

CHECKLIST

**Social Customer
Care Platform**

What to Look for in a Social Customer Care Platform

It's never been easier for a customer to engage with a brand. Social media has removed the barriers between people and brands, allowing for real connections to take place. While social media makes being a customer easier, it also places increasing pressure on brands to meet expectations. Fortunately, there are solutions for social customer care available to meet those demands—and even exceed customer expectations.

The smartest brands know that stellar customer experiences are the foundation for loyalty, regardless of which of the brand's team creates the experiences. The shift of social from a channel primarily for marketing to a hybrid channel offering customer service means brands must bring together disparate teams, synchronizing efforts so customers can enjoy a better, more consistent experience and brands can gain control of the customer journey.

But, customer expectations cannot be met without a strategy. Brands must create internal processes and dedicated teams to monitor, respond, escalate, and report on incoming customer issues on social.

Finally, automation is a crucial component for how brands will provide great customer experiences on social. By 2020, customers will manage 85% of their relationship without interacting with a human. An important task ahead is defining how to embrace automation without eliminating the humanity in social engagements and re-installing barriers. An effective social customer care platform optimizes workflows through automation and ensures smooth transitions to human agents from tools like chatbots.

We've developed the following checklist to help you identify your brand's priorities for a social customer care platform. Use this list to make a more informed choice about the technology partner you choose to create great customer experiences on social.

Interested in What
Your Peers are Saying?

[Read TrustRadius Reviews of Social Media Management Platforms](#)

¹ Gartner, "Customer 360 Summit: CRM Strategies and Technology to Understand, Grow, and Manage Customer Experiences."

Your Checklist

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Looking for a Social Customer
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[Download the spreadsheet](#)

1. One Integrated Platform

Whether you want to activate a team of 10 agents or 1,000, only a purpose-built Social Customer Care platform scales across the needs of your business and empowers your team to put out the very best your brand can offer—while integrating with your existing technology investments.

Look for a solution that can:

- Ensure ease of use by mapping workflows and configurations to your organizational structure, including: different brands, agencies, regions, departments, teams—or any other way you need to organize
- Authenticate all owned social media accounts, across every major social network
- Integrate with and provide APIs for your existing software, like Salesforce for CRM, Synthesio or Crimson Hexagon for listening, and Adobe for digital asset management (DAM)
- Provide administrative controls that ensure proper governance, by managing employee access to the parts of the platform they need
- Enable organization-wide visibility with a global publishing calendar that shows what other brands, divisions, or regions have planned
- Distribute individual posts and entire campaigns across multiple teams to drive brand consistency and alignment
- Extend workflows, content management and publishing capabilities to mobile, via integrated apps on iOS and Android

2. Global Support, Education & Strategy Consulting

Many vendors provide basic platform setup and training, but the partnership stops there. A true strategic partner will guide and support you beyond onboarding to help manage your people, processes, and ongoing marketing initiatives, ensuring you meet your goals and recognize the full return on your technology investment.

Look for a solution that can:

- Provide an interface for agents translated in the local language
- Provide consultative services on social care, content strategy, content attribution, amplification, community management, insights, analytics and more
- Plan for your ongoing onboarding needs for the full life of your contract taking into account the natural changes and rhythms of your business
- Facilitate deep, collaborative discovery around your business needs and desired strategic outcomes
- Understand how your business works - teams, processes, analytics, etc - and then configure the platform to reflect that model
- Provide complete platform training, on demand learning, and continuing education utilizing an approach that works best for your team and budget, including onsite and online instructor-led courses
- Offer a dedicated customer success team for ongoing advisory and account planning, as well as best practices guidance and usage
- Deliver 24/7 global platform support and ongoing Q&A sessions available to all users
- Provide on-demand platform learning resources through a self-service, scalable curriculum and interactive guidance
- Provide community management and moderation services on a project basis, such as live events and ongoing social communities
- Design and execute custom integrations, visualizations and dashboards for major events and campaigns
- Provide comprehensive, self-service help resources for key product use cases, configuration and administrative settings

3. Compliance, Security & Governance

It's critical that enterprise organizations, especially those in regulated industries, platform that ensures security and compliance both internally, amongst employees, and externally with customers.

