



OPERATIONALIZING DIGITAL CARE:

# 10 Best Practices You Need to Know Now

# Contents

<a href="#"><u>Introduction: developing digital care as a core strength</u></a>	3
<a href="#"><u>1 Implement a workflow built for social customer care</u></a>	4
<a href="#"><u>2 Ensure seamless automation</u></a>	5
<a href="#"><u>3 Automate conversation routing and prioritization</u></a>	6
<a href="#"><u>4 Control unexpected volume spikes</u></a>	7
<a href="#"><u>5 Resolve issues in-channel</u></a>	8
<a href="#"><u>6 Coordinate agent processes</u></a>	9
<a href="#"><u>7 Establish real-time service level monitoring</u></a>	10
<a href="#"><u>8 Integrate agent-level reporting</u></a>	11
<a href="#"><u>9 Measure and report on customer satisfaction</u></a>	12
<a href="#"><u>10 Connect social with the core business</u></a>	14
<a href="#"><u>Summary: pulling it all together</u></a>	15
<a href="#"><u>References</u></a>	17

# Introduction: developing digital care as a core strength

Consumers expect a consistent, high-quality customer experience (CX) no matter how they choose to connect. That means making sure agents can respond to any customer interaction in the same friendly, effective, and efficient way, whether they're answering a phone call or replying to a frustrated customer on Facebook.

That's a high bar to clear, but one that offers impressive advantages: get your omni-channel care experience right, and you're 22x more likely to retain your customers. You can also tap into the 56% of customers who report a strong connection to brands that engage them on social media.<sup>1</sup> Unfortunately, the reverse is also true: fail to meet customer service expectations, and your customers could join the 83% who say they've abandoned a brand over a single bad service experience.<sup>2</sup>

But there's a catch: social isn't just a tool you can shoehorn into your call center because customers like it. You have to plan for it and choose technology driven by your business objectives. Then, with the right solution in place, social has the power to be a low-cost, high-satisfaction support channel. And there's more: social CX initiatives also tend to receive the highest customer satisfaction (CSAT) and net promoter scores (NPS) of any channel.

For example, consider the experience of Comcast. With its technology and entertainment brand Xfinity, Comcast has put digital CX at the heart of their offering—and it's quickly becoming their [best product](#). Leveraging Khoros Care, Comcast reduced response times by more than 64%, kept resolutions 99% in-channel, and drove a year-over-year increase of in-channel NPS of nearly 30%. Read their [success story](#) to see how they did it.

Yet despite these clear benefits, most companies still aren't treating social as a key support channel. In [The State of Social Engagement 2017](#), we reported that 98% of brands are stuck in broadcast mode, using a "post and go" approach that pushes branded content but fails to answer customers' questions or respond to comments.<sup>3</sup>

And it's not because they lack technology: a huge reason many companies are missing out on the full benefits of digital care is that most agents are still struggling with complex tools designed to handle marketing content, or with traditional call-center software that wasn't built with social in mind. You can do better than that. And you have to.

Leading brands like Comcast have implemented digital care solutions that make it easy for agents to do their jobs quickly and effectively. These tools provide a workflow that's purpose-built to handle the unique challenges of social while also providing a way to measure these channels with consistent metrics that make sense to executives.

In this whitepaper, we'll walk you through the 10 most important best practices that can be enabled by an effective digital care solution. We'll also show you how the right technology can give your digital care team the power to prove the value of its services, help you forecast the resources you will need in the future, and successfully engage your customers by resolving the issues that matter to them.

## 1

## Implement a workflow built for social customer care

First things first: any good solution must be purpose-built to take on the unique demands and workflows of digital care. While calls, chat, and email are private 1:1 interactions, social is inherently public and private—and any issue that arises there can quickly go viral, escalating into conversations involving thousands of people. Even though it may be tempting to some managers to try to move dissatisfied customers out of the public eye and back into private conversations in the call center, brands that do so miss out on multiple opportunities including the chance to engage customers on their preferred channel and address their issues in a public way that builds loyalty with other people.

Always reply publicly to acknowledge the customer's problem. If the case requires a private conversation, you should then use 1:1 interaction on the same channel, to avoid frustrating the customer further by moving them off-platform. After solving the problem privately, follow-up publicly as long as it is appropriate to do so. This “closes the loop” in the public eye.

