearly 70 percent of customers who were "extremely satisfied" with a customer service interaction on Twitter received responses in less than one hour¹⁴. The move to digital is only a piece of the puzzle though, as companies try to compete on delivering exceptional customer service.



WILL YOU BE AHEAD OF THE CURVE?

With consumers flocking to Twitter for customer service, companies are racing to keep up with the demand and expectations. In fact, the number of service accounts responding to Tweets increased 45 percent over the last two years¹⁵.

The companies that lag behind will be left behind. The percentage of online adults in the U.S. who have used Twitter to contact a company for customer service climbed from 22 percent to 37 percent between 2013 and 2014¹⁶. But only 9 percent of Twitter users said that they've heard from a brand after Tweeting about them.

That leaves a tremendous opportunity on the table. Companies that get in early have a chance to set the standard for excellence in their industry. Consumers, meanwhile, are taking note of the brands that are out in front. They're also noting those that aren't. You'll find their names spelled out in consumer Tweets for millions to see.

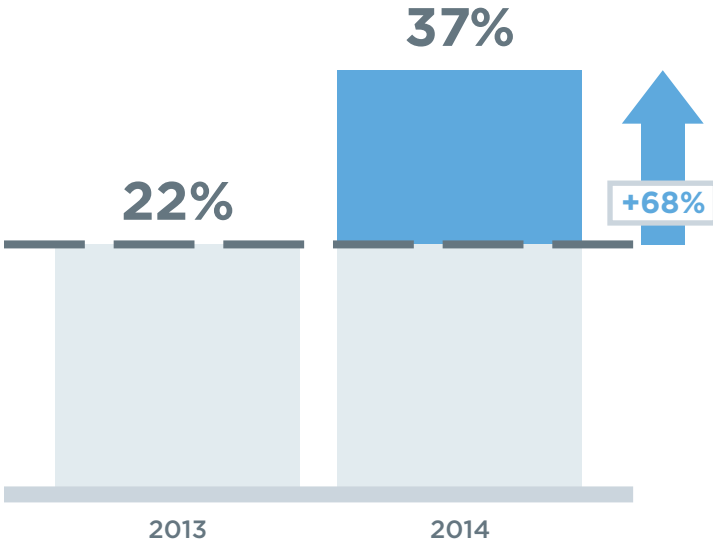
We've seen a year over year 4.6% decrease in response rate because companies can't keep up. We were at 21.9%, now we're at 17.3%. Customers' service Tweets are increasing faster than companies can respond.

Hassan Syed (@HVSN) bought a promoted Tweet to complain about BA customer service after they lost his father's suitcase. They only responded 8 hours later (during business hours), after 76,000 users had seen it.



Online Adults Using Twitter for Customer Service

Percent of Online Adults







2. OPPORTUNITY

2.1 VALUE AT STAKE

2.2 FIVE SUCCESS STORIES

2. OPPORTUNITY

The Golden Goose



Customer service at one-sixth the cost of a call center interaction



Potential for 97 percent customer satisfaction



Reduced churn



Higher rate of conversion



Increased reach and visibility for your brand



Continuous conversation with existing and potential customers



Real-time listening and trending based on what your customers are saying

All through one platform. Sound impossible? It's not – it's customer service on Twitter.

2.1 VALUE AT STAKE

The vanguard companies offering customer service on Twitter are capturing a range of benefits. If you're still watching from the sidelines, you may think Twitter's primary value is in mitigating PR disasters. While that's important, there's much more at stake. Companies can improve the customer experience while cutting costs, build a brand asset and tap into new revenue



81% of consumers do not recommend a brand to their friends if the brand did not respond to their inquiry (NM Incite)



opportunities. Those with a little more experience are using the insights gleaned from customer conversations to drive business decisions that have a direct impact on the bottom line.

It's important to note that there may be some risks to sitting it out. Your customers expect to find you on Twitter. If you're not there

to engage and steer the conversation, it could veer in the wrong direction before you even know it's happening. Companies that step in can differentiate themselves and wow their customers. For those willing to take flight, opportunity awaits.



51% of Americans have switched companies due to poor customer service



Over 95% of consumers say they are at least somewhat influenced by what other people say about companies on social media

IMPROVE THE CUSTOMER EXPERIENCE WHILE CUTTING COSTS

Companies that provide exceptional customer experiences are rewarded with outsized returns. Leaders in Forrester's customer experience index experienced a 43 percent cumulative total stock price return over 6 years, compared to a 33.9 percent decline for laggards¹⁷.

Moving the needle on customer experience has tangible benefits. Three quarters of Americans say that the customer experience influences their attitude towards a business—and they express that attitude at the cash register¹⁸. In the wireless industry, for example, every three-percentage-point increase in customer experience satisfaction correlates with a 20 basis-point decrease in customer churn.

Twitter provides an opportunity to improve that customer experience. Twitter research shows that 68 percent of customers who engage in customer service on Twitter are at least "somewhat" or "extremely satisfied." More than 82

percent of such customers are likely to recommend the brand based on their interaction.

Just as important, Twitter can lower costs for your company. Solving a customer problem on Twitter costs an average of \$1, just a sixth of what it would cost to solve the same problem through a call center¹⁹. Companies that are preemptive can find other opportunities to save as well. When an HP tablet was discounted by 80 percent, big box retailer Best Buy braced itself for millions of phone calls from customers asking about product availability. Instead of waiting for the onslaught, Best Buy decided to Tweet out the information. That single Tweet received more than 330,000 views from people who likely would have called the 1-800 number.

How many customer service calls could you prevent through a simple Tweet? How many of your customers' problems could you address more efficiently through Twitter? Probably more than you think.

Comcast has been able to achieve a 99% in-channel resolution rate on Twitter, dispelling any myths about an inability to handle issues through Twitter.

BUILD A BRAND ASSET

Twitter uniquely enables a one-to-one-to-many customer service interaction. On Twitter, customer service is transformed from an operating expense to a critical brand asset that directly impacts customer satisfaction. Indeed, every time you serve a customer on Twitter, a crowd is watching, forming an opinion about your brand as they see you supporting your customer in a personal, effective manner.

Can this be said about any other customer touch point?

TAP INTO THE SALES OPPORTUNITY

While companies are already using Twitter for marketing purposes, there's an often overlooked opportunity to convert customer service conversations into



sales. Banks and telecommunications companies have seen 2-7 percent conversion rates for service-related calls at their call centers. There's no barrier to replicating this strategy on Twitter and seeing better results, at a far lower cost.

The opportunity is even bigger when you consider the public nature of Twitter

conversations and the ability to engage in proactive delightful interactions. Not only that, Twitter enables you to know more about your customers and to target the right ones with the right products. Leading companies are already leveraging these unique advantages.

Hilton, for example, proactively reaches out to travelers offering them local tips, even if they are not staying at a Hilton property. These Tweets sometimes translate into bookings. In other cases, travelers, who have already booked their accommodations elsewhere, promise to stay at a Hilton property during a future stay.

The impact goes beyond that conversion's incremental revenue. Research has shown that, when positioned as counseling, service to sales actually increases customer satisfaction.

Twitter uniquely enables you to:

- Find the right target customers
- Know more about them and their interests
- Better tailor your offerings to them



LEVERAGE CONTINUOUS INSIGHT AND ANALYTICS

Sometimes companies are able to use customer service on Twitter as an early warning system. Additionally, Twitter customer service teams can serve as the “voice of the customer” within the larger organization and share transformative insight.

T-Mobile, for example, found that a change in its service offering suddenly spiked negative sentiment on Twitter from 1 to 3 percent all the way to 37 percent. This pulse-check was fed into the organization, and the company’s CEO, John Legere, was able to quickly respond with a Twitter update that brought sentiment back to normal levels.

When General Mills heard its customers on Twitter clamoring for a discontinued product, it analyzed the business case for a re-launch. Ultimately, the cereal maker brought back French Toast Crunch™, to much fanfare²⁰.

“I don’t think people understand the lengths I would go to have a box of French Toast Crunch in my life.”

- @BeeLH on Twitter

“Nothing could fill the hole in my heart where French Toast Crunch used to be.”

- @Darth_DURFFFY
on Twitter

Jawbone uses its Twitter timeline to sense when there are service outages, making the Twitter conversation a “first alert,” and allowing the company to get ahead of the problem. Jawbone is able to coordinate teams and provide customers with information via Twitter, allaying concerns.



Examples like this abound. Companies spend significant amounts on marketing research in an attempt to better understand their consumer. But the reality is that the consumer is already at their doorstep on Twitter, providing unique and additive insights to what traditional research methods can provide.

So go on, Tweet back and begin the conversation.

2.2 FIVE SUCCESS STORIES

SUCCESS STORY - HILTON

“Twitter enabled Hilton to fulfill its mission to fill the world with enlightened hospitality...everything we do should live and breathe hospitality.”

-Vanessa Sain-Diequez, Hilton Hotels

For almost 100 years, Conrad Hilton’s mission to provide every customer with unrivaled hospitality has driven Hilton Hotels’ focus on customer care. Now, Twitter is enabling Hilton to extend this hospitality not only to customers, but to all travelers, no matter where they’ve made reservations. Hilton has taken proactive service to a new level with its innovative @HiltonSuggests Twitter account. That’s where the hotel chain reaches out and responds to travelers with restaurant recommendations, sightseeing options, and other travel advice in 120 cities worldwide. If those travelers don’t already have a relationship with Hilton, they do once they get one of its welcoming and informative Tweets.

Key Takeaways

- It’s easy to make the case for your organization to invest in customer service on Twitter by showing what your customers are already saying about you.
- Customers value authenticity, and you can almost always leave them satisfied by being authentic.
- Your organizational choices depend on your strategy; Hilton has separate reactive and proactive teams. Its reactive team is centralized, while its proactive team is decentralized to provide localized tips to travelers.

Twitter is critical to Hilton's ability to deliver exceptional service to its customers. Its journey—from an initial focus on responding quickly to customer issues to proactive recommendations is a lesson in how to get started, be authentic on Twitter, and go “above and beyond” by solving problems and answering questions before they arise.

“I JUST SHOWED MY DIRECTOR THE LIVE FEED, AND THERE WERE ALL THESE NEGATIVE COMMENTS, AND THAT’S HOW WE GOT STARTED”

By the time Hilton began to experiment on Twitter, its customers were already deep in conversation about the brand—and it was clear they expected Hilton to chime in. When the Director of Care saw these unaddressed Tweets, there was an immediate urge to engage with customers and solve their problems. They knew the changing landscape required a bigger presence on Twitter. As a first step, the Hilton team focused on issue resolution. They set up @HiltonHelps and responded only to negative comments. The effort required few process changes; in most cases, Hilton simply transferred its existing customer-service processes to Twitter. Getting started was easy, too. The entrepreneurship made it a fun time to be at Hilton. The best customer service agents were put on Twitter, and they quickly became ‘the cool team’ to be a part of.

But the team quickly realized that the opportunity to resolve customer-service requests in the hospitality industry is smaller than in other industries, like telco and airlines. Hilton took this learning, along with the realization that reaching new customers via Twitter scaled effectively and efficiently, and began to focus on proactively “surprising and delighting” travelers.

“WE HAD THIS OPPORTUNITY TO REACH PEOPLE ANYWHERE AT ANY TIME, BUT IT HAD TO BE AUTHENTIC”

The Twitter customer service team was centralized and aligned under Care Operations, which was the most effective choice for simply resolving issues. Once Hilton began proactive outreach, however, it needed a new strategy: Hilton elected to create a separate, decentralized team, which is now

distributed across 120 cities. These advocates can respond to Tweets from any visitors to their city. Their goal: to create authentic, curated experiences, no Hilton reservation required!

Proactive service turned out to have some unexpected benefits. “We knew it would be a good service to help travelers, but what we never envisioned was the engagement and motivation it would generate for each team member ...that was the biggest surprise.” That engagement is critical to the team’s success; teammates take pride in knowing their city and being authentic in their quest to delight customers. At the same time Hilton sees them improve their performance in their core tasks, even if those are not service related.

“TO CONTINUE IMPROVING, WE HAD TO MAKE SURE OUR GOALS AND MEASUREMENT MATCHED OUR STRATEGY”

Naturally, Hilton measures the amount of time it takes its Twitter service team to respond to customers. They can respond in 20-30 minutes, whether the request is at 2pm or 2am.

Hilton also sets metrics for proactive service. 50-60 percent of their outreach elicits a response from the user. Of those conversations with random travelers, 50-60 percent respond with some sign of appreciation, usually an enthusiastic, thankful Tweet. Success is how you define it; for Hilton, creating positive experiences for travelers fits its corporate ethos.

Hilton is rapidly building a reputation as a leader in proactive customer service on Twitter.





SUCCESS STORY - BEST BUY

“Our customers are active in multiple channels, and it’s important for us to be there too.”

-Gina Debogovich, Community Manager

In 2008, Best Buy, a global electronics retailer, launched an experiment: a dedicated customer service team to satisfy requests on Twitter. The chain is mentioned on social media 5M times per year, and as expected, when the team initially launched its “Twelpforce” (Twitter Helpforce) and began monitoring and responding, the floodgates quickly opened. Today, that small team has grown into an industry-leading unit that responds to over 150,000 inquiries a year, 365 days a year, 24 hours a day, all within 15 minutes.

As you consider launching a Twitter customer service operation, consider Best Buy’s journey from concept to impact.

TWITTER IS WHERE THE CUSTOMERS ARE

“We just wanted to help customers, and we knew they were already talking about us outside of traditional channels,” notes Gina Debogovich, Best Buy’s community manager.

Best Buy had carefully built a reputation for excellent service with its Blue Shirts and its Geek Squad. It was only natural to extend its famous customer service into these new venues.

Key Takeaways

- Customers are already talking about your brand on Twitter; it’s important to meet them where they are.
- Cooperation within the organization and hiring the right people were absolutely critical to scaling success.
- Within the right tools, people, and process, customer service on Twitter generates positive impact to operational costs and conversion.

The mission was clear: “to create meaningful communication in a virtual world by bringing the power of our Blue Shirts and Geek Squad agents online in service of our customers.”

“Let’s take the secret sauce and take it online!”

-Gina Debogovich
Best Buy

THE JOURNEY STARTS WITH THE ORGANIZATION AND PEOPLE

It’s one thing to articulate a mission. It’s quite another to get started. Best Buy began by developing critical partnerships between its customer service operations and its marketing, human resources and ethics teams. It located the new team squarely within its service operations, but made sure that other groups within the organization were on board.

Before long, the new team had launched a dedicated customer service Twitter account.

The volume in these channels grew 20-30 percent year over year. Given Best Buy’s aspiration to preemptively resolve customer issues, it had a strategic imperative to respond to all service inquiries mentioning its brand and service Twitter usernames. To make sure it was responding as effectively as possible, Best Buy adopted a third party Twitter customer service tool to help triage and queue Tweets for its agents.

