



# SMART BUSINESS,

A Playbook for Social Media in Your Organization

# SOCIAL BUSINESS

*foreword by* BRIAN SOLIS

MICHAEL BRITO

## Praise for *Smart Business, Social Business*

“*Smart Business, Social Business* is comprehensive in scope and a must-read for all businesses grappling with the rapidly changing world of social media and its potential positive (or negative) impact on business.”

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“Social media has empowered the social customer, which is forcing all businesses to be more human and in touch. It is imperative that companies today understand what social business means and how they can begin to effectively practice it internally and externally within their organizations. Michael Brito’s book, *Smart Business, Social Business*, is an outstanding guide to understanding ‘social’ and the steps necessary to leverage its power to compete effectively in today’s changing business landscape.”

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# SMART BUSINESS, A Playbook for Social Media in Your Organization SOCIAL BUSINESS

MICHAEL BRITO

**que**<sup>®</sup>

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Indianapolis, Indiana 46240 USA



# Smart Business, Social Business

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# CONTENTS AT A GLANCE

	<i>Foreword by Brian Solis</i> .....	<i>xvii</i>
	Introduction .....	1
1	Human Capital, Evolved .....	9
2	Surveying the Technology Supermarket .....	37
3	Establishing a Governance Model .....	59
4	Embracing the Social Consumer .....	77
5	In Response to the Social Customer: Social CRM .....	93
6	Establishing a Measurement Philosophy .....	109
7	How to Choose the Right Vendors, Agencies, and Technology Partners .....	129
8	Marketing Investments on the Rise for Social Business Initiatives .....	149
9	Creating a Comprehensive Social Media Strategic Plan .....	165
10	The Rise of Customer Advocacy .....	185
11	Ethical Bribe: Relevant Content Matters .....	203
12	Social Businesses in the Real World: EMC and Intel .....	221
	Index .....	239

# TABLE OF CONTENTS

<b>Introduction</b> .....	<b>1</b>
Chapters at a Glance .....	4
Based on Actual Events .....	7
<b>1 Human Capital, Evolved</b> .....	<b>9</b>
Driving Cultural Change in the Social Business .....	10
Tearing Down the Silos for Organizational Growth .....	13
Communicating Successful Failures .....	16
Qantas Airlines: No Crash, Despite Lots of Rumors .....	16
Domino's Pizza YouTube Crisis .....	17
Motrin: Does Anyone Listen to Baby-Wearing Moms? .....	18
Gaining Executive Sponsorship to Facilitate Change .....	20
Activating Employees to Engage in Social Media .....	21
Fundamentals of Community Management .....	24
Establishing Continuity in the Global Landscape .....	26
Standard Organizational Models for the Social Business .....	29
Who Really Owns Social Media? .....	34
Taking the Next Steps .....	34
<b>2 Surveying the Technology Supermarket</b> .....	<b>37</b>
Choosing the Right Social Software .....	39
Jive .....	39
Microsoft SharePoint .....	41
IBM .....	41
Box.net .....	41
Tibbr .....	42
Yammer .....	42
Cisco WebEx Meeting Center .....	43
Social Listening Software Commoditized .....	44
Radian6 .....	44

Lithium Social Media Monitoring (Formerly ScoutLabs) .....	46
Meltwater Buzz .....	47
Social Relationship Management Applications .....	48
Sprinklr .....	49
Awareness .....	49
The Syncapse Platform .....	49
Hearsay Social .....	50
Real-Time Analytics and Publishing Efficiencies .....	51
The Future of External Social Technologies .....	52
The Entire Internet Will Be Facebook .....	53
Network Consolidation .....	54
Taking the Next Steps .....	56
Social Technologies .....	56
Build a Listening Station: Listen and Act .....	57
<b>3 Establishing a Governance Model .....</b>	<b>59</b>
Crafting Social Media Policies and Procedures .....	62
Transparency and Disclosure .....	66
Moderation .....	66
Training and Organizational Intelligence .....	68
Noncompetitive Collaboration .....	71
Social Media Executive Councils .....	72
Taking the Next Step .....	73
<b>4 Embracing the Social Customer .....</b>	<b>77</b>
The Value of a Social Media Practitioner .....	78
Hiring Social Media Practitioners .....	79
Corporate Profiles Versus Personal Profiles .....	81
Integrating Customer Support into Social Media .....	83
Comcast .....	85
Best Buy Twelpforce .....	85
Zappos .....	86
Using Social Media to Solicit Product Feedback and Innovation .....	87
Dell IdeaStorm .....	88

MyStarbucksIdea .....	88
Intel's Ajay Bhatt T-Shirts .....	89
Taking the Next Step .....	90
<b>5 In Response to the Social Customer: Social CRM .....</b>	<b>93</b>
Various Definitions of Social CRM .....	95
The Social CRM Response Process and Workflow .....	96
Applications of Social CRM .....	99
The Venting Customer .....	99
The Passive Customer .....	100
The "Used-to-Be" Customer .....	100
The Collaborative Customer .....	100
The Customer Advocate .....	101
The Future Customer .....	101
Social CRM Roles and Responsibilities .....	102
A Look at Social CRM Vendors .....	103
SugarCRM .....	104
Pivotal Social CRM 6.0 .....	105
Nimble .....	106
Taking the Next Steps .....	107
<b>6 Establishing a Measurement Philosophy .....</b>	<b>109</b>
Choosing a Measurement Strategy That Works .....	111
Defining and Understanding ROI .....	111
Purchase Funnel Metrics .....	112
Awareness .....	112
Consideration and Preference .....	114
Purchase .....	115
Advocacy .....	115
Paid, Earned, and Owned Media Value .....	117
Community Health Metrics .....	119
Share of Voice and Conversational Sentiment .....	120
Measuring the Influence of Social Channels .....	121
The Value of a Facebook Fan .....	123
The Challenges of Measurement .....	125
Taking the Next Steps .....	126

<b>7</b>	<b>How to Choose the Right Vendors, Agencies, and Technology Partners</b> .....	<b>129</b>
	Choosing the Right Technology Partner .....	130
	Understand the Organization, Culture, and Leadership .....	131
	Understand the Internal Technology Suite .....	132
	Technology Feature Sets .....	133
	Support Models .....	134
	Training .....	134
	Maintenance Considerations .....	135
	Choosing the Right Social Media/Digital Agency .....	135
	Research the Agency .....	136
	Listen to What They Are Saying .....	137
	Act Personally .....	138
	Evaluate and Make a Decision .....	138
	A Company Point of View to Agency Selection .....	139
	An Agency Point of View to Agency Selection .....	142
	A Cisco Case Study on Vendor Selection .....	144
	Taking the Next Step .....	146
<b>8</b>	<b>Marketing Investments on the Rise for Social Business Initiatives</b> .....	<b>149</b>
	Demonstrating the Business Value of Social Media to Acquire Budget .....	152
	How Organizations Are Prioritizing Social Media Budgets .....	156
	How to Determine Budgets for Social Media .....	159
	Taking the Next Steps .....	161
<b>9</b>	<b>Creating a Comprehensive Social Media Strategic Plan</b> .....	<b>165</b>
	Defining the Mission, Goals, Objectives, Strategy, and Tactics for a Social Media Plan .....	167
	The Mission of Social Media .....	167
	The Social Goals and Objectives .....	168
	The Social Strategy .....	169
	Social Media Tactical Plans .....	169

Understanding Audience Segmentation .....	170
Global Considerations of Social Media .....	173
Snapshot of Social Media Usage in Europe .....	174
Snapshot of Social Media Usage in Latin America .....	176
Snapshot of Social Media Usage in Asia-Pacific Countries (APAC) .....	177
Integrating Social Media with Owned and Paid Media .....	179
Taking the Next Steps .....	181
<b>10 The Rise of Customer Advocacy .....</b>	<b>185</b>
The Difference Between Influencers and Advocates .....	187
Advocates Love the Brand and Tell Others About It .....	188
Measuring the Reach of Influencers and Advocates .....	190
The “Advocate” Purchase Funnel .....	191
The Various Segments of Customer Advocacy .....	192
How to Create a Customer Advocacy Program .....	193
Organizational Readiness .....	193
Finding the Right Advocates .....	195
Choosing the Right Advocate Platform .....	195
Eloqua Case Study on Brand Advocacy .....	198
Taking the Next Steps .....	200
<b>11 Ethical Bribe: Relevant Content Matters .....</b>	<b>203</b>
Relevant Content Creates Business Value .....	207
Relevant Content Adds Value to the Conversation .....	208
Relevant Content Happens as a Result of Listening .....	210
Relevant Content Positions the Brand as a Trusted Advisor .....	211
Relevant Content Is Authentic and Believable .....	212
Relevant Content Builds Trust with the Community .....	213
Relevant Content Increases the Reach of Branded Messages .....	214
Relevant Content Increases the “Organic” Search Results .....	215
Taking the Next Steps .....	217