---

“If you aren't responding fast enough on social, if you can't solve your customer's issue within the same channel they contacted you on, then your social customer service channel may be driving disloyalty.”

*CRM Magazine* <sup>4</sup>

### Bottom line

**A digital care solution should have automated workflows that enable your agents to:**

- Interact with threaded conversations with individuals across both public and private channels so that agents don't lose context
- Claim and lock incoming conversations to avoid collisions between agents who would otherwise work on the same conversation
- Be notified automatically when customers respond, so agents can easily handle multiple conversations, whether real-time or asynchronous
- Coordinate handoffs easily between agents when it's time to take a break or change shifts
- Get automated reminders for above-and-beyond actions such as following up with a customer after a technician visit
- Make it easy to close the loop publicly if the actual resolution warranted a private interaction.



## 2

## Ensure seamless automation

Digital care solutions that are integrated with automation technology can help your agents coordinate interaction with automated responses seamlessly, all without disrupting the customer experience. For example, bot integration can shave time off agent handle time by automating simple interactions like answering commonly asked questions. Bots can also gather information and classify issues, routing results to the right queue, getting customers to the right agent more quickly.

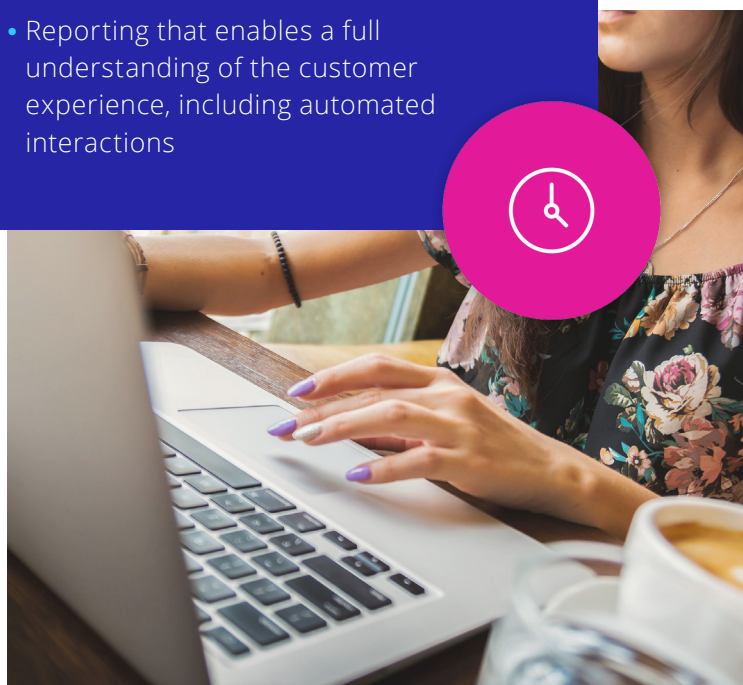
When designing automated interactions, a great best practice is to always make clear to customers whether they're talking to an agent or an automation tool, such as a bot—and to make it easy for them to choose to talk directly with a person. Ideally, your automation tools should even be able to recognize confusion or frustration and then hand off to an agent as needed. Once a conversation is handed off to the agent, that agent must be able to see the full conversation between the automation tool and the customer. This allows the agent to move the conversation forward without repeating questions, a leading cause of frustration that will almost always result in a bad experience for the customer.

Understanding the customer experience with automation tools is also very important. Your customer care solution needs to support monitoring and measuring of the quality of your customers' automated interactions. Metrics such as sentiment conversion, CSAT, and NPS can be used for this purpose to measure the customer experience.

### Bottom line

**A digital care solution can seamlessly integrate with your automation tools by providing:**

- A clean hand-off: one that allows automation tools to clearly indicate when an agent needs to take over as well as when the automation tool has resolved the conversation
- A clear indication of whether customers are interacting with an automation tool, such as a bot, vs. an agent
- The full record of the customer's automated conversation easily viewable by agents at hand off
- Reporting that enables a full understanding of the customer experience, including automated interactions



## 3

## Automate conversation routing and prioritization

Social posts often contain great information about both the customer and their reason for posting: this insight is actually one of the advantages of social customer care. Technologies including automated tagging and machine learning are sophisticated enough to pick up on subtle cues in posts and then use them to automatically route and prioritize issues. To get the most from these features, choose technology that makes it easy to configure routing and prioritization rules based on post content and author attributes. For efficiency, choose tools that make it easy for non-technical staff to update or change rules on the fly.