CUSTOMER SERVICE ON TWITTER LEADS TO REAL IMPACT

Best Buy measures impact both in terms of activity and performance. It collects data on productivity, average first-response time, first-contact-to-resolution time and overall issue resolution by agent to help measure performance and fuel continuous improvement. And thanks to the external tool it uses, Best Buy has no problem tracking impact metrics: they can easily see online conversations from links posted to Twitter which allows the team to assign real dollars to its customer service on Twitter efforts.



SUCCESS STORY - T-MOBILE



-John Legere, T-Mobile CEO

Twitter is the channel of choice for T-Mobile when it comes to engaging its customers on their problems and questions – even for its CEO. T-Mobile—the “uncarrier” of wireless—has found success with its focus on customer needs. With 927 percent growth from 2013-14 in its social fan base, and 90 percent customer satisfaction among its Twitter users, its engagement on Twitter has been critical to that success. T-Mobile’s journey— from launch to its current 40-person “T-Force”— provides useful lessons as you develop your Twitter strategy, measure your performance and choose a tool.

LISTEN. ENGAGE. RESOLVE.

Having a clear mission and process was critical to T-Mobile’s ability to scale quickly while

Key Takeaways

- Developing a clear mission and process enables consistency in your interactions and buy-in from the team.
- Gathering actionable data doesn't need to be difficult; surveys are a great way to analyze customer interactions and prove the value of customer service on Twitter.
- Selecting the right tool helps you execute on your strategy; for T-Mobile, switching tools helped cut response times by 90%.

maintaining high customer satisfaction. When it became clear that customers wanted to engage on Twitter, Michelle Mattson, who leads social customer support, spent a week with her team to set goals and document the steps for getting there. They emerged with a succinct mission: to be the world class brand for engagement.

The team also outlined the steps for achieving that mission: listen, engage, resolve. Mattson assigned mini-teams to study each step. The teams defined the key activities, metrics, tools and participants necessary for success. Once they had a clear process in place, the Twitter representatives were able to coordinate effectively with other groups, including marketing, PR and legal and provide the resources to respond to customers quickly and effectively.

KEEP YOUR CUSTOMERS SATISFIED

The T-Force team set metrics to make sure they maintain the engagement they want. They regularly survey customers on satisfaction, issue resolution, whether they needed to call a customer service representative and whether they would be likely to recommend the “T-Force” to someone in the future.

Let us know how we did!

Was T-Force able to resolve your issue?

Did T-Force resolve your issue quickly?

Would you recommend T-Force to someone in the future?

Did you call Customer Care after working with T-Force?

Rate your overall T-Force support experience: ★★★★★

(Optional) What is your social handle?

(Optional) Do you have any comments for us?



The goal is to keep each measure above 90 percent, even as volume increases. If these measures dip, the team adjusts and learns. Mattson believes the high satisfaction comes from having a consistent, authentic voice on Twitter, something they try to screen for when interviewing for new Twitter agents. Candidates are asked Twitter-like questions to see if they can respond effectively and naturally.

“You can’t force someone to sound cool.”

In addition to tracking customer satisfaction, T-Mobile closely monitors the sentiment of Tweets about its brand. T-Mobile uses this sentiment data to create an early warning system, allowing it to head off problems before they escalate. For example the team once saw negative sentiment – normally at 1 – 3 percent – spike to 37 and immediately reacted. It discovered that a change to its corporate discounting program was upsetting customers. John Legere, T-Mobile’s CEO, quickly Tweeted, stemmed the tide of frustration and brought sentiment back to normal levels.

Imagine preemptively alleviating the concerns of thousands of your customers with less than 140 characters at the speed of Twitter.

RESPOND TO CUSTOMERS FAST

The tool you choose matters. T-Mobile began with a homegrown solution, tried several providers and ultimately settled on a tool designed specifically for customer service via Twitter. “Many tools say they’re social, but they don’t get it,” says Mattson. The T-Force uses tools for social listening and for queuing Tweets. Together, these tools have enabled T-Mobile to cut response times to 10 minutes, a 90 percent improvement.

The Twitter platform has become an essential part of T-Mobile’s mission to put its customers first, and customers are noticing: T-Mobile is ranked number one in customer care satisfaction by J.D. Power.



SUCCESS STORY - COMCAST

“Customers come to Twitter willing to have a conversation, instead of being pissed off!”

-Bill Gerth, Comcast

It's no secret that Comcast receives a high volume of customer service requests, sometimes from very upset customers. What most people don't realize is that Comcast is making enormous strides in improving the customer experience through customer service. Twitter is an important part of that. On Twitter, service is more transparent, more available, more consistent and more customer-centric. Over its journey, Comcast has overcome challenges by creating a unique team structure, understanding the right metrics and innovating new ways to track resolution. And this is only the beginning. It is continuously experimenting, refining metrics and innovating ways to improve the customer experience.

Key Takeaways

- Structure your team to enable a seamless customer experience. Comcast developed an innovative 3-tier structure to handle Tweets across service lines.
- Measurement is critical to success. Comcast is refining its metrics and incorporating its data into internal systems to create a better understanding of its customers.
- Comcast is moving towards preemptive issue resolution, intending to introduce "wellness checks" that address customer issues before they happen.



TESTING THE WATERS

Comcast has always known Twitter is important; it began monitoring Tweet volumes and customer behavior more than seven years ago. It launched @ComcastCares and began responding to customer needs. The benefits were clear and compelling—Twitter created a new way to have meaningful interactions with customers and was a departure from the usual impersonal and robotic customer service.

Feeling their way along, the team quickly added value by generating insights that they distributed to relevant groups, helping make the case for expansion.

TAKING THE CUSTOMER'S POINT OF VIEW

Customers expect consistency. While a simple observation, any large organization with multiple product lines understands how difficult it is to address. The Comcast digital care team is tackling this head on, overcoming internal barriers and silos and structuring its team to deliver a better customer experience. It designed a team with three tiers of specialists, augmented with analyst support.

WHAT CUSTOMER SERVICE ON TWITTER LOOKS LIKE AT COMCAST

- **Tier 1:** These agents are the central Tweet intake for the entire company and are responsible for triaging, tagging and assigning Tweets to the right groups and people. Triage was previously automatic, but the team discovered that manual triage is more effective.
- **Tier 2:** Aligned by expertise, these agents are responsible for particular service lines or products.

“Our core objective is providing a consistent, solid experience. Whether you’re happy or sad. One hundred thousand followers or 10. We want a consistent experience for everyone.”

-Bill Gerth,
Comcast

“If someone calls, they have a clear objective. Less so when they Tweet – they can be ranting, needing service, or grabbing a beer at the Xfinity center. Triage has been a real challenge, but we feel like we have our arms wrapped around it now.”

-Bill Gerth,
Comcast

For example, a specific agent would handle the “cable” tag if that’s her background.

- **Tier 3:** The super agents of the group handle Comcast’s most difficult service challenges. They know all lines of business, understand Twitter and have at least three years’ experience. They’re the ones who decide if a Tweet should be escalated, making them key to Comcast’s 99 percent in-channel resolution.
- **Additional support:** Consists of supervisors and analysts. Their job is to measure day-to-day team metrics and goals. They also develop training materials and plan for upcoming features or trials.

The new structure has been a success. Before implementation, Comcast’s escalation rate was 30 percent. Now it’s down to 1 percent.

MEASURING FOR A UNIFIED CUSTOMER VIEW

Comcast is continually refining what it measures and has improved its ability to quantify the how well is service efforts are working. It is even gathering information that can be integrated with internal systems to analyze along with internal data.

Comcast has built this capacity over time. Its initial scorecard was simple: followers and responses. Since then, it has evolved considerably to include metrics like percentage of conversations taken private, perception changes and sentiment analysis. The team also measures internal operations, analyzing discussions, resolution rates, response speed, channel efficiency and productivity by agent.

Comcast also tracks issue resolution in an innovative way. The triage team (Tier 1) assigns tags to Tweets to identify line of business, issue type and sentiment. The Tweet is routed to an agent who addresses the issue with the customer. The agent self-identifies resolution (which is audited by a quality



assurance team), then closes the Tweet with a specific tag and identifies the resolution type.

PREPARING FOR THE FUTURE

Comcast, which recently tripled the size of its Twitter customer service team, aims to further reduce response times and reach more customers. It also plans to use Twitter for “wellness checks” that will attempt to turn neutral conversations into positive interactions.

The team hopes to include full account checks for customers after the customer provides their identity. This in-the-moment check would include looking for expiring promotions, obsolete equipment and eligibility for upgrades and more, allowing them to head off future customer service interactions.

Twitter’s unique attributes are enabling Comcast to provide a consistent customer service experience. Meanwhile, the company is continuing to test new ideas as it looks for ways to preemptively address future service issues and identify opportunities to improve service on other channels.

SUCCESS STORY - MICROSOFT LUMIA (NOKIA)

“Customer service on Twitter is not just another channel to add to the contact center. This is something bigger, something that could add value for the customer and save us money.”

-Delfin Vassallo, Microsoft Lumia

Microsoft Lumia (formerly Nokia) provides customer service where it sells phones—all over the world.

Their story is an inspiring example of taking a small English-speaking Twitter team and scaling to a team of 145 working in 24 languages. All while maintaining high marks for response times and engagement across geographies.

Microsoft Lumia's journey with customer service on Twitter showcases what Twitter can do for global brands, as well as how to go from reacting to problems to anticipating needs.

Key Takeaways

- Customer service on Twitter can be extended to anywhere you have customers, no matter what the country or language involved.
- Customer service on Twitter costs less per interaction than traditional channels – even before factoring in reach.
- Developing customer service content can help you solve questions before your customers can ask them.

ORGANIZE FOR A UNIFIED CUSTOMER EXPERIENCE

In 2010, Lumia's social customer service team realized it was speaking the wrong language — literally. It provided customer service only in English, even

though customers were asking questions in multiple languages. But scaling across countries and languages posed organizational challenges.

For one, at Lumia “social media” had always been the domain of marketing. “Yes, we were using the same channel, this thing called Twitter, but for fundamentally different purposes...but I thought, the customer doesn’t know whether it’s a community manager, a marketer, or whatever, they just want a unified experience,” recalls Delfin Vassallo, the head of Microsoft Lumia’s customer service.

Vassallo used data to show that his team was uniquely suited to delivering that experience. “Country by country, we went to the marketing teams and pulled up the Twitter timeline, showing them how we can resolve problems and how they wouldn’t have to worry about it anymore.” After getting buy-in from marketing, the team added new locations and languages, ultimately creating unique Twitter account for each language.

“TWITTER WAS HALF THE PRICE OF TRADITIONAL CHANNELS”

“The business case was the most important thing for leadership,” recalls Vassallo. His team looked at cost differences for handling cases and found that, in 2012, the average case handled on Twitter cost them 50% less compared to traditional call centers.

Cost savings was only half the equation though; they also factor in the additional reach available through Twitter, thanks to its public nature. “One post can be seen by many; our answers provided help to many others beyond the person asking,” says Vassallo. Nokia was also able to improve resolution, solving more than 95 percent of problems received on Twitter in channel, rarely having to ask anyone to call a 1-800 number or send an email.

DEVELOP CONTENT TO BE PREEMPTIVE

The Lumia team initially found scaling issue resolution across geographies to be difficult. “In some countries maybe 1 in 10 Tweets is actionable, and in

others it's much higher. It became difficult to filter out the noise," Vassallo recalls. Lumia solved the problem by adding content to address the most frequently asked questions, allowing the team to solve problems before they were asked.

The team produced product tutorial videos, blog posts and pictures to help customers. At one point, they were making nearly 100 videos per month. They quickly ramped up because the team was able to monitor the most frequent customer concerns and leverage existing content across geographies.

From 2013-14, Nokia increased the volume of customer service on Twitter by 230 percent while only increasing headcount by 15 percent. In 2015, they produce editorial calendars specifically for Twitter in 17 languages. The content is not mere translations, but each piece of content is created specifically for that language and country's needs.

Where else can service scale like that?







3. CHALLENGES

- 3.1 PROLIFERATING CUSTOMER TOUCH POINTS
- 3.2 CHALLENGES SETTING UP THE CAPABILITIES

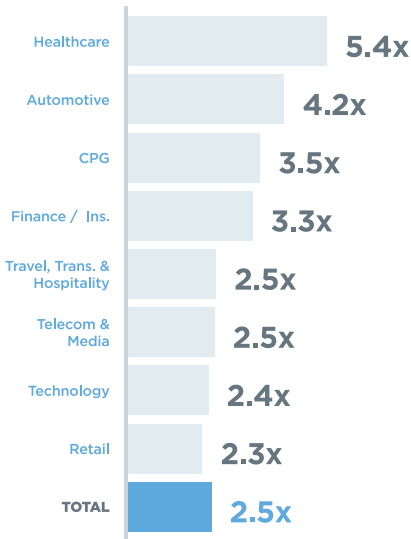
3. CHALLENGES

In the true spirit of Twitter, let's be transparent: tapping into these opportunities is hard. Tweet volumes are rising rapidly across all industries, and companies are finding it challenging to keep up.

Companies are Struggling to Keep Up With Twitter Growth

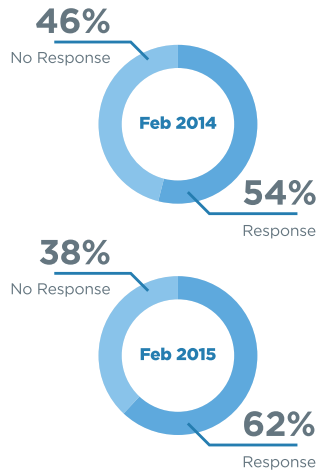
Tweets at brands growing in all verticals

Growth in Tweets brand and service accounts, Mar 2013 - Feb 2015



~40% of Tweets service accounts get no response

Percent of unique users Tweeting at service accounts



With customers contacting your brand in public, it's all too apparent when your company isn't up to the task of responding. But companies that do this well can capitalize on a unique opportunity — customer expectations are still forming and you can surprise them with great service.

Companies looking to serve their customers on Twitter need to think carefully about their objectives and about the needs of their customers, and from there create and implement a strategy. It's not easy. Most companies find that the right thing and the hard thing are usually the same.

Let's take a closer look at the challenges. Spoiler alert: the next chapter (4) is a step-by-step guide on how you can overcome them.

