Sprinklr Modern Care

Strategic Handbook

INTRODUCTION

Customers expect you to know them.

Modern customers want to be recognized as people, not data points – customer service must feel personal.

As customers communicate with your business - and with each other - through an ever-growing number of channels, the demands of customer care have increased exponentially. Consumers expect businesses to respond to questions and issues quickly, and to meet them on the channels they use most. Your business has to provide Care efficiently, but you can't afford to sacrifice quality of service.

The Modern Care Strategic Handbook was designed to empower brands to craft a strategy for Customer Care that delights customers and effectively deploys resources to meet goals.

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THE EVOLUTION OF CARE
How Social changed the landscape of Care

Before we begin, it's important to take a closer look at what care means for brands and for their customers. The concept of customer care is long-established, and even before the emergence of mainstream social media, care had already seen a history of evolutionary changes, from writing letters to placing calls to sending emails.

But in 2009, **the world shifted.** Social media brought about three revolutionary changes for care:

1. The rapid proliferation of new channels
2. Two-way, real-time engagement
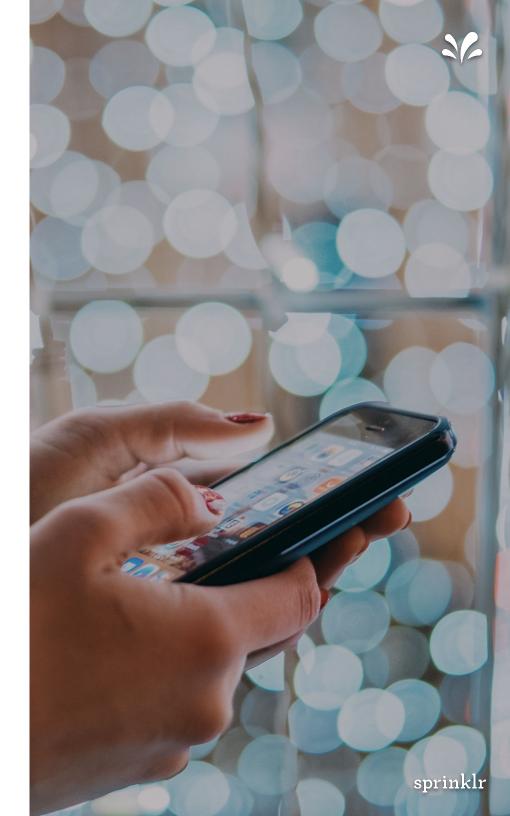3. Customers who are connected, informed, and in control

	Traditional (before social)	Modern (after social)
Care organization	Care is a siloed department	Marketing and care seamlessly connected. Shared responsibility for delivering excellent customer experience.
Care objective	Customer support primarily focused in resolving customer issues/problems	Care as an opportunity to initiate sales conversations and serve as a key input for business decisions
Care data	Siloed within the Customer Support department – often in legacy systems.	Democratized throughout the organization; freeing up real-time insights
Care drivers	Customer support reactive based on direct, inbound customer engagement	Care is proactive based on a complete view of the product, brand, location and competition
Care context	Static, disjointed based on limited CRM profiles	Dynamic, shared based on real-time CXM profiles
Care channels	Disconnected self-care/peer care/brand care	Seamless self-care/peer care/brand care
Care costs	Increasing volume drives increasing, human costs. Care seen totally as cost center.	Intuitive AI applied to broad, real-time care through social channels revolutionizes care both from a cost as well as an experience standpoint

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PRINCIPLES OF MODERN CARE

In the modern post-social world we live in, successful brands need to adapt to new realities that exist for Care.

We'll bring these principles to life with real brand examples throughout this Handbook.

- We are all responsible for Care

- Care can drive leads & sales

- Care should drive business decisions

- Care can be proactive

- Context can be shared in real time

- Costs can be reduced through social and AI

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HANDBOOK

a step-by-step guide for creating your
Care Strategy

ABOUT THE HANDBOOK

A handbook defines how people use processes and technology to achieve a desired outcome with consistency. It's more than a plan. It's a series of guidelines and guardrails that enables teams to execute with excellence.

The Modern Care Strategic Handbook was crafted on a framework built based on our experience engaging with enterprises across industries and geographies, including in-depth experience within the telecommunications, hospitality, retail, and technology sectors in over 100 countries and over 20 languages.

A **Care Handbook** is critical to the coordination of customer support activities across social media and other digital channels. A successful handbook details how to engage and collaborate internally and externally to enhance your customers' experience.

5 C's OF A GREAT HANDBOOK

COLLABORATION	written by the team, owned by the team
CLARITY	breaks down the complex into repeatable processes
CULTURE	trains new members of the team on how to operate within guidelines and become part of the desired culture
CONTRIBUTION	enables the sharing and adoption of best practices
CREATIVITY	fosters innovative thinking as a living document

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CARE PHILOSOPHY

How you care for your customers determines what they say about you.

Consumers no longer just consume. They advocate and criticize with equal power. And what they choose to say about your brand is largely defined by how you care for them. To thrive in an un-enterprise world, you need to turn customer care from a cost center into a powerful marketing engine.

We're in a new world of business where the old rules don't apply. Connected and empowered customers control the conversation. They expect companies to respond immediately to their questions and concerns – and to do so on their preferred channels. To get to the customer-first future of care, all brands – especially those entrenched in legacy systems and strategies – must overhaul their approach to people, processes, data, and technology.

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Your customer support philosophy is ultimately about how you view "service". For many companies, there's a strong temptation to start with data; the "know me to serve me" approach. Here, the thinking is that there's so much profile data across so many channels that mining that data for insights first is the best place to start.

But this approach can leave the consumer feeling misunderstood, alienated, or exploited. Great brands have found that service is the starting point and follow a serve to know to grow approach. Exceptional service leads to a progressive exchange of information which, in turn, leads to a deepening relationship.

WE ARE ALL RESPONSIBLE

"The customer care leader of the future will be any leader that still wants to have a job. If you're not customer centric in whatever role you're in, you're going to be out of work because that's the world that we'll be operating in."

- Jessica Federer, former CDO of Bayer

NORDSTROM

Nordstrom is a brand that is synonymous with customer service. Their care philosophy is simple: **"Use good judgement in all situations."** With this philosophy of employee empowerment and their exceptional attention to detail, Nordstrom has been delighting customers for over 100 years. Like Nordstrom, your customer service philosophy should be plain and simple.

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"Customer care is no longer the cost center of the business; it's the new price of entry. If you have any desire to win in areas like e-commerce, direct-to-consumer sales, and marketing, customer care is your best ally — helping you retain customers, nurture advocates, and drive a more profitable relationship. Customer care is your most powerful marketing engine"

- Pete Blackshaw,
Global Head of Digital and Social for Nestlé

SEE IT IN ACTION: APPLE'S CARE PHILOSOPHY

Apple's care philosophy uses the word Apple as an acronym:

Approach customers with a personalized, warm welcome

Probe politely to understand all the customer's needs

Present a solution for the customer to take home today

Listen for and resolve any issues or concerns

End with a fond farewell and an invitation to return

MODERN CARE OBJECTIVES

According to Microsoft's 2017 State of Global Customer Service Report, "96% of our respondents say customer service plays a role in their choice of and loyalty to a brand. This number is simply too high to ignore – and there's a major pay-off for brands that seize the opportunity. There is a **direct correlation between superior customer service and brand loyalty**, which means your customer service organisation can be a key stakeholder of your customer acquisition and retention strategy."

