



## iSocialise ~ technical overview

### Contents

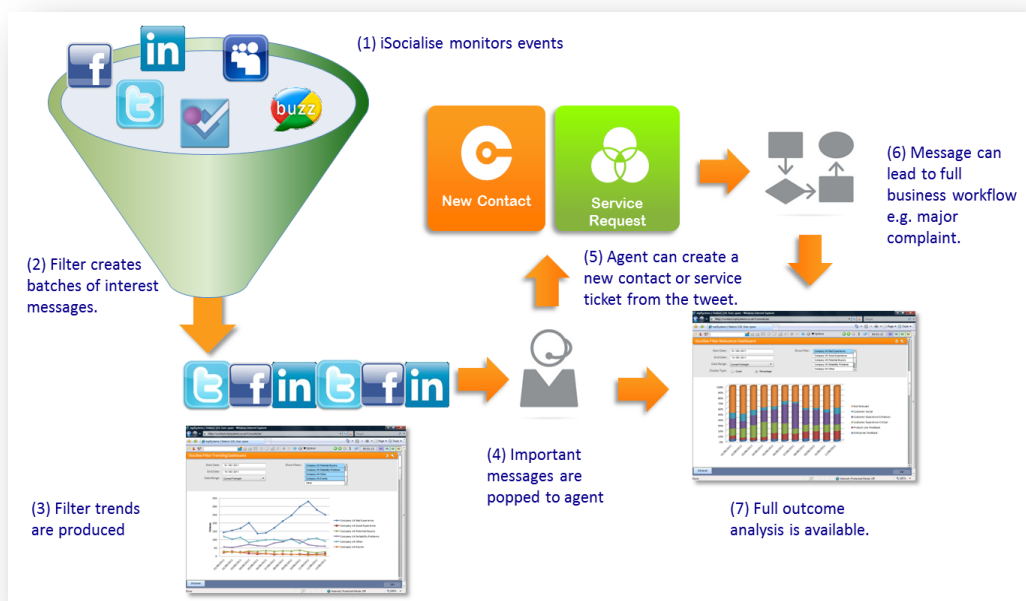
Topic	Pg.
1. Monitoring	2
2. Filtering	2
3. Trend analysis	2
4. Agent pops	3
5. Chat	4
6. Promotion	4
7. Workflow	4
8. Outcome analysis	4
Filter configuration	5
Features summary	6

### Introduction

For many, social media has become central to how we live our lives. More than 320 million of us log into Facebook at least once a day; we send 95 million Tweets and 40% of people aged 30 to 50 access a social network every day.

It is also fast becoming the place where we tell the world what we think about products, brands and customer service experiences. According to recent research, 53% of people on Twitter recommend companies in their Tweets, and, whilst only 18% of us trust television advertising, 78% of us believe what our peers tell us on social media.

Companies now know they need to be both aware of these conversations and acting on them, addressing complaints and acknowledging praise. Tools are now available to monitor social interactions and marketing can manage a certain amount of posts but the volume of social comments can soon become overwhelming.



### Social media in the multi-channel contact centre

Within your consumer base, and within your brand profile across worldwide forums, your customers will be discussing, endorsing, debating and even deriding the experiences they have with your organisation.

iSocialise allows you to blend posts, tweets or discussions that include your key words into your customer services workflow queues so you can become more proactive in contacting those individuals who are making comments – good or bad – about your brands.

By building customers' social media identities into their history, iSocialise increases your knowledge of your customers, their likes and their dislikes; marketing opportunities are maximised through your brand advocates and, conversely, negative comments can be controlled.

### 1. Monitor

The first task is to monitor tweets and status posts taking place on main social media social sites, including:

- ☛ Twitter
- ☛ Facebook
- ☛ Linked In
- ☛ Foursquare
- ☛ Google Buzz
- ☛ Forums

### 2. Filter

The next step is to define a set of filters to distil the most interesting and relevant information from all these posts. This can be done by using keywords, hashtags, locations, language and sender information.