<b>12 Social Businesses in the Real World: EMC and Intel</b> .....	<b>221</b>
EMC's Social Business Evolution .....	223
The Early Days of Social Media .....	224
EMC Experiences Strong Internal Community Growth .....	225
EMC's Decision to Start Internally First .....	226
EMC Opens Up the Corporate Firewall .....	229
EMC's Social Footprint .....	230
EMC's Organizational Model and Governance .....	231
Intel's Social Business Evolution .....	231
The Early Days of Social Media at Intel .....	232
The Establishment of the Social Media Center of Excellence .....	234
Intel Social Media Footprint Focuses on Employees .....	236
Social Media Ownership of Intel .....	237
Conclusion .....	237
 <b>Index</b> .....	 <b>239</b>



## About the Author

**Michael Brito** is a vice president at Edelman Digital and leads the digital team in Silicon Valley. He provides strategic counsel, guidance, and best practices to several of Edelman's top global tech accounts and is responsible for driving new business, growing existing business, mentoring junior staff members, and maintaining strong client relationships. Previously, Michael worked for major companies in Silicon Valley, including Sony Electronics, Hewlett Packard, Yahoo!, and Intel Corporation, working in various marketing, social media, and community management roles.

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Michael has a Bachelor of Arts in Business degree from Saint Mary's College and a Master of Science, Integrated Marketing Communications degree from Golden Gate University. He proudly served eight years in the United States Marine Corps.

Michael believes that marketing can be evil at times; but if done right, it can drive customer loyalty, product innovation, and brand advocacy. He believes that marketers need to spend more time listening to the social customer and less time sending one-way marketing messages. He is confident that if brands love their customers, they'll love them back and tell others about it. He also believes that organizations cannot and will not have effective, external conversations with consumers unless they can have effective internal conversations first.

## Dedication

*This book is dedicated to the three most important girls in my life: Kathy, Milan, and Savannah. Without your laughter, smiles, hugs, kisses, support, and sacrifice, I would be nothing. You truly give my life meaning.*

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# Foreword by Brian Solis

## Adapting Businesses to Meet the Needs of the Connected Customer

The social media movement is far more important than we realize. Several years ago I compared the democratization of information to the economic impact realized during the Industrial Revolution. Indeed, social media is much more than Twitter, Facebook, and YouTube. Social media is a lens into the future of business and the relationships that are created between brands and customers. However, social media can only benefit the organization if its promise is unlocked across the entire organization and not siloed in any one department or function.

Hosting a dynamic Facebook presence and active Twitter stream does not make a business *social*. Pointing to these accounts in marketing and advertising material also do not make a business social. So what, then, defines a social business?

A social business is one with its communities, wherever they reside. As customers view businesses as one brand and not as a series of disconnected units or departments, a social business is connected, engaged, and adaptive. United on all fronts, a social business connects the dots between value and customer experiences as it heralds a new era of relationships and operates under a banner of transparency and open leadership.

Once-reluctant businesses are now increasingly turning to social media as a means of capturing customer attention. Read any blog or turn to any mainstream media source, and you'll find countless stories of how social media represent the panacea for all business ills. These ills, however, plague every business. While social media represent a wonderful opportunity for businesses to get closer to their customers, businesses could also benefit from a little soul searching. Why? In addition to improving customer relationships, social media also represent an amplifier for all aspects of customer experiences—the good, bad, and the ugly.

Despite this realization, businesses invest in the cultivation of dedicated communities in fledging social networks because there's a prevailing perception of necessity, or in some cases it's recognized as a tactical advantage. We don't have to venture too far before we stumble upon success story after success story. For example, Coca-Cola has impressively amassed 26 million "Likes" on Facebook, and the Starbucks fandom has percolated to 22 million. These examples become the standard to which other businesses aspire and serve as best practices for others to follow.

These social presences offer the semblance of consumer magnetism and honestly, the numbers are nothing short of staggering. In comparison, traffic to the traditional web sites for Coca-Cola and Starbucks pale by comparison at 270,000 and 1.8 million monthly visitors, respectively. With every example we read, we're led to believe that Facebook, Twitter, et al represent sure-fire magnets for customer attention and catalysts for interaction—and ultimately loyalty. At the same time, presences in social media enable and inevitably invite customer engagement and feedback. A social business looks at customer activity and designs click paths and experiences internally to guide external experiences.

In a 2010 study, my colleague at Altimeter Group, Jeremiah Owyang, examined the social media architectures within enterprise businesses and found that 50% of all social media initiatives reside within the marketing department. When combined with corporate communications and web/digital teams, almost 90% of social media is siloed within a marketing function and thus trapping social media's potential at transforming the organization into a social business. Thus, it's time to rethink the future of social media. If businesses are truly to become social businesses, they must match the behavior of customers to effectively meet their needs and expectations instead of simply responding to them.

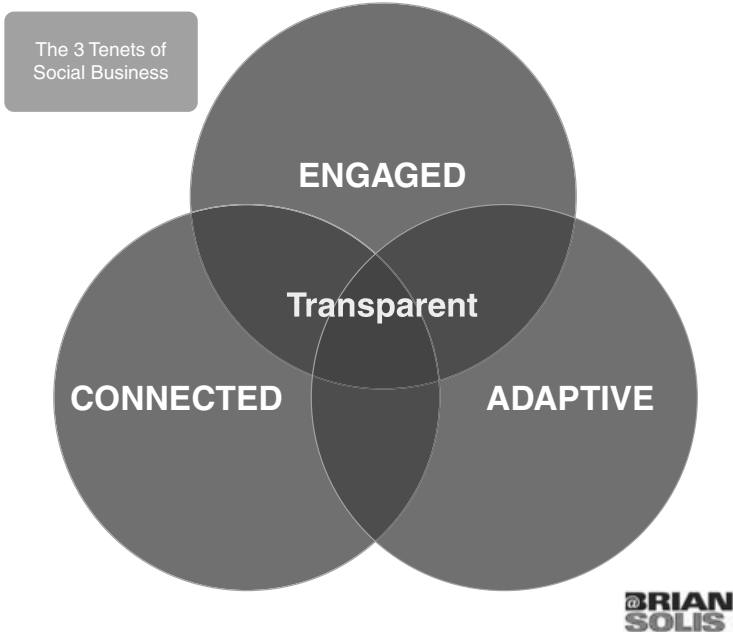
Everything begins with the realization that customer needs and characteristics aren't created equally. In order for businesses to truly become social, the tenets of social media must permeate the entire

organization. These businesses build a foundation based on three important pillars:

Connected

Engaged

Adaptive



These pillars prepare a business for the dynamic nature of customer engagement across the distinct categories that define what I call a “market in transition.” This shifting landscape is segmenting the customer base into three very distinct groups: traditional, online, and now social. This social customer is important because he finds and shares information, qualifies prospects, and makes decisions unlike the other two groups. As a result, they require a different level of engagement. They’re connected. They’re influential. Their experiences steer the actions of others. Engaging them and building a business to support them over time, is mutually beneficial.



How customers use social technology opens new feedback loops that teach those who listen...namely, the social business. It is in the identification of this customer and the construction of an interactive social framework that enables a business to effectively engage and learn from them. Doing so benefits the brand, the social customer, as well as the other two customer segments. Additionally, designing products and services that through monitoring reflect acknowledgement and understanding of the social customer creates relationships built on value and mutual benefits. As a result, the development of a social business makes a company not only modern and adaptive, but also relevant.

Social media is both a right and a rite of passage. At some point, every business will feel the power of their social customer. The question is, what are businesses going to do about it? Perhaps more importantly, what are businesses going to do with feedback to offer closure, resolution, and steer positive outcomes. It starts with connecting the dots between marketing and customer service, between customer service and product development, and also across all departments affected by, or possess the capacity to affect, outside social activity.