Your objectives and goals for your digital customer service group should align your teams around delivering seamless, personal service that builds trust, consumer confidence, brand affinity and customer loyalty.

> ❝*Customer care has become a major contributor to their overall customer satisfaction and can serve as a competitive advantage in the market.*❞
> *- McKinsey&Company*

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MODERN CARE OBJECTIVES

Beginning with the end in mind.

We suggest that companies follow the OKR model for this stage. OKR stands for **Objectives** and **Key Results**.

Objectives drive alignment throughout the organization. So the first questions to ask are:
- What are the objectives of the organization/division?
- What objectives should your work in paid advertising have to support the objectives of the organization/division?

Key Results are the **SMART** actions that will tell you that you've achieved your goals:
- **S**pecific - clearly defined and unambiguous
- **M**easurable - quantifiable and trackable
- **A**ttainable - ideally a stretch but not impossible
- **R**elevant - aligns with business objectives
- **T**ime-bound - start date and target date

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USE CASES AND OKRS

Here are the typical primary business use cases (PBUC's) for Modern Care in the market today:

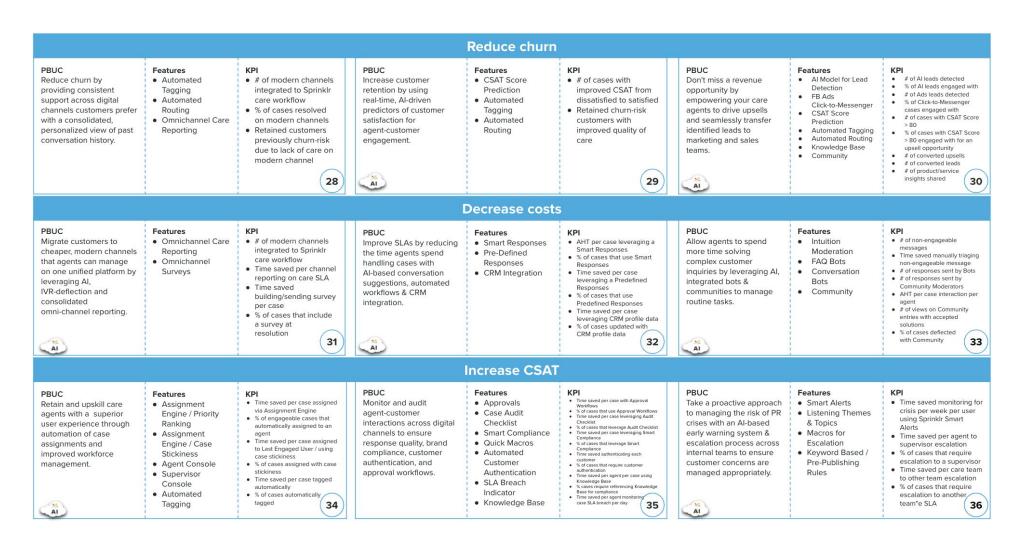|			
Reduce Churn	Reduce churn by providing consistent support across digital channels customers prefer with a consolidated, personalized view of past conversation history.	Increase customer retention by using real-time, AI-driven predictors of customer satisfaction for agent-customer engagement.	Don't miss a revenue opportunity by empowering your care agents to drive upsells and seamlessly transfer identified leads to marketing and sales teams.
Decrease Costs	Migrate customers to cheaper, modern channels that agents can manage on one unified platform by leveraging AI, IVR-deflection and consolidated omni-channel reporting.	Improve SLAs by reducing the time agents spend handling cases with AI-based conversation suggestions, automated workflows & CRM integration.	Allow agents to spend more time solving complex customer inquiries by leveraging AI, integrated bots & communities to manage routine tasks.
Increase Customer Satisfaction	Retain and upskill care agents with a superior user experience through automation of case assignments and improved workforce management.	Monitor and audit agent-customer interactions across digital channels to ensure response quality, brand compliance, customer authentication, and approval workflows.	Take a proactive approach to managing the risk of PR crises with an AI-based early warning system & escalation process across internal teams to ensure customer concerns are managed appropriately.

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USE CASES AND OKRS

Objectives, metrics and results depend on the role/level within an organization. Here's what we see in the market for Care today:

Reduce churn

PBUC	Features	KPI
Reduce churn by providing consistent support across digital channels customers prefer with a consolidated, personalized view of past conversation history.	• Automated Tagging • Automated Routing • Omnichannel Care Reporting	• # of modern channels integrated to Sprinklr care workflow • % of cases resolved on modern channels • Retained customers previously churn-risk due to lack of care on modern channel

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PBUC	Features	KPI
Increase customer retention by using real-time, AI-driven predictors of customer satisfaction for agent-customer engagement.	• CSAT Score Prediction • Automated Tagging • Automated Routing	• # of cases with improved CSAT from dissatisfied to satisfied • Retained churn-risk customers with improved quality of care

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PBUC	Features	KPI
Don't miss a revenue opportunity by empowering your care agents to drive upsells and seamlessly transfer identified leads to marketing and sales teams.	• AI Model for Lead Detection • FB Ads Click-to-Messenger • CSAT Score Prediction • Automated Tagging • Automated Routing • Knowledge Base • Community	• # of AI leads detected • % of AI leads engaged with • # of Ads leads detected • % of Click-to-Messenger cases engaged with • # of cases with CSAT Score > 80 • % of cases with CSAT Score > 80 engaged with for an upsell opportunity • # of converted upsells • # of converted leads • # of product/service insights shared

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Decrease costs

PBUC	Features	KPI
Migrate customers to cheaper, modern channels that agents can manage on one unified platform by leveraging AI, IVR-deflection and consolidated omni-channel reporting.	• Omnichannel Care Reporting • Omnichannel Surveys	• # of modern channels integrated to Sprinklr care workflow • Time saved per channel reporting on care SLA • Time saved building/sending survey per case • % of cases that include a survey at resolution

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PBUC	Features	KPI
Improve SLAs by reducing the time agents spend handling cases with AI-based conversation suggestions, automated workflows & CRM integration.	• Smart Responses • Pre-Defined Responses • CRM Integration	• AHT per case leveraging a Smart Responses • % of cases that use Smart Responses • Time saved per case leveraging a Predefined Responses • % of cases that use Predefined Responses • Time saved per case leveraging CRM profile data • % of cases updated with CRM profile data

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PBUC	Features	KPI
Allow agents to spend more time solving complex customer inquiries by leveraging AI, integrated bots & communities to manage routine tasks.	• Intuition Moderation • FAQ Bots • Conversation Bots • Community	• # of non-engageable messages • Time saved manually triaging non-engageable message • # of responses sent by Bots • # of responses sent by Community Moderators • AHT per case interaction per agent • # of views on Community entries with accepted solutions • % of cases deflected with Community