Why is it important to choose the right technology for digital care? Imagine three customers, all posting at once: someone frantically trying to get your product to work when they're up against a deadline, someone with a minor billing issue, and someone posting a video about your brand. Each of these customers has different expectations about how—and how quickly—you respond, and each may even need the expertise of a different team.

The right technology can help you prioritize and route these cases to the correct agent the first time—so that even as you scale your operations, you can be sure the most important issues are answered in a timely manner while also ensuring that no issue falls through the cracks. Choosing technology that provides multiple levels of prioritization (beyond simply “urgent” and “not urgent”) can help you make sure issues are triaged accurately, leading to efficiency gains and happier customers.

Taken together, it's clear that without robust routing and prioritization, machine learning, and automated

### Bottom line

**So what should a great digital care solution provide? A robust workflow implemented through a deliberate process that:**

- Eliminates noise, surfacing only actionable conversations and incorporating machine learning to continuously improve its selection criteria
- Ensures digital care teams engage in the most important conversations first, dynamically updating the queues with multiple levels of prioritization
- Automatically routes customers to the right digital care agent the first time
- Makes it easy for leads and admins to quickly adjust routing rules and prioritization levels as new topics arise, without the need for an expensive consultant

tagging, digital care teams will either have agents sorting through the noise themselves or will need to specifically task teams to manually triage and route posts. This wastes resources, including your agents' valuable time, and significantly slows down response times. Ultimately, the result is a poor customer experience: the opposite of your goal.

## 4

## Control unexpected volume spikes

One day your brand's reputation on social media is at an all time high, but the next morning your care team comes to work greeted by a red alert. Brands dealing with these viral issues can spend days working through the spikes in volume that bury their care teams. During those peaks, care teams can't maintain consistent service levels or response times for customers not associated with the viral issue—and those customers become frustrated when their issues go unresolved. None of this produces a great customer experience.

With the right preparation and software, digital care teams can efficiently manage a crisis event while continuing to maintain day-to-day service levels: [United Airlines'](#) service levels remained consistent, even when their daily posts rose to more than 250x normal volume.

Brands like United are able to maintain SLAs in a crisis because they're well-prepared—preparations which may even have included staging mock-crisis events. They also have the technology to keep crisis-related posts away from front-line agents. This, in turn, keeps the front line focused on the most actionable issues for their regular customers.

Digital care technology must be scalable enough to handle high-volume events and stable enough to avoid a system crash from rapid volume fluctuations. This prevents customer frustration by maintaining SLAs, ensuring important posts get answered and helping you manage the current crisis rather than inadvertently creating a new one.

### Bottom line

**To respond in real time to a viral event, you need a digital care solution that provides:**

- Volume spike alerts, with mobile access to alert you when you're away
- Ongoing volume monitoring at regular intervals to detect spikes early
- Advanced filtering to retroactively tag crisis posts and re-route them to a specialist team
- A platform that can reliably handle 100x-to-1000x volume spikes without crashing



**“What your customers say on social has the power to make or break your brand reputation.”**

*Khoros, The State of Social Engagement 2017 <sup>3</sup>*

When consumers contact your digital care team through a particular channel, they choose it for a reason. Requiring customers to go to a different channel not only undermines the value of social as a support channel, it too often forces them back to a channel they purposely did not choose in the first place. High effort customer experiences such as transferring customers to other channels is the number one driver of disloyalty from [customer service interactions](#).<sup>5</sup>

**So why do brands do it? Brands that transfer customers to alternate channels do so for two reasons:**

### SECURITY CONCERNS

Because social media sites are not owned by brands, brands can't control their customers' data. When they need to collect personally identifying information (PII), they must move customers to another often more expensive channel in order to protect privacy. A robust digital care platform enables an agent to securely collect customer information from within the social workflow—keeping customers in-channel and allowing the agent to focus on customer satisfaction.

### SKILL-SET CONCERNS

Many social agents have not developed broad skills across all areas of the business. This can drive the need to transfer specific issues to other, more secure channels (thus preventing them from developing expertise), or because the social team does not have the budget or attention to provide this level of training. Observing the best practices shown in this whitepaper can help you with both of these hurdles so you can support resolution of all customer issues in-channel.