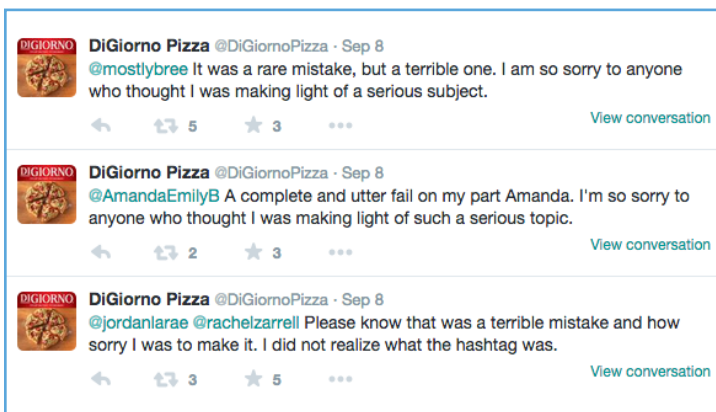
3.1 PROLIFERATING CUSTOMER TOUCH POINTS

Consumers are on multiple channels as they speak about and engage with your brand. These interactions are becoming increasingly public—even if they don't start on a public channel—and can turn one customer's experience, whether good or bad, into a story shared for millions to see. In this kind of an environment, being an active participant in the conversation is critical.

Your organization must balance the challenge of controlling the narrative with the necessity of engaging in real time. Not only that, your brand must be nimble in responding in a personal way across channels. Maintaining a consistent experience across channels is not always easy. Comcast, for example, with its many service lines, has had to invest in the infrastructure and systems to ensure customers are provided with a consistently high level of service across channels.

“If you're not engaging customers during the entire product life cycle through social media, you're missing out. Because someone else will.”

-Dennis Stoutenburgh



3.2 CHALLENGES SETTING UP THE CAPABILITIES

Mere presence on Twitter is insufficient- customers expect a response when they reach out, but the challenges of engaging effectively are many. Companies need to develop a customer service philosophy, learn how to create a personalized experience, design the organizational structure, build the team, choose the performance metrics, evolve the customer service process for Twitter and select the right tools.

Companies are aware of the hurdles; in fact, 82 percent of

Liability

Getting this wrong could lead to a potential PR disaster.

DiGiorno, for example, light-heartedly chimed in on a trending hashtag, without first understanding the context: highlighting domestic abuse against women.

Instead of closing down shop, as other brands have done in crisis moments, DiGiorno responded to the ensuing firestorm with maturity and authenticity.

DiGiorno apologized to every single person who Tweeted them with a sincere, authentic apology, which brought them favorable press and standing with the people they offended.



companies believe their processes for providing customer service on social networks could be more mature²¹. A better understanding of the following challenges can help you mature your customer service on Twitter.

DEFINING A SERVICE PHILOSOPHY

Many companies start out on Twitter in a purely reactive way, waiting for customers to find them, then scrambling to put out the fire. The best brands are able to define a clear service philosophy that supports its brand promise. It is hard for companies to clearly articulate what they stand for, but failing to do so prevents a consistent customer experience.

CREATING A PERSONALIZED EXPERIENCE

Consumers demand personalization – they aren't interested in chatting with a bot. Many companies struggle with providing a clear, consistent brand voice and efficient, personalized service, especially as they scale. Some companies have found partial success by outsourcing their customer service on Twitter, but others have found that outsiders fail to represent the voice of their brand adequately. The challenge in all cases is to make each individual feel like they matter.

DEFINING THE ORGANIZATION

In many companies, responsibility for the social media strategy falls to the marketing department. When it comes to delivering customer service on Twitter, however, the existing customer service team may be better suited to the task. Companies must consider their internal needs, strengths and assign clear ownership. They must also determine the size of the team, define the process and coordinate across departments where necessary.

BUILDING THE RIGHT TEAM

The skillsets of your best call center or chat employees do not always overlap with those needed for customer service on Twitter. Twitter agents, for example, need strong writing skills. Not only is hiring the team a challenge,

companies must also develop training to prepare their Twitter agents to respond, publically and in real time.

CHOOSING METRICS

The existing customer service metrics do not always port perfectly to customer service on Twitter. Companies have difficulty deciding which metrics to use, and how they should inform the operational performance of the team. Many companies struggle with making the business case and defining the ROI of their efforts.

EVOLVING THE CUSTOMER SERVICE PROCESS FOR TWITTER

Companies should examine their current service flows and decide if they make sense for Twitter. There are lots of strategic decisions: What issues should be addressed on Twitter? How does the process on Twitter integrate with existing customer service processes? Which customers matter most? Should we setup a specific customer service account? And when do we handle an issue in private versus in public? How you answer these questions will affect your process.



Company responses to similar Tweets differ widely. Some issues can only be resolved in Direct Message, while others can be resolved in the same conversation

Yaniv @3EBfanman85 · Mar 28
@ChaseSupport what is the \$12 service fee I see on my account balance?

Chase Support @ChaseSupport · Mar 28
@3EBfanman85 Good morning! We have seen and replied to your DM. Please let me know if you have trouble viewing it. ^AN

Yaniv @3EBfanman85 · Mar 28
@ChaseSupport reply sent

Chase Support @ChaseSupport
@3EBfanman85 We've replied to you via DM. Let us know if you have any other questions or concerns. ^AN
10:43 AM - 28 Mar 2015

Gregory S. Lambiase @GregoryLambiase · Mar 26
@Chase Why do I have to show my license when I'm depositing cash into my own account?

Chase Support @ChaseSupport · Mar 27
@GregoryLambiase 2/2 owners & authorized signers can make cash deposits to a personal acct & that they must show identification. ^JD

Gregory S. Lambiase @GregoryLambiase · Mar 27
@ChaseSupport That makes completely know sense! Let's go over this again, my account, my cash deposit but you still need my id, lol. #smh

Chase Support @ChaseSupport · Mar 27
@GregoryLambiase It is part of our anti-money laundering policy. We will forward your feedback internally. Tweet us for addt'l acct ?s. ^JD

Gregory S. Lambiase @GregoryLambiase · Mar 27
@ChaseSupport Oh, why didn't you say that to begin with? Is that only specific to business accounts?

Chase Support @ChaseSupport · Mar 27
@GregoryLambiase For business accts anyone can make a cash deposit, but the depositor must present one piece of primary ID. ^JD

Gregory S. Lambiase @GregoryLambiase · Mar 27
@ChaseSupport Feels good having my account protected, thanks for the information.

SELECTING AND IMPLEMENTING THE RIGHT TOOLS

The right tool can dramatically boost your ability to respond. But buyer beware: some tools claim to be optimized for service on Twitter, but are really just poorly adapted software that actually hinders your ability to scale. Choosing the right tool requires research. Companies iterate, testing different tools only to find a variety of frustrations — one being the difficulty in integrating Twitter service tools with their CRM systems.

These are some of the most common challenges organizations face as they attempt to serve their customers on Twitter. The next chapter will provide a step-by-step guide to help you address these issues and capture the full opportunity presented by customer service on Twitter.







4. YOUR JOURNEY TO CUSTOMER SERVICE ON TWITTER

SET THE STRATEGY

- 4.1 SET YOUR VISION
- 4.2 SIZE AND PRIORITIZE YOUR OPPORTUNITIES
- 4.3 DESIGN YOUR TWITTER CUSTOMER SERVICE EXPERIENCE

DEFINE GOALS AND MEASUREMENT

- 4.4 SET GOALS FOR PERFORMANCE METRICS
- 4.5 ESTABLISH THE MEASUREMENT MECHANISM

MOVE TO ACTION

- 4.6 PUT YOUR STRATEGY IN MOTION

BUILD CAPABILITIES FOR SCALE

- 4.7 ITERATE AND INNOVATE

4. YOUR JOURNEY TO CUSTOMER SERVICE ON TWITTER

“Customer service succeeds when it accomplishes what the organization sets out to accomplish.”

Seth Godin, marketer and best-selling author

Even companies that are successfully serving their customers on Twitter may not be getting the full benefits of the channel. This chapter offers you a step-by-step guide for getting the maximum value out of the customer service you provide on Twitter, making it more than a platform for resolving issues but also a channel for satisfying and delighting your customers. The chapter breaks the process down into four steps: first, set the strategy, then define success and measurement, move to action and build capabilities for scale.

- **Set the strategy:** Companies must set a clear vision, articulate the business case and define the customer experience.

Seven Steps to Customer Service on Twitter

Set Your Strategy

- Step 1: Set your vision
- Step 2: Size and prioritize your opportunities
- Step 3: Define the customer service experience

Define Goals and Measurement

- Step 4: Set goals for performance metrics
- Step 5: Establish the measurement mechanism

Move to Action

- Step 6: Operationalize your strategy

Build Capabilities to Scale

- Step 7: Iterate and innovate



- **Define goals and measurement:** Get specific with how you define success and then build the capabilities to manage the team and continuously improve.
- **Move to action:** Setup your account, organize a Twitter SWAT team, choose a tool, develop your process and define priorities for triaging Tweets.
- **Build capabilities for scale:** Iterate and innovate to continue building your capabilities.

SET THE STRATEGY

4.1 SET YOUR VISION

Companies that succeed with customer service on Twitter have a clear understanding of how they want to respond to customers, which ones to respond to first and how to incorporate creating moments of delight in their interactions. Twitter research has uncovered how companies with different strategies and brand images meet customer expectations differently. The most successful companies align their strategies with their visions of the customer experience. To get to the highest levels, companies progress through three stages of maturity as they increase their expertise with customer service on Twitter.

CREATE YOUR VISION FOR CUSTOMER SERVICE ON TWITTER

Companies that create competitive advantage with customer service on Twitter anchor their vision in their existing marketing and brand strategies. A strong vision will set the stage for the customer experience you wish to deliver and how you will differentiate yourself from the competition.

As you define your vision for your Twitter presence, you'll want to consider how your brand should be perceived, what behaviors will support that perception and how this will differentiate your brand from competitors. Note, most brands already have a vision, so you likely do not need to start from

EXERCISE: USE THE FOLLOWING TEMPLATE WITH YOUR TEAM TO BEGIN POSITIONING YOURSELF AND CREATING A VISION STATEMENT...

As **[INSERT COMPANY]**, we will be **[INSERT 2-5 Key Words / Attributes]** to our customers while **[INSERT mission of your care organization]**. As a **[CHOOSE a STAGE]** organization, we will focus on performance across **[INSERT categories / portions of the gameboard]**. Unlike **[INSERT competitors here]**, we will be **[INSERT key point of differentiation]** by **[INSERT proof points of differentiation]**.

scratch. Leverage existing materials and focus on how the brand can maintain consistency on Twitter — with clear information on your brand strategy, you can design the types of touch points and service that are consistent with that vision. Hilton, for example, has a brand vision “to fill the earth with the light and warmth of hospitality.” Hospitality, by definition, includes being friendly and generous toward customers and non-customers. Therefore, to extend Hilton’s vision onto Twitter, they provide travelers with personalized travel tips, even when they’re not Hilton customers.

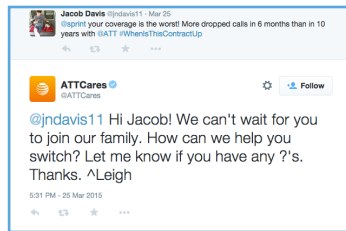


Consider two examples for how companies do this well: Zappos and AT&T. Two very different companies. Two very different approaches to customer service on Twitter. But two equally effective approaches. Deciding your vision will help you decide “where to play” in customer service, and can guide your agents to represent your brand consistently.

ZAPPPOS AND AT&T HAVE DIFFERENT VISIONS FOR CUSTOMER SERVICE ON TWITTER

Zappos service-focused vision translates into high-touch, playful interactions on Twitter...

...AT&T’s vision, though less playful, focuses beyond issue resolution to proactive engagement



Zappos’ customer service strategy reflects its core values, which include “Deliver WOW Through Service” and “Create Fun and a Little Weirdness.” Its Tweets combine playfulness and humor as they seek to wow their customers. If you consider Zappos’ competitive market, it sells products identical to other online and brick-and-mortar shoe stores. For Zappos, differentiation happens in the way it presents itself and serves its customers. It strives to reinforce its brand essence with each customer interaction.

But not all companies need to be like Zappos. As a wireless carrier, AT&T operates in a competitive market where growth is dependent upon acquiring customers from other carriers. In addition to issue resolution, AT&T leverages Twitter to proactively reach out to potential customers who are unhappy with their service with other carriers, and reinforce one of its points of differentiation: its extensive network.

BUILD AN ORGANIZATION TO SUPPORT YOUR STRATEGY

Figure out where your team should reside in the organization. Where will it get the best support for delivering on your strategic priorities? We have seen many successful models: the two most common are alignment under customer service or a hybrid structure with the Twitter team split between customer service and marketing.

- **Alignment with customer service:** Companies with mature capabilities typically house the Twitter team within existing customer service operations, where there is already deep experience resolving service requests. However in this model, it is essential that the team work closely with marketing to ensure no customer Tweets slip through the cracks and that the brand voice is represented clearly and coherently across channels.

- **Hybrid between customer service and marketing:** Some companies split responsive service and proactive service between operations and marketing. The Twitter service team often starts out under marketing simply because the marketing group may

already be handling other company activity on Twitter. But sole marketing ownership has disadvantages: customer service know-how is elsewhere in the organization and porting it over can be difficult. In addition, marketing typically optimizes for different metrics. On the other hand, marketing's strengths can be a plus for proactive customer experiences, which is why

Examples of companies who have placed Social Care in operations



Both Hilton and Brooks Brothers have a clear demarcation between ownership of customer care, versus the group creating moments of delight.



many companies choose a hybrid model. If you take that route, however, it's crucial to put in place governance for coordinating across functions.

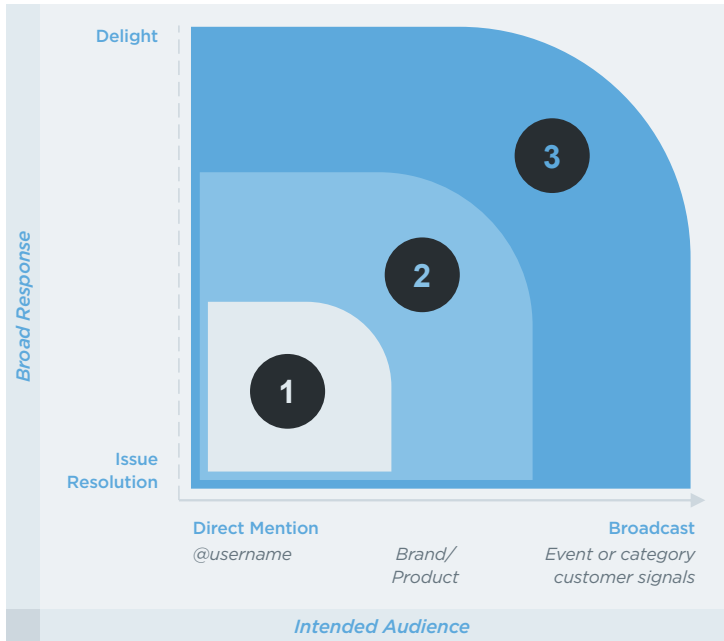
KNOW THE STAGES FOR CUSTOMER SERVICE ON TWITTER

We've identified three stages that companies go through as they improve their ability to deliver customer service on Twitter. Understanding these stages can help you as you consider the level of your service on Twitter today, and define your goals for the future.