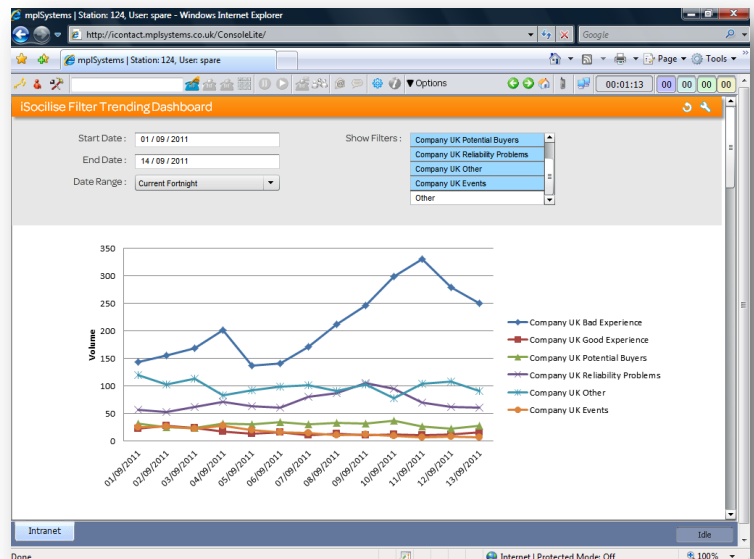
- ☛ **'Company' UK Bad Experience** – filter identifies customers who have a bad customer experience in the UK. These can be changed into service requests and resolved to make sure the customer is maintained.
- ☛ **'Company' UK Good Experience** – filter designed to identify customers who have had a good experience in the UK. This might be used to improve processes so more customers have a similar good experience.
- ☛ **'Company' UK Potential Buyers** – Filter designed to identify people who may be a potential sales target. These could even be new prospects that have had a bad experience with your competitors or those actively seeking a product that you provide.

- ☛ **'Company' UK Reliability Problems** - Filter to identify customers experiencing reliability or product problems; an opportunity to garner useful feedback to improve your products.
- ☛ **'Company' UK Other** – Filter to pick up any other interesting information.
- ☛ **'Company' UK Events** – Filter relating to a particular event that your company is involved in.

Of course these are only a few examples and filters can be created to capture whatever group of messages or posts that are currently relevant.

### 3. Trend analysis

Once the filters have been set up, iSocialise monitors how many posts have been identified by that particular filter. It is important to understand the volume that particular filter is generating. The diagram below shows how a range of filters can be selected by the dynamic reporting and compared with each other.



#### 4. Agent pops

Filters can be associated with a contact centre skill and posts delivered to the set of agents trained to respond to that specific filter. Social media events can even be blended with other media types including voice calls and emails.