Everyday customers are increasingly relying on social networks as their primary way to connect and communicate with one another and also make important decisions. The old adage of happy customers telling a few friends and unhappy customers telling many more is not only coming to life in social networks, but also the effect of doing so in social networks hurls sentiment from person to person and from network to network across hundreds and even thousands with every Like, ReTweet, comment, and reaction.

Listening to the social customer is just the beginning. Responding to them when they're in need or simply to express gratitude in real time in their channels of relevance opens a door that cannot be closed. Unlike Pandora's infamous box, the resulting activities and the change in dynamics of business is not unwise—it is, to the contrary, shrewd and necessary. The door of self-expression was opened with or without your consent. For those businesses that seek engagement and relevance in new media, let's consider the broader implications of a simple conversation. In fact, think of a conversation as a conduit for desirable outcomes that carry benefits on all sides of the customer equation.

Today, getting closer to customers is a top priority for executives. It's almost ironic considering that mainstream business practices were almost in direct conflict with this new sense of renewed customer centricity. Over the years, businesses have moved in an opposite direction distancing representatives from customers through technology, automated process, and through the introduction of outsourced representatives. Customers were practically penalized for trying to seek attention. All was done, however, in the name of operationalization, efficiency, and profitability.

Now we see an about-face through the convergence of media, marketing, and service. Businesses now aspire to social prominence following in the digital footsteps of the much publicized and studied examples of @ComcastCares and @ATT on Twitter. In these cases, if a customer Tweets a problem or a question, Comcast and AT&T have fully staffed Twitter and other social media accounts ready to listen and also respond when necessary. Empowerment is an important characteristic for a social business. Often these representatives can solve problems on the spot or retrieve useful information or trigger next steps to achieve resolution. But at the same time, the shared experiences of customers also vocalize recurring trends that require that attention of other departments. Before we can collaborate externally, we must first collaborate within. Doing so creates processes and systems that proactively fix problems through constant product improvement, redesign, or further experimentation. Most representatives on social networks are disconnected from influencing or expediting internal change for the betterment of the customer experience and ultimately the sentiment associated with the brand. A social business is designed to optimize experiences.

Whether it's through traditional means or through social networks, responding to problems is by default reactive and focused solely on negative origins. Although still important and necessary, reactive-based engagement attempts to change customer perceptions or impressions once they're already experienced. Proactively translating that insight into continuous innovation positions the businesses toward a much more productive position, one where positive experiences eclipse the unfavorable.

A good business will use social networks to identify and solve problems as they arise. A social business will then connect the dots within the organization to adapt and positively steer experiences of connected customers through an integrated approach—an approach of oneness. A social business will design the organizational framework to liberate social media from any one department and focus while uniting silos to connect, engage, and adapt. As a result, success will then be measured in sentiment, referrals, and loyalty.

Whether in social networks or in real life, people naturally share experiences. In the end, customers will inevitably share experiences whether they're negative or positive. The opportunity here is that now more than ever, businesses have a say in the matter. They can choose whether those shared experiences are positive or negative, starting at the development of a product or service and enlivened through the company's sales, marketing, and service programs. The social customer for all intents and purposes deserves a seat on the board of advisors of any social business. They are stakeholders. They are the guiding light toward relevance and success. And, they require nothing less than the complete transformation of business.

I've had the opportunity to work with Michael Brito over the years, and his work is nothing short of inspirational. In this book, Michael shares his insights into the needs of a new generation of connected customers and the importance of building an adaptive framework of a social business. In *Smart Business, Social Business* Brito gives you actionable steps to help you chart your course toward success. By the time you're done reading this book you will not only get closer to customers, but learn how to place customers at the front-and-center of all aspects of business where social equates to relevance and where relevance equals allegiance.

You are the architects of a new era of business where adaptive organizations are measured by the ability to shape and steer positive customer experiences before, during, and after transactions.

**Brian Solis**

**Principal of Altimeter Group and**

**Author of *Engage!* and *The End of Business as Usual***

# Introduction

*This is not a book about social media marketing. Within these pages, you'll find no hidden formula that will teach a business how to increase friends, fans, and followers. It's not a book about viral marketing, and it doesn't condone using social media to broadcast one-way messages to the masses. This book is different.*

*Many organizations today spend a lot of time, resources, and money trying to understand the social landscape and engaging externally with their customers and prospects. They're on a quest to become a social brand. They're investing in Facebook applications, branded communities, and blogs; many also are using online monitoring solutions to listen and see what people are saying about the brand. From this perspective, many companies today are doing a decent job.*

Friends, fans, and followers are important, yes. And brands increase their social equity by engaging in two-way dialogue with their constituency, yes. And transparency is key to these external engagements, yes. But while many organizations are trying desperately to humanize their brand, they are failing to understand that they need to humanize their business first.

Therein lies the business challenge. As social network sites such as Facebook and Twitter gained popularity and social customers became more influential, companies of all sizes and from all industries began to join the conversation. Customers learned to expect companies to be part of the social web. And social influencers started criticizing brands for every action—or inaction—they took online.

Companies listened. Organizations are now aggressively hiring community managers and social strategists, allocating budgets to social media, hiring agencies, and creating engagement strategies. They are doing everything a “good” social brand should be doing.

But this book is not about social brands. It’s about an organization’s natural (sometimes forced) evolution into a social business. A social business deals with the internal transformation of an organization and addresses key factors such as organizational models, culture, internal communications, collaboration, governance, training, employee activation, global and technology expansion, team dynamics, and measurement philosophy.

To do this effectively, companies have to get smarter; acquire new technologies, intelligence, and talent; and become more open and transparent. They have to establish business processes, governance models and rules of engaging on the social web that protect the organization yet empower their employees. They have to change the way they do business—and that starts with the people of the organization.

An organization that uses social media to engage externally with customers is a social brand but not necessarily a social business. There’s a huge difference between the two.

From the outside looking in, most people wouldn’t recognize or understand the challenges that social media has created in an enterprise. The anarchy, conflict, confusion, lack of communication and collaboration, and organizational silos that exist behind the firewall

are not visible. These challenges make the process of becoming an effective social brand much more difficult and less effective. For some organizations, this quest to become a social brand and a social business is done simultaneously.

The premise of this book is that organizations cannot and will not have effective external conversations with consumers unless they can have effective internal conversations first. This involves much more than internal conversations, conference calls, and a collaboration forum. For this evolution to take place, organizations need to adopt social behaviors in every aspect of their business.

Figure I.1 illustrates the evolution of social business. It started with the growing influence of the social customer. The immediate response to the social customer was that companies began to adopt behaviors of a social brand—brands/companies and organizations started engaging with the social customer on the social web. Today, this is causing a multitude of challenges internally, such as no governance and policies, employees running wild in social media, social media ownership issues, and more for many organizations. Now organizations are trying to operationalize social media internally to become a collaborative social business.



**Figure I.1** *The evolution of social business*

This is the key takeaway of this book.

This book aims to equip business leaders, marketers, and communications professionals with the knowledge necessary to transform their business. It provides actionable insights for them to take back to their teams and organizations to begin facilitating change. The social business evolution will not happen overnight. It may take years. But it has to happen and it will happen. This book helps make that happen.

## Chapters at a Glance

**Chapter 1, “Human Capital, Evolved,”** deals with the organization’s most valuable asset: its people. It addresses the need to facilitate organizational change in an effort to break down organizational silos and communicate more effectively. Much of that communication should involve organizational failures in the social space so that teams can learn what not to do and avoid making the same mistake more than once. The chapter also discusses the importance of gaining executive support from either the CEO or someone close to him or her who can champion the evolution internally. A big part of this chapter discusses the need to empower employees to engage in the social web; it offers examples of how to manage teams and employees across different business units and geographies. The chapter concludes with an overview of three common organizational models related to social media: centralized, decentralized, and a fully collaborative and integrated social model.

**Chapter 2, “Surveying The Technology Supermarket,”** discusses technology and the importance of choosing the right social software. It’s not a comprehensive overview of every technology vendor in the market; rather, it covers a subset of vendors—some old, some new—that are driving innovation on the social web. The chapter discusses collaboration/internal community software, social listening, and social relationship management vendors. It also discusses the importance of internal scalability and the need to have IT involved when sourcing vendors. The chapter concludes by making a few predictions on the social landscape for Facebook and Twitter.