As you read the game board, the progression from left-to right (x-axis) represents the universe of Tweets, from targeted to a brand or customer service account, all the way to broadcast Tweets. For example, some customers will Tweet directly at your brand or customer service account, while others may only mention a product, or mention a life event in passing. As you move from left to right, it is more difficult to source, triage and queue Tweets.

From bottom to top (y-axis) represents the type of Tweet response, from pure issue resolution (i.e., a Telco customer's phone plan needs renewal and the company helps her) to creating moments of delight (i.e., a Telco customer moves and the company offers her with a special broadband unprompted).

The Stages of Customer Service on Twitter



STAGE	STAGE	STAGE
1	2	3
Direct Mention Issue Resolution:	Broad Issue Resolution:	Proactive Engagement:
<i>Resolves issues directed at @brand and @care usernames</i>	<i>Resolves all stage 1 issues and those with brand / product mentions, responding to every Tweet that seeks resolution in a quick and effective manner</i>	<i>Spans the universe of Tweets from direct to broadcasts, and responds with issue resolution or delight, when appropriate</i>



- **Stage 1: Reactive Issue Resolution:** This stage focuses on quickly and effectively resolving customer service issues that are Tweeted to your service or brand Twitter accounts. This is Stage One for most companies because these high priority, actionable Tweets come directly to you. By learning how to resolve your customers' most pressing issues, you can prepare to advance to the next stage.

- **Stage 2: Broad Issue Resolution:** The second stage expands the focus of customer service to include Tweets that aren't aimed at brand accounts. Interactions with customers also evolve, relying more on preemptive resolution and engagement, including the development of content that can answer the most frequently asked questions, heading off a service request. This could include the use of richer content, like

Twitter videos, Periscope script, Infographics and image instructions, all of which can increase the effectiveness and engagement of customer service interactions. The volume of Tweets and complexity of requests rise for this group; to succeed, companies need clearly defined processes and the right technology and tools. @BestBuySupport is a prime example: its customer service team responds to Tweets targeted at its accounts as well as those with product mentions that are aimed elsewhere. Customers can solve a lot of problems on their own, thanks to a broad array of content addressing common issues.

Find Your Company's Stage:

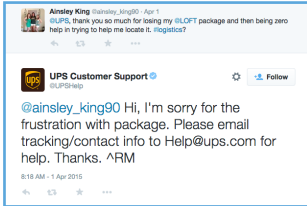
Thinking about where you are and where you're going can help align your team:

1. Draw the game board on a whiteboard and gather your team.
2. Describe the game board, including what each axis represents, to your team.
3. Distribute two Post-it notes to each team member.
4. Label each note 1 and 2. 1 represents current operating space; 2 represents desired future space.
5. Have each person place his/her sticky notes on the game board.
6. Let each person discuss the rationale for his/her selection; facilitate a discussion and align on your starting point and goal.

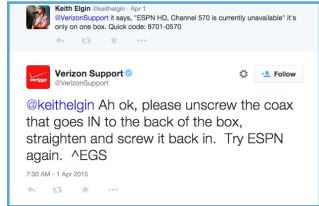
The Types of Tweets for Each Stage

COMPANIES AT STAGE 1 RESPOND TO TWEETS TARGETED BRAND OR SERVICE ACCOUNTS WITH A FOCUS ON ISSUE RESOLUTION

@USPS respond to Tweets at its brand with specific help



@VerizonSupport provides troubleshooting advice over Twitter

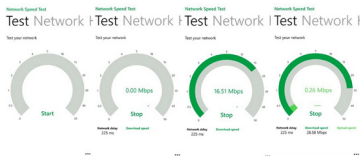


COMPANIES AT STAGE 2 PROACTIVELY PROVIDE CUSTOMERS WITH CONTENT AND RESPOND TO TWEETS BEYOND THOSE TARGETED AT BRAND OR SERVICE ACCOUNTS

Microsoft proactively sends content to help users before they have questions



Best Buy reaches out to customers proactively



COMPANIES AT STAGE 3 EMPLOY A VARIETY OF TECHNIQUES TO PROACTIVELY CREATE MOMENTS FOR THEIR CUSTOMERS

Hilton provides travel tips, even if a person is not staying in a Hilton Hotel



Wal-Mart reaches out to customers, even if they haven't mentioned the brand



- **Stage 3: Proactive Engagement:** In this stage, companies have succeeded in filtering, triaging and responding to the universe of Tweets, and have learned to proactively create moments of delight. For example, Purina, a maker of pet foods, has been known to respond to new pet owners with gifts, typically when the new owner didn't Tweet at Purina. Companies in this group have a differentiated service philosophy that drives them above and beyond issue resolution.

The trajectory for companies is typically sequential, with stage three being most advanced. Companies that have already been using Twitter for marketing purposes, however, may already be engaging with customers proactively but will still need to learn how to resolve the customer issues that will undoubtedly be Tweeted at them. In this case the journey starts at stage 3, and circles back to stage 1 and then stage 2. Wherever your starting point is, the important thing is to understand where you are, where you want to be and the necessary steps for getting there.

Each stage requires new skills. Here's a look at what you'll need as you progress in your customer service journey:

- **Mastering Stage 1:** Skilled, empowered team. The key to success in the first stage is having great people empowered to resolve issues. Every company we interviewed emphasized the importance of selecting top people, with a skillset tailored to the job. Excellent writing skills, for example, are a must. Additionally, the team should be empowered to take the initiative to quickly resolve problems. T-Mobile, for example, gives its Twitter customer service team more freedom and authority to resolve issues than its call center agents.
- **Transitioning from Stage 1 to 2:** Technology and tools. The second stage requires companies to focus on Tweets not directly targeted at their Twitter accounts, including Tweets that merely mention the brand. To find the

relevant Tweets, handle the increase in volume and triage which Tweets to respond to, companies will need to develop new processes and acquire new tools. For example, when Hyatt chose a partner, its ability to respond increased 10x in one month.

- **Transitioning from Stage 2 to 3:** Shift in philosophy. Moving toward creating moments of delight requires a shift in service philosophy. Now you're looking for opportunities to provide an unexpected benefit. But to do this will require triaging massive Tweet volumes to identify the right customers at the right time and crafting responses that inspire.

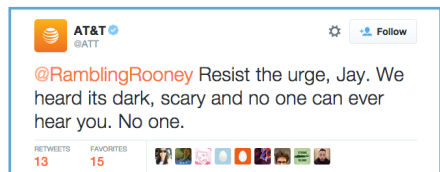
A better understanding of your stage will frame your priorities for developing customer service on Twitter. Is quick, cost-effective issue resolution most important? Or is there a new opportunity for you to delight your customers with services that go beyond mere problem solving? We believe all companies can benefit from both.

4.2 SIZE AND PRIORITIZE YOUR OPPORTUNITIES

You've articulated your vision and identified with a stage. Now it's time to make the business case. It is essential to articulate the value as you seek resources to build your team. This section of the Playbook will help you as you make the case for the customer service opportunity on Twitter.

PROFILE THE OPPORTUNITY FOR ENGAGEMENT

News flash: your customers are talking about you on Twitter. The question is, will you join the conversation? Often, a good way to begin making the case for customer service on Twitter is to simply show how people are currently discussing your brand. Could you imagine not



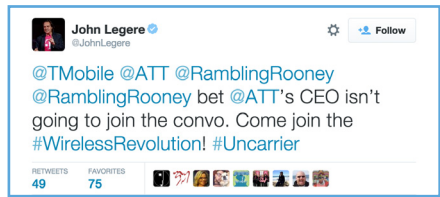
picking up the phone when your customers call you?

Twitter provides the opportunity to make a positive impression with your customers — and for the world to see. For many

companies, this is reason enough to launch customer service on Twitter. To make a strong case, measure the volume of Tweets at your brand, then select a sample and share them with a cross-functional executive team.

At T-Mobile, the opportunity on Twitter is compelling enough for the CEO, John Legere, to personally respond to Tweets. See the example where he wins a customer from AT&T!

Hilton provides another good example. Its team showed a display of Tweets about Hilton to the Director of Care. Much to the director's dismay, Hilton was not engaging in the back-and-forth conversations that would help support its brand focus of hospitality. The team got buy-in, then and there, to begin forming a team and start responding to Tweets.



MAKE THE CASE WITH METRICS

A prime benefit of serving your customers on Twitter is in the rich new array of data that your interactions will generate. It is important to select the metrics that matter most to you. This can depend on your stage. For example, if you're in Stage 1, much of the value will come from the cost savings compared to solving the same issues through your call center. If your organization is further along on the maturity scale, it may prioritize customer satisfaction or engagement, both of which are easily measured. Regardless, it is important to try to translate these metrics into real dollar opportunities.

Many companies use surveys for harder-to-get data. T-Mobile asks customers

Let us know how we did!

Was T-Force able to resolve your issue?

Did T-Force resolve your issue quickly?


Would you recommend T-Force to someone in the future?

Did you call Customer Care after working with T-Force?

Rate your overall T-Force support experience: ★★★★★

(Optional) What is your social handle?

(Optional) Do you have any comments for us?

90%  Percentage of T-Mobile customers who indicate they do not need to call the call center after interacting with Twitter customer service

about their satisfaction rates; keeping the scores above 90 percent is a critical marker of success for the Twitter service team. They also use surveys to ensure that issues are resolved, and that the customer will not need to use a call center, which can be used as a proxy for call deflection.

As you try to develop an ROI, experiment initially with the ROI from operational savings (i.e., reduced cost per interaction on Twitter) and new revenue opportunities (conversion opportunities from previously unaddressed questions). Remember, this is an iterative process and you may not have the data you need right away.

At times, the data you want will not be easy to get. In those cases, many companies can use indicators of value. For example, correlating metrics like customer satisfaction, churn, or impressions to concrete value metrics, like revenue can help you better understand which metrics to prioritize. Follow the infographic in this chapter as a potential path for establishing the value of your Twitter presence.



Define your priority for Twitter value creation...

Make the case using metrics that:

- matter most to your business strategy and performance
- are the most influential for decision makers

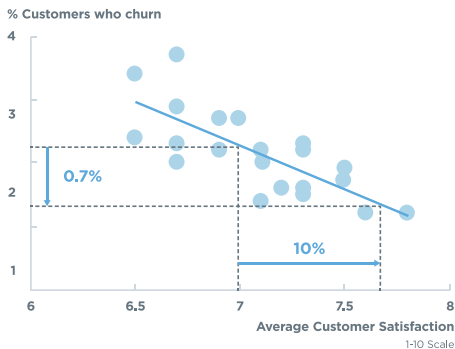
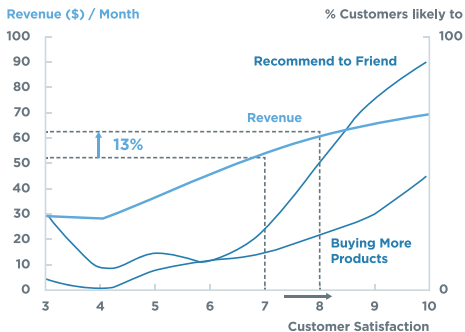
Customer Satisfaction	Engagement	Revenue	Operational/ Cost Savings	Continuous Insight & Analytics
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...select an approach to find the value...

Key Question	Engagement	Revenue	Operational/ Cost Savings	Continuous Insight & Analytics	
<ul style="list-style-type: none"> • What is the baseline CSAT for customer service channels? For Twitter? • What are the primary drives of CSAT on Twitter and how do we optimize? 	<ul style="list-style-type: none"> • What is the number of impressions (re-Tweets, favorites, views) per service request on Twitter? What drives it? • What is the savings vs. current CPI? 	<ul style="list-style-type: none"> • What is the conversion rate or intent to purchase on Twitter? What is the average spend? • What is the correlation between CSAT and revenue? 	<ul style="list-style-type: none"> • What is the volume and mix of requests on Twitter vs. other channels? What can be deflected? • What is the cost differences by channel? 	<ul style="list-style-type: none"> • Which customer preferences, behaviors, demographics and occasions predict value? • Which product features matter? • What is the current buzz/settlement? 	
<p>01 10</p> <p>Data</p>	<ul style="list-style-type: none"> • CSAT by channel • Dimension of service 	<ul style="list-style-type: none"> • CPI/CPM • Drivers of engagement • Engagement date 	<ul style="list-style-type: none"> • Conversion/intent to purchase • Spend/purchase • Correlation between CSAT and rev. 	<ul style="list-style-type: none"> • Volumes/issue types on Twitter vs. traditional channels • Fully-loaded costs of service per interaction by channel 	<ul style="list-style-type: none"> • Product/transaction • Demographic/behavioral data • Twitter engagement/sentimental data connected to CRM
<p>Sample Analysis</p>	<p>Surveys on CSAT and other service dimensions</p> <p>Multiple-regression to correlate CSAT with timeliness, friendliness, resolution, etc.</p>	<p>Engagement over time</p> <p>Incremental engagement x CPM = Impression value</p> <p>Correlates with revenue</p>	<p>Surveys</p> <p>Cookies/links to track conversion</p> <p>Regression correlating CSAT/ impressions to revenue</p>	<p>Social listening</p> <p>Surveys (see example)</p> <p>Costing analysis</p>	<p>Text mining/conversational</p> <p>Segmentation of customers</p> <p>Predictive (Bayesian) analytics on value/behaviors/life events/etc.</p>

...translate performance metrics into dollars...

Correlate performance metrics with value metrics²²



Impact of 10% increase in CSAT

13% ↑
Increased Revenue
Per Month

22% ↑
Increased
Recommendation

8% ↑
Increased Intent
to Buy

↓ **8%**

Annual Reduction in Churn Linked
to 10% Improvement in CSAT

Make the value tangible: e.g., “A 5% improvement in response time yields a 10% improvement in CSAT, which correlates with an incremental \$10 revenue per customer per month. For 5k customers, this is a \$600K run rate opportunity.”

...experiment to learn.

Identify
Variables to
Optimize

- Identify 1-2 independent variables (i.e., tone, response time) that you want to test against your dependent variable (i.e., CSAT or revenue)

Test Your
Hypotheses

- Hypotheses make your hunches testable – a simple example might be “responses with a smiley face result in higher CSAT
- Tests prove or disprove your hypothesis – work with your teams to design experiments to isolate the treatments

Measure Your
Results

- Ensure you have the capabilities to measure results and act upon them – this is critical to continuous learning

Rinse & Repeat

- Continually test and try new things

* Typically companies set 95% confidence intervals as the minimum confidence to reject the null hypothesis (that the given treatment has no effect on the dependent variable)



And recall, the impact of customer service on Twitter goes beyond the interaction with the immediate user. The nature of Twitter enables one-to-one-to-many relationships—which means others on Twitter can view your one-to-one service interaction—thus creating an earned media opportunity.