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Increase CSAT

PBUC	Features	KPI
Retain and upskill care agents with a superior user experience through automation of case assignments and improved workforce management.	• Assignment Engine / Priority Ranking • Assignment Engine / Case Stickiness • Agent Console • Supervisor Console • Automated Tagging	• Time saved per case assigned via Assignment Engine • % of engageable cases that automatically assigned to an agent • Time saved per case assigned to Last Engaged User / using case stickiness • % of cases assigned with case stickiness • Time saved per case tagged automatically • % of cases automatically tagged

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PBUC	Features	KPI
Monitor and audit agent-customer interactions across digital channels to ensure response quality, brand compliance, customer authentication, and approval workflows.	• Approvals • Case Audit Checklist • Smart Compliance • Quick Macros • Automated Customer Authentication • SLA Breach Indicator • Knowledge Base	• Time saved per case with Approval Workflows • % of cases that use Approval Workflows • Time saved per case leveraging Audit Checklist • % of cases that leverage Audit Checklist • Time saved per case leveraging Smart Compliance • % of cases that leverage Smart Compliance • Time saved authenticating each customer • % of cases that require customer authentication • Time saved per agent per case using Knowledge Base • % cases require referencing Knowledge Base for compliance • Time saved per agent monitoring case SLA breach per day

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PBUC	Features	KPI
Take a proactive approach to managing the risk of PR crises with an AI-based early warning system & escalation process across internal teams to ensure customer concerns are managed appropriately.	• Smart Alerts • Listening Themes & Topics • Macros for Escalation • Keyword Based / Pre-Publishing Rules	• Time saved monitoring for crisis per week per user using Sprinklr Smart Alerts • Time saved per agent to supervisor escalation • % of cases that require escalation to a supervisor • Time saved per care team to other team escalation • % of cases that require escalation to another team"e SLA

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Tips for Setting Objectives:

- Pick just three to five objectives - more can lead to over-extended teams and a diffusion of effort.
- Avoid expressions that don't push for new achievements, e.g., "keep hiring," "maintain market position," "continue doing X."
- Use expressions that convey endpoints and states, e.g., "climb the mountain," "eat 5 pies," "ship feature Y."
- Use tangible, objective, and unambiguous terms. It should be obvious to an observer whether or not an objective has been achieved. Research shows more specific goals can result in higher performance and goal attainment.

Tips for Developing Key Results:

- Determine around three key results per objective.
- Key results express measurable milestones which, if achieved, will directly advance the objective.
- Key results should describe outcomes, not activities. If the KRs include words like "consult," "help," "analyze," "participate," they're describing activities. Instead, describe the impact of these activities, e.g., "publish customer service satisfaction levels by March 7th" rather than "assess customer service satisfaction."
- Measurable milestones should include evidence of completion and this evidence should be available, credible, and easily discoverable.

-rework.withgoogle.com

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CARE STRATEGY

How you engage your customers determines what they say about you.

Now that you have your objectives and goals defined, you can lay out your strategy to achieve them. Your strategy is not the specific tactics (agent resources, do's and don'ts etc.) you'll use but the high level plan of attack.

Where should you be engaging customers?
This first thing is to figure out which channels you are going to participate in. There are a number of ways that customers can reach you and selecting the channels you'll use for care is an important part of your care strategy.

> *Today's customers interact with brands across a growing number of channels. And they're not picking favourites. When asked how many customer service channels they use, 66% of global respondents say they actively use 3 or more channels. As customers jump from channel to channel, especially during the course of a single service enquiry, brands must be empowered to transform that collection of unique customer interactions into a single engagement experience.*

- Microsoft State of Global Customer Service Report, 2017

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Consider the following questions when selecting the channels on which your business will engage customers.

Where are the conversations taking place?

People are talking about your brand right now as you read this. But where are those conversations taking place? Often this question can be answered by listening across social for mentions of your company, brand, store locations, or products. If you are an international brand, local channels need to be considered. For example, WeChat in China, VK in Russia, Line in Japan, etc.

Real-time or asynchronous?

A real-time or *synchronous* channel is a channel that requires both parties (your customer and your representative) to be conversing at the same time. The focus required for real-time communication can be resource-intensive when multiple conversations are occurring at once, but with no wait time, for customers, real-time interactions are the best experience.

An asynchronous channel is a channel where a delay occurs between the time a customer asks a question and receives an answer. For example, you don't expect an answer to an email instantly.

Expectations on how long consumers will wait for an answer on social media are increasing.

According to The Northbridge Group, **about half of all Twitter users now expect an answer to a customer support question within one hour.**

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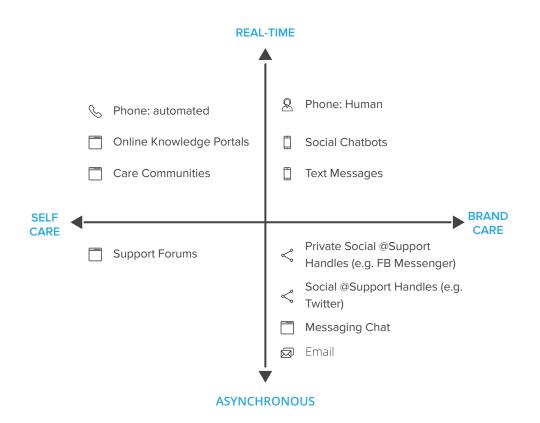
Self care or brand care?

Through self-help communities, and online knowledge more and more brands are moving toward self care. Messaging apps like Facebook Messenger and WhatsApp are becoming go-to channels for brand care.

When providing direct brand care through social media, consider maintaining a separate social media account for customer support to avoid having support issues interfere with your main brand account.

What are market leaders, disruptors and your competition doing?

There's a lot of innovation going in the world of customer service -- from AI, to machine learning, to chatbots and intelligent, IoT self-help devices like Alexa. Often it's your competitors that are pushing the boundaries, forcing you to keep up.

REAL-TIME

- Phone: automated
- Online Knowledge Portals
- Care Communities
- Phone: Human
- Social Chatbots
- Text Messages

SELF CARE — **BRAND CARE**

- Support Forums
- Private Social @Support Handles (e.g. FB Messenger)
- Social @Support Handles (e.g. Twitter)
- Messaging Chat
- Email

ASYNCHRONOUS

DECREASE COST THROUGH SOCIAL & AI

KLM offers 24/7 care on social media including WhatsApp, while Lufthansa offers customer support on Twitter and via chat on FB Messenger.

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How many channels can you support?

Considering how many channels your team can manage - both financially and with human resources - is a long-term sustainability question. Without a human or AI moderation layer, as the inbound volume increases, so will the load on your resources. Chatbots can help govern the volume, but not all social channels are suited for bots. On the other hand, providing avenues for crowdsourcing customer responses via forums and communities can be a great way to manage volume.

CXM or CRM?

As you consider care channels, you need to ask yourself about the type of data that can be collected. Traditional CRM systems typically capture fairly static customer data points, while social channels are able to surface CXM or Customer Experience Management data that is real-time, extensive, interest- and action-based, and personal.