**Chapter 3, “Establishing a Governance Model,”** discusses the need for organizations to establish governance models that address employees’ use of social media, disclosure, and moderation policies (on and off domain). Several real-life (and very public) examples illustrate

what happens when organizations do not have policies in place to guide employee behavior. The chapter also discusses the need for organizations to become more intelligent through ongoing training opportunities and through noncompetitive collaboration with other companies to share enterprise best practices. The chapter concludes with a discussion of the need to create social media executive councils that will help shape governance, training, and deployment internally.

**Chapter 4, “Embracing the Social Consumer,”** discusses the evolution of social customers and their growing influence on the social web. It also covers their business counterpart: the social media practitioner, the employee responsible for establishing, fostering, and guiding a conversational exchange with the social customer. The chapter also discusses the difference between corporate social profiles and personal profiles as this relates to social media practitioners. Much of this chapter also illustrates the importance of integrating customer support into social media, as well as using the channels to solicit feedback from the community.

**Chapter 5, “In Response to the Social Customer: Social CRM,”** is all about social CRM. It defines the process of managing and responding to the social customer via social CRM channels. The chapter goes in depth about various applications and use case models of social CRM and categorizes different types of customers that organizations must pay attention to. Roles and responsibilities are also discussed. The chapter concludes by highlighting three vendors that are taking social CRM to the next level.

**Chapter 6, “Establishing a Measurement Philosophy,”** discusses the importance for organizations to agree on a measurement philosophy that works for everyone. The chapter also discusses financial impact and nonfinancial impact-measurement philosophies, including ROI-driven metrics, purchase funnel metrics, owned-earned-paid media values, community health, and share of voice metrics. The chapter concludes with a discussion of how to measure influence, the value of a Facebook fan, and challenges that organizations will face when determining a measurement philosophy.

**Chapter 7, “How to Choose the Right Vendors, Agencies, and Technology Partners,”** outlines a step-by-step process for choosing the right technology vendors and spotlights issues to consider before



making any purchase decisions. Additionally, the chapter highlights three agency perspectives and three perspectives from Fortune 500 companies (Intel, Cisco, and Adobe) and shares valuable advice on what to consider when selecting a social agency. It concludes with a quick case study showcasing Cisco and its process for choosing technology vendors.

**Chapter 8, “Marketing Investments on the Rise for Social Business Initiatives,”** discusses the recent trend of organizations allocating marketing dollars to social business budgets, both internally and externally. The chapter cites several research studies from eMarketer, MarketingSherpa, Econsultancy, ExactTarget, Meltwater, StrongMail, Zoomerang, and Alterian as it relates to 2011 predictions and insights into social media budgets within the organization. The chapter also highlights data from the Altimeter Group as to which job functions and social media initiatives the budget dollars are getting allocated to. The chapter concludes with a framework that organizations can use to determine budgets internally and to develop buy-in and support from senior management.

**Chapter 9, “Creating a Comprehensive Social Media Strategic Plan,”** helps business leaders and marketers define and create a comprehensive social media strategy, taking into consideration the difference in an organization’s mission, goals and objectives, strategy, and tactical plans. The chapter goes in depth to explain the value of audience segmentation and gives global snapshots of social media usage, behaviors, and adoption in Latin America, Europe, and Asia Pacific. Finally, it discusses the importance of integrating social media with paid media.

**Chapter 10, “The Rise of Customer Advocacy,”** examines the difference between influencers and advocates. The chapter details how to create a robust customer advocacy program and highlights a well-known vendor’s program. The chapter concludes with a case study about marketing automation SaaS company Eloqua.

**Chapter 11, “Ethical Bribe: Relevant Content Matters,”** is about content. It discusses how strategic, relevant content can add business value to the online conversation. The chapter gives specific recommendations for companies on adding value to the conversation,

becoming a trusted advisor, being authentic and believable, building trust, and listening. Relevant content can increase the reach of branded messages and increase the organic search results for certain terms.

**Chapter 12, “Social Businesses in the Real World: EMC and Intel,”** highlights two case studies of companies that exemplify the characteristics of a social business and are succeeding in the social space, EMC and Intel. EMC first gained focus internally and created a fully collaborative, social organization before unleashing its employees externally to engage with customers. Intel, on the other hand, began its journey as a grassroots effort more than 10 years ago when technology experts and IT managers were engaging in forums and chat rooms, talking shop with other IT managers. This natural groundswell effect from employees, coupled with management’s vision to socialize the organization, drove Intel to become a leading brand in social media.

## Based on Actual Events

The views, theories, strategies, and recommendations presented in this book are the culmination of my 12 years of experience working in the enterprise; I’ve held positions in top technology firms such as Sony Electronics, Hewlett-Packard, Yahoo!, and Intel Corporation and have specialized in building social media programs that focus on building long-term relationships with customers. In short, I consider myself not an academic, but rather a practitioner with practical in-the-trenches experience and real-world perspectives.

That said, it’s important to make a distinction between this book and many others written on the topic of social media. Most of them are written specifically from the theoretical perspective, which makes sense because of the relative newness of social media, especially within business. Here, however, I’ve focused on practical strategies, tactics, and lessons learned, which can effectively evolve internal culture into something that is much more appropriate and effective for today’s social business.

Hopefully you’ll find such an approach a refreshing change that allows you to quickly and easily apply the ideas presented to your business.



# 4

## Embracing the Social Customer

*In a perfect real-world scenario, this book is meant to mirror, in chronological order, the natural evolution into a social business. That is, a business undergoes a cultural change and a shift in the way it operates:*

*Tearing down silos and communicating effectively across the organization → adopting social technologies that foster communication globally → instituting governance models that emphasize smart participation on the social web → employing tactical considerations that address the social customer.*

People have always been social, even before the Internet. Sharing experiences with others about the brands, products, and services that they love or hate comes naturally. The difference today is that the social customer now has a voice that travels well beyond the living room. The social customer is influential and isn't afraid to blog about negative experiences, share thoughts on Twitter, and post critical comments within status updates on Facebook. Some customers even spend hours writing well-formed critical product reviews on Consumer Reports, CNET, Epinions, Amazon, and Yelp. The end result of all these conversations happening in the social space is that every review, rant, criticism, praise, opinion (positive or negative), blog post, and tweet is appearing in Google search engine results—and has been for many years now. Companies might face a reputation-management problem when others see criticism in the search results when searching for a brand or product.

The difference today is that the social customer now has a voice that travels well beyond the living room.

Companies need to embrace social customers and learn how to work with them collaboratively. This starts with a social media practitioner, the point person in any organization who establishes, fosters, and guides conversations with customers across the social web.

## The Value of a Social Media Practitioner

The social media practitioner is potentially any employee with sanctioned authority to represent the brand or the product or service on the social web. The social media practitioner is essentially responsible for interacting and engaging with the social customer. This person might or might not have “social media” in the job title and could be a customer support agent or an engineer. Social media practitioners are mainly responsible for managing the daily operations of a community or routing service requests, product insights, or sales inquiries to the appropriate subject matter experts or departments. Social media practitioners might also be responsible for collecting actionable

intelligence, insights, and reports, as well as making specific recommendations for editorial changes to corporate blogs and communities based on those insights.

Social media practitioners can include the CEO, the chief marketing officer (CMO), or even the information technology (IT) analyst who just started with the company. Often the title “social media practitioner” is synonymous with “community manager.” This depends on how the company is organized internally.

The value of social media practitioners is twofold. First, customers see them as trusted sources of information, more so than corporate communications and advertising personnel. Why? Because people trust other people like themselves. This was discussed in Chapter 1, “Human Capital, Evolved,” when referencing the Edelman Trust Barometer. Second, the social media practitioner is the company’s first line of communication with the social customer, so the trust factor is an extremely important attribute.

Social media practitioners are the human link between a company and its customers. Because this is such an important responsibility, companies need to consider several criteria before hiring an employee for this role.

## Hiring Social Media Practitioners

The phenomenon known as the “social media expert” is largely a myth. Avoid individuals who promote themselves with such a label. The very nature of this space involves constant change and adaptation. It is said that true knowledge is found in understanding that there’s always much to learn, and the same is true for social media.

That being said, it’s still important for companies to hire and train social media practitioners and help them develop expertise about both the brand and social media technologies and best practices. When hiring specifically for a social media practitioner, it’s important to look for certain qualities in candidates:

- **A passion for social media**—A good social media practitioner knows about popular new social technologies and has an ongoing interest in news related to the progression of

social media and its application to business. He or she is also passionate about customers and the brand or product.