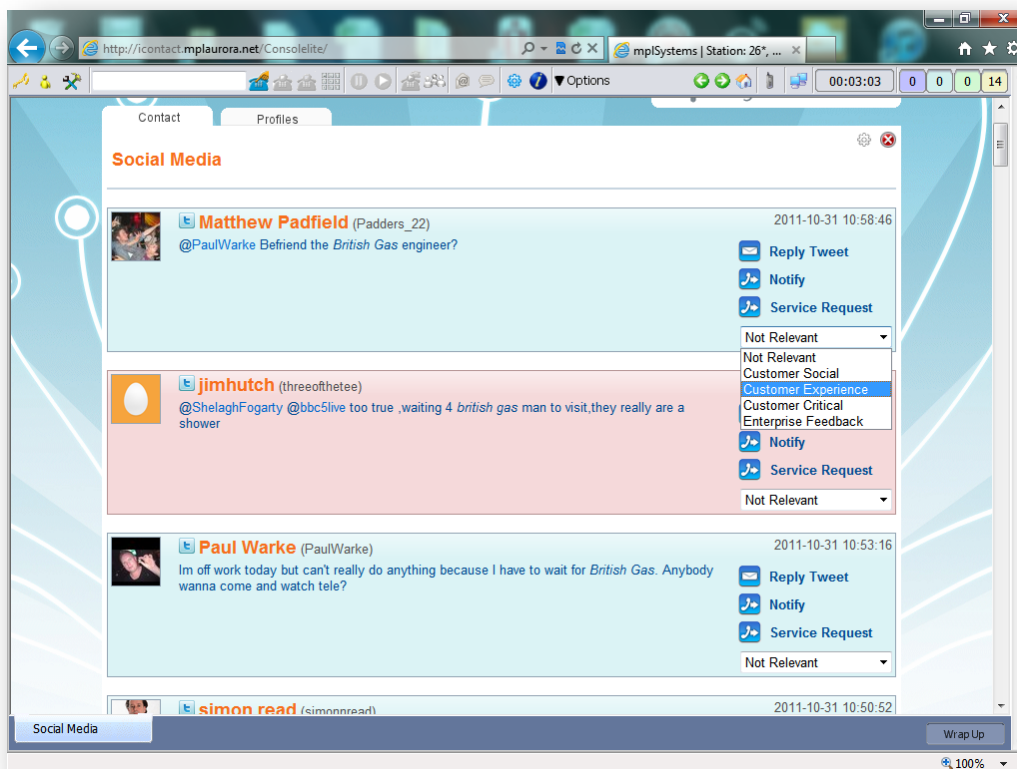
In most cases, social posts are collected in batches and popped to the agent in one go. This is designed to enhance agent efficiency as opposed to popping each item separately as they come in. Messages might be popped on their own if iSocialise has identified the sender from one of their social identities stored in their customer history.

Colour coding can be used to identify if the customer and their identity is already stored in the database. This might prompt the agent to respond in a different way than to a new contact. The source of the post is shown on the top left and the agent can respond using a set of standard or company approved messages. This is done using the **Reply Tweet** button. If the agent wishes to escalate the message to a supervisor it can be converted into a workflow object and managed accordingly.

Once the post has been reviewed, the agent marks it with an outcome code. In the example below, the outcome codes are:

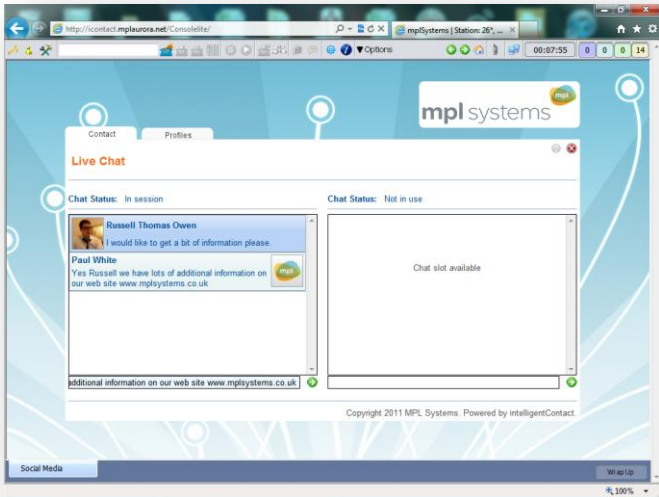
- Ⓢ Not relevant – the post had no relevance to the business
- Ⓢ Customer Social – the post had some social interest to the business and may add to our understanding of the customer but does not have a direct business outcome.
- Ⓢ Customer Experience – the post has a direct effect on, or is directly related to, the customer's experience and so should be taken seriously and followed up.
- Ⓢ Customer Critical – the post is customer critical and may cause them to seek alternatives. This must be acted upon by senior management.
- Ⓢ Enterprise Feedback – the post contains very good feedback for the company, marketing or brand but does not have a direct effect on service.
- Ⓢ Product Feedback – the post contains very good feedback for the product line but does not have a direct effect on service.

Outcome codes can be tailored to meet the needs of the organisation.



## 5. Chat

In many cases it may be possible for the agent to enter into a direct chat session with the client and for multiple chat sessions to take place to improve efficiency.



## 6. Escalation

A post can be converted into a formal service request or trouble ticket using the service request button and designated to the appropriate resource to deal with it. The post can be also promoted into a customer contact item in CRM so that all filtered messages can be tracked.