TEST TO LEARN

If you do not have the necessary metrics to calculate an ROI, that's okay. Companies are always working toward developing more concrete ROIs. You can build your ability to run experiments over time. For example, try running A/B tests to see if different types of messages change conversion rates. For more on building capabilities and getting value from experimentation, see Step 7.

4.3 DESIGN YOUR TWITTER CUSTOMER SERVICE EXPERIENCE

After you set your vision and size your opportunity, the next step is defining the type of customer service experience you want to deliver on Twitter.

This is particularly important because customer service on Twitter is your company's chance to showcase your most important brand values.

But what are your options for shaping that experience? We have identified four major components: brand voice, response content, service hours and response timing and engaging community.



From Vision to Action

Best Buy is a great example of translating a wider customer service mission onto Twitter.



Vision

Best Buy aims to create meaningful communication in a virtual world by bringing the power of their blue shirts and Geek Squad agents online in service of our customers.

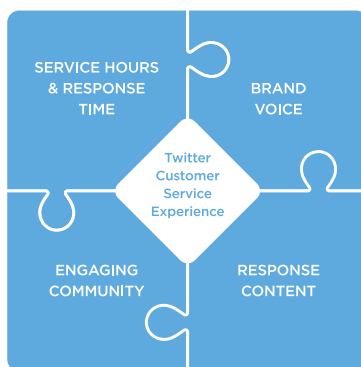


Action

This translates to knowledgeable, comprehensive responses to customers, effective use of content, and an end-to-end service mentality.

DEFINE THE EXPERIENCE

The experience you provide on Twitter should be an extension and amplification of the general experience your customers expect from your company. Do you want to foster a personalized, concierge service experience? Or maybe a consistent and efficient one? The right answer is the one that matches the overall customer service experience you are trying to achieve and meets the needs and expectations of your customers.



Since Twitter is a public forum, it's a showcase for what consumers can expect if they engage with your company in the future.

As we dig into the four components of the Twitter customer service experience, we can explore specific examples of how brands employ each one to create their desired experience.

BRAND VOICE

The first component of your Twitter customer experience is an authentic brand voice that captures your brand's tone, focus and points of differentiation. Do you want to come across as a friend or advisor? Would your customers like to grab a beer with you, or perhaps sip a glass of wine?

Voice/Conversation

Part of developing the brand voice means acknowledging that the interaction on Twitter is a conversation, not a monologue. Brand voices are traditionally one-sided, talking at customers.

You have a unique opportunity to extend that brand voice into a dialogue with your customers. This extension is an exciting chance to continually build your brand as you talk with customers.



Since customer service on Twitter is an extension of your overall brand, it is important to consider how your conversations map to the brand experience you wish to uphold in all channels. Companies should solicit input from relevant units within the organization, including customer service, marketing, PR, product and others, unifying the approach to customer service with the larger brand management efforts. Spotify, for example, has someone from the marketing department embedded within the Twitter customer service team.

A good way to refine your brand voice is to create a persona or give your brand human attributes. If your brand were a person, what are the top 5 attributes it would have? This will result in a clear vision that guides how your Twitter customer service team responds.

Friendliness

Regardless of the brand voice you employ, remaining friendly is essential. Being friendly includes being empathetic, offering to help and more. Brands are expressing empathy with customers less than half the time on Twitter. Two-thirds of brands first response to consumers inquiries on Twitter include phrases of willingness to help. Customers are most satisfied when their interactions are friendly. Consumers are 25% more likely to be satisfied with a brand after a friendly customer service interaction.

Seamless is known for their fun, quirky style and is not afraid to use humor



Brooks Brothers, true to brand, remains formal and professional in their voice



As you refine the persona, it is helpful to run training and learning exercises for your teams. Spotify, for instance, builds the brand voice in training by having agents role play Tweets and talk about responses.

THE RIGHT RESPONSE

Content, such as pre-written Tweets, links, creative and videos can help simplify the service experience, increase engagement and facilitate issue resolution, but it should not be employed at the expense of personalized service. Customers expect that you will not only solve their issue, but that you will also provide a personalized experience. Brands are using customers' real names

in their replies just 8 percent of the time²³, if you are looking for somewhere to start. The value of being personal should not be understated, of customers who sought service on Twitter, 83 percent were satisfied when they felt the experience was personalized. Only 20 percent were satisfied when the experience was impersonal²⁴.

Providing your Twitter customer service team the right rich media makes responses more engaging and ensures consistency for your customers. Best Buy, for example, employs an arsenal of product videos, creative and community forums, to help consumers address their issues holistically. But you need to exercise some caution if that content directs customers to other channels:

- Moving to another channel creates one more hurdle for the customer before their problem is resolved.

Sidebar on Periscope

Brands that leverage Periscope can revolutionize the service experience on Twitter. With the ability to seamlessly live stream, agents can walk customers through an issue or see first hand what customers are experiencing. Agents will be able to diagnose problems in a fraction of the time, avoid a truck-roll, show customers exactly what to do — the possibilities are endless.



- Removing the conversation from the public eye decreases the number of people who see the successful resolution.
- The redirection or content has to be effective, complete and relevant, otherwise you risk frustrating customers who may feel the response is canned and insincere

SERVICE HOURS AND RESPONSE TIME

Your service hours and response times shape customers' sense of how seriously you take their problems.

When it comes to service hours, certain sectors can have down time during non-core business hours, but others don't have that luxury. The reality is that customers will Tweet whenever is convenient for them, whether that's 2pm or 3am. If you want customers to feel supported around the clock, you need a Twitter customer service team that's always on. If, on the other hand, your customer service requests tend to be less urgent and you elect to staff the function only during certain hours, you need to communicate that clearly. In fact, up to 30 percent of all customer dissatisfaction is caused by customers making the simple mistake of having incorrect expectations²⁵.

Response time is one of the fundamental levers influencing customer satisfaction when providing customer service over Twitter. Make sure you let



Don't forget to factor in flex capacity! Just as with call centers, service requests on Twitter will fluctuate based on external factors. As you improve your response time and make promises to your customers, make sure that you prepare accordingly for times where demand spikes so you're not falling behind.

your customers know what level of service they should expect. (see Step 4 for more information on this).

Many call centers are now 24/7 with well-established response time standards. Benchmarks and standards on Twitter, however, have not solidified. Customer expectations are still in their early stages. This presents an opportunity for your brand to stand out and provide a VIP-experience by optimizing the service timing lever.

ENGAGING YOUR COMMUNITY

The last component of the customer service experience, and one that can be particularly powerful, is developing and engaging your community. Given its uniquely public nature, Twitter presents a great opportunity for building a community, especially among users of customer service.

Brands with a loyal following can rely on their communities to build an environment in which users help solve one another's problems. Here are some ways you can encourage this:

- Tweet "thanks" at users who speak up.
- Favorite a user's helpful Tweet.
- Spotlight particular users.
- Run promotions for champions of the brand.
- Create an "elite" club of superusers with perks, bonuses, discounts, or coupons

While this type of community may not be possible for every brand, you can still encourage your customers to connect by referencing shared issues and resolutions.

The Power of "Thanks"

Thank-you gestures offer recognition to your most engaged customers, reinforcing their community spirit and encouraging them to continue offering a hand to their fellow users.



DEFINE GOALS AND MEASUREMENT

4.4 SET GOALS FOR PERFORMANCE METRICS

Performance metrics for customer service fall into four major categories: customer satisfaction, operational efficiency, revenue opportunity and brand building. As you start to measure and set goals against these metrics, consider what matters most to your customers and factor in where along the journey you are.

THE METRICS

Customer happiness

- **Satisfaction (CSAT):** the percentage of customers who are satisfied with their service interaction
- **Willingness to recommend:** percentage of customers who are likely to recommend your brand based on their service experience
- **Reengagement rate:** percentage of customers you serve who continue to interact with your brand in the future

Operational efficiency

- **First response time (FRT):** average amount of time it takes your team to offer the first response to a customer's Tweet.
- **Response volume:** number of Tweets your team responds to
- **Response rate:** percentage of all incoming Tweets your team responds to
- **Channel impact:** Twitter customer service as a percentage of service over

Problem Solved

Resolution is often difficult to track and companies have approached it in different ways. Most common is having agents self-identify an issue as resolved with a quality assurance team going through and checking a sampling of prior interactions.

This can be taken even further, as at Comcast, where agents are required to identify how the issue was resolved allowing care leadership to identify trends and empower the team with relevant training and content to handle more volume.

all channels

- **Resolution rate:** percentage of interactions that result in a resolution
- **In-channel resolution:** percentage of interactions initiated on Twitter that are resolved on Twitter
- **Channel efficiency:** average number of Tweets necessary to resolve an issue

Revenue opportunity

- **Engagement:** Twitter engagement metrics such as clickthrough rate, Retweets, favorites and responses
- **Conversion rates:** the percentage of people who go on to make a purchase from a Twitter link

Brand building

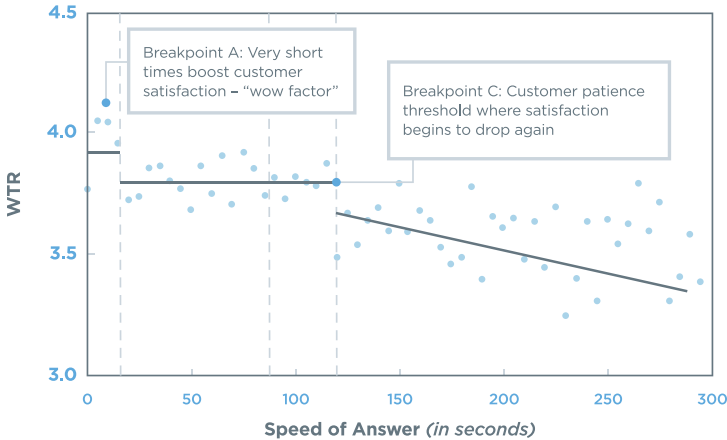
- **Impressions:** the number of times your Tweet was seen, including views of its Retweets
- **Potential reach:** the number of followers of your Tweet plus follower of its Retweets
- **New followers:** the additional number of followers that your account has over a given period of time

Some of the metrics listed above, such as first response time, are directly comparable to the metrics used in a call center, but others derive more from marketing or are unique to Twitter. Revenue opportunity and brand building metrics, like impressions and engagement, are unique to Twitter and show the extent to which you're tapping into the unique value of providing customer service on Twitter. Hilton, for example, tracks conversion and reengagement as opportunity metrics. These metrics, traditionally difficult to isolate, are now at your fingertips, allowing you to measure and track them as you scale.



Willingness to recommend (WTR) as a function of speed of answer²⁶

Survey based; CS only; n=-95K during 4 month period



Companies need to determine the “zone of indifference” in which they can satisfy customers while remaining efficient

As you set goals for your metrics, it’s worthwhile to understand what matters most to your customers. For example, in traditional customer service, companies have found that there is a response time window in which longer response times don’t dramatically affect customer satisfaction. This “zone of indifference” helps companies to balance customer expectations with cost.

WHAT MATTERS TO CUSTOMERS

As you measure, be sure to find out what your customers care about most. A common thread in customer service, for instance, is that companies overemphasize the importance of first response time in customer satisfaction.

Since customers’ expectations are still solidifying on Twitter, a 1 hour response time serves as the outer limit of what’s acceptable. In 2013, 53 percent of customers who asked a brand or product question on Twitter expected a

response within one hour. If a customer complained to a brand, that figure went up to 72 percent²⁷. Expectations for response times are rising quickly. In addition, acceptable response times vary by industry and each company needs to understand their customers' "zone of indifference" or the amount of time customers will tolerate before satisfaction rates fall. For example, T-Mobile has a stretch goal to respond to customers in less than 15 minutes.

That said, there is a significant opportunity for companies to differentiate themselves with superior service as consumer expectations have not yet formed. This is your chance to shine and be the standard-bearer.

In social care we are still inventing what our reference points are. There is not yet a set value for what 'excellent care' is on social. Companies who are leading in social care have the unique opportunity to define the space (to their advantage).

WHAT TO EMPHASIZE FOR YOUR STAGE

As you progress through the various stages, you should use different measures to gauge success:

- **Stage 1:** Focus on the most important drivers of customer satisfaction like resolution rate, resolution time, first response time, as well as softer skills like brand voice and personalization
- **Stage 2:** Focus on the opportunity to become more efficient. Also, measure efforts to resolve a broader range of issues. This requires more advanced prioritization and triage, typically by using more advanced tools.
- **Stage 3:** Become more advanced in developing metrics around opportunity and brand building. This is where companies set real goals around creating delight and earned media.



4.5 ESTABLISH THE MEASUREMENT MECHANISM

As with any emerging channel, you need to share your results across the organization and build the right capabilities so that everyone knows the goals and you can track them across channels. Emphasize to the organization that customer service on Twitter goes beyond traditional customer service. Old metrics won't always apply, and the Twitter customer service team should be judged on a mix of new metrics unique to Twitter and existing measurements.

ESTABLISH THE METHODOLOGY

Once you have established which metrics to track, you need to determine how to obtain the necessary data. Some measurements will be directly available to you, like the number of followers or inquiries. You'll need special tools to gather other metrics, such as impressions or engagements. Finally, there are more elusive metrics, like customer service, which need an even more sophisticated approach. Methods for reliably quantifying this type of metric include:

- **Direct surveying** – Offer customers a quick 3-5 question survey directly after a service interaction.
- **Quality Assurance** – Either manually or with the aid of a program, assess user's Tweets following a service interaction. This can be done by having agents manually tag responses or by using software to analyze customer attitudes.
- **Focus group** – Gather customers and get their feedback on your service.

T-Mobile commonly surveys their customers after a Twitter customer service interaction.

Spotify uses custom links to be able to track the impact of their interaction on a customer.

Best practice in correctly measuring impact is to measure the difference between a test group and a control group, which you could do using any of

the methods above.

What's equally important is tracking and measuring the customer service journey across channels. Your customers may have different satisfaction levels across channels, for example. By selecting representative samples across channels, you'll be able to measure the differences and act upon them.

Of equal importance is tracking and measuring the customer service journey across channels. This is a powerful chance to prove the impact your Twitter customer service team is having across the organization. It's not always easy, however. A preferred method is to obtain a customer's Twitter username during any registration by adding a Sign In with Twitter button to get it. Some companies who don't want to assign points in the journey to a specific customer use other methods, like tracking cookies across channels, or using custom website links when customers are referred to company websites. This is especially useful when measuring conversion.

FORMALIZE THE MEASUREMENT

If you've chosen the right measurements and communicated them effectively, there should be a lot of interest from the broader organization. For example, your CMO might want to hear about impressions, your COO about resolution and your CEO about customer satisfaction. You should report your results on a regular basis.

