# CUSTOMER SERVICE

## at the Speed of Twitter

# Contributors

**Assistly** is a web-based customer service and support platform. Our powerful tools are designed with the front-line agent in mind. A collaborative desktop brings in customer issues: from your website, email, chat, **Twitter**, and **Facebook**. Assistly supplies an out-of-the-box, customized help center. With a flexible payment model, all employees can focus on Customer Wow.

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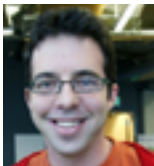
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# Table of Contents

# Foreword <span style="font-size:smaller">by Shep Hyken</span>

Since... well, since forever, the power of marketing has been measured in "impressions"—passive viewing of ads—but now we're turning a corner. People and brands can motivate thousands without ever buying an ad. Even **Coca-Cola**, a company that spends bazillions of dollars on advertising, is now measuring their marketing effectiveness using the new unit of "expression"—what you and others are saying about their brand. In this world, the advertising agency is being replaced by customer service.

It's an indicator that we're living in a whole new world, and *Customer Service at the Speed of Twitter* is one of the first maps to this new territory, created by the early explorers at Assistly.

In this new world, expressions on any medium are powerful because they represent influence. Not just a person gaining an impression—but the expression of that person, amplified by all the social influence they wield. Imagine the force multiplier role Twitter could play in this scenario.

As ubiquitous as Twitter has become for many of us, it's still a very young and unexplored technology and the people using it are still early adopters. Week by week, we see the world changing, and Twitter right along with it. In business as well as global politics, Twitter is also a moving target.

A lot of the customer service stories you hear about Twitter are based on complaint resolution. But there is so much more.  The real value of Twitter may be in its power to engage. Twitter offers a wide-open opportunity to do exactly that by allowing us to push content and useful messages to the communities we create with our followers.

Debate continues about the feasibility of Twitter as a way to deliver support to customers, but it's clear any business would be remiss to ignore customers asking for help. As Greg Meyer (Customer Experience Manager of Gist at **Research in Motion**) says, "If someone walked into your office, would you tell them, 'Please don't talk to me, I only respond to phone calls?'"

Twitter is an exciting channel that is contributing to the reversal of power we are seeing in e-commerce. It could take customer service to a whole new realm. As you read through this excellent treatise on Twitter, take notes.  Think about how you can use the ideas, concepts, and strategies shared in these pages.  I know you'll find a lot to think about as you read.

Shep Hyken, customer service expert and bestselling business author.

# How Can You Provide Service at the "Speed of Twitter?"

## Welcome

Welcome to the Assistly e-book *Customer Service at the Speed of Twitter*. Customer service is changing. The stakes are very high. You need to be where your customers are. Most customer support and services were built for a world that no longer exists. The legacy solutions were built for call centers and sometimes email. But now:

- It's every channel. Customers aren't just reaching out to you on the phone or by email—but on Facebook, Twitter, live chat, your website, and everywhere else they can participate and share their ideas.

- It's real time. Customers expect an instant response. Even a small problem, unaddressed, can quickly explode.

- It's public. A customer issue is no longer a private conversation; it's right out in the open.

- It's "whole company." Every person in a company can (and should) play some role in support.

Companies that adapt to this new and sometime scary environment will be the ones who succeed long term.

The core of any good customer service program is the ability to acknowledge: to let the customer know they've been heard; to let the customer know you're going to do something about their issue; and to demonstrate to the customer that you've either solved their problem or that you offer some other solution. A great customer service program not only does these three things also employs continuous improvement (whether you call that agile, kanban, doing better than the other guy, or just learning

from your mistakes) to make sure that the good things keep happening for your customers and the bad things... well, that they should stop immediately.

# What You Will Learn in This Book

The basics of any customer service program don't change, whether you provide support with Twitter or not. This e-book explains how you can use Twitter as a channel for service and support. We're going to present many of the conundrums you might face, and share how some leaders in the space are using Twitter not just for "social media," but as an integral part of their sales and marketing and service strategy.

## ■ You'll Learn:

- Why you should (and perhaps when you shouldn't) be using Twitter;

- How leading brands use Twitter in a variety of situations *(both for engagement and crisis management);*

- What your customers expect of you as a social company (psst. The days of 9-5 office hours are over, so if you're going to embrace Twitter, make sure someone at your company is available);

- And a few tips to help you engage like a pro!