HOLISTIC CUSTOMER PROFILES

"*At the service level, we have a unique opportunity to build holistic customer profiles. If you know that the individual who gave you direct feedback is also active on Facebook or is also active on Twitter, and is also an influential blogger, you can assign a much bigger value proposition to that customer and that interaction.*"

-Pete Blackshaw
Global Head of Digital and Social, Nestlé

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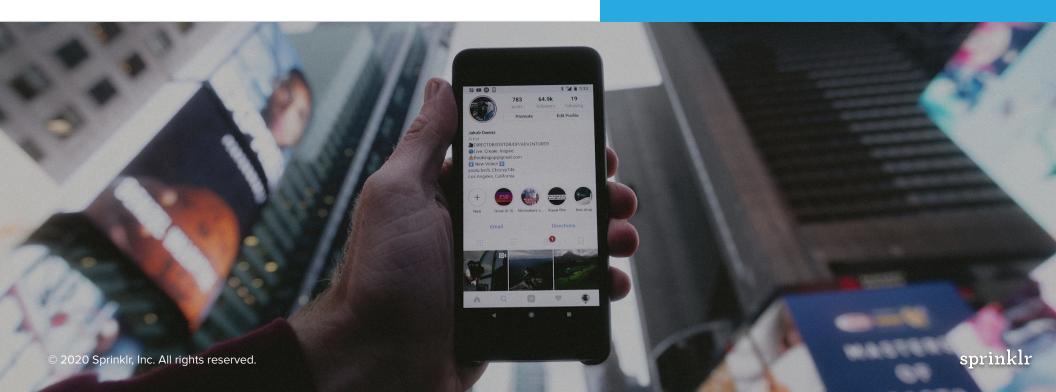
What is the utility?

It's very important to anticipate the types of questions you'll be asked by your customers in order to determine the best channels. For example, if you are in the home appliance business, you might be faced with a lot of installation and repair questions. Video is often the best way to answer these, so YouTube would be a great place to send people for self-help.

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Which channels are the most important for your brand?

Once you've identified the best-fit channels for your brand, the next step is to prioritize channels for investment and resource allocation. This may be done at the global or local brand level. Often brands will bucket channels into tiers with **Tier 1** channels being the top 3-4 channels, **Tier 2** being the secondary channels of choice, and **Tier 3** containing lower-priority channels on which you'll be engaging.

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Who are we?
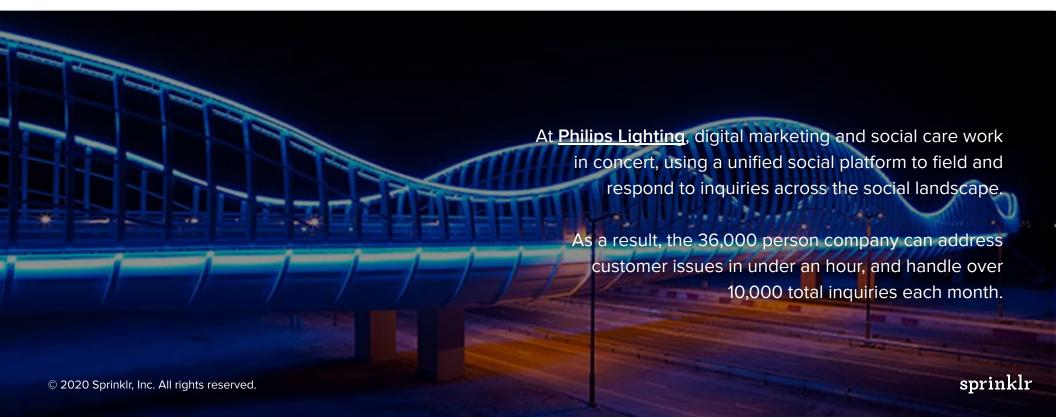
The personality you express in customer care interactions should be congruent with your Brand Personality. Do a little research and you'll find that the seminal work on Brand Personalities was published over 20 years ago - but still can be applied to brands today. In _Dimensions of Brand Personality_, Jennifer Aaker describes the brand personality framework. We've used that framework to illustrate how that's applied by brands today:

Personality	Traits	Brand Examples
Excitement	Daring, Spirited, Imaginative, Topical	Red Bull, Nike, Heineken, Wendy's, Taco Bell, Doritos
Sincerity	Down-to-earth, Honest, Genuine, Cheerful	Pampers, Campbell's Soup, Holiday Inn
Ruggedness	Tough, Strong, Outdoors	REI, Canada Goose, North Face, Jeep
Competence	Reliable, Intelligent, Successful	Toyota, Citibank, Delta Airlines, SPG Hotels
Sophistication	Elegant, Prestigious, Sophisticated	Rolex, Audi, Tiffany

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Many brands will also publish guidelines for their Customer Service personality in a series of "who we are" and "who we are not", or *do's* and *don'ts.*

Who we are	Who we are not	Do	Don't
• Helpful	• Irreverent	• Be honest and direct	• Use jargon
• Supportive	• Sarcastic	• Follow-up	• Be condescending
• Dedicated	• Disingenuous	Be clear and concise	• Overpromise
• Accessible	• Patronizing	• Be conversational	• Express a personal opinion
• Friendly	• Elitist	• Be flexible and adapt to the	• Be cheesy
• Approachable	• Judgmental	conversation	
• Knowledgeable	•	• Take time to understand	
• Authentic		your audience	

At **Philips Lighting**, digital marketing and social care work in concert, using a unified social platform to field and respond to inquiries across the social landscape.

As a result, the 36,000 person company can address customer issues in under an hour, and handle over 10,000 total inquiries each month.

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What's our unique point of view?

This step is often overlooked. Your point of view (POV) brings together your objectives and your persona relative to the channels on which you are engaging. It is a short and simple guiding principle for a channel. In the table below, you'll find a brand example.

A few things to keep in mind when developing your channel point of view.
- The POV guides engagement strategy and service guidelines
- You can have the same persona across multiple channels and/or objectives but each channel has its own POV
- You can have a different persona for a particular channel (e.g. for a sub-brand or category)

Objective	Channel	Persona	POV
Provide a consistent and contextual care experience across social channels	Twitter	Sincerity	The how-to clubhouse
Provide a consistent and contextual care experience across social channels	Facebook	Sincerity	The go-to group
Intelligently route cases, across channels, in real-time, to the people who can most effectively address them	Web Chat	Competence	The instant helper
Leverage self-service technologies such as bots on Facebook Messenger to help customer find answers to FAQs on their own.	Messenger	Competence	The simple source

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How Technology Helps Us: Automation, AI, and Bots

Customer care is all about operational efficiencies. Care Center managers are constantly looking for ways to reduce clicks, maximize service, and optimize their workforce.

Automating manual processes is critical to optimizing your care workflows. Automation can provide behind-the-scenes Rules for routing and tagging, click-based consolidation through macros and real-time auto-responses to customers.