- **A people person**—Look for someone who can communicate effectively online, offline, and in blog posts, in 140 characters or less. He or she must also be able to communicate the value of social media to senior management.
- **Strategic thinking**—The candidate must be able to set measurable goals and look beyond social media when creating marketing plans. The ability to see the big picture is important.
- **Effective collaboration skills**—Communication skills and effective sharing of ideas can make a significant impact across the company in various business units and geographies.
- **Analytical thinking**—The candidate must be able to understand various methods of tracking the effectiveness of external social media engagements, and then extract key and actionable insights to use for future plans.

Whether a company is hiring social media practitioners or simply empowering and training existing employees, a governance model must provide direction and guidance when creating social media profiles, specifically with Twitter.

For example, when engaging with social customers on Twitter, it's absolutely vital to be 100 percent transparent in all communications with them, and this starts with disclosure. It's good practice to disclose the nature of the relationship between the practitioner (the employee, contractor, or agency) and the company represented somewhere in the bio. This can be as simple as stating, "I work for company X, but these opinions are my own." At all costs, social media practitioners also should avoid spamming the community with one-way

When engaging with social customers on Twitter, it's absolutely vital to be 100 percent transparent in all communications with them, and this starts with disclosure.

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marketing messages and promotions. An overly commercial message is a very easy way to convince the social customer of your irrelevance. It may even spark a groundswell movement of criticism, which is never good for any brand.

Perhaps one of the best ways to find qualified talent is to leverage the collective networks of those who already have a solid grasp of the social media space. Cisco is a good example of a leading-edge social media organization that exemplifies this behavior. Candidates there are sourced internally from the networks of existing staff.

After a company has identified, hired, and trained its social media practitioners, the next step is to determine how those people should represent themselves on the social web and establish a social media profile to engage with the social customer.

## **Corporate Profiles Versus Personal Profiles**

When employees first began using social media professionally, they were tweeting and blogging about anything and everything. Some employees were disclosing where they worked, and some weren't. Some were using the corporate logo as their profile picture, and others were using their own head shots. Others were spamming anyone and everyone with one-way marketing messages and promotions. The social web was basically a free-for-all—and the source of major internal headaches for senior management. Few companies established governance models and began to think through tactical approaches to external engagement.

Specifically, few companies considered the management and governance of social media profiles and, more importantly, what happens when employees decide to leave a company after they have built significant brand equity within those social profiles.

One example is the Twitter profile. Three types of Twitter profiles have evolved in the last few years: personal, corporate, and hybrid.

A personal profile is self-explanatory: It's used for personal reasons (to share relevant content with friends, ask and answer questions, promote one's own content, ramble, and in some cases build a personal brand). If employees are using a personal profile to talk about the company they work for, they should disclose that they are employees of that



company. This is standard practice, and most people are doing this today. Additionally, most personal profiles link to a personal blog, Facebook page, or LinkedIn profile.

A corporate profile usually has the trademarked name as the Twitter handle (as in @Intel, @Dell, and @Adobe). The look and feel of this profile is company branded and matches the corporate identity of the organization. Often the logo serves as the profile photo. Much of the content shared on a corporate profile is specific to company-related news (announcements, staff hires/departures, press releases, product launches, press briefings, quarterly earnings, and so on). Additionally, companies are creating Twitter profiles specifically for products such as @Photoshop, which are used just to share product-related content and interact with their community. Customer support usually has its own corporate profiles as well. For instance, Adobe has @Adobe\_Care, used to solve customer support inquiries across all product lines.

Hybrid profiles come in a variety of shapes, sizes, and colors. No set standard or existing nomenclature is used; a hybrid profile embodies characteristics from both the corporate and personal profiles. One that really stands out is Scott Monty's Twitter account. Monty runs digital marketing for Ford Motor Company. A close examination of his profile reveals that he uses elements from both a corporate profile and a personal profile. His Twitter background is completely branded Ford, so at first sight, it looks like he is either a Ford enthusiast or an employee. As his profile photo, Monty uses a picture of himself with a Ford logo at the bottom. He fully discloses that he works for Ford, and much of his daily interaction involves evangelizing about the Ford brand, interacting with his community, or answering Ford-related questions. Monty links to his personal blog, where he writes mostly about social media marketing and not so much about Ford.

The question "What happens when Monty decides to leave Ford?" suddenly turns into a serious business concern, especially because he has almost 50,000 followers and has built significant brand equity for Ford and himself. That's why it's important for organizations to think about the long-term implications when appointing external spokespeople

and empowering social media practitioners to engage online. Companies must consider two issues to protect themselves:

- Establish a governance policy that addresses personal and company profiles. More importantly, for personal profiles, companies must determine how much of company resources can be used to promote their growth and expansion.
- Empower more than one employee to be external spokespeople for the brand. Dell has done an outstanding job of this over the last five years by empowering multiple employees to engage externally and even standardizing their Twitter accounts (as in @richardatdell, @chrisatdell, @deniseatdell, and @manishatdell).

Empowering more than one person to engage with the social customer is good practice because it potentially solves a few problems before they even arise. First, although these Twitter accounts are personal profiles, the standard nomenclature makes it naturally transparent where Richard, Chris, Denise, and Manish work. In addition, if one of them decides to leave Dell, the company would face minimal impact because the others would be able to take up the slack and continue to engage with the community.

One of the most common ways for companies—specifically, social media practitioners—to address the social customer is through customer support. Most conversations that involve the social customer are complaints and concerns about a company's product or services—and maybe even the support department itself—so this is a natural first step.

## **Integrating Customer Support into Social Media**

Obviously, social customers have a voice. And since the birth of channels such as Twitter, they also have an audience, some big and some small. Regardless of the audience size, these consumers have no problem slamming companies that offer substandard customer service or products. Even worse is that many of these critical conversations on Twitter, blogs, and review sites appear in search results for others to read—and they live on the Internet forever. This new, disruptive

behavior from the social customer is causing chaos to companies big and small, and forcing them to adapt their business models.

There's perhaps no better native and out-of-the-box use for social media in business than for customer support. The social customer is online and increasingly bound to social media networks of all types. A 2009 study by Cone Research revealed that 43 percent of consumers expect companies to use social networks to solve consumers' problems. It's no surprise, then, that these same customers also assign enormous convenience value to resolving the inevitable customer support problem via their favorite social network.

Companies can integrate customer support initiatives with social media in two ways. The first is to assign social media practitioners to data-mine the Internet looking for customer support-related inquiries that they can respond to. This can be achieved easily by investing in social media listening software and monitoring brand- or product-related terms (see Chapter 2, "Surveying Technology Supermarket," for more information on social media listening software). The social media practitioners can then either fix the issues themselves or create processes and workflows to filter and assign the identified conversations to the appropriate support channel. Second, and probably a better long-term solution, is for organizations to operationalize the support department to include social media as a viable support and outreach channel, just as they would a contact form on the corporate website or a toll-free number. Many companies today are doing both.

Due to Twitter's real-time conversation, it's natural for social media practitioners to use this channel to address customer issues. However, some companies are also monitoring comments on their YouTube channel and Facebook Wall, and within the corporate blog. They're also watching for comments posted on third-party sites, such as their competitors' pages and Amazon.com's review pages.

Companies have taken a variety of approaches to integrating their customer service efforts with social media. Many of these companies are being proactive and thinking long term about addressing the social customer, but others have been thrown directly into the fire.

## Comcast

In spring 2008, Michael Arrington, founder and co-editor of TechCrunch, a blog covering the Silicon Valley technology start-up community, wrote a blog post about his discontent with Comcast, a local cable service provider. After a cable outage, Arrington contacted customer support and had a horrible experience. Not only did Arrington write a blog post about his experience, but he also expressed his unhappiness multiple times on Twitter, which was retweeted several times.

This incident got a lot of press, and the conversation surrounding Comcast's poor customer service began to appear more often in multiple social channels.

Comcast responded quickly and set up the Comcast customer support Twitter profile and business initiative known as @ComcastCares, now used to solve customer problems on Twitter.

What's important to note here is that this one incident caused a significant culture change at Comcast and forced it to operationalize customer support around a new channel—in this case, Twitter.

Today Comcast is considered one of the leaders in customer support online and is often cited in case studies, blog posts, and whitepapers as a company that's using social media the right way. And, while Comcast still isn't perfect and still criticized, it is surely one company that takes social customers seriously.