## Let's Get Started.

# Using Twitter for
# Service & Support

## Why You Should be Using Twitter to Reach Your Customers

**@dooce**

So that you may not have to suffer like we have: DO NOT EVER BUY A MAYTAG. I repeat: OUR MAYTAG EXPERIENCE HAS BEEN A NIGHTMARE.

**@WhirlpoolCorp**

@dooce Please know that we hear you, and our Maytag customer service team is trying to reach you. RT @wp2008 http://bit.ly/3UKjx

Service and support through Twitter? Really? Let's examine the obvious advantages: it's immediate, it's intimate, it's responsive, and it's perfect for certain issues that can be handled in the Twitter way—in 140 character bursts. It's also transparent—a method where you accept full accountability and ownership in a very public medium. Is this something that's right for your company?

It's clear that some customers increasingly see Twitter as a way to get quick attention from companies in response to complaints. No company wants to see their dirty laundry posted around the world. They want to address issues immediately. Twitter-driven public relations disasters are the stuff of legend. Take Keven Smith's Southwest Airline **debacle**, where he was denied a seat because of his weight. Or, Heather Armstrong's famous Whirlpool **saga** in which poor service was eventually resolved via Twitter.

Now there's even an app built around the idea of complaining via Twitter. The company, **Gripe**, has a revenue plan that includes selling its services to businesses so they can resolve complaints.

## Isn't This Just "Giving in to Bad Behavior"?



@ComcastCares

Chicagoland, we are aware of the service disruptions around the area. We have crews working around the clock to restore services.

Some feel that by providing service and support via Twitter, business encourages complaints as blackmail. On the other hand, groundbreaking customer service pioneer Frank Eliason, who built **@ComcastCares**, created an incredible amount of goodwill and industry admiration for **Comcast** by providing customer service on Twitter—not just for his real-time interventions in crises, but also for connecting, informing, and resolving problems. As far back as 2008, Michael Arrington blogged about a Comcast **experience** that was resolved via Twitter:

*[Comcast has identified] Twitter as an excellent early warning system to flag possible brand implosions. It's trivially easy to do a brand search on Tweetscan and create a feed for any new postings. Whether you join in the conversation directly or reach out to aggrieved customers is up to you. But Twitter is the place where conversations are exploding well before they even make it to mainstream blogs. With the information just sitting there, it's surprising that more brands aren't watching the tweetosphere.*

These days, it is increasingly common to see companies using Twitter support accounts to inform and assist customers during unexpected downtimes or service interruptions. Kate Leggett, Senior Analyst at **Forrester Research** for Customer Service, feels that while "true customer service can't be delivered effectively in the constraints of Twitter," Twitter can play a role in "letting customers know that the company is listening and can take the issue offline to resolve via other communications channels appropriate to the issue at hand."

## Your World is Changing, Can Your Organization Adapt?

Providing service and support via Twitter is an important organizational decision. It's not a one-off marketing program; it's about connecting to your customers and building relationships over the long term. Scott Monty of **Ford** says "It is less about a campaign and more about a commitment... It's an ongoing way of doing business."

So what's the right answer for your company? What part is Twitter destined to play in your customer service and support strategy?

Here are some benefits of using Twitter for Service and Support:

| | |
|---|---|
| • Nurturing online communities. | • Monitoring and responding to support requests in real time. |
| • Demonstrating rapid response and company emphasis on quality customer care, transparency, and authenticity to a large, public audience. | • Intervening quickly to protect reputation and improve customer experience during urgent or crisis situations. |
| • Utilizing Twitter as the "canary in the mine" to spot issues, correct course, and clarify messaging. | • Gathering actionable data by listening to customers. |
| • Interacting with and understanding populations who use Twitter only—to the exclusion of other contact with your organization. | • Gaining exposure for your brand. |
| | • Tracking the entire conversation about your brand. |
| • Reduce support costs; if it works— great. If it doesn't, your investment was small. | • Releasing product updates and other informative updates to reduce support costs. |
| • Sharing tips and techniques. | • Providing valuable and interesting content to attract new business and earn the trust of existing customers. |

Spotting a customer issue, responding to it, and resolving it using Twitter can provide a positive customer experience. Those experiences:

• Lead to good word of mouth.

• Facilitate open dialogue and sense of belonging.

• Move the relationship beyond immediate needs and grow the emotional connection.

• Augment the evolution to customer collaboration and co-creation level.