Look for a solution that can:

COMPLIANCE

- Archives all audit trails on every item and action taken
- Captures all inbound and outbound activity in a single system
- Maintains an annual SOC2 audit and regularly submits to ongoing third-party security and penetration testing
- Automates daily exports via SFTP or SMTP

SECURITY

- Has documented security policies and procedures and employee training
- Supports encryption in transit via mandatory SSL using modern ciphers
- Supports a variety of security features for local logins including complex passwords, password reuse, password expiration, IP whitelists, and session and inactivity timers
- Supports federated identity via SAML 2 standard single sign-on
- Encrypts your data at rest

GOVERNANCE

- Establishes configurable, multi-stage approval workflows to ensure only approved content is published, including a designated approvals workspace and notifications
- Has a robust permissions systems and role-based access controls for users
- Supports advanced credential and access management by providing visibility and control over native access to social channels
- Retains independent access to social activity without relying on social networks
- Allows administrators to restrict application access using white-listed IP addresses and ranges
- Leverages data API for integrating social archive information with data warehouses

4. Personalized & Tailored Response

Context is everything when interacting with a customer. The last thing you should do is treat a customer like a stranger. To respond personally, social teams must be armed with historical, public, and internal data on the customer.

Look for a solution that can:

- Categorize people interacting with your brand with custom labels
- View previous history of interactions a customer had with your accounts on social
- Bring together public and private conversation history with your customers
- Unify interaction history with a customer from across multiple owned Twitter accounts for a single view of the customer
- View the origin of the conversation and any subsequent comments or replies in a threaded fashion
- Allow agents to view and leave notes on the person's profile
- Provide publicly available information from the customers social profiles
- Create, view, and edit contacts and cases from CRM's like Salesforce, Siebel, and SAP

5. Monitoring & Automation of Care Content

Social Media is not just one channel, but many streams of 1:1 and 1:many communications. The role of a technology partner is to capture the entirety of direct and in-direct mentions, finding items that require attention, categorize and finally route to the right person for action.

Look for a solution that can:

- Track hashtags and keywords your brand cares about across public social conversations
- Capture direct and in-direct mentions for public interactions
- Integrate with leading private-messaging platforms like Facebook Messenger and Twitter Direct Messenger
- Integrate with deep listening solutions like Brandwatch or Synthesio so you can respond to items sourced from your listening platform
- Ingestions of ratings and reviews into workflows from 100+ sources, like Yelp, TripAdvisor, Google, and more
- Automatically categorize and label inbound content via attributes like keywords, language, profile labels, and sentiment
- Get the right content in front of the right people, using intelligent automatic or manually routing
- Integrate with the Facebook handover protocol for chatbot-to-human transitions
- Provide a protocol for supporting chatbots via Twitter Direct Messages
- Assign statuses to inbound content to track responses from “open” to “resolved”
- View images, text, links, and GIFs shared with you without having to leave the interface
- Route conversations to agents based on labels, profile history, or keywords

6. Advanced Tools For Agents

Done right, social care increases customer loyalty and deepens affinity—but it requires coordination to deliver extremely fast responses with careful, well-crafted messaging in an interface designed for customer care on digital channels.

Look for a solution that can:

- Maintain a knowledge base for quick access to pre-approved responses, common pre-scripted messages, and content
- Provide an easily configurable dashboard for rapid response and action
- Offer a dedicated interface for handling inbound items case-by-case for “zero inbox” like functionality
- Assign a status to an inbound item to follow its progress through your workflows
- Allow keyboard shortcuts of the most common actions an agent takes
- Avoid agent collision with real-time updates of status changes visibly on each item
- Hide or delete posts from social networks with easy spam identification and removal
- Transition conversations from public to private
- Support responding to content via separate support/service social account
- Visually show the status of SLA's on each inbound item for agent priorities
- Collaborate with other agents via an internal chat, including @ mentions and assignment

7. Integrated Social Marketing Needs

Finding the right technology partner to aid brands in social customer care is just a part of the picture. A technology partner should also assist in the proactive communication planning, publication, and fan activation to give you the tools necessary to reach and grow your audience.