## Best Buy Twelpforce

In 2009, consumer electronics giant Best Buy empowered hundreds of retail employees to manage online customer support inquiries and company promotions using Twitter. Best Buy even used online media and television commercials to promote this initiative and educate its customer base. The way it works is pretty simple. Employees register their personal Twitter accounts on a Best Buy site called Best Connect. When registered, employees from across the company can send tweets from the @Twelpforce profile; they add the hash-tag #twelpforce to make their messages automatically show up under the twelpforce Twitter profile, with a credit to their proper Twitter account (as in "via @mytwitterhandle").

The following pledge from Best Buy management to its employees sums up the company's intentions with this initiative:

Why would customers want to talk to you on Twitter? The promise we're making starting in July is that you'll know all that we know as fast as we know it. That's an enormous promise. That means that customers will be able to 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.

Best Buy is one of the first companies to publicly communicate that it is using Twitter to engage with customers. While some may consider this to be a bold move and hard to scale, this initiative certainly positions Best Buy as a company that trusts its employees and understand the importance of personal communication.

Of course, no company can guarantee that it will solve every support issue that arises online. But Best Buy's Twelpforce has taken the steps necessary to make an impact in solving customer problems.

## Zappos

Tony Hsieh is the CEO and founder of Zappos.com, an online shoe and retailer store that Amazon acquired in 2009 for \$1.2 billion. Today nearly one-third of all Zappos employees are using Twitter to solve customer problems. What's important to note here is that this shift in culture dynamics started at the top, with Hsieh himself engaging with customers in social media. What was once chaos trying to manage customer support online is now standard operating procedure. The social customer is top-of-mind for Hsieh, Zappos, and several hundred employees who use Twitter. The reputation of Zappos customer service has been amplified through normal conversations on Twitter. These conversations aren't meant to drive up sales or even offer promotions. They're simply meant to please and educate the social customer, either new or existing. Such external engagement has also resulted in cost-savings. According to tech blog ZDNet, Zappos

estimates the cost of reaching out to past, present, or potential customers on Twitter at \$300,000 a year.

Additionally, one of the company's core values is to deliver "WOW" through service. All new employees are required to undergo a four-week customer loyalty training course, which includes at least two weeks of talking on the phone with live customers in the call center. After the training is complete, employees are offered \$3,000 to leave the company immediately, no strings attached. This ensures that employees are there for the love of the job and passion for customers; not the money.

Zappos has created a culture of service and empowers each employee to join Twitter and delight customers. The company's culture focuses on making sure every possible interaction with customers results in them saying, "WOW, that was the best customer service I've ever had." And the initiative seems to be working: Zappos has seen triple-digit revenue growth over the last three years.

These examples have shown the evolution of companies using Twitter to solve customer support issues. They also have tremendous opportunity to use the collective intellect of the community to innovate their products.

## **Using Social Media to Solicit Product Feedback and Innovation**

Some forward-thinking companies have already started listening to customer feedback on social media channels and are innovating their products, services, and business processes. This is also known as crowd sourcing. A company uses the collective intellect of the community to create or co-create a product or initiative. As a result of involving social customers in the decision-making process, the company fosters customer and brand advocacy and encourages loyalty to the brand. Companies such as Dell, Starbucks, and Microsoft have established such programs and are seeing a tremendous impact on the level of engagement with the community. In some cases, these companies are improving the customer experience for millions of customers and solving real business problems at the same time.

## Dell IdeaStorm

Dell launched IdeaStorm in February 2007 as a way for the company to talk directly to its customers. The site allows Dell customers to view ideas posted by other community members, post new ideas about Dell's products or services, promote or demote ideas, and then see what ideas were actually implemented. In the three years since the site first launched, Dell has received more than 10,000 suggestions and implemented nearly 400 ideas. What's important to note here is that teams of Dell product managers spend time interacting with community members, sourcing good ideas that didn't necessarily make it to the top, and gaining insights into its customers' biggest concerns. The difference between Dell's program and what other companies are doing is that Dell is actually changing the way it does business based on community feedback.

Originally, the most popular suggestions concerned the Linux operating system on Dell machines. On May 24, 2007, just three short months after the site launched, Dell started selling three computer systems with Linux Ubuntu 7.04 preinstalled in the computers. The article requesting Linux eventually moved down the list and was replaced by newer ideas promoted by other community members.

## MyStarbucksIdea

MyStarbucksIdea was built with the same intentions as Dell's IdeaStorm: to crowdsource ideas with the community. Community members can share, vote on, and discuss ideas, as well as see what ideas are being implemented. As with Dell, the entire community site is flooded with Starbucks employees listening to and engaging with customers. The site can be characterized as a real-time, always operating customer focus group. Since March 2008, the community has submitted more than 70,000 ideas.

A few suggestions that Starbucks has implemented include free coffee for Gold Card Members on their birthdays, a Starbucks VIP card, the infamous Starbucks Splashstick, and the program that gives customers a free cup of coffee when they buy coffee beans.

## Intel's Ajay Bhatt T-Shirts

On a much smaller scale than the two previous examples, Intel took an idea one step further to delight its customers.

In 2009, Intel launched Sponsors of Tomorrow, a marketing campaign that centered on the people who work for the company, in an attempt to humanize the brand. Part of the campaign was a TV commercial titled "Your Rockstars aren't like our Rockstars." It featured Ajay Bhatt, Intel Fellow and the co-founder of the Universal Serial Bus (USB).

In the commercial, while Bhatt (played by an actor) is walking through the office, someone appears in the back holding open a T-shirt with Bhatt's face on it. The commercial was uploaded to YouTube and shared across the Internet on various web properties and blogs; then it was amplified through Twitter. Within days, these communities were begging for Ajay Bhatt t-shirts. They were tweeting about it, commenting on the Intel blogs, and posting on the YouTube channel and in third-party tech blogs.

Intel moved fast, printing 100 Bhatt T-shirts and giving them away as part of a month-long contest on Twitter. After the T-shirts were shipped, the winners began to post pictures of themselves wearing the T-shirts to Twitpic and Ajay Bhatt's Facebook Fan Page.

These three companies have more in common than just the fact that they're listening to social customers. They were also cited in a 2009 case study by Charlene Li and Wetpaint titled *Deep Brand Engagement Correlates with Financial Performance*. The report examined the top 50 brands and measured their depth of engagement with consumers on the web; it also looked at their financial performance for the last 12 months. The analysis showed that the companies that were more engaged in social media were seeing an increase of around 18 percent in revenue during the reporting period; companies that were least engaged suffered an average of 6 percent decline in revenue. Dell, Starbucks, and Intel were all listed among the top 10 companies in social media. It's not an exact science, but it's good food-for-thought for brands that are seriously considering social media engagement.



## Taking the Next Step

The first step in addressing social customers is to decide who internally will be interacting with them. Someone in customer support? The CEO? A dedicated community manager or a social media practitioner who spends his or her days sourcing brand-related conversations and participating when appropriate? In any of these scenarios, it's important that companies be ready to scale and grow. Why? Because once there's even an ounce of interaction between a company and the social customer, customers will expect the company to stay engaged all the time.

Companies need to think about ways to train social customers so they don't use Twitter just as a bullhorn every time something goes wrong. Setting up a support community similar to what Research In Motion has done is a great model to follow. RIM uses its @BlackBerryHelp Twitter profile for customer support, offering up tips and tricks and also linking to relevant BlackBerry.com blog posts and forum discussion threads.

Companies need to think about ways to train social customers so they don't use Twitter just as a bullhorn every time something goes wrong.

One of the worst things any company can do is create a thriving community and then abandon it. Unfortunately, this happens all too often. Before launching new communities, Facebook fan pages, and Twitter profiles, a company must get a firm commitment from everyone involved to continuously engage in these channels. Otherwise, the company will surely be at the center of criticism and will probably be featured in a *Harvard Business Review* case study titled "What Not to Do in Social Media."

The next step is to get the customer support department involved, if it isn't already. In some cases, a company might need to justify human capital and overhead expenditures for any external engagements. Of course, the advantages of customer support engaging with the social

customer goes far beyond where the audience is: Considerable cost-saving side effects can be had by augmenting service and support operations to include increasingly more social touchpoints and efficiency. According to research data from the help desk industry, the cost to answer a support call is between \$13 and \$40. Imagine a call center that receives an average of 1,000 calls in a 24-hour time period. On the lower end of \$13 per call, that's \$13,000 a day (\$4.7 million annually), and this doesn't even take into consideration the cost-per-minute charges and other overhead costs to manage a call center.