• Move the customer to a central position in the company, elevating their contribution and putting them on the team.

# What Leading Companies are
# Doing with Twitter

## How Successful Companies are Using Twitter

Despite the newness of Twitter, there are some great examples of companies that have figured out how to use Twitter to deliver customer service:



**H&R Block**'s Paula Drum says: "Brands that want to participate in Twitter need to be committed and be part of the community. This is not advertising."

Scott Wilder of **Intuit**: "Senior level staff is very familiar with Twitter—and like the rest of the company, uses Twitter as a listening outpost as well as a way to inform customers."

**Dunkin' Donuts** "Dunkin' Dave": "Dunkin' Donuts is a brand that places a huge premium on listening to our customers. In addition to engaging directly with our customers through social networks like Twitter, it's also invaluable for us to be able to get their opinions and feedback in real time and in very authentic ways."

Dan Schawbel of **EMC**: EMC's Twitter goals include, "News distribution, hashtagging events, promoting job openings, and engaging stakeholders."

Charles Miller says that **DIRECTV** is using Twitter because "Twitter is unique for its real-time understanding of your challenges and fans. Very concise and real."

Customer support on Twitter is very new and rapidly evolving. But we know this for sure: a thoughtful Twitter program will support your marketing. It can also position people from within your company as thought leaders and help your company play a role in influencing those who regularly talk about issues of interest to your company.
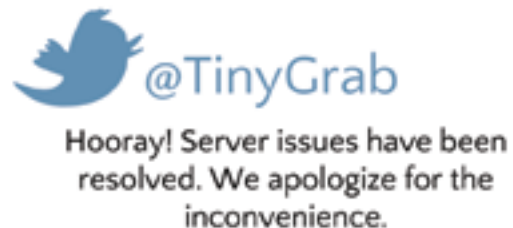
# Oops! Unexpected
# Outages & Crises

## What Do Customers Expect When Things Go Wrong?

So, great! You've decided to use Twitter like some of the experts you read about in the previous pages. But what happens when things don't go exactly as planned?

Companies that deliver a web-based service often see a great deal of Twitter activity when they have downtime or service interruptions. An emerging best practice is to establish one or more "support" accounts to broadcast system status and to reply to users who are in the dark about what happened. Common practice now is for users to go right to a tweet when service is down. Customer-centric organizations can seize these opportunities.

**Tiny Grab**, for instance, when hit with a Denial of Service attack that brought down their systems, found customers—angry, curious, worried—tweeting questions and expressing their frustration.

Tiny Grab personnel responded to each customer and made a distinctly positive brand impression while managing the return to service.

@TinyGrab
@dansgalaxy Looking into it right now. Apologies for the issues. :-(

@TinyGrab
Hooray! Server issues have been resolved. We apologize for the inconvenience.

No matter what the channel, under the chaos and stress of a crisis, authenticity and transparency are even more critically important. Sarah Scoular writes in *The Social Customer* that the way to reach that customer base and build a bridge to lead them back to you are consistently transparency, authenticity, and engagement, Jason Fried, co-founder of **37signals**, shared the details of a **Campfire** crisis that led to downtime. Here's what he said in his article in *Inc. Magazine* on how they handled the event:

*Downtime disgusts us. It's embarrassing. Knowing that our mistakes are disrupting thousands of people's lives weighs heavily on us. No one is happy around here when our customers aren't happy.*

*And believe me, they let us know when they're not happy. They flood our inbox with complaints. They broadcast their exasperation on Twitter. Here's a little bit of what we heard when Campfire crashed: "I wish @37signals could sort their sh\*t out, causing me a lot of grief lately." "Come on guys. Killing my business over here…" "Up until a week ago, I'd suggest @37signals' Campfire to anyone. Now, I'm telling everyone I know to avoid it." People were upset, and they were right to be. When we mess up, we deserve to be the punching bag.*

*Of course, all companies experience episodes like this. How they handle the situation is what counts. I'm not talking about fixing the problem—you have to fix it; that's a given. I'm talking about how you communicate with your customers, how you accept responsibility, and how you make things right. That's what people remember.*

*We're very careful about how we explain downtime and other glitches. We don't beat around the bush. We don't try to hedge. We don't pass the blame to a vendor or another party. When our customers are affected, it's on us.*