## Bottom line

**If you want social customer care to be seen as a first-class support channel, then you will need to be able to resolve customer issues in-channel. To do so, your care platform needs to provide the following:**

- The ability to securely collect PII and/or securely authenticate a social user as effortlessly as possible on public social channels while keeping customers in the channel of their choosing
- Automated, integrated support for your standard agent workflows
- Training and technology that empowers your social agents to handle all types of issues





## 6

## Coordinate agent processes

Agent onboarding, behavior monitoring and quality assurance: three key processes important to building and maintaining a high-performance digital care team. The challenge is that many customer care teams can't afford to send agents to lengthy training sessions, particularly when they have large call centers staffed with hundreds of agents subject to high turnover. Onboarding needs to happen in hours, not days. And once agents are ramped up, they need to be fully productive, responding to customers within established service levels. This means you need a platform that enables rapid skill transfer, and that makes productivity assessment easy.

This need extends beyond agents: supervisors need monitoring tools that help them understand how agents spend their time. Analysts need real-time streams to manage staff levels: it's important to know if agents are working consistently throughout the day, spending too much time on individual conversations, closing too many issues without responding, or cherry-picking some conversations while prematurely closing or re-assigning others they don't like. If team leads can monitor these types of behaviors across agents through real-time dashboards they can catch inefficiencies and adverse behaviors before they become larger problems that affect team morale and customer SLAs.

To get a full picture, you also need to understand the quality of the conversations agents are having. While onboarding agents, you should review their posts to ensure they are providing accurate answers with the correct tone and in the brand voice. After new agents are certified, regular quality checks can help you make sure they're continuing to offer an excellent overall customer experience.

### Bottom line

**Your digital care solution can help agents stay focused and on-task through:**

- A simple, easy-to-understand interface that requires minimal training
- Pre-approval processes that ensure new agents are on track before posting "live"
- Real-time agent-level monitoring to ensure experienced agents are working consistently and meeting expectations
- Continuous conversation auditing to ensure agents are following brand guidelines and rules of engagement



## 7

## Establish real-time service level monitoring

In digital care, service level agreements (SLAs) define your commitment to your customers by specifying how fast—and how well—agents respond to inquiries and resolve concerns. Real-time monitoring can help brands make sure they're meeting SLAs and resolving potential issues before problems arise.

**The three most important metrics relevant to customer experience that you need to measure in real time are: incoming support queue volumes, response times, and customer satisfaction.**

### **INCOMING SUPPORT QUEUE VOLUMES.**

If you're alerted within minutes of a sudden volume spike, you can make adjustments before your SLAs are affected. For instance, you can route a spike of unactionable content such as video sharing out of the support queue or re-balance the workload between teams, bringing on more agents if necessary.

### **RESPONSE TIMES.**

If you're monitoring your response-time SLAs you can ensure in real time that your SLAs are within your goals. In addition, setting up SLA breach alerts over 5-10 minute intervals will notify you should those SLAs start falling. That way you can react quickly, before your daily SLA is affected.

### **CUSTOMER SATISFACTION.**

If you're monitoring customer satisfaction metrics like sentiment conversion, CSAT, and NPS in real time, you can quickly spot customers who aren't satisfied with their latest interaction. Then, you can set up processes to try to remediate the problem.

So, if you are running a high-volume care team

## Bottom line

### **Your digital care solution should offer:**

- Proactive, contextual alerts when volume spikes above expected levels
- Notifications when response times approach pre-set SLA bounds
- Dashboards that allow agents to take actions from alerts, including: closing, routing, and viewing full conversations
- Real-time sentiment conversion tracking
- Real-time CSAT/NPS monitoring with the ability to take action on specific conversations

you need the right social customer care solution and processes in place to maintain a consistently positive customer experience. More and more companies are committing to shorter and shorter response times on social channels to meet customer expectations. Not only do quick response times lead to a better experience, but studies have shown that the faster a brand responds, the more customers are willing to pay in a subsequent purchase.<sup>6</sup> In other words, it's a question of value, and rapid response is associated with a heightened perception of brand value.

A key part of monitoring and reporting on digital care is the ability to compare apples-to-apples when reporting to executives operations and marketing. That means digital care teams need to be able to tie reporting to traditional call center metrics such as cost per resolution, response time, handle time, and customer satisfaction. Aligning these measurements drives alignment between teams and makes it easier to champion digital care as a core offering by comparing its efficiency and effectiveness with other channels.