AI takes it one step further through inbound social moderation automation. Tools like Sprinklr Intuition can process the massive volume of inbound messages that large brands receive, then route and assign to the agent with the right skills or fit for solving a customer's' issues.

AI for Modern Care includes:

- **Moderation**: determining which messages to engage with
- **Classification**: determining the type of message (lead, product insight, issue, praise, etc.)
- **Routing**: assignment based on skills, last agent response, consumer profile etc.

- **Response:** smart, suggested responses based on responses of best agents
- **Escalation Prediction:** NPS prediction
- **Performance:** ongoing monitoring of agent performance and alerts/suggestions.

According to Digitas, 59% of Americans have communicated with chatbots or would be willing to do so. Customers can use chatbots to receive quick and personalized assistance right on their mobile devices. And brands can use chatbots to automate customer service, be available 24/7, and collect data about their consumers.

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AI also plays an important role in a key emergent customer service channel: chatbots.

According to Accenture, there are three elements to a chatbot:

1. The UI - This the user interface between the chatbot and the (human) user, through a messaging app or a chat session on a company's website.
2. The AI - The artificial intelligence that allows the chatbot to understand and solve customer queries and to learn from each interaction
3. The SI - The systems integration with other platforms including management systems to access human agents.

Despite the excitement, chatbots are still failing your customers. Without the proper approach to this new technology, companies will only end up wasting money and frustrating their audiences.
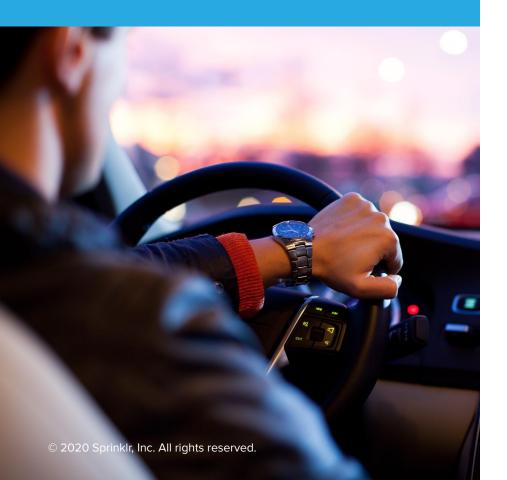
Here's what you need to know.
Chatbots aren't being used to their full potential. Companies are forcing them to perform traditional functions, plugging simple automated responses into their messaging services instead of taking the opportunity to reimagine the entire customer experience around this new tool.

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DECREASE COST THROUGH SOCIAL & AI

Chatbots could help reduce business costs by more than $8 billion per year by 2022. That's why major companies such as NBC, Sephora, and Uber have already built their own bots.

Chatbots are powerful tools that can deliver personalized experiences to individual consumers on demand. Bots can be used to follow up with each consumer along their journey, provide optimized services, complete transactions, drive adoption throughout the customer and product lifecycle, and facilitate care – but only if companies deploy them strategically.

As Katie Lamkin wrote for Prophet, "Many companies think they are innovating, when they are simply iterating ... Rather than re-imagining the moment and overall experience, initial solutions for chatbots mimic modern-day call centers."

Chatbots, automation and AI aren't going anywhere. They offer new and efficient ways for companies to reach individual customers at scale.

And with the growth of messaging apps, they fit right into customers' mobile habits. To harness the full potential of these tools, companies must take the right approach. They have to connect their chatbots to an intelligence platform that combines data from every touchpoint.

This way, the chatbot can fall right into line with other outreach channels, and customers can enjoy the most intuitive and personalized experiences possible.

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When will we be available?

Service levels and response times are crucial considerations for real-time care channels such as social media and chat.

32% of social media users who contact a brand expect a response within 30 minutes, and 42% expect a response within 60 minutes.

As mentioned earlier, the degree to which you apply automation, AI and chatbots will directly impact the resources required to sustain a service level.

CARE CAN DRIVE SALES

A 2019 study showed that prompt and personal customer service does indeed pay off. HBR states, "Customers who had interacted with a brand's customer service representative on Twitter were significantly more likely to pay more for the brand, or choose the brand more often from a comparably-priced consideration set, compared to our control group of customers who had no such interaction.

"When an airline responded to a customer's tweet in five minutes or less, that customer was willing to pay almost $20 more for a ticket on that airline in future months. Similarly, wireless customers were willing to pay a whopping $17 more per month for a phone plan when they received a reply within five minutes."

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Can our customers help themselves?

According to McKinsey, "Digital self-care channels already allow companies to direct 30 to 50 percent of contact volume to online self-serve tools, representing a massive opportunity to prevent low-value contacts and to save resources." Many of these self-serve tools are community forums, blogs or public groups where consumers go for answers.

As Marketing Insider explains, with unfiltered customer insight for your market research purposes and iron-clad customer loyalty, online branded communities have a lot of potential benefits:

- Reduced customer support costs – 49% of businesses with online communities report cost savings of 10% to 25% annually.
- Boosted brand exposure and credibility, making it easier to sell without selling.
- 67% of businesses use their communities for insights on new products or services and features.
- Heightened engagement and better customer retention.
- A channel through which to present products and services before the official launch.

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7 Key Steps for Building a Customer Care Community

Factoring a Care Community into your Care Strategy is a great way to reduce costs and raise consumer engagement.

|	
1. Set clear business objectives	*Consumer-focused companies* like airlines and mobile providers must manage high inbound volume while maintaining service quality. Their objectives might center around improving customer satisfaction while managing costs. *Business-oriented companies* like tech vendors are often more interested in using customer communities to streamline the sales process and enable prospects to find relevant solutions.
2. Define performance metrics	Essential metrics include monthly pageviews and unique visitors, but it's also essential to track engagement – how many people are asking and answering questions, creating blog posts, or otherwise contributing user-generated content (UGC)?
3. Construct the content architecture	In a new Community, structure content around a few busy areas, then expand as volume permits. You might categorize content by product, vertical market, use case, or other factors based on your audience. Some tips: • Use tags to aggregate related content • Create customized landing pages for each main topic • Using widgets to highlight hot topics and promoted posts • Modify the content structure as the community evolves.
4. Design matters	Be sure to involve your branding team early in the process to ensure you strike the right balance in the community's design.
5. Launch content	Speak to customer care and technical support leaders, product managers, developers, and engineers about their existing and planned content. Set up brainstorming sessions to plan future content; for example, your sales ops and care teams may decide to collaborate on a new forum containing all the content for your annual customer conference
6. Sustain it	Even with an active base of brand ambassadors contributing "free" content that amplifies your message, it takes resources to find, nurture, and reward super-users. Work with your Sales Ops team so that each new customer receives an invitation to join the community, then reward them for sustained engagement. Above all, put yourself in the mind of your audience. The best way to create a vibrant community is to ensure it's managed by someone who cares. If your community is made up of hard-core gamers, your community manager should be a hard-core gamer – speaking the language is vital.
7. Maintain, integrate and evolve the platform	• The community platform should offer configurable workflows that can help you escalate community posts to other teams for standard case management and resolution. • To make discovery easy for your customers, it should be highly optimized for Google and other search engines. • To feed insights and data from the community, it should integrate with the technologies you use for publishing, monitoring, listening, analytics, etc.