*And we've discovered that the more honest we are, the better our customers feel. They just want to know what's going on and what happened. They want to be informed. Wouldn't anyone? You don't win any prizes for confusing people—especially during a crisis. The clearer and more honest you can be, the better off you'll be. It's hard to admit mistakes, but you really don't have a*

*choice.*

*So here's what we did when Campfire went down. First, we posted regular updates on the status page of our company's website. We let people know we were working on the problem. As we figured things out, we shared the results. And if we still didn't understand something, we admitted as much. That's OK with us. What isn't OK is leaving people in the dark. Everyone's afraid of the dark when their data are involved.*

*We also took to Twitter.*

*My business partner David Heinemeier Hansson responded to more than 100 tweets from customers. "We're battling demons on all fronts and losing. It's pathetic, I know," David tweeted to one customer. "We're spending the goodwill we've built from years of reliable service like it's going out of style." "So sorry for the disruption," he wrote to another. "You can only say duh! so many times before people just think you're annoying. We're way past that," he wrote.*

*We responded to every complaint and took the blame every time—even when people went overboard and launched into personal attacks. There was no fighting back, no attempt to save face. We messed up, we knew it, and we let every customer know that we knew it.*

*And our customers responded with enormous goodwill. "37signals has been giving a free lesson in customer service and honesty the past few weeks," one customer tweeted. "Way to go on being awesome and communicative to your customers," said another. Such expressions of support were really heartwarming—and evidence of how honesty, openness, and personal attention to a difficult situation can turn the darkest moment into one of the brightest.*

# It's Your Listening Post & Early
# Warning System

## What You Should Expect From Your Customers

Remember, Twitter (and all customer channels) are a two-way street. The advent of Twitter makes that conversation happen much more quickly. There are some clear benefits to this exchange, chief among them the ability for your customers to help you– just by doing what they normally do—and you need to be paying attention and expect those customers to behave in certain ways.

By participating in social networks, you can spot trends and respond to early warning signs of trouble—and act on them quickly. Customers on social media sites like Twitter and Facebook are often the most savvy and can be the first to warn you about problems or concerns. Using social media as a "listening post" makes it easier to adapt quickly, updating and building out knowledge bases, fixes and FAQs as topics crop up. Your teams can now identify and resolve problems more readily, and satisfy more customers with less effort.

One of Assistly's clients, **The Little App Factory**, uses this method, with success. Here's how their customer service representative approaches Twitter as a listening post: "I can quickly get a read of our support situation and see any oddities or trouble spots. I've set up the Assistly filters for each of our products, and given each of our products its own inbox, so as an agent I have a 'feel' for the expected volume and tenor of requests. If something is not right, I can spot it quickly and move to address any potential problems before they get out of hand.

# The Crowd Can Help!
# Awesome!

You might think that the responsibility of all of this communicating and exchanging falls solely upon you, but don't despair—you've got ready and willing customers who can help you spread the word and even provide you with some valuable and compelling content. This process can happen either as a response to your question or just in the course of communicating on Twitter.

Twitter permits you to gather actionable data from your customers. It's great for listening, but you don't need to wait passively for the customer—you don't have to just listen and hope they give you clues. Rather, you can guide the conversation. Twitter is a great network to use to uncover information about your customer and what they need and expect from your products or services.

Here are some common types of information you can glean from you customers on Twitter:

- Opinions

- Expectations

- Preferences

- Aversions

- Reviews

- New ways to use your product

- User tutorials

• Interest in related products or suggestions for new ones

If you'd like to and really get some amazing content out of your Twitter interactions, treat your conversations on Twitter as a "real-time think tank." The content you discover on Twitter can drive product development, reveal buying patterns and uncover potential problems—all actionable. Additionally, you can create opportunities to increase your visibility, engage customers and non-customers alike, and offer them opportunities to buy.

# What Your Customers
# Expect from You

## Remember, You Now Have a Personal Connection to the Customer

With this great power and information, of course, comes great responsibility (with apologies to Stan Lee of **Marvel Comics** when he described the burden of Spider-man's powers). You get insight and knowledge from your customers, can reach them in all corners of the world at almost any time of day, and in exchange... they expect you to do the same. Welcome to the information future.

According to a social media study conducted in 2010 by public relations firm **Burson-Marsteller**, consumers have higher expectations for customer service on social media. One-fourth of respondents who complain via Twitter or Facebook expect a reply with an hour. This contrasts with website requests, where the customer is willing to wait up to three days. On Twitter and Facebook, consumers look for speedy support, but also professionalism—friendly, responsive, accurate resolutions.