Formalizing the reporting process for your measurements is a major step in becoming a mature organization. You should establish a regular rhythm, perhaps disseminating reports weekly to management and holding daily huddles with agents. Use a common reporting format. Measurements by agent should roll up into management dashboards, giving a transparent and direct view of the impact the team is making for the company.



TIE BACK TO TEST AND LEARN

The reason for measuring is to guide and improve your work. The information obtained through your Twitter customer service interactions can be used to help you test, learn, refine your process and test again (More about this in section 4.7). If you have mapped your metrics to your strategic objectives, they can be used to quickly improve how you service your customers

Your current capabilities may not allow you to track all the metrics you need right away, emphasizing the importance of building internal capabilities and alignment on the way you track. Alignment from IT, marketing and operations is particularly important. Hilton, for example, brought together leaders from across the organization to show, using real life examples, the impact customer service on Twitter can have on the customer experience.

With the mechanism in place and the metrics shared with the rest of the organization, it is time to create a culture of continuous improvement. Every company we have spoken to has exciting plans for where they're taking customer service on Twitter next. Don't get left behind!

“If you cannot measure it, you cannot improve it.”

-Lord Kelvin,
19th Century Physicist

MOVE TO ACTION

4.6 PUT YOUR STRATEGY IN MOTION

What are you waiting for? Get moving! Companies that differentiate themselves through customer service on Twitter do so through execution and they generally use a similar approach in moving from strategy to action. Within weeks, you'll be responding to customer Tweets – as you begin, consider the six activities to putting your strategy in motion:

- Mobilize the Twitter SWAT team
- Establish the face of your customer service on Twitter
- Select and implement the right tools
- Develop response content
- Establish criteria for triaging and prioritizing Tweets
- Build insight generation into your organization

A way to approach these activities is through a “crawl, walk, run” framework, which can help companies get started, then think strategically about the incremental growth in capabilities needed for delivering seamless customer service on Twitter.

MOBILIZE THE TWITTER SWAT TEAM

The first step to success is “getting the right people on the bus,” says management guru Jim Collins. Great companies focus on the “who” before the “what,” and the same is true for customer service on Twitter. The initial team should be handpicked based on specific skills, trained to handle customer service on Twitter and empowered to solve customer service issues from beginning to end.

There are certain skills and characteristics that predict success for your Twitter



customer service team. Team members should be:

Key Characteristics for your Twitter Service Agents:

- **Passionate About Solving**

Customer issues: The best customer service agents take pride in their ability to help customers and always go the extra mile.

- **Strong Writers:** Many

companies we've spoken to emphasize the importance of writing skills. In fact, writing is the basis of the job. It can be challenging to solve customer issues in a conversational, consistent voice using a limited number of characters. Many companies administer writing tests to make sure job candidates have what it takes.

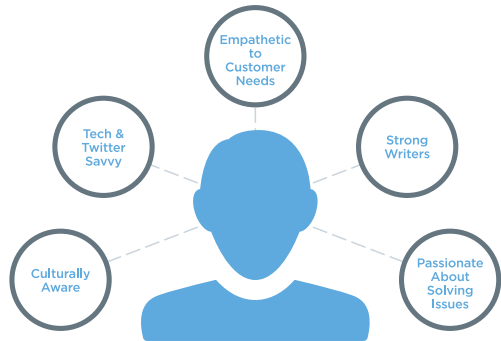
- **Empathetic:** Agents need to put themselves in the customer's shoes to

understand what they need and to put those needs first. Agents with empathy are able to resolve a customer's issue in a way that makes the customer feel valued.

- **Twitter Savvy:** Agents should understand the how and why of Twitter.

Interview questions like "what does your day on Twitter look like?" help identify those who have a real grasp for how the channel works.

- **Culturally Aware:** Discerning the root issue in Tweets can be hard: users communicate with abbreviations, colloquialisms and varying tones, all in 140 characters. To respond effectively, agents must understand a range of cultural contexts.



You want to build a team fast and get started, but beware. Many companies have learned the hard way that mistakes in hiring can be a costly diversion.

Avoid these common pitfalls when putting your team together:

- **Don't assume youth predicts Twitter customer service savvy.** Millennials may have experience with Twitter, but this does not mean they automatically possess the skills or experience to resolve a customer issue quickly and effectively.
- **Don't assume call center skills predict Twitter skills.** Issue resolution on a private phone call vs. issue resolution in 140 characters in public are quite different. Your best call center agents may not necessarily be your best Twitter agents.
- **Don't assume you need to hire externally.** You should hire agents based on skills and talent. Sometimes, the best people are right in front of you, in your customer service or marketing organization. We've seen companies find success with both internal and external hires.

Once the team is in place, you need to provide them with the training and materials to set them up for success. Agents need to understand the nature of providing customer service “on stage.” They need to know that the digital trail they create in each interaction will live on long after the last Tweet. Training should focus on customer service guidelines, company policy, legal and regulatory guardrails as well as the need to maintain a consistent brand voice (see Step 3). Even if you haven't yet mapped out a comprehensive set of guidelines, there are still materials you can provide to help your agents. A description of the brand voice with representative quotes is a good place to start.

“Customers prefer to have their issue solved in the same channel as they used for the first contact. Switching channels is seen as cumbersome and is likely to significantly reduce customer satisfaction.”

-McKinsey

It's crucial that your team be empowered with the necessary authority



to solve your customers' issues from end-to-end. Customer frustration is compounded when speaking with an agent who cannot help, or when deflected to an alternate channel. The right team members respond favorably to empowerment, ultimately using the authority to go above and beyond to solve customer issues. To help them respond quickly, you need to establish a clear understanding of goals and processes with your Twitter customer service team and the internal functions they'd be most likely to interact with, particularly legal, marketing and product.

ESTABLISH THE FACE OF YOUR CUSTOMER SERVICE ON TWITTER

Your customers' experience begins with what they see; therefore, the visual representation, or face, of your Twitter presence should be appealing and reflective of your branding. Personalize your Twitter presence and make its purpose clear to your customer.

First, decide whether to create a dedicated service account, for example “@ComcastCare” or “@BestBuySupport” to tackle service requests. This is an increasingly popular option. With a dedicated account, even if customers Tweet at the primary brand account, you can reply from the service account. Though more companies are moving toward dedicated account, this is a strategic decision, with pros and cons.

Should we create a dedicated service account?			
	Benefits	VS	Limitations
Dedicated Service Account	<ul style="list-style-type: none"> • Simpler Tweet triage • Clear delineation for Care and Marketing • Clear purpose for customers 		<ul style="list-style-type: none"> • Customer may not be aware of it • Turnaround stories have less reach given less followers
Unified Brand Account	<ul style="list-style-type: none"> • Simple for customers • Higher reach for positive interactions 		<ul style="list-style-type: none"> • Tweet triage is more challenging • Unclear swim lanes for care/marketing • Higher reach for negative exchanges

- **Single brand account:** The big advantage here is having a unified

username for marketing, customer service and all other interactions with your customers. A unified username is easier for customers, as many will not readily understand that you have a customer service account. It may also increase the amplification of positive experiences, since the rest of your followers will be exposed. However, it can muddy the lines between marketing and customer service conversations. A single username also makes prioritizing Tweets more difficult since you can't easily delineate between a service and non-service Tweet.

- **Dedicated service account:** A username set up solely for customer service allows you to separate those conversations from your marketing and makes the job of triaging customer Tweets much easier. That's why most companies are able to respond faster with a customer service account rather than brand accounts. On the downside, customers may not immediately know that you have a customer service username (is it @brandcares or @brandassist?) and customer turnaround stories may not get as many impressions.

Regardless of which strategy you choose, it is important to remember that some customers, especially in the heat of a frustrating challenge, might not bother to look up your username. They might simply make up a username or just use your brand name, and Tweet their service issue at it, expecting an answer. Best practice is to listen to any possible permutation of the brand name or keywords indicating a service need. This way you minimize the chances of missing a customer service issue.

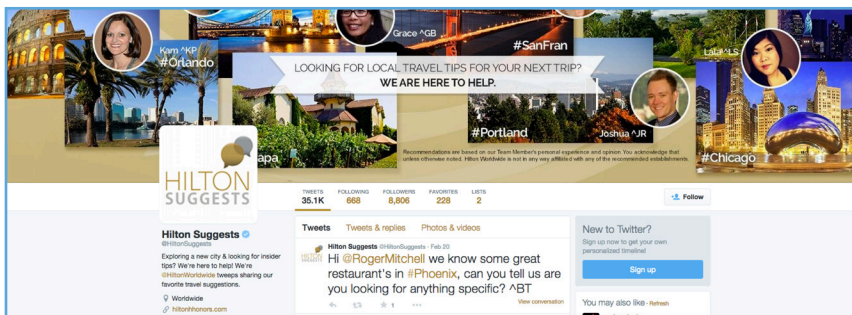
It's time to setup your account. Here are a few tips when setting up your Twitter account:

- **@username:** Your username should contain your brand name and, if a service specific account, some designation indicating that.
- **Name:** This is the name people see when they land on your page. This could



be your company, franchise, brand, or product name.

- **Profile photo:** Most brands use their brand logo as their photo. Some people add a modifier indicating that the account is specifically for customer service.
- **Header photo:** Some brands use this to personalize the account or to display additional information, such as the service goals and operating hours, if they are not mentioned in the bio.
- **Bio:** The short description (160 characters) of your account. This should include your brand name, what level of service you're offering and links to your other Twitter accounts
- **URL:** The URL should link to your brand's support website, or, if one does not exist, your company website.

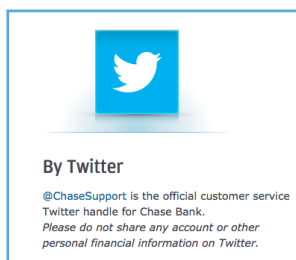


For example, @HiltonSuggests has a Twitter page that shows members of its team, a subset of cities where @HiltonSuggests is available, and makes it personal (“We’re @HiltonWorldwide Tweeps”). It also provides a link to other Hilton Twitter accounts (and the other accounts provide a link to Hilton Suggests).

TIP: Market your service username once you are set up to direct volumes to the username where it's easiest to sift through, prioritize and answer customer inquiries.

Once your page is setup, disseminate the information to the right people, including:

- **Internal communication:** Let other groups, including marketing, know about your customer service account. Follow your brand account from your customer service account, and vice versa.
- **External communication:** Once you begin answering Tweets, make customers aware of your username. This will help to funnel service traffic toward Twitter. Strategies include Tweeting from your brand account, embedding a Tweet button on your web page and contact center materials, including it in the IVR²⁸ on the phone, listing your Twitter username on a customer sign in page, search engine optimization and listing the username on your actual product or service related materials. With the Tweet button, you can even customize the pre-populated content of a customer Tweet.



Add buttons to your website to help your visitors share content and connect on Twitter.

Choose a button

- Share a link Follow Hashtag Mention
-

SELECT THE RIGHT TOOLS

Getting started requires more than simply signing into Twitter.com and looking at Tweets; you'll need the tools that can help you monitor, sort, prioritize and queue communications, as well as track your performance.

Selecting the right platform can have a big impact. Some companies have



boosted response volume 10x in the month after adopting the right platform. Others that were able to cut their first response time by 95 percent.

There are many tools available. The following questions can help guide you as you choose:

- **Where is the value?** Which platform enables you to best capture the value articulated in the “value at stake” section in chapter 2?
- **What is the solution?** What new capabilities does the platform provide?
 - **Ease of set up:** How easy is it to set up filters to surface customer issues?
 - **Support:** What kind of workflow support does it provide? How easy is it to customize over time?
 - **Integration:** How easily does it meld with my existing systems?
 - **Threading:** Does it enable conversation threading?
 - **Reporting:** How advanced is its reporting functionality?
- **How to deliver?** Who in your organization will have ownership and what is the governance model?
- **How much to spend?** What are the cost parameters, what is the business case and which functionalities and features matter most to drive ROI?

Select the Right Tool for Supporting Your Business Strategy



With a little research you can find the platform that best suits your operational needs and financial constraints. There is an entire ecosystem of tools that can

help you get moving. Speak to other Twitter customer service experts to get recommendations.

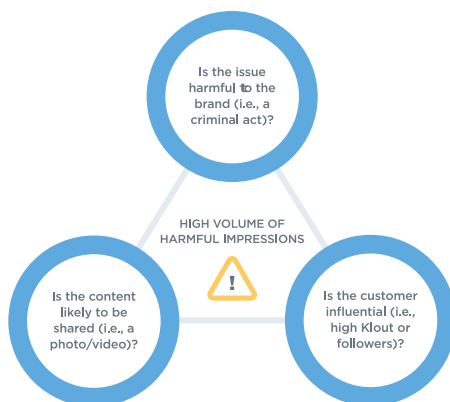
DEVELOP RESPONSE CONTENT

As you respond to Tweets, you'll notice that your existing customer service processes don't always map directly to Twitter. An important step in improving customer service on Twitter is to help your agents to solve issues quickly and effectively. Start with your existing customer service processes. Compare them to the most prevalent issues on Twitter and adapt when necessary. Get a feel for how they work by role playing with Tweets and responses and then develop process guidelines and create content.

- **Leverage existing content.** Your customer service team has a wealth of experience in tackling the most common issues. Adapt the resolution techniques they've developed for use on Twitter.
- **Listen to your customers.** Taking inventory of how your customers are talking about you on Twitter will help you decide which topics to address first. See section 4.2 for a more detailed approach.

- **Create a resolution approach for key topics.** Many companies conduct cross-functional role plays for Tweets, co-creating responses and resolutions with the right people in the room.

Sample Crisis Escalation Criteria



- **Establish criteria for crisis escalation.** What does a Tweet become a potential threat to the company? You need carefully defined criteria for when to escalate a Tweet and a process for doing so. Best-in-class companies rehearse these escalations at least annually, so the team is prepared when a crisis hits.

- **Know when to take a Tweet private.** While customers often prefer public resolution of issues, you need clear guidelines for when to take an issue private and when to put it back in the public domain. Keep in mind that many customers prefer in-channel resolution, whether public or over Direct Message.

- **Develop content to address common service questions.** Prepare a guide to best practices for internal use by your customer service team. Create photos, Periscope scripts, Twitter videos, links to FAQ's and blog posts and infographics to engage the audience and answer questions.



ESTABLISH CRITERIA TO TRIAGE & PRIORITIZE THE INCOMING STREAM OF TWEETS

As you immerse yourself in Twitter, you'll find that just as with other strategic priorities, it's easy to spend too much time on the urgent at the expense of the important, to paraphrase Stephen Covey. Learning to triage the constant stream of service requests can help to ensure that you meet your top priorities.