Finally, it's important to note that crowdsourcing has grown since 2004 with the publication of *Wisdom of Crowds*, by James Surowiecki. In his book, Surowiecki argued that large groups exhibit more intelligence than smaller groups and that the collective intelligence of a community can shape business more effectively. That said, it's important for companies to create a community for their customers to interact in and make product-related recommendations. With services such as Get Satisfaction, companies can instantly create crowdsourcing and support related communities that are integrated with corporate websites almost instantly.

Social customers are here to stay and are gaining influence every day. They're not shy about providing public feedback about the companies and brands they use, either. This can be either a serious threat to a company or an opportunity to create customer advocacy. Companies need to keep the social customer top-of-mind when optimizing internal business processes and creating external engagement strategies.



## Symbols

- 2008 Cone Business in Social Media Study, 23
- 2009 Consumer New Media Study, 23

## A

- abandoning communities, 90
- acquisition metrics, 119
- activating employees to engage in social media, 21-23
  - community management, 24-26
- AddThis data, 214
- Adobe, 140
- advocacy, measurement metrics, 115-116
- advocate identification, 197
- advocate platforms, choosing, 195-198
- advocates, 186-187
  - customer advocacy programs, 193
    - choosing the right advocate platform, 195-198*
    - finding advocates, 195*
    - organizational readiness, 193-194*
  - identifying and empowering, 192-193
  - versus influencers, 187-188
  - measuring reach of, 190
  - purchase funnels, 191-192
  - role of, 188-190
- agency point of view, social media/digital agencies, 142-144
- Altimeter Group, 156, 174
- Amplicate, 58
- AMR (American Medical Response), 61
- anarchy, 59
- APAC (Asia-Pacific Countries), social media usage, 177-179
- Architectural Digest*, 180
- ARM process, 97-98
- Armstrong, Heather, 61
- Arrington, Michael, 85
- Asia-Pacific Countries (APAC), 177-179
- audience segmentation, 170-173
- authentic content, 212-213
- awareness, 49
  - measurement metrics, 112-114

## B

- B2B (business-to-business), 136, 152
- B2C (business-to-consumer), 136
- Bartz, Carol, 54
- Best Buy, integrating customer support into social media, 85-86
- Bhargava, Rohit, 142
- Bhatt, Ajay, 89
- Blog Council, 71
- blogs, consideration and preference, 114
- Boot Camp, 68
- Box.net, 41
- brand advocacy, Eloqua case study, 198-199
- brand advocates, 181
- branded messages, increasing reach of through relevant content, 214-215

- brands
  - conversations with, 14
  - positioning as trusted advisors with relevant content, 211
- bribes. *See* ethical bribes
- Brogan, Chris, 125
- budgets, 161-163
  - demonstrating business value of social media, 152-156
  - determining for social media, 160-161
  - Facebook, 162
  - prioritizing social media budgets, 156-159
- business professionals, audience segmentation, 171
- business value, content, 207-208
  - adding value to conversations, 208-210
- business value of social media, demonstrating to acquire budgets, 152-156
- business-to-business (B2B), 136, 152
- business-to-consumer (B2C), 136
- Buzz (Google), 55

## C

- case studies
  - brand advocacy (Eloqua), 198-199
  - Cisco, 144-146
- challenges of measurements, 125
- Chambers, John, 21
- charters, 166
- Chernov, Joe, 198
- choosing
  - advocate platforms, customer advocacy programs, 195-198
  - social media/digital agencies, 135-136
    - agency point of view, 142-144*
    - company point of view, 139-142*
    - evaluating, 138-139*
    - listening to, 137*
    - researching, 136-137*
    - RFP (request for proposal), 138*
  - technology partners, 130-131
    - maintenance considerations, 135*
    - support models, 134*
    - technology feature sets, 133-134*
    - training, 134*
  - understanding internal technology suites, 132-133*
  - understanding organization, culture and leadership, 131*
- vendors, Cisco case study, 144-146
- Cisco Systems, 141
  - audience segmentation, 171
  - case study on vendor selection, 144-146
  - Social Media Roundtable, 72
- Chambers, John, 21
- Dominguez, Carlos, 21
- The Global Social Media Marketing Group, 19
- WebEx Meeting Center, 43-44
- click-through rates (CTR), 180
- CNET.com, 115
- Coca-Cola, social media policies, 65
- COE (Social Media Center of Excellence), 32-33
- collaboration, 38
  - noncompetitive collaboration, 71-72
- collaboration software, 39
  - Box.net, 41
  - IBM, 41
  - Jive, 39-40
  - Microsoft SharePoint, 41
  - Tibbr, 42
  - WebEx Meeting Center, 43-44
  - Yammer, 42-43
- collaboration teams, social CRM, 103
- collaborative customers, social CRM, 100
- Comcast, integrating customer support into social media, 85
- command centers, content, 218
- communication, 13-14
  - challenges, 15
  - successful failures, 16
    - Domino's Pizza, 17-18*
    - Motrin, 18-19*
    - Quantas Airlines, 16-17*
- communities
  - abandoning, 90
  - building trust through relevant content, 213-214
- community engagement, 120
- community growth, 119

community health, measurement metrics, 119-120

community management, activating employees to engage in social media, 24-26

community satisfaction, 120

company point of view, social media/digital agencies, 139-142

ComScore, 174  
Twitter, 175

conflict, 35

Conflict Minerals Trade Act, Intel, 67

consideration and preference, measurement metrics, 114-115

content  
authentic and believable, 212-213  
building trust with communities, 213-214  
business value, 207-208  
increasing organic search results, 215-216  
increasing reach of branded messages, 214-215  
listening, 210-211  
positioning the brand as a trusted advisor, 211  
proactive content, 217  
reactive content, 218  
relevant content. *See* relevant content

content chaos, 205

content creation, 217

content planning, 217

content strategies, 217-219

continuity, establishing, 35

conversation audits, 210

conversational sentiment, measurement metrics, 120-121

conversations, 14  
adding value with relevant content, 208-210  
with brands, 14

corporate profiles versus personal profiles, 81-83

CRM (customer relationship management), 93

CTR (click-through rates), 180

cultural change, driving, 10-12

customer advocacy programs, 193  
choosing the right advocate platform, 195-198  
finding advocates, 195  
organizational readiness, 193-194

customer advocates, social CRM, 101

Customer Intelligence Center, Lithium, 46

customer journeys, 204-207

customer relationship management (CRM), 93

customer support, integrating into social media, 83-84  
Best Buy, 85-86  
Comcast, 85  
Zappos, 86-87

customer support departments, social CRM, 102

customers  
social CRM, 99-101  
social customers. *See* social customers

## D

Davis, Caitlin, 61

decentralized organizations, 31

*Deep Brand Engagement Correlates with Financial Performance*, 26, 89

Dell  
Social Media Listening Command Center, 210  
Twitter accounts, 66

Dell IdeaStorm, 88

Devanna, Len, 224, 227

digital agencies  
agency point of view, 142-144  
choosing, 135-136  
company point of view, 139-142  
evaluating, 138-139  
listening to, 137  
researching, 136-137  
RFP (request for proposal), 138

Digital IQ, 41  
Intel, 69

disclosures, social media policies, 66

Dominguez, Carlos, 21  
 Domino's Pizza, successful failures, 17-18  
 Doran, George T., 168  
 Doyle, Patrick, 18  
 driving cultural change, 10-12

## E

earned media, measurement metrics, 117-119  
 EcoHub, 154  
 Econsultancy, 150  
 Edelman, Trust Barometer, 21  
 Eloqua, case study on brand advocacy, 198-199  
 EMC, 222  
   social business evolution, 223  
     *early days of social media*, 224-225  
     *internal community growth*, 225-226  
     *opening the corporate firewall*, 229-230  
     *organizational model and governance*, 231  
     *social footprint*, 230  
     *starting internally first*, 226-228  
 EMC|ONE, 226-228  
 employee privacy, 62  
 employees  
   activating to engage in social media, 21-23  
   social media and, 60-62  
   social media footprint, Intel, 236  
 empowering advocates, 192-193  
 Engagement Console, Radian6, 45  
 ethical bribes, 203-206, 219  
   customer journeys, 204-207  
 Europe, social media usage, 174-175  
 evaluating social media/digital agencies, 138-139  
 evolution of social business, 3, 11  
 ExactTarget, 150  
 executive councils, 72-73, 76  
 executive sponsorship, facilitating change, 20-21  
 Export.ly, 195

external social technologies, 52-53  
 Facebook, 53-54  
   network consolidation, 54-55