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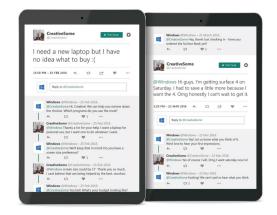
How will you engage on social?

There's a tremendous opportunity for content within the context of care that extends beyond problem resolution. Types of content in care include:

- **Reactive content:** this is your standard response to customer queries
- **Reactive-marketing content:** this is content that is a response designed to be shared (care as marketing)
- **Proactive-service content:** based on listening and the identification of common issues, this content serves to ward off future issues
- **Proactive-motivation content:** content designed to increase awareness and adoption, for example, fun customer stories or tips and tricks

Reactive:
content designed to support

Proactive:
content designed to prevent

Proactive-Education:
content designed to educate

Reactive-Marketing:
content designed to be shared

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Customer Care on Messaging Platforms
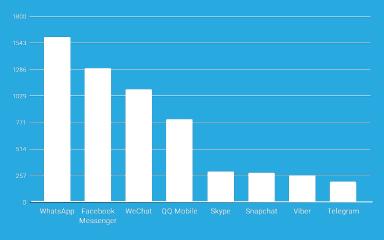
According to a 2019 article in ADWEEK, "Sixty-eight percent of consumers note that **messaging is the most convenient way to stay in touch with businesses** and today, they send 10 billion messages each month on Facebook Messenger alone to do so.

The advantages of messaging platforms for customer service include:

- **Single channel:** Unlike social media, messaging can be used as an all-inclusive service channel. A customer can send you a photo of a faulty item and you can immediately send them a PDF of a return label.
- **Privacy**: Messenger platforms are all direct channels where information is sent securely and privately.
- **Image and reputation:** 1:1 communication means that your customers' concerns won't become a talking point for your entire Twitter audience and the media.
- **Speed and automation**: It's easy to automate messaging app communication. You can start small with pre-set answers, enabling your customer service agents to respond to customers with just one click.
- **Popularity:** Messaging apps not only have more users than traditional social media, but they're also growing faster and offering more business potential

Millions of monthly active users on the world's largest messaging platforms

Source: statista

"Seventy-two trillion messages were sent in 2018 across these platforms. Compared to the 1.6 trillion searches on Google, **messaging is well-positioned to reinvent how marketers approach all of their initiatives, from branding to customer service**."

ADWEEK

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Guidelines and Best Practices for Messaging Platforms

Here is a summary of best practices from Facebook:

Channel	Getting Started	Up and Going	Running Hard
Facebook Messenger	- Use Messenger Greeting to set expectations on how customers should use this channel and how long they should expect to wait for a response - Use instant replies to let your customers know when they should expect to hear from you and redirect to resources they might find helpful in the meantime - When you're closed or otherwise unable to get back to customers quickly, create an away message that's automatically sent to people who message your Page when your Page's messaging status is set to away. - Bring Facebook traffic to Messenger with a "Send Message" CTA	- Send a private reply on Facebook comments via Messenger to solve customer requests more efficiently and securely. - Depending on volume, you can message directly via Page Manager (low) or you can use the more advanced solution with Page API to do more programmatically (med or high volume) - Use Checkbox Plugin on your checkout page to provide a seamless way for people to receive shipping status, receipts, flight confirmations, and updates via Messenger. - You can authenticate people on Messenger and start a thread using your website. - Customize your messages or use one of Facebook's structured templates to ensure a consistent and rich experience. - Message Tags give you the ability to send messages out of the 24+1 window for updates on shipping, account, issue resolution and more.	- Include a Persistent Menu to make key commands accessible at any point in the - Interaction. - Use Quick Replies to clearly outline next steps for users. They're an easy way to communicate what actions are possible within conversation with your bot, and to speed along the conversation with as little confusion as possible. - Send richer content via generic and list templates. Structured templates are interactive and clearly display information hierarchy. - Avoid using "Menu" as a name for items in the Persistent Menu. This is redundant and adds extra steps for the user. - Handover Protocol lets you pass thread control seamlessly between your live agents and automation - providing an easy way for live agents to step in when self-service isn't enough. - The "Message Us" plugin can be used to immediately start a conversation and send the person to Messenger. On the desktop web, the user is sent to messenger.com and on mobile they are sent to the Messenger native app. - The Customer Chat Plugin is a simple way to allow people to chat with businesses on their websites and in Messenger. With this plugin, customers can transition back and forth seamlessly without losing the conversation's history and context.

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Guidelines and Best Practices for Messaging Platforms

Here is a summary of best practices from Facebook:

Channel	Getting Started	Up and Going	Running Hard

WhatsApp	• The phone number that you intend to use with WhatsApp must be clean, that is, with no previous registration or affiliation with WhatsApp. There are 3 types of eligible phone numbers for this product:
	  ○ Landlines - Probably the easiest to use
	  ○ Cellphones - Can be used as long as the number has not been used for WhatsApp in the last 6 months.
	  ○ 1-800 or toll-free numbers - Possible as long as the phone number is capable of receiving SMS or voice calls directly. You will not be able to use numbers that are behind IVR.
	• Private communication by design: Users should manage their own accounts for one-on-one chats and small group conversations.
	• Gain people's permission: Messages should only be sent to people who have contacted you first or have requested you contact them via WhatsApp. It's best to give people your phone number so they can message you first. If people provide their phone number, message them in ways they would expect. For example, explain who you are, and how you got their phone number.
	• Think twice before forwarding: WhatsApp has affixed a label to all forwarded messages to encourage people to think before sharing.
		• Respect people's choices: If a user asks you to stop messaging them, you should remove the user from your address book and refrain from contacting them again. You should get permission from people before you add them to a group. If you add someone to a group and they remove themselves, please honor that decision.
		• Use Group controls: WhatsApp created an "Admin Only" messaging setting for groups — so if you create a group, you can decide who can send messages within it. Using this feature can help cut down unwanted messages in groups.
		• Automatic "Quick" replies, such as greetings and away messages, can save you from writing the same message over and over again. It's also a great way to let your customers know that their message has been received and will be replied to when you are back online.
			• Respond to all customers within 2 days (48 hours).
			• Keep it human: remember emojis can be used in both shortcuts and quick replies.
			• Keep it engaging: use the photo editing tools to create clickable, personal content.
			• Depending on your audience and or campaign, custom stickers may be a fun way to engage your customer.
			• Utilize Labels to mark and categorize messages that you may want to reach out to as an audience later (e.g. for a common issue)
			• Proactively move traditional care channels to WhatsApp to reduce Customer Care costs.

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A case is the primary entity of the customer service interaction. A care agent creates a new case to identify a customer's question or issue and to track the activities related to resolving the issue. An agent also uses a case to track all of the communication to and from the customer, ideally across all communication channels.

A key aspect of case management requires resolving an issue across channels. For example, a person may start a conversation on social and then be routed to an email or phone system to resolve. Typically these systems are not connected, so an integration is necessary to close the case upon resolution in each channel that it was opened. This will help to avoid frustration and confusion, and set the right context the next time the customer engages with your brand.