There are many different Tweets that may be relevant to your brand. The first step is to understand and segment Tweets by their fundamental

characteristics:

- **Tweet destination:** Is someone addressing your CEO? Or is the Tweet just a typical request targeted at your brand account? The Tweet destination should help inform your prioritization. Your brand will receive a range of Tweet types, including direct mention of company executives, service username, brand username, competitor usernames, industry accounts, or even just a mention of an event or aspiration.
- **Tweet topic:** Which Tweet demands a more immediate response: a “help me” or a “thank you”? The answer is intuitive, but acting on it is hard. You’ll need to segment Tweets by topic, requiring the ability to match key words. This takes business, product and service expertise, time and much tweaking of the process.
- **Tweet origin:** Did Beyoncé Tweet your brand? If so, congratulations. Now go do something about it. High priority Tweets could come from celebrities, brand advocates, customers with high Klout scores and customers with high status and high loyalty to your brand. You need a way to segment these Tweets and move them to the head of the queue.
- **Tweet history:** Is this individual notorious for complaining? If so, it may not be a good use of agents’ time to engage in a long dialogue. The history of engagement with individuals can help inform your response.

You will need the right tools to triage and prioritize properly.

You can assign a different level of service for each level of priority as you rank Tweets in the queue. Exactly how you structure that ranking depends on your strategic aims and your maturity level. As you gain expertise, you’ll want to translate your priorities into routing logic, so that you can triage Tweets automatically. There are many partners with tools that can help simplify this process. Platforms and tools offer functions such as text mining



to help identify key words and classify Tweets, automatic queuing (similar to call center technology) to direct each Tweet to the right team member, Tweet history to provide context to your agents; and user interface design that enables agents to see threaded conversations and respond quickly and effectively (see the “Select the right tools” section).

Whichever prioritization criteria you choose, be sure they pass the “sniff test.” If these criteria became public, would they embarrass you? If so, they probably need some reworking. Remember, because of the public nature of Twitter, and the fact that anybody can set up a Twitter account and give it any username, analysts, journalists, bloggers and consumer advocates can test your Twitter customer service response, and “reverse engineer” reconstruct your prioritization policies.

BUILD INSIGHT GENERATION INTO YOUR ORGANIZATION

The value of customer service on Twitter goes beyond the impact of solving customer issues; it provides a real-time pulse on your customer’s behaviors, attitudes and needs. These insights can be used to inform strategic decisions. Comcast and Jawbone provide excellent examples of how different companies can build on these insights. Both companies have extracted important insights from customer service on Twitter, but their capabilities look quite different.

Comcast’s Twitter team has established a formal mechanism for disseminating insights from their customers deep into the company. They track the types of issues and any emerging trends they see in the flow of Tweets they handle. They describe the findings in newsletters and reports, which Comcast distributes regularly to specific groups within the company. These customer insights have become an important way of keeping the larger Comcast organization closely connected with its customers.

Jawbone, a technology products company, generates insights to improve service and to connect with its customers. Its distribution, however, is much

more ad hoc than Comcast's.

Before Twitter, Jawbone had a hard time getting information on service outages fast, particularly when the outages involved its technology partners. Now, customers

are providing a "first alert" on Twitter. Jawbone's team picks up the signal, then contacts the product and engineering groups, creates an approach for reps and distributes the information among all customer service channels. As a company with mostly indirect sales, customer service has become its leading channel for interacting directly with its customers.

"Customer service on Twitter is the best way for us to get the true voice of the customer."

-Andy Kim,
Jawbone

Both Comcast and Jawbone have developed innovative ways to ensure that insights from customer service on Twitter are used to the greatest benefit of the company. It is worth considering how the insights you generate could help others within your organization, and how you could deliver them in a way that would ensure maximum impact.

CRAWL, WALK, RUN

As you improve your ability to provide customer service on Twitter, you'll find that your ability to provide effective response content and to triage Tweets improves as well. Some companies plan for capability growth with a "crawl, walk, run" framework. In each phase, the team develops procedures, response content, triage guidelines escalation criteria and other rules and procedures for responding to customer needs.

- **Crawl:** Represents the best customer service issue resolution possible with current capabilities. This means no new functionality via IT capabilities and only moderate adjustment to processes, people and content.
- **Walk:** Represents the interim stage from Crawl-to-Run; this may mean having Tweet-scripts or shareable content that can better resolve customer



issues.

- **Run:** The end-state customer service experience on Twitter with accompanying capabilities. The team has the right processes to optimize for personalized, responsive customer service on Twitter and the organization has the processes and tools to measure success and continually iterate and learn.

By using this framing, companies can identify an end-state “run” phase, then work backwards by using the “crawl” and “walk” phases to incrementally build its capability.

BUILD CAPABILITIES FOR SCALE

4.7 ITERATE AND INNOVATE

To build and refine your customer service on Twitter as quickly as possible, consider agile approaches. By quickly trying different procedures and use cases and failing fast you’ll learn fast. Don’t expect to start with the perfect solution; if you do you’ll never get started at all.

Hyatt updates their internal guidebook weekly if not daily with their team’s latest learnings and thinking.

Your service needs to operate at the speed of Twitter. Here’s how you can keep up!

WHAT THE JOURNEY LOOKS LIKE

All of the companies we’ve spoken to were willing to start with very modest goals. The most successful were not afraid to take risks, engage with their customers and, at times, make mistakes. We’re sharing best practices that have emerged from these early users, but you should consider them guideposts, not rules. As you strive towards the unique goals that are best for your organization, an agile approach will help you get there faster.

CAPABILITY TYPICAL STARTING POINT

TEAM

Small carved out team of best customer service agents or marketing associates

BEST PRACTICE AT SCALE

Team of specialists with flex capacity

- Team size tuned to volume and desired SLAs
- Role based issue specialization
- Tiers within the team: triage, service and escalation

TOOL

Public Twitter platform

Power use of tool functionality

- Full visibility into conversations and opportunity
- Integrated with existing systems (e.g. CRM and advanced analytics)
- Customized capabilities with vendor

RESPONSE CONTENT

Referral to other customer service channels or unedited contact center scripts

Content fine-tuned to social and building off digital portfolio

- Consistent voice, personalization and friendliness
- Custom media enriched content
- Templated custom answers
- Incremental content unique to customer service on social

PROCESS

Limited

Process and triage dialed in to service strategy

- Mapping of issue to resolution workflow across organization
- Triage criteria based on customer and issue segmentations
- Established escalation process with legal and PR

METRICS/GOALS

Followers and responses with limited goals

Metrics enabling customer service improvement

- Detailed set of tracked, managed and reported impact metrics which tie into core business metrics like revenue, cost and CSAT
- Service and efficacy metrics by agent / team

STRATEGY

Overall company customer service or marketing strategy

Company, brand and service strategy translated to Twitter service

- Company strategy rolls down to specific Twitter customer service
- Clear and communicated vision for Twitter customer service
- Syndication of vision and how it translates into guiding principles and actions



AGILE TWITTER CUSTOMER SERVICE

Agile development of your capabilities means taking a mantra of try it, break it, fix it. In other words, your team should focus on quickly turning insight into action, not being afraid to fail and not waiting for perfect solutions. So what exactly does it mean to be agile when it comes to turning insight into action? There are specific steps you can take that will help you arrive at the best possible Twitter customer service for your organization.

TEST, LEARN FAST AND TEST AGAIN

The immediate insight into engagements, Retweets, impressions, clicks and favorites of a single interaction allows you to implement real-time test-and-learning on live customer interactions. A leading customer service team can run dozens if not hundreds of concurrent versions of these tests to rapidly improve the quality of its customer service interactions.

LEARNING TO LEARN ON TWITTER

These tests can happen organically as a result of the inquisitiveness of your team, but a handy step-wise framework to use is as follows:

1) Let your strategy guide you

- Your strategy should determine your learning agenda. Are you trying to wow your customers? Are you trying to increase revenues? Be more efficient? These are not necessarily mutually exclusive, but it's helpful to remember your big picture goals and prioritize accordingly.

Guiding Principles for Agile Development of Capabilities

- Embrace change
- Optimize for good enough
- Prioritize speed over perfection
- Empower teams and self-organize

Guiding Principles for Agile Development of Capabilities

An agent at Spotify experimented by sending a message to a customer through a playlist. The customer loved it; highlighting an opportunity. Spotify then built a “custom playlist generator” tool and scaled the practice up through its entire customer service organization.

2) Pick one metric for improvement

- Once you know your goal, pick a metric to improve. If you're going for customer satisfaction higher satisfaction ratings or a willingness to recommend may be your preferred dependent variables. Alternatively, to simplify, you can use a proxy like the number of favorites you receive on your service responses.

3) Identify 1-2 variables to experiment with

- What do you want to test? Is it the tone of your agents? The response time? The extent to which you take conversations private? The things you can test are limitless and can extend into larger issues you face in the rest of your organization. This is really a chance for your Twitter customer service team to be your customers' pulse.

4) Develop hypotheses

- Hypotheses help guide your testing. A simple example might be, "responses that include a smiley face result in higher customer satisfaction" or "we can generate 10 percent more impressions by responding to customers with more than 100 followers in less than 2 minutes." The hypothesis adds some discipline by making clear what you are trying to prove or disprove.

5) Test the hypotheses

- Show your agents how to employ the tests to prove or disprove the hypotheses. In many companies, agents are already testing things on their own and are intuitively figuring out what works and what doesn't.

6) Rinse and repeat from step 2

- The idea behind agile is that you are constantly testing and trying new things.

Go with Whatever Works

Comcast discovered that having live agents triage and assign incoming Tweets was more effective than relying on automatic routing.



TURN INSIGHT INTO ACTION

Learn to act fast on the insights you generate from testing. Some brands maintain a living, breathing document that contains best practices and the latest training material for all the agents. Others generate tools that enable agents to quickly employ the newest practices, whether it's a playlist generator like at Spotify or a cache of easy to access responses that have proven effective.

EMBRACE FAILURE

Companies are understandably nervous about giving their Twitter customer service agents free reign, given how public interactions are, but research indicates greater benefit from trusting your team and embracing failure as an opportunity.

Customers ultimately respect and appreciate authenticity. Making it ok to fail in the name of learning and empowers your agents to be themselves, connect with customers better and facilitate innovative ways to address customer issues.

Many brands we spoke to were careful to not set too many rules because they did not want to stifle their agent's voice or inhibit innovation. That outlook changed, however, when outsourcing customer service, as many companies do at certain periods of the day. Most companies were more careful to provide written guidelines for outside agents.

Remember, your in-house agents are the key to your best insights. Let them unlock the door.

GOOD ENOUGH IS...GOOD ENOUGH

As you progress along the journey, embrace imperfection. Your team is operating in an innovative space and needs to narrow down the almost limitless possibilities. Empower them to do that. Take a lean startup approach.

“We trust our agents the way we would trust them to interact with customers in our stores.”

- Natanya Anderson,
Whole Foods

Understand that you're starting with imperfect data, process and technology and encourage your people to develop new ways to make your organization's customer service shine in public.





SIERS

MARKETEERS

ERS &

USERS



5. HOW TWITTER ENABLES CUSTOMER SERVICE

- 5.1 TWITTER'S UNIQUE ATTRIBUTES AND HOW THEY RELATE TO CUSTOMER SERVICE
- 5.2 VIEWS ON THE CUTTING EDGE OF CUSTOMER SERVICE ON TWITTER

5. HOW TWITTER ENABLES CUSTOMER SERVICE

Twitter is the ideal customer service channel. Customers are already on the platform and are interacting with brands at unprecedented volumes. Not only that, but Twitter possesses unique attributes that enhance a brand's ability to provide and scale customer service effectively and efficiently. Leveraging these unique attributes allows you to break new ground through customer service.

“Twitter, more than any other platform, has that open perspective on care. They’re open to helping users define their own experience and move things forward rather than controlling it.”

-Karen Dawson,
Hyatt

Users will create the experience they want on Twitter. For example, mentions and hashtags were introduced by Twitter users and adopted by the Twitter platform. What will you and your customers create that transforms the customer experience on Twitter?

5.1 TWITTER'S UNIQUE ATTRIBUTES AND HOW THEY RELATE TO CUSTOMER SERVICE

Twitter is public, real-time, conversational and distributed. Each attribute affects customer service in different ways. While many brands are already taking advantage of these attributes, the door to further innovation is wide open.



TWITTER: A NEW WAY TO ENGAGE CUSTOMERS

Twitter's platform is

How this affects customer service

Public

Twitter is open to the world. Content on Twitter is broadly accessible to your users and unregistered visitors.

The public nature of Twitter has expanded how brands interact with their customers

- Customer service on Twitter is integral to how your customers perceive your brand
- Proactively engaging customers is now possible at very low cost
- Twitter gives you deep insight into your customers and how they interact with brands
- Brands can connect with customers outside of traditional touch points
- Brands can measure impact of their interactions

Real-Time

Twitter empowers users to quickly create, distribute, discover and consume content in real time.

Real-time interactions provide new opportunities for both brands and users

- Companies have new opportunities to delight customers at the right points in time
- Companies can resolve issues at the speed of Twitter
- Customers can be (pre-emptively) kept in the loop of developments

Customers can immediately voice their concerns in moments of need

Conversational

On Twitter anyone can converse with anyone, creating an opportunity for users and brands to connect like never before.

Conversational interactions allow for more, deeper context and openness

- Companies can develop a better understanding of a customer by leveraging their previous Tweets
- Service interaction context and history is preserved
- Twitter's informal and conversational nature facilitate new conversations

Distributed

Tweets can be distributed to analyze along with a company's internal data. Tweets can be shared on and off the Twitter platform.

Twitter's distributed nature enables content integration and amplification

- Integration of Twitter data into internal systems allows for analysis along with other data.
- Publishing onto other properties (e.g. your company or news media) extends the impact of customer service interactions

Establishing a strong customer service presence on Twitter can pay off in unexpected ways, as Spotify found out. When a competing music-streaming service was launched, the group of celebrities backing it sought media attention and public support with the hashtag #TIDALforALL. Users responded by voicing their support for Spotify with their own hashtag: #SpotifyForAll. The tag rallied Spotify users across Twitter.



When was the last time your customers, unprompted, banded together and stood up for you on a public platform? Do you think Spotify's customers would have been this vocal if they didn't have a long history of Tweeting with its agents?



5.2 VIEWS ON THE CUTTING EDGE OF CUSTOMER SERVICE ON TWITTER

Companies are constantly innovating new ways to use Twitter. Some of the latest techniques develop deeper context and generate more data and insights for the company CRM. Others companies have new ways to deepen and measure the impact. And, of course, companies are always finding new ways create moments that amaze.

1) Make Twitter your primary channel for customer service

Doing customer service on Twitter correctly requires an investment, both in resources and messaging. We've already shown how customer service on Twitter can provide a lower cost per resolution, greater sales opportunity and the chance to build your brand reputation, so the investment in a Twitter first customer service approach can clearly pay off.