How do you actually do this? First, you need to find the technology that's right for your team. Most crucially, you need to be able to monitor conversations rather than individual posts. That's because the social equivalent of one call is one conversation, not one post; a conversation can include dozens of posts and span multiple days. Using conversations as the unit of measurement is the only way to track true first-call resolution (FCR). In other words, it's the only way to know how long customers wait for first contact, how long they wait for time management (granular tracking of agent states throughout the day) along with resolution speed and the total and the number of customers that have been helped during the reporting period.

To optimize productivity and accurately predict staffing needs you will need the ability to track all of these metrics, and you'll need to be able to do it at the individual agent with specific understanding of how they spend their time. When you correctly track conversations at the agent level, you can provide the data that your workforce management tools need in order to accurately project how many agents you'll need in the future—enabling you to plan rather than forcing you to react.

### Bottom line

**The right social customer care solution will make it easy to report on well-established customer support metrics and should offer:**

- Conversation threading across public and private messages, always measured at the level of conversations with single customers
- Reporting that tracks both full conversations as well as individual posts and replies
- Individual response and conversation handle-time tracking
- Agent-level tracking of key efficiency (total conversations, responses, response time, and handle time, all per-agent) and core customer satisfaction metrics (CSAT, NPS, sentiment conversion)
- APIs to integrate your team analytics with external reporting systems (where all other channels are tracked) such as workforce management, BI, or CRM solutions

## Measure and report on customer satisfaction

Just as brands need to monitor the efficiency of social teams, they also need to measure the quality of those interactions. It's important to track customer satisfaction and quality of care using the same metrics used by other channels, namely CSAT and NPS. CSAT/NPS surveys can be useful in learning how well your digital CX stacks up to other channels. And of course, you also need to think through your process: relying on agents to send CSAT/NPS surveys, a surprisingly common practice, can lead to inaccurate results.

**The survey solution you choose should support these common processes for sending surveys:**

### **AGENTS SEND SURVEYS.**

Agents can make sure surveys are sent when the conversation is truly over, and that the right survey is sent to the customer in the right situation. However, you'll need to provide guidelines for survey selection and timing, and you'll need to have a QA process in place to make sure agents are sending out surveys when expected, rather than only when it suits them.

### **A TEAM MEMBER OTHER THAN THE RESPONDING AGENT SENDS SURVEYS.**

This maintains human control but removes the bias by not having agents send the surveys about the conversations they handled themselves. This may mean investing in a separate team, but with the right guidelines in place you can ensure customers are getting surveys at the right time and in the right situations, and that your results have high data integrity.

### **SURVEYS ARE AUTOMATED.**

Survey automation can seem like the ideal solution because it requires no effort from your team and removes bias. However, you'll need to carefully set up the automation so that you don't send the survey at the wrong time or where it doesn't make sense. For instance, you don't want to send a survey before the conversation is over. You also don't want to send a CSAT survey structured to ask about issue resolution satisfaction if the customer didn't reference an issue.



Of course, tracking satisfaction goes beyond resolution and surveys: it's also important to find ways to track customer satisfaction beyond surveys. That's because surveys require additional action from customers and often push them off channel to respond—making response rates fairly low and even artificially depressing the result: remember the earlier discussion of out-of-channel dissatisfaction. Instead of over-reliance on surveys, consider using sentiment tracking and reporting. It's a great way to supplement survey data, especially if it allows you to track and report on changes in customer sentiment throughout each conversation as well as overall.

No matter what method you choose, your digital care solution should support your business goals and make it easy to use standardized surveys across all channels: that way, you're reporting consistent, fully aligned results to executives.

## Bottom line

### **The right digital care solution should provide:**

- The ability to send third-party surveys and track them at both the individual conversation and individual agent level
- The ability to send automated surveys on all channels that support survey automation (for example, Twitter supports integrated, automated surveys)
- Historical and real-time survey results, facilitating comparisons and tracking over time
- Historical and real-time reporting on conversation sentiment conversion



Digital customer experience, including social customer care, is part of the overall customer journey. This means that someone looking at CRM data needs an omni-channel view that includes not only calls and chat, but also social conversations. To offer that wider view, you need to be able to integrate social data with your customer relationship management (CRM) and other core business systems.