When it comes to profile management, there are some basic rules we suggest:
- **Be transparent -** never associate a consumer's profile on one channel with their profile on another channel without their explicit consent.
- **Be consistent -** how you treat your customers on one channel should be the same as on all channels when it comes to data and data privacy
- **Be clear -** don't use complicated language when describing how you will use consumer data if the consumer agrees to give it to you. Keep it simple, honest and follow the Golden Rule: do to others as you would expect them to do to you.
- **Be deliberate -** data should only be gathered for very specific use cases. Data for data's sake is tempting but ultimately useless.
- **Be helpful -** Care is a simple use case for customers to connect their profiles and consent to data use. Care really is the new Marketing.

WE ARE ALL RESPONSIBLE

"Acquiring a new customer is anywhere from five to 25 times more expensive than retaining an existing one."
HARVARD BUSINESS REVIEW

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What to do in a time of crisis?

While you never want to have one, being prepared for a social media crisis is crucial. The key steps are:
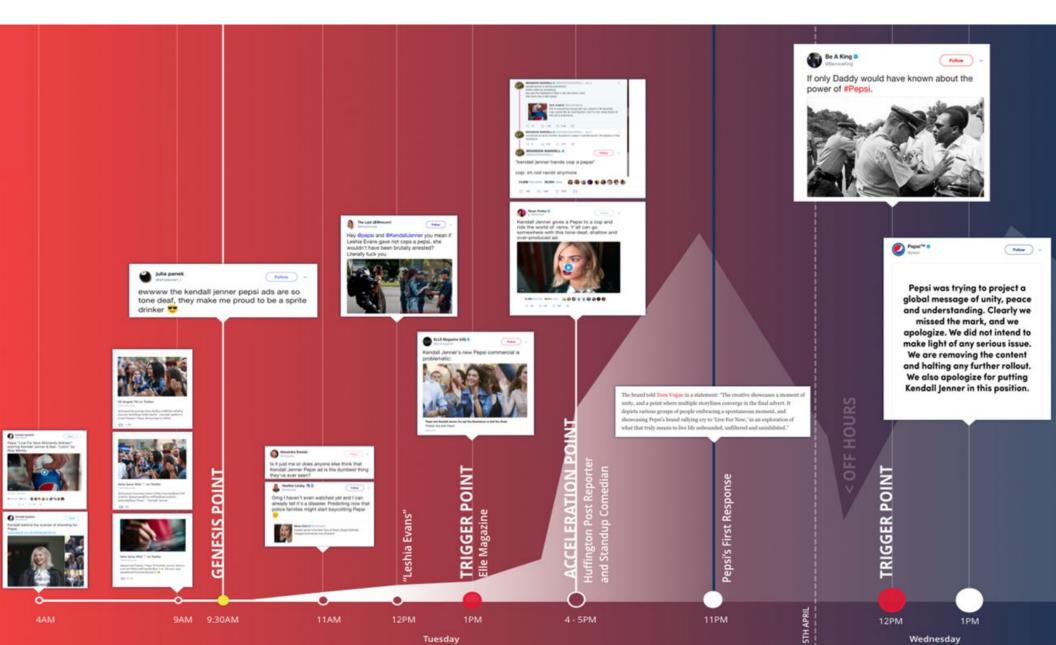
1. **Identification**: list all possible risks that could affect your brand equity and business - from organizational and operational to regulatory and political risks.
2. **Measurement**: understand the specific risk exposure and the probability of a loss occurring due to this exposure.
3. **Mitigation:** after having categorized and measured its risks, take the decision on which risks to eliminate or minimize, and how much of your core risks to retain.
4. **Reporting / monitoring:** It is important to report regularly on specific and aggregate risk measures in order to ensure that risk levels remain at an optimal level.
5. **Handbook:** be clear about what, when and by whom needs to be played out based on the various types of social crisis.

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ANATOMY OF A SOCIAL MEDIA CRISIS | EXAMPLE: PEPSI COLA

On April 4th, 2017, Pepsi's ad featuring Kendall Jenner sparked outrage on social media, with some saying the imagery appropriated a now iconic photo of Black Lives Matter protester Ieshia Evans, who was detained after approaching police during a demonstration in Baton Rouge. Others widely mocked the image for being tone deaf, including Bernice King, the daughter of Martin Luther King Jr. The company pulled th ad the following day, stating ""Pepsi was trying to project a global message of unity, peace and understanding. Clearly, we missed the mark, and we apologize," But the damage was done.

GENESIS POINT

"Leshia Evans"

TRIGGER POINT
Elle Magazine

ACCELERATION POINT

Huffington Post Reporter and Standup Comedian

Pepsi's First Response

< OFF HOURS

TRIGGER POINT

4AM | 9AM | 9:30AM | 11AM | 12PM | 1PM | 4 - 5PM | 11PM | 5TH APRIL | 12PM | 1PM

Tuesday | Wednesday

How are we doing?

Here are some of the most common survey types for Customer Care, and when you should consider using them:

Type	Description/When to Use	Examples
Short Answer Question	• Generally used to collect open-ended, written feedback from respondents on a product, service, situation, event, or customer service experience • Specifically, more useful when the feedback sought needs to be unguided • A means to gather qualitative feedback in an otherwise quantitative survey	• Any feedback on our new bottle design? "Comment Box" • Anything you did not like at our event? "Short Answer Box" • Any other feedback you would like to share? "Text Box"

Multiple Choice Question	• Generally used to allow selection of one or more than one alternatives from a set of pre-defined alternatives
	• Used extensively for insights into your company's market position, your products, your competition, and the market in general, in surveys like
	• Market Profiling-Segmentation Surveys,
	• Customer Attitudes and Expectations Surveys,
	• Brand Equity Surveys,
	• Customer Service Surveys, etc.
		• Which of the following media did you use before your problem was resolved?
		  ○ Phone
		  ○ Email
		  ○ Social Media
		  ○ Store Visit
		• Which of the following brands do you like?
		  ○ Brand A
		  ○ Brand B

Single Choice Question	• Generally used to allow only a single choice from a set of pre-defined options
	• Used for dichotomous questions with two possible answers (yes or no; true or false; etc.)
	• Effective in asking about an option that is closest to their choice or opinion
	• Also effective while asking respondents' least preferred or most preferred option from a predetermined list
	• Most basic of the survey questions and used almost in all type surveys from market research to customer service.
		• How many online purchases did you make in the last month?
		  ○ None
		  ○ 1-10
		  ○ More than 10
		• Have you ever used product XYZ?
		  ○ Yes
		  ○ No
		• Which one of the following brands do you like the most?
		  ○ Brand A
		  ○ Brand B