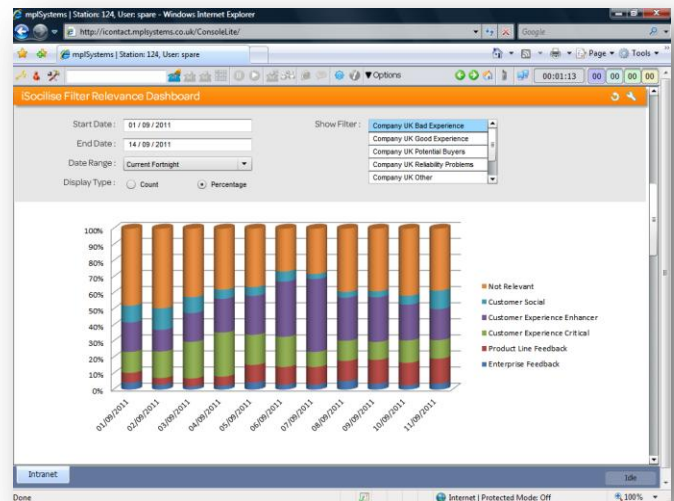
## 7. Manage & Track issues

Posts can be sent to managers, supervisors or any third party organisation that needs to act to resolve an issue or respond to a comment. This can trigger other outbound media actions such as an email or call back to the customer. These workflow items can be associated with to the organisation's social media service level target, reported on and escalated to managers if required.

## 8. Outcome analysis

It is essential to continually monitor each filter and the relevance to the agents associated with them. This is managed by tracking all the outcomes from each post recorded by the agent

The example below shows that the 'Company' UK Bad Experience filter has been relevant between 50% and 70% at all times. From the Chat history, it is possible to track how interesting the filter is to the company and so used to refine the filter.



Actual action taken by the organisation in response posts should also be measured and action codes can be tailored as required, for example:

- ☛ **Customer Identified** – the person who posted has been identified in CRM. This should increase over time as more customer posts are tracked in CRM.
- ☛ **Customer Converted** – the post was converted into a sale.
- ☛ **Issue Resolved** – the customer's issue has been resolved.
- ☛ **Direct Contact Made** – the person who posted has been directly contacted.
- ☛ **No further Contact** – no further contact was possible.
- ☛ **Other** – Other outcome.

## Filter configuration

A full filter configuration facility is provided for system administrators.

### Networks

This allows the administrator to select which social media sites to search for posts.

### Keywords

Keyword options to look for, or exclude, from the filter.

### Hashtag

Search for a specific #hashtag on Twitter searches.

### Date range

Set start and end dates for the filter, possibly related to a specific campaign, product launch activity etc.

### Type

There characteristics that can determine the type of the message:

- Attitude
- Question
- Language used

### Polling and batch size

The polling setting will determine how often each social media site is queried using the filter. If there are any posts found that match the filter they will be popped to the next available agent with the appropriate skills (based on priority and preference).

If there are more items found than the maximum batch number, then a number of social media events will be generated and sent to the queue to be dealt with by the agents. For example, if the maximum batch size is set to 20 and 65 items are found, this will result in 3 batches of 20 items and one batch of 5 items entering the queue.