Making Twitter the primary channel for customer service means having the right resources available to handle customer requests. One major Telco has thousands of people tasked with answering costly phone calls, but only 75 agents dedicated to customer service on Twitter. Imagine the savings, the increase in customer satisfaction and the customer understanding that could come if those calls, and agents, were diverted to Twitter.

Getting your customers to Tweet you instead of calling you will not happen on it's own. To shift people from expensive phone service to Twitter you should do things to make it easier for your customer to Tweet than to call such as placing a 'Tweet us' button on your website, support site and mobile app above the other contact options. You should also give them meaningful reasons to choose Twitter. Offering VIP customer service for those who sync

Twitter provides the code and resources you need to be able to implement a Tweet button or Sign in with Twitter button. No technical skills necessary!



 **Tweet to @support**



 **Sign in with Twitter**

their Twitter account with their account in your system will give them a good reason and give you access to understand who they are when they Tweet at you.

Have you ever considered why you encourage your customers to call instead of Tweet? With so many benefits of coming from customer service on Twitter maybe it is time to contemplate that question deeply.

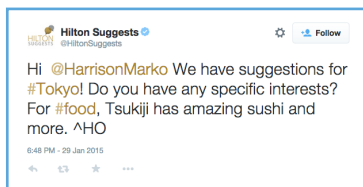
2) Deepen the context

As your agents take a consultative approach to solving a customer's issues, context is everything. What are this person's interests? What's driving their recent need for service? What kind of history does this person have with you? Is this person a consistent complainer? What products is he or she interested in?

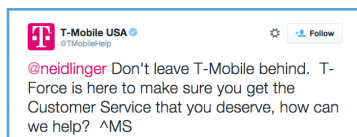
These are simple questions perhaps, but crucial for engaging with a customer. Innovative service depends on knowing as much as possible about your customer. Imagine if you could personalize your responses and reach resolution earlier, all while being able to upsell to meet your customer's unspoken needs.

With Twitter, you can find out your customer's interests, needs, life events and behaviors. You

@hiltonsuggests Tweets tips to people, customers and non-customer alike, whose tweets contain signals that they are on a trip



T-Mobile cut churn in half in one quarter by combining Tweets with other data points to pinpoint the source of frustration and solve the problem for unhappy customers



can search past conversations to find the information you need to create an exceptional experience. That's taking consumer research to a new level.

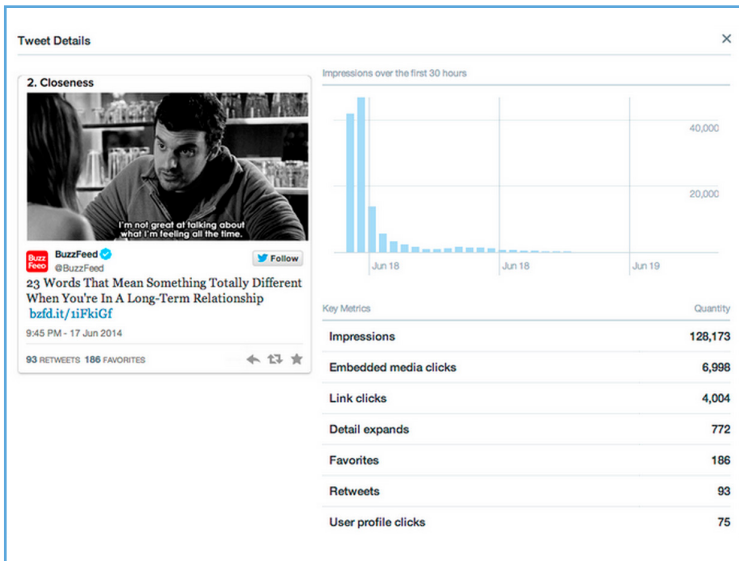
3) Feed your internal systems with rich Twitter data

You can gain an even deeper understanding once you integrate your customer interactions on Twitter with your other internal data. Integrating Tweets into your internal systems allows you to build on the analytics and insight you're already running in other channels.

Additionally, you'll be able take that intelligence to more effectively engage with customers across those other channels. Whatever the touch point is, your company can use insights from interactions on Twitter to better serve all of your customers.

4) Measure the impact

Twitter's transparency into engagement, impressions, favorites and clicks



Twitter's transparency into engagement, impressions, favorites and clicks gives brands unique insights into the impact of their interactions with customers. This data enables constant refinement. You can see in real-time how your customers are engaging and tweak on the fly to continuously improve your performance.

If a Tweet starts with an @mention, it is considered conversational and will only show on your stream, the stream of whoever you Tweeted at and the stream of users who follow both of you. Adding a dot at the beginning of your Tweet in front of the @username makes your Tweet show up in all your followers' timeline.

Past engagement metrics can also indicate what potential future impact is, giving a brand leading indicators of what issues or customers they should prioritize in their queue.

Not only that, but with engagement metrics, you can discover which methods are most effective for your brand, your customers and the goals you're trying to achieve. For example, if you want to reach the most people, how much does including pictures help? When responding, does putting a period at the beginning of the Tweet result in better engagement? The possibilities are endless.

5) Find new opportunities

Brands have unique in-moment opportunities to be proactive and connect with individual users. The opportunity is transformative.

Users are sharing personal details about their lives, their needs and their desires in huge numbers. There has never before been a scalable way to engage with consumers in such an intimate way at exactly the right moment.

With 500M new Tweets per day, there are countless opportunities for your brand to start or join a conversation. It may not even be with an existing



customer. Potential customers will enjoy a moment of delight as well.

With access to a new trove of data and the right filtering technology, you can forever change what it means to provide customer service. Suddenly, you can know and serve the people most important to your company like never before.

Bring it all together

These innovative use cases are applicable for any company. A single Tweet can spawn countless opportunities for delight. Brands who put it all together will create unique, magical moments for their customers, deepen loyalty and gather unprecedented insights.



Hypothetical Customer Tweet	“ Stoked about #Paris for my sister’s wedding! Bummed I broke my bag and flight is #delayed :(”		
	Wireless carrier winback oppty	Airline delights delayed customer	Retail chain builds loyalty
Find New Opportunities	<ul style="list-style-type: none"> Customer is traveling to where Telco offers free roaming 	<ul style="list-style-type: none"> Customer is going for a trip Flight is delayed 	<ul style="list-style-type: none"> Traveling to flagship store location with a potential retail need
Get More Context	<ul style="list-style-type: none"> Travels regularly Prior customer, last churned because of local service 	<ul style="list-style-type: none"> Travels regularly Tweets about craft beer often 	<ul style="list-style-type: none"> Broken suitcase Previous mentions of affinity for chain
Tweet	<ul style="list-style-type: none"> Have fun Jon! Interested in free int'l roaming? By the way, we've improved service back in Seattle! 	<ul style="list-style-type: none"> Congrats to your sister, Jon. Sorry about the delay. Have a cold one on us during your flight <link> 	<ul style="list-style-type: none"> Sorry your bag broke – Swing by our flagship store to find a replacement for pick up a tux. Enjoy the wedding!
Measure	<ul style="list-style-type: none"> Number of impressions on conversation vs. previous interactions Engagement, number of Retweets and replies Correlation of engagement with changes in sentiment 		
CRM	<ul style="list-style-type: none"> Join identified as winback opportunity Tagged as frequent traveler 	<ul style="list-style-type: none"> Placed in list for gate agent/flight attendant experience Noted for airlines loyalty/service 	<ul style="list-style-type: none"> In-store POS reflects Jon's issue Broken product analysis
	<ul style="list-style-type: none"> Tweets imported into internal systems 		

How's that for stand-out customer service?

PUT CREATING DELIGHT INTO PRACTICE

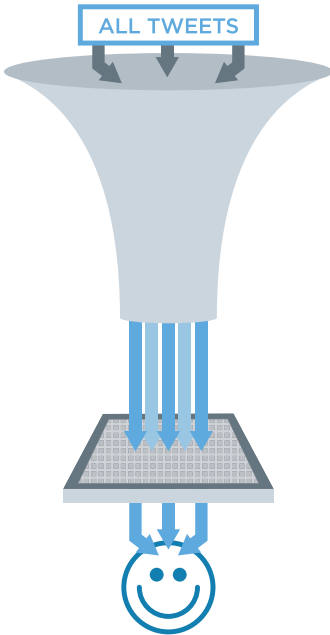
There are three steps you can follow to put creating delightful moments into practice: identify your universe of moments, choose where you can have the most impact and make the moment delightful by being relevant. Let's dig in.

1. Identify: Find your universe of moments to engage

To prioritize which Tweets matter most to your company, look for ways to filter and prioritize them based on the following criteria:

- **Category.** Define which words relate directly to your category, for an airline, that might be travel, flying, or trip.
- **Adjacencies.** Think of which categories may connote a potential to interact with yours. For example, users who interact with airlines may need a rental car or travel bag.
- **Event indicators.** What events or happenings may indicate that a user will need to interact with your sector? Users participating in an Ironman, for example, will likely need to travel to the course.





- 1 IDENTIFY**
 Find your universe of moments to engage

- 2 PRIORITIZE**
 Choose where you can have the most impact

- 3 CONTEXTUALIZE & ENGAGE**
 Make the moment delightful by being relevant

- **Product.** Look directly for mentions of the products you provide, whether it's flights, first-class, in-flight Wi-Fi, etc.

- **Competitors.** In addition to Tweets mentioning your competitors, find out what Tweets your competitors are sending out, what Tweets they're responding to and what Tweets are directed at them.

- **Customer profile, behavior and Tweet contents.** As you understand your customers better, you can understand the universe of opportunity better. For example, do they have travel listed in their bio? Are they often found in multiple geographies during a week? Do they Tweet about their wanderlust? Do they follow travel bloggers?

As you build out these categories, try to be comprehensive. You want to be sure you know what the entire space you can operate in before prioritizing.

2. Listen and prioritize: Choose where you can have the most impact

The opportunities for you to create moments of delight will be considerably greater than your capacity. You need to figure out which instances are most

important for you to engage with and can generate the most value. Below is a sampling of important factors to help you prioritize:

- **Customer journey.** Where in the customer journey would you like to have more presence?
Depending on the experience you want your customers to have and your Twitter customer service vision, identify how Twitter can help you fill the gaps. For example, an airline struggling with loyalty might engage before trips whereas an airline struggling with service may want to engage during trips.
- **Differentiation.** How can you have the most impact?
Creating the best moment for your users requires differentiation. Your competitors may already be creating these types of experiences. How will you differentiate? You can target the same moments in a more impactful way, or you can target entirely different moments.
- **Customer value.** Which customers are most valuable for your business?
Aim to match your existing high value customer segments. For example, the airline struggling with loyalty may prioritize reaching out to frequent travelers who live near their hub and are known to pay for upgrades.
- **Influence.** How large of an audience will this interaction impact?
Creating moments of delight lets you have outsized influence through small interactions. Take advantage of it. For example, an airline might prioritize a travel blogger with a high Klout score, an internet celebrity who gets lots of impressions, or an average user who has high engagement rates.

As you go forward, to be most effective, segment and rank engagement opportunities. Agents can then go through the most relevant, impactful interactions.

3. Contextualize and engage: Make the moment delightful by being relevant
Once you have the prioritized set of Tweets to engage with, you need to



understand the customer you are engaging with and tailor your response or offering.

- **What is the conversational context?** Explore both the immediate and historical context of the identified Tweet. For example, did the user run into another issue moments before the Tweet you identified? Have they historically mentioned flying preferences?
- **Who are you talking to?** Customers already share a lot about themselves on Twitter. In your customer service solution you can understand your customer and her preferences, then overlay that with historical and predicted reach along with data imported from your CRM. For example, your customer Jon, whose flight is delayed, may be an occasional traveler with a few followers. Context lets you know he's passionate about beer. Mary, on the other hand, is a regular business traveler with thousands of followers and a delayed flight. You know she's a busy person and appreciates a seamless experience.
- **How can you create a special moment?** Match your capabilities with your customer's context, needs and the potential impact. Given Jon's profile, you offer him a free beer on the flight. Mary is offered a first-class upgrade and expedited boarding next time she flies with you.

As your Twitter customer service team engages in more delightful moments, you will learn what works best. Use those learnings to refine your approach. As you build a data set of customers and Tweets that represent the ideal circumstances for your opportunity, you can more easily find and prioritize similar moments. Machine learning, depending on your capabilities and the tool you use, can especially help with this.

#TakeFlight

Twitter customer service is transformational. Implement what you've learned in this book and create magical moments for your customers.

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- ⁶ through voice recognition and use of dial tones
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- ⁹ 8Yy0EZ5VunJEUWy2YADS9QhcOuuEwcWGog8wwBRGeuTc5g%3D
We Are Social report, global average
We Are Social – global report
- ¹⁰ Lithium
- ¹¹ Twitter Analytics
- ¹² Twitter Research Survey
- ¹³ Twitter Research (based on analysis of 379 leading B2C brands)
- ¹⁴ Forrester
- ¹⁵ A stock portfolio of Forrester’s Customer Experience Index leaders (defined
- ¹⁶ as the top 10 companies of 175 US brands across 14 industries including
- ¹⁷ retailers, hotels, banks, credit card providers, insurance firms, airlines, wireless service providers, and investment firms) had a cumulative 43% gain in performance over a six-year period (2007-2012) compared with a 14.5% increase for the S&P 50 index and a 33.9% decrease for a portfolio of



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¹⁹ [got-big-news-about-french-toast-crunch/](http://www.blog.generalmills.com/2014/12/weve-got-big-news-about-french-toast-crunch/)

²⁰ Forrester

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²⁸



Brands have flocked to Twitter for the powerful marketing ability to reach their customers and potential customers. Because Twitter is an inherently conversational platform, the users have viewed these marketing communications as the start of a conversation. Their response: customers are rapidly turning to Twitter to resolve their issues with these companies. More than 80% of all customer service requests on social channels are happening on Twitter. And over the past two years, there's been a 2.5X increase in the number of Tweets to brands and their customer service accounts.

Brands can capitalize on these customers who are turning to Twitter for help. Twitter is also significantly more efficient and effective for companies who are seeing a cost per resolution on Twitter that's 1/3 of what they're seeing in call centers. Additionally companies who excel at customer service on Twitter can realize greater customer satisfaction, increased opportunities for sales, decreased churn rate, improved brand reputation, and most importantly a greater understanding of their customers.

While Twitter is powerful channel for customer service, it's not without its challenges. Users expect timely responses, personal and friendly interactions, and quick resolutions. Agents from the phone are not skilled in the nuances of doing customer service in public. Metrics for customer service on Twitter are not the same as in other channels. Customer service on Twitter requires its own strategy and philosophy that is an extension of the company ethos.

Drawing on lessons learned from Twitter data and leading brands, this playbook outlines the opportunity, the challenges, the four steps to becoming great, and innovative ideas for doing customer service on Twitter. Whether your company is just getting started or a leader, you'll find something in this book that can elevate your use of Twitter for customer service.