Likert Scale Question	• Binary questions with response such as yes or no give an indication of direction of opinions but Likert Scale questions measure both the direction and the intensity of opinions.
	• Use Likert Scale whenever you can:
	• how people are reacting to your new product launch event,
	• how successful your product is in the market,
	• what do customers think of your brand
	• how customers feel about the customer care at your company, etc.
	• You will get more information from each question. And you will get more granular feedback.
		• How satisfied or dissatisfied are you with our customer service overall?
		  ○ Very satisfied
		  ○ Somewhat satisfied
		  ○ Neither satisfied nor dissatisfied
		  ○ Somewhat dissatisfied
		  ○ Very dissatisfied
		• I prefer Brand A over Brand B:
		  ○ Disagree
		  ○ Neutral/Neither agree nor disagree
		  ○ Agree

Net Promoter Score (NPS) Question	• Used more in a B2B context to understand how does your customer feel about your organization, brand, product or service.
	• Used to calculate NPS score to set internal performance benchmarks
	• Also for external benchmarks to compare against competitors in your industry
		• How likely is it for you to recommend our company to a friend or colleague? "Scale/options from 0-10 with 0 indicating 'Not at all likely' and 10 indicating 'Extremely likely')" Those with scores:
		  ○ 0-6 are classed as Detractors,
		  ○ 7-8 are classed as Passives and
		  ○ 9-10 are classed as Promoters

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ROLES & RESPONSIBILITIES

Your ultimate resources are your people.

Customer support and care is about delivering personal, premium, seamless service and building human relationships between your people and your customers.

To deliver that high level of service consistently and at scale, you'll need to define the roles and responsibilities within your care organization.

As you establish roles and responsibilities within your care team, keep in mind their place in your care workflows and in your overall care strategy.

In this section, we'll outline some of the typical roles and responsibilities important to a customer care team, outline how care teams might be organized across the business -- both across organizations and across locales, and help you identify some of the key considerations when defining your care team.

SEE IT IN ACTION: GOOGLE'S ONBOARDING CHECKLIST

To make sure that new employees understand their responsibilities clearly, Google uses a 5-step checklist for onboarding:

1. Have a role and responsibilities discussion

2. Match your new hire with a peer buddy

3. Help your new hire build a social network

4. Set up onboarding check-ins once a month

5. Encourage open dialogue

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Business *and* technical, not business *vs.* technical

When we look at great brands in Care, they have one thing in common: they have invested in people both on the business side as well as on the technical side. The following table summarizes this:

Area	Group	Typical Roles	Typical Responsibilities
Business	Care	Care Lead Care Agent Care Analyst	Call/contact center supervision and management, routing and responding to messages, crisis management & coordination.
Technical	Product Design (if applicable)	Systems Architect Project Manager Product Manager	Technical systems design, integrations project management, enhancements definition and delivery, product roadmap coordination.
	System Administration	System Administrator Business Analyst	System configuration and maintenance, social display/command center management, social listening enablement, paid media setup.
	Training and Communications	Platform Evangelist/Trainer Communications Manager	New product introductions, newsletters and communications, platform rollouts, new user onboarding, adoption monitoring and remediation.

WE ARE ALL RESPONSIBLE FOR CARE

Establishing lines of communication between the Business and Technical teams is critical. When Business teams source technologies independently from the Technical teams, it can lead to duplicative efforts, inefficiencies and increased costs. When Technical teams don't consider Business needs, technologies are chosen that do not meet expectations, leading to low adoption and wasted resources.

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Global and Local

If you are large, global brand, centralization vs decentralization is an important consideration. When defining roles, consider what does the global team do vs what does the local team do? Global often refers to your company headquarters or your core operations hub. Local might refer to a region or store location, or a category or sub-brand.

Consideration	Centralized	Decentralized
Care business planning and strategy	• Align budget and planning to the "Global" business stakeholders • Single point to define and drive care philosophy	• Multiple budgets means disjointed planning • Local care philosophy may or may not be on brand
Delivering personal, seamless service	• Connect CRM & Case Management systems to HQ database	• Local systems often not connected to HQ databases resulting in lack of data
Ensuring consistency of customer care	• Clearly define training resources, SLA's and agent expectations • One source for team communications • Collect and disseminate best practices & publish global Care handbook	• Local cultural expectations can be taken into account (e.g. Brazilians expect a response on social media almost twice as fast as in the United States)
Governance and crisis management	• Tight governance concerning social media and customer service policy • Create and activate crisis management playbook • Take into account all legal and regulatory aspects of social	• Less governance • Local crises may not warrant brand response.
Social media account management	• Clearly define guidelines for social account activation and governance • Clearly define social care strategy	• Manage social accounts within the local team. • Ensure brand is on unique accounts specific to local geo
Technology selection and management	• Centralize budget and vendor selection for technology • Consolidate local feedback for Technical teams • Ensure the processes/workflows are consistently applied	• Potential for simple tools for simple processes

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IN SUMMARY

What does great look like for Customer Care?

1. Create different **social accounts for care and marketing**.
2. Communicate clearly when your social customer service team will be **available** on each platform. And if you are bold, tell customers how quickly they can expect an answer.
3. Be **personal**. Add a name and face to your care agents on social media to connect better with the customers they are interacting with - and make sure to use the customer's name when engaging with them
4. Deploy **social analytics** to understand the sentiments behind brand mentions.
5. Do not try to resolve every single issue on public social media. Take the message to a **private or direct message** or, if necessary, transfer the sensitive ones to your call center.
6. Map out a different strategy to handle **trolls**.
7. Make sure you have a **crisis management playbook** - and that everyone knows it.
8. Anticipate customers' problems proactively through **social listening** (location-, brand-, and product-based and visual listening too) and answer questions before they are asked.
9. Regularly **connect Care and Marketing** teams to share insights and shape the brand together.
10. Have a social engagement guide to ensure **consistency and governance.**
11. Be **authentic** - honest, clear, transparent and human interactions are way more appreciated than canned, impersonal, templated responses.
12. Take social care seriously and **resource it appropriately**.

THREE GREAT EXAMPLES OF SOCIAL CUSTOMER CARE

Company: Microsoft
Channel: Twitter
Account: @xboxsupport
With over 1 million followers on Twitter and around 300 thousand tweets, @xboxsupport has been recognized as the "most responsive brand on twitter". According to Microsoft: "Social engagement is the customer experience. We think about social media the same way we do service call centers, and we believe that a customer tweet that is ignored is like letting the customer service phone ring off the hook."

Company: Nike
Channel: Facebook
Account: @nikerunning
With 17 million followers (and just as many Likes) on Facebook, @nikerunning is a good example of using Facebook as a support community. Nike's mission statement is "To bring inspiration and innovation to every athlete* in the world." and the "*" is explained as follows: "The legendary University of Oregon track and field coach, and Nike co-founder, Bill Bowerman said, "If you have a body, you are an athlete." Nike uses Facebook to provide professional service interwoven with premium content to serve and motivate everyday people to move and "Just do it".

Company: Michael Kors
Channel: WeChat
Account/site: Michael Kors
Michael Kors has been an innovator in engaging Chinese consumers through WeChat. The company utilizes the the breadth of WeChat's brand offering to create engaging consumer experiences around key moments in the Chinese calendar.

Michael Kors is also known for innovative ways of using WeChat to translate the online to the offline/in-store experience.

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Sprinklr Modern Care

For more information, visit www.sprinklr.com