While 70% of customers want to communicate via social media, only 65% of Fortune 100 companies have active Twitter accounts. It's clear that few companies have yet to make full use of social media in general and Twitter in particular. With the role of social media rapidly becoming a more important part of the picture, the impact of good (or poor) service via social channels will undoubtedly become more important.

# A Thought Leader's Opinion:
## Esteban Kolsky on
# Twitter Scalability

In response to a question on **Quora**, social business leader Esteban Kolsky offered his strong opinion about the role of automation in assuring the scalability and cost-reducing properties of Twitter support:

*I am astounded that no one has raised the flag yet on what will make Twitter (or any other channel, really—twitter is no different from any other channel to be honest—just shorter messages) scale for customer service.*

*Automation.*

*Yeah, yeah, yeah... it is anti-social, it is about engagement, it is about people...*

*Sure, you are all right and I am all wrong.*

*But, just for a second consider this...*

*What does the customer is looking for when they come to you via Twitter? (hint: 20% of people want an answer in an hour, 30% are more lenient and they will give you a whole 2 hours—the rest expect in about 4 hours) It ain't engagement, they want action, a response, and an action quickly.*

*In every single situation I have been involved in my many, many, many years in customer service, there is one thing I learned: 20-40% of the questions you receive*

*can get an automatic response and be closed. Password reset. Times and dates you are open.*

*Directions. Varied information that is repeated ad-nausea (ask the IRS how many times they have to tell people over the phone the new filing date when April 15 falls on a weekend). Each company will have their own example.*

*These questions may not be the ones you receive via Twitter today, likely that some of them are actually, but once the shine wears off Twitter you will start receiving them.*

*Preempt them. Automate the heck out of it. In one of the answers above someone said that Twitter is cheaper because it takes less time to answer—some of that statement rings true... if you take no time to answer, and the computer does it, then you are where you need to be: self-service is the second cheapest method for customer service.*

# Before You Tweet:
# Thoughtful Planning

## ■ Steps to Set Up a Twitter Service Program:

- Identify staff, hierarchy, and management expectations about the Twitter support program.

- Define job duties.

- Set policies, procedures, and goals that clearly inform employees what is accepted and prohibited for public consumption on behalf of your company.

- Set up monitoring processes to track your company, competitors, and influencers and make sure staff know what reporting is expected, and on what schedule.

- Brand your Twitter support account(s) to reflect your company's design. These decisions help verify your legitimacy, reinforce the brand, and inspire trust. Here's some great advice for branding Twitter.

- Name your Twitter support account(s) in a thoughtful way.  Ford is a good example; their Twitter account name is **@FordCustServ**. The name(s) should reflect the purpose of the account, and clearly differentiate from advertising or marketing.

- Plan and prepare any adjunct marketing efforts to accompany your Twitter service program, such as a Facebook fanpage.

# What Does Success Look Like?
# Dispatches From the Front Line

What does it actually look like when brands you know respond to customers using Twitter? For many of them, it looks exactly like the way they communicate in other customer channels. For some other brands, so-called "new media" has literally changed the way they do business, for the better.

## Dell Takes an Early Lead in Response to Criticism

**Dell** was one of the first companies to employ Twitter for customer service. Now they are held up as a social engagement model, but their success was hard won. The whole program was born in 2005 out of the bad press Dell was receiving about customer service. Social media helped Dell view the public attitude toward the brand, skipping over more traditional methods like focus groups.

Momentum was sometimes difficult because of Dell's well-entrenched siloed team structure, and at the beginning the concept was not even on top executives' radar. With steady engagement, active change, and consistent results, the company has made itself into a shining star of social support.

In 2010 Dell added a Chief Listening Officer who integrates insights gleaned from online conversation monitoring back into key company processes. The company even has a Social Media Listening Command Center.

Dell stands out in the disseminating information about product discounts and e-Commerce updates on **@DellOutlet**.

# Best Buy Turns Twitter Support Company Wide

It doesn't just take a CLO in a social media command center–sometimes, it takes a customer service village to communicate with the customer–especially in a large customer brand like **Best Buy**. This challenger brand (now the leading brand for electronics in the US) took a bold stance by broadening the scope of who could talk to the customer to... almost everyone!