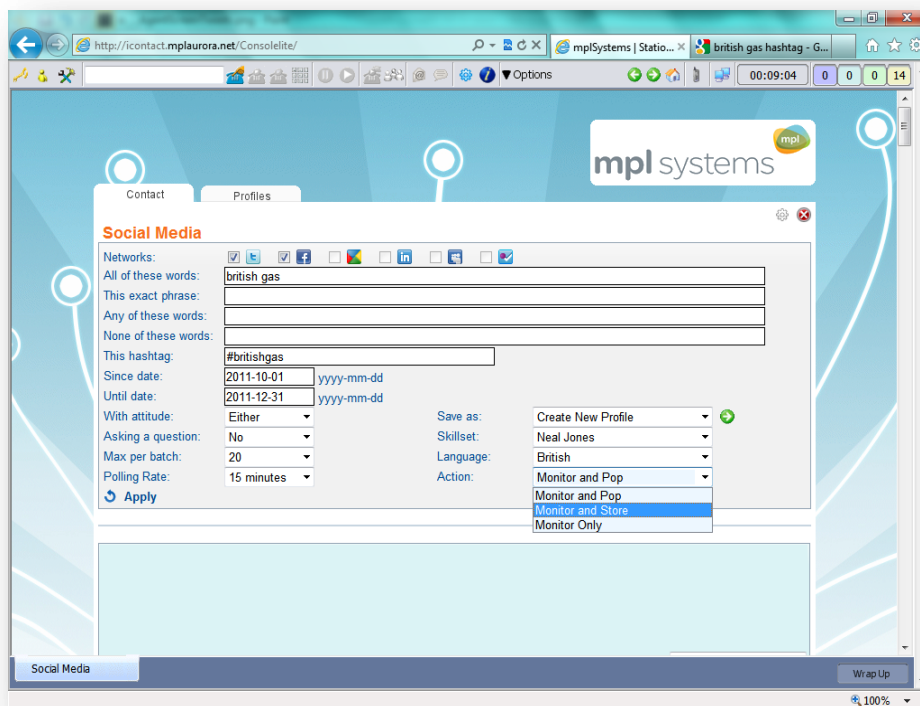
### Skillset

Each filter can be associated with a skill set so it can be routed to the appropriate agents.

### Actions

There are three types of actions that can result from a post batch:

- **Monitor and Pop** – pop all messages in the filter to agents
- **Monitor and Store** – store messages against the customer's contact history, if known, but don't pop to an agent.
- **Monitor Only** – monitor the volume of posts selected by the filter but don't pop or store them in CRM.



## iSocialise Feature Summary

### Identify key social posts

Social monitoring tools enable businesses to start listening to what people are saying about their products, service and brand. By setting different criteria for these searches, different types of posts may be identified: for example, critics can be identified in order to resolve their issues or advocates found and used to promote to the online community. The social space provides the perfect hunting ground for clients looking for your products and services and, by setting different search criteria, new leads can be identified.

### Provide a quick, informed response

Social interactions can be prioritised and routed in different queues. If a post requires immediate attention, it may be prioritised ahead of other media types and routed to a specific agent. Criteria can be set to route posts on different topics to the agents with the best skills or knowledge to deal with that type of query.

### Offer a complete view of customer

By integrating social interactions into a multi-channel contact platform, all customer details are available and any previous communication history via other channels, e.g. voice, emails, can be accessed. Integration with back office systems enables the agent to determine the status of existing orders or requests and issues to be rapidly resolved.

### Reduce contact centre traffic

Carefully managing social interactions as well as calls and emails can actually reduce the volume of service requests or queries made to the organisation. Social media is a broadcast medium and answers are provided to the social community; if you wish to share information on a current issue, e.g. strike at an airport, best practices or advice on how to make your profile more attractive, this can be communicated to the community via the Facebook Interaction Portal, reducing the inbound contact load on your contact centre or customer service department..

### Resolve issues, manage workflow and respond

Managing the customer experience is not just about listening to requests; it's about managing and resolving those requests. If a resolution to a problem is not provided within 24 hours then you can be sure that the online audience will hear about it. iSocialise ensures any issues, or compliments, are automatically directed to the correct agent or manager, provisioned on a relevant back office system and then tracked and reported on for review.

### Integration with existing technology

iSocialise is added alongside existing telephony, contact management technology and back office systems with no 'rip and replace' required. iSocialise sits as an additional channel to legacy communication channels which can be unified, along with any existing CRM and business applications business, onto a single agent desktop.

## Business Benefits

- ☛ Integrate social contact with all customer touch points
- ☛ Increase right-person-first-time conversations
- ☛ Convert customer contact into sales opportunities
- ☛ Improve customer satisfaction and brand advocacy
- ☛ Identify new product development opportunities
- ☛ Collaborate with and learn from your customers
- ☛ Increase customer lifetime value
- ☛ Protect and promote your brand