Look for a solution that can:

- Centralize simultaneous planning of ongoing, seasonal, tentpole, and real-time events
- Offer complete content management for all of your content with folders, tags, themes and permissions
- Customize assets with image editing and a library of templates optimized for each social network's size requirements
- Schedule posts in advance across multiple accounts, channels, and dates
- Reach more of your audience with paid publishing options across a variety of channels
- Distribute and track content to tens or hundreds of destinations for localization and/or queued use
- Integrate with existing web analytics tools to display conversion data alongside key social engagement metrics
- Integrate with Digital Asset Management (DAM) solutions, like Adobe Experience Manager Assets, and file storage services for seamless access to content
- Aggregate engagement and account metrics across different social networks and owned social accounts

8. Trend Identification, Crisis Tracking & Social Research Capabilities

Social offers unparalleled real-time insights into trends your care teams should be paying attention to and provides perspective and context to let your care teams know the information needed to make decisions in times of crisis. That same data can also be mined to understand blocks of time from the past and the social conversations you care about during those periods of time.

Look for a solution that can:

- Surface top trending content from multiple social media sources to understand local, national or global impact
- Track multiple social channels for trends around an unlimited number of terms, phrases, hashtags, or locations
- Visualize a conversation or crisis via a live, real-time dashboard featuring top media, tweets, and influential accounts
- Monitor the keywords and topics trending within your own audience and industry, or broaden your search for a holistic look across industries
- Filter topics by location, terms, sentiment, language, and influencer status
- Create smart alerts for trending or over-performing topics and branded terms

9. Configurable Analytics & Reporting

Data is only as valuable as the actionable insights you derive from it. Whether you're reporting for workforce management or tracking issue trends, social teams must be able to measure in a way that translates to organizational business objectives.

Look for a solution that can:

- Customize reports and dashboards to keep tabs on the metrics that impact business goals across social networks
- Integrate with existing web analytics tools to display conversion data alongside key social engagement metrics, directly attributing social dollars to business dollars
- Aggregate engagement and account metrics across different social networks and owned social accounts
- Offer visibility for all internal stakeholders using custom dashboard displays that aggregate various metrics (community, listening, real time marketing, and experiences)
- Easily share your reports and data via PDFs, .CSVs and a set of APIs
- Base reports on the business hours of a specific region, office, or team

10. Care Efficiency Analytics

Social care teams can learn much from the call center, such as its sophistication in reporting. Whether you're resource planning or making sure items are addressed with the least amount of friction, understanding where to optimize your team will make you better equipped to connect with the people you care about most. While you are busy tracking down an answer and measuring your teams on how fast they moved things internally, your customer is on the other end waiting. Tracking key metrics from the customer's perspective is paramount.

Look for a solution that can:

- Accurately report on resource management with volume reports on inbound vs. responded items
- Visually display actual wait times and indicate via colors whether items are falling outside of goals for first response
- Track time to first response, resolution time and amount of touches via a dashboard
- Ensure efficiency with team and individual reporting on the service level agreements (SLAs) that matter to you
- Label incoming items and report on the transition between them
- Follow up on interactions with customized surveys to solicit feedback and calculate Net Promoter Score®
- Report on various customer-care analytics including response rates, resolution time, average handle time at team and individual level
- Understand the breakdown of the type of issues being addressed in real time



Spredfast is transforming the way companies connect with consumers. Spredfast's smart social software enables companies to build lasting relationships with today's digitally connected consumer. Enterprise brands worldwide use Spredfast to manage, integrate and amplify social content across any digital touch point in real time.

With global reach, Spredfast customers manage over one billion social connections across 84 countries. More than 650 customers, including all five major broadcast networks and over one third of Interbrand's 2017 Best Global Brands have partnered with Spredfast to create first-class social experiences.

For more information,
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