**@Twelpforce**
@kmleland What was the installation window? I assume they missed it, correct? via @bernierjohn

**@Twelpforce**
@briandberman Yes. Please make sure it is accessible and any water lines are disconnected. via @Coral_BestBuy

Best Buy has turned Twitter support company-wide with its **Twelpforce** of almost 3000 employees. Anyone can participate in Twelpforce (it doesn't "live" in customer service), and they don't require a minimum time in the job. Instead, Twelpforce becomes a learning opportunity for each participating member: you can look up the answer you don't know, learn something new, add your "flavor" to it, and share it back with the community. The process of learning from each other is powerful, and John Bernier, Social and Emerging Media Manager, says it's "fun to watch this community police itself, govern itself, evolve itself into something that's efficient and effective".

The program debuted in 2009 and now has over 32,000 followers.  Bernier adds, "Customers ask us about the decisions they're trying to make, the products they're using, and look for the customer support that only we can give. And with Twitter, we can do that fast, with lots of opinions so they can make a decision after weighing all the input. It also lets others learn from it as they see our conversations unfold."

**@Twelpforce**
@jkbuckway http:///bit.ly/p8qhBh I checked our inventory, it doesn't look like it will be sold anymore. Sorry. via @BestBuyDanvers

**@Twelpforce**
@photofreakswim The other would be your OS installtion disc. Available from PC manaufacturer here: http://is.gd/eVyaj7 via @AgentScottie

# VMWare: Improving Content to Reduce Costs

There are also methods of communicating with customers that look much more like traditional customer support and service, even if they are happening in a new channel. Some companies like **VMWare** employ these methods to streamline content production and to lower costs.

VMWare broadcasts new knowledgebase content to thousands of followers using **@VMwarecare** and **@VMwarekb**. This is proactive and informative, but serves another purpose as well: it deflects service issues before they ever get to the call center. A buildable knowledgebase is one of the best self-service assets to lower support costs, and using Twitter to amplify the updated information inspires confidence in the brand's ability to keep content fresh and relevant.

# Six Twitter
# DON'Ts

Now that you've learned a bit about what the Big Brands do on Twitter, here are some suggestions for behaviors to avoid. Please take a look at these suggested DON'Ts and learn to recognize when you're on the brink of one:

**1** **Don't try to use Twitter support as a way to "push" products.** This comes across as crass and cheesy. Suggestions in context of service or support are fine, if carefully handled; blatant marketing is a no-no. Although Twitter is not the place for intensive "PR speak" or sales and marketing pushes, you can judiciously drop in notifications of media coverage, special offers, remind of public events, and put forward product updates.

**2** **Don't let your Twitter presence lapse or lag.** Once you start a program, never let your customers hear the sound of crickets. Be present, be active, be responsive.

**3** **Don't be defensive.** The purpose of most communication is to let the other person know you are listening and trying to understand. Defensive postures (such as the one **SW Airlines** used with Kevin Smith) don't work. Respond with respect and propose solutions. The artistry of this support is in striking the right tone—not stilted and formal—just a balance of transparency, friendliness, and helpfulness.

**4** **Don't be too quick to respond.** Listen first, give others a chance to defend your brand, and then decide if any response is warranted. Before you go treating a tweeter like a VIP to be soothed, make sure you aren't feeding a troll. Is this a person with genuine insights, or just a naysayer?

**5** Don't use Twitter to tell anyone about your personal business. Nobody cares what you had for lunch, or that you had a dentist appointment. Don't be boring.

**6** Don't treat a Twitter request for support as if it were a "service ticket" or phone call. One size does not fit all, and trying to put a round peg in a square hole will only lead to customer dissatisfaction.

**\*** BONUS: Don't Feed the Trolls. Love everyone. Honey is a lot stickier than vinegar when you're trying to catch positive sentiment, even from a disgruntled customer with an axe to grind. Just remember—that one negative comment can be retweeted in a heartbeat–and the positive WOW can be too...

# Best Practices for Delivering
# Customer Wow

Here are some "best practices" for making sure that you are doing your best to be authentic, to communicate genuinely with customers, and to have fun. Rest assured, this isn't a definitive list of what to do to make customers feel like rock Stars nor is it sufficient to just read a list–but we think you'll agree that all of these attributes are necessary to build the conditions that make customers appreciate the way you try and in the right circumstances, BOOM! You've created a Customer WOW.

We've split these ideas up into general ideas, key points for follow up, and some reminders that Emily Post or your grandmother would probably approve of when considering your Internet conduct.