To do so, you'll need a digital customer experience platform that integrates with your CRM, one that displays social conversations in your CRM so that all agents have context into all conversations with an individual customer across all channels. Social agents should have easy access to CRM customer data, as well as the ability to seamlessly escalate a conversation to an alternate channel via CRM if they can't solve an issue in-channel. Additionally, your digital care analysts need the ability to pull their operational metrics and customer satisfaction reporting into core BI and workforce management systems in order to compare efficiencies across channels.

Beyond integration, great digital care solutions also use that wider view to put clear, actionable reporting in front of executives. Such reports should be short, easily viewed on a mobile device, focused on the right metrics, and not overloaded with complex marketing analytics. These reports should also be interactive, enabling "drill-downs" if executives want more context.

Whether it's calculating the cost per call, measuring customer satisfaction and loyalty, or understanding how social affects purchasing behaviors, integrating social into the core business is critical to measuring and highlighting ROI—

### Bottom line

#### Your digital care solution should offer:

- The ability to share clear, actionable reporting with executives and stakeholders across the business
- The ability for social agents to easily access CRM data for decision-making and context
- APIs that enable integration of customer conversation data with CRM systems
- APIs that get operational data integrated into your core business intelligence and workforce management systems

and demonstrating that value to executives. Successfully doing this means your executive sponsors can confidently champion your services, helping secure the funding and staffing your team needs to increase its value to your company.



## Summary: pulling it all together

Digital Care is an increasingly crucial part of the capabilities brands need to meet people and address issues where they are, in their preferred channel. So important, in fact, that 81% of companies expect to compete mostly or completely on the basis of customer experience in the future.<sup>7</sup> If your company is making the effort to listen and respond to your customers on social platforms, you've got an advantage over competitors who are not.

Working with a robust digital care solution can boost that advantage even further, by giving you the power to engage with your customers at

scale—in a personalized, timely, and highly effective manner, providing the ability to integrate social with other channels so you can monitor, refine, and successfully adapt your overall customer service experience strategy to new social trends and technologies as they continue to emerge.

**Build these capabilities into your digital customer experience platform now to ensure your place among leaders tomorrow.**



## About Khoros

Khoros is the leading customer engagement platform built to turn siloed knowledge into enterprise value, and customers into contributors. By connecting consumer insights across all departments, Khoros gives companies the ability to run their business with their customers, anticipating their needs and accelerating sales, loyalty, and innovation.

With 2,000+ customers, including 52 of the Interbrand 100, and ten offices globally, Khoros powers approximately 500 million digital interactions every day. From social media to online communities and messaging to digital customer care, Khoros helps companies authentically connect with customers throughout their journey.

Khoros provides enterprise companies with a best-in-class platform to help them stay all-ways connected.

**Connect across social channels**

**Engage on branded communities**

**Understand your most valuable products and customers**

**Request a Demo**



## References

1. "Discover everything you need to know about the consumer of 2017 in 10 revealing sales and service statistics," Business.com, February 2017 <https://www.business.com/articles/scott-sampson-sales-service-consumerstatistics/>
2. "Brands need to dig deeper to create awesome customer service experiences," Loyalty360, March 2017 <https://www.loyalty360.org/contentgallery/daily-news/brands-need-to-dig-deeper-to-create-awesome-custom>
3. "The State of Social Engagement 2017," Khoros (formerly Lithium), 2017 <https://www.lithium.com/resources/white-papers/state-of-socialengagement-2017>
4. "Delivering Effortless Customer Service Experiences with Social Media," CRM Magazine, October 2016 <https://www.questia.com/magazine/1G1-465558816/delivering-effortless-customer-experienceswith-social>
5. "Blinded by Delight Why Your Service Experience Should Be Effortless, Not Exceptional," CEB, 2015 <https://www.cebglobal.com/content/dam/cebglobal/us/EN/top-insights/executive-guidance/pdfs/eg2014q1-blindedby-delight.pdf>
6. "How positive customer service interactions on Twitter boost consumer spending," Twitter Marketing, December 2015 <https://marketing.twitter.com/na/en/insights/customer-service-interactions-on-twitter-boost-consumerspensing.html>
7. "5 Social Media Management Boosts You Need in 2017," Khoros (formerly Lithium), 2017 <https://www.lithium.com/resources/white-papers/5-social-mediamanagement-boosts-you-need-in-2017>