## ◼ General Guidelines:

- Use good judgment and common sense. You represent the company, so don't be an idiot.

- It's a good idea to occasionally solicit input from the crowd as a whole. Ask for advice or opinions.

- Let your own personality and sense of humor in, but be conservative. This is not an audience of your friends. It is a group of strangers with a common interest in your company.

- Tone is important. Friendly, helpful, conversational tone. No sarcasm or snarkiness, ever. No matter how bad your day is, no matter how much your headache hurts.

- Respond quickly. The window of opportunity for a response by tweet is short; people expect quick action on social networks.

- When responding, use the technique of recognizing publicly, but addressing privately. It's better to move to more private channels to understand and resolve the issue

## What Happens After the Fact?

- Don't leave anyone in limbo. If Twitter isn't the channel to resolve, take it to email or to the telephone, but resolve each issue that starts as a tweet.

- Always follow up to make sure they got what they needed.

- Welcome advice and constructive criticism and collect it for reporting.

- Asking questions leads to great customer discovery.

- Be authentic, it's okay to risk failure because people are forgiving.

- Be transparent and honest.

- Don't market or sell or "push" anything.

- Handle one issue at a time, keep it simple.

- Respond quickly, soldier.

## Manners and Etiquette:

- Listen first, talk second.

- Be yourself. This is a conversation.

- Show and expect respect.

- Never use bad language (you know what I'm talking about), or language that your mother, grandmother, and dear Aunt Harriet couldn't see and be comfortable with.

- Apologize with sincerity, if it's appropriate. Humility is good.

- Celebrate and respect diversity. Never say anything derogatory about anybody, especially your competitors.

- Be polite; follow normal social norms, just like offline.

- Thank everyone you interact with. If a person retweets something, or compliments your company, it's normal to respond and thank them. You don't always have to thank retweeters, but I think it's nice.

- Real-time relevance based on trending topics is fine, as long as it meshes with your goals. For national news events, either happy or sad, you can acknowledge the event ("Our hearts are with you, New Orleans"). Never express sentiments in political or religious terms. (e.g., "Happy Holidays" not "Merry Christmas").

- Identify yourself as an employee.

- Do not ask for any personal information, even in direct messages.

- Put your Twitter info in your signature to encourage correspondents to try Twitter.

- Check for mentions, and answer every one.

- Never tweet in capital letters. It both connotes anger, and reminds of Spam.

## ▪ Tweet Protocols:

- Fresh and exclusive work better than older and more widely disseminated.

- Make tweets trackable, and track them.

- Friction-free is always the goal when working with customers. Make it easy to retweet—keep length well under 140 so that retweeting doesn't cause the sender to go over the limit.

- Keep your Twitter account name understandable. Good example and bad example of this. @AcmeSupport is good, AcmeRocksIt is not.

- Write the first 3-5 words of a tweet as if they were advertising copy. These initial words are most important to engagement.

- Use a mixture of good keywords AND more engaging long-tail terms.

## ■ Nuts and Bolts: What & When?

- Automate tweets judiciously. Twitter is real time. Tweeting on a rigid schedule makes you seem disconnected and unapproachable.

- Tightly packed tweets are not as effective as those spaced out at intervals. The optimal space between tweets is either 31-60 minutes or 2-3 hours. Dr. Ben Hanna from this blogpost for Best Practices from **www.businessesgrow.com**: Quantity–between 3 and 11 tweets per day has been identified as the best range. I admit to having trouble with this recommendation. I'm impetuous about tweets; when I see something I can't wait to share it, so my tweets oftentimes come in bursts spread over the day.

- Quality content (when measuring clicks per tweet with a trackable link) yields higher follower growth than higher quantity.

- For scheduled tweets, take time zones into account.  Research indicates that early a.m., mid-day, and end-of-workday Eastern time are the best times to schedule.

- Be consistent. Whatever schedule you set, keep to it. Consistency inspires confidence and trust.

- Use @reply at the front of the message if it's just plain housekeeping posting; use it further into the message if you want it to get better SEO results: "@reply Thanks for the RT" vs."Well, this is good news indeed, @reply! We are looking forward to hearing more about your new initiatives! Good luck."

## ■ What Else Can You Do? #Hashtags, Searches & Lists:

- Use hash marks judiciously, and not in the first few words. The hash tag is a Twitter convention, whereby you create a searchable "tag" by prefixing a word with a hash symbol. You tweet will then appear in a search for that term. Using hash tags can help you track corporate or incoming inquiries and see trending topics. This is another area where I could improve my technique.

- Set up a lot of searches to act as filters for terms of interest in your twitter stream. Tools like **Summize** and **TweetScan** allow you to do a keyword search within conversations on Twitter.

- When trying to build followers, try to keep the people you follow a lower number than those who follow you. Better for SEO.

- Periodically check new followers and follow back if it makes sense. Over time, the "Zen" of checking your twitterstream will yield high returns in ideas and

tweeting candidates.

- Take advantage of Twitter Lists. Twitter users can organize "lists" composed of tweets of other users who interest you. When you look at the list, you'll see a stream of tweets from everyone in that group, but you won't see their messages in your main timeline every day. When you follow a list, you aren't following all the members on that list. You follow the list itself.  Read more about Twitter lists.

- Use something like **Klout** or **Website Grader** to keep track of your influence over time and determine whether simple changes can make a difference in your ratings.

# Setting Up Your
# Policies

If your company has a communication policy--or if you are in an industry that has a lot of compliance rules like banking—you want to make sure that these rules are applied in Twitter just like anywhere else. But even if your company doesn't have specific policies, don't be dumb, don't be rash, and don't say things that you don't want to end up on the front page of the *Wall Street Journal, The New York Times*, or *Mashable*, *TechCrunch*, or *Lifehacker*.

Social media is new and many of the legal ramifications are still being worked out. A blog post or tweet may be considered a part of a business record. They can certainly be considered to be advice or marketing content. A conversation of tweets can even be considered a "public appearance." A profile or Twitter background is an advertisement. Linking to other sites may represent an endorsement.

As social media channels continue to evolve and become more frequent and important points of contact between customers and companies, companies must consider compliance as it pertains to communications on these channels.

New companies like **Hearsay** are appearing to help manage compliance with brand guidelines as well as regulations from the **SEC**, **FINRA** and the **FTC**. That's especially important when representatives and franchisees are networking with and recruiting their own clients under the banner of a corporate name.

## ◼ Companies May Consider These Goals:

- Aim to balance tone. Choose on the continuum the best tone, neither overly serious nor frivolous and silly.

- Pay attention to wording that might be construed as misleading or unsuitable for the intended audience on the channel.

- Be informative. Share intellectual capital while maintaining the firm's brand.

- Always identify yourself; do not make anonymous recommendations on behalf of your company.

- Never be flippant about serious topics (e.g., investments and secure retirement).

- Read and follow social media guidelines from the Financial Industry Regulatory Authority and other advisory white papers.

# Okay, What Did You Learn?

## If You've Made It This Far, THANKS!

It's no longer easy for a company to speak with one voice, especially when the number of voices is exploding. It's also not easy to think about the right way to engage with a customer, as your customers may run the gamut from a single mom in Kansas to a call center worker in Bangalore to a nightclubber in London or Amsterdam. The important thing to remember is that social media business is all about people. There are people connecting with you and engaging with your brand from all around the world. You should do your best to consider not only your customer's point of view, but the ways in which your organization creates, communicates, and delivers unique value for that customer.

## After Reading Our Book, We Hope You Learned:

- Why you should (and perhaps when you shouldn't) be using Twitter;

- How leading brands use Twitter in a variety of situations (both for engagement and crisis management);

- What your customers expect of you as a social company (psst. The days of 9-5 office hours are over, so if you're going to embrace Twitter, make sure someone at your company is available);

- And a few tips to help you engage like a pro!

# Now It's
# Your Turn

## We'd Like to Hear From You

We think we've made a good start in demonstrating the kinds of things you can do with Twitter and the companies that are engaging successfully, and we know we haven't been able to do more than just scratch the surface of this amazing topic.

And now we'd like to hear your stories so we can share them.

## Here's How to Participate

Send us your best stories, tips, and techniques about engaging customers using Twitter to **alyson@assistly.com**. We'll select 20 for the Assistly blog and we'll send you an autographed copy of a Shep Hyken bestseller as a special thanks!

From Alyson, Greg, and Shep—Best wishes, and remember...

# ALWAYS BE AWESOME!

# Infographic

This infographic will help you think about the changes that are ongoing in the world of Customer Engagement.



*Customer Engagement Then & Now, illustration by **Ahoy Graphics***