## F

Facebook, 53-54  
   APAC (Asia-Pacific Countries), 178  
   budgets, 162  
   consideration and preference, 114  
   social media usage, Europe, 174  
 Facebook fans, value of, 123-125  
 facilitating change through executive sponsorship, 20-21  
 failures, successful failures  
   communication, 16  
   Domino's Pizza, 17-18  
   Motrin, 18-19  
   Qantas Airlines, 16-17  
 Fauschette, Michael, 95  
 Feller, Kelly, 68, 141  
 finding advocates, customer advocacy programs, 195  
 firewalls, opening (EMC), 229-230  
 Ford Motor Company, 82  
   integrating social media, 180  
 Forrester's free social technographics tool, 173  
 Forrester's Social Technographic Profile Ladder of Participation, 172  
 foundation, social business, xviii  
   adaptive, xix  
   connected, xix  
   engaged, xix  
 Frequent Words Analysis module, Lithium, 46  
 future customers, social CRM, 101

## G

Gartner, Inc., 40  
 Gatorade Mission Control Center, 57, 210  
 global considerations of social media,  
   APAC (Asia-Pacific Countries), 177-179  
   Europe, 174-175  
   Latin America, 176-177  
   Twitter, 173-174

global continuity, establishing, 35  
 The Global Social Media Marketing Group, 19  
 GlobalWebIndex, 174-175  
 goals, mission statements, 168-169  
 Google, 53-55  
   increasing searches through relevant content, 215  
   listening, 57  
 Google Alerts, 58  
 Google Blog Search and Twitter Search, 57  
 Google Buzz, 55  
 Google Keyword tool, 216  
 Google Wave, 55  
 governance, 60  
   EMC, 231  
   noncompetitive collaboration, 71-72  
   social media policies, 62-65, 73-76  
     *moderation guidelines*, 66-68  
     *transparency and disclosure*, 66  
   training and organizational intelligence, 68-70  
 Greenberg, Paul, 95  
 growth, tearing down organizational silos, 13-15

## H

Hearsay Social, 50-51  
 hiring social media practitioners, 79-81  
 “How Corporations Should Prioritize Social Business Budgets,” 156  
 How Engaged Is Your Brand? 2011, 151  
 Hsieh, Tony, 86  
 human capital, 11  
 humanity, 23  
 hybrid profiles, 82

## I

IBM, 41  
 identifying advocates, 192-193, 197  
 Ignite Social Media, 143  
 implementing social business, 34-36

influencers, 186  
   versus advocates, 187-188  
   measuring reach of, 190  
 innovation, 53  
   soliciting with social media, 87-89  
 integrating  
   customer support in social media, 83-84  
     *Best Buy*, 85-86  
     *Comcast*, 85  
     *Zappos*, 86-87  
   social media with owned and paid media, 179-181  
 Intel, 141, 223  
   Ajay Bhatt t-shirts, 89  
   Conflict Minerals Trade Act, 67  
   Digital IQ, 69  
   SharePoint, 41  
   SMPs (social media practitioners), 234  
   social business evolution, 231-232  
     *early days of social media*, 232-234  
   Social Media Center of Excellence (SM COE), 234-236  
     *social media footprint*, 236  
     *social media ownership*, 237  
   social media Integration forum, 72  
   social media policies, moderation, 67  
   standard organizational models, 33

Intel Architecture Labs, 232  
 Intel Social Media Guidelines, 65, 74  
 Intel Social Media Policy, 64  
 intelligence, 69-70  
 internal technology suites, 132-133  
 investment in social media, 150-152  
 IT, social CRM, 102

## J

Japan, social media usage, 179  
 Jive, 39-40  
 Jive SBS, 39  
 Johnson & Johnson, Motrin, 18-19

## K

key performance indicators (KPIs), 166  
 Klout, 121-122  
 Knox, Steve, 188  
 KPIs (key performance indicators), 166



## L

Laozi, 59

Latin America, social media usage, 176-177

Li, Charlene, 89, 156

listening, 57-58  
     relevant content, 210-211  
     to social media/digital agencies, 137

Lithium Technologies, 46

Lotus Connections, 41

Lotus Quickr, 41

Lotus Sametime, 41

## M

Magic Quadrant for Social Software in the Workplace, 40

maintenance considerations, choosing technology partners, 135

Managing Your Facebook Community, 52

Marine Corps Recruit Depot, 68

marketing and public relations departments, social CRM, 102

Marketing Budgets 2010, Effectiveness, Measurement and Allocation Report, 150

marketing campaigns, 203

marketing investment in social media, 150-152

measurement metrics, 110  
     advocacy, 115-116  
     awareness, 112-114  
     community health, 119-120  
     consideration and preference, 114-115  
     conversational sentiment, 120-121  
     earned media, 117-119  
     Facebook fans, 123-125  
     owned media, 117-119  
     paid media, 117-119  
     purchase, 115  
     purchase funnel metrics, 112  
     ROI (return on investment), 111-112  
     social channels, 121-122

measurements, 109  
     challenges of, 125

measuring reach of influencers and advocates, 190

Meltwater Buzz, 47-48

Meltwater Drive, 47

Meltwater Group, 150  
     Meltwater Buzz, 47-48

Meltwater Press, 47

Meltwater Reach, 47

Microsoft SharePoint, 41

mission of social media, 167-168  
     goals and objectives, 168-169  
     social strategy, 169  
     tactical plans, 169-170

mission statements, 167

missions, 166

moderation guidelines, social media policies, 66-68

Momentous XT webcast, 44

moms, purchasing decisions, 171

Monty, Scott, 82

Morgan, Jacob, 96

Motrin, successful failures, 18-19

MyStarbucksIdea, 88

Mzinga and Babson Executive Education, 111

## N

National Football League, 69

Naver, 179

NDA (nondisclosure agreements), 63, 196

Neiger, Petra, 141

Net Promoter Score (NPS), Eloqua case study on brand advocacy, 198-199

Net Promoter Score management tool, 197

NetApp, Jive, 40

network consolidation, 54-55

Nielsen, 174  
     Facebook, 53

Nimble, 106-107

noncompetitive collaboration, 71-72

nondisclosure agreements (NDAs), 63, 196

## O

“Obama for America,” 186  
 Obama, President Barack, 185-186  
   relevant content, 212  
 objectives of social media, 168-169  
 Ogilvy, 142  
 omnipresent, 206  
 ONE (Online Network of EMCers), 226  
 Open Graph platform, 54  
 organic searches, increasing through  
   relevant content, 215-216  
 organizational intelligence, 68-70  
 organizational model, EMC, 231  
 organizational readiness, customer  
   advocacy programs, 193-194  
 organizational silos, tearing down, 13-15  
 organizations, decentralized, 31  
 owned media  
   integrating with social media, 179-181  
   measurement metrics, 117-119  
 ownership of social media, 34  
 Owyang, Jeremiah, 34, 156

## P

paid media  
   integrating with social media, 179-181  
   measurement metrics, 117-119  
 Parr, Ben, 111  
 passive customers, social CRM, 100  
 Payne, Ashley, 61  
 personal profiles versus corporate profiles,  
   81-83  
 Photoshop Elements, 198  
 Pivotal Social CRM 6.0, 104-105  
 “plan of record,” 166  
 Policytool.net, 74  
 Post Cereals, audience segmentation, 170  
 post-moderation, 67  
 Poveromo, Maria, 140  
 pre-moderation, 67  
 prioritizing social media budgets, 156-159  
 proactive content, 217

processes, 11  
 product feedback, soliciting through  
   social media, 87  
     *Dell IdeaStorm*, 88  
     *Intel*, 89  
     *MyStarbucksIdea*, 88  
 profiles  
   corporate versus personal, 81-83  
   hybrid, 82  
 publishing tools, 39, 51-52  
 pull approach, cultural change, 11  
 purchase, measurement metrics, 115  
 purchase funnel metrics, 112  
 purchase funnels, advocates, 191-192  
 purchasing decisions, moms, 171  
 push model, cultural change, 10

## Q

Quantas Airlines, successful failures,  
 16-17

## R

Radian6, 44-45  
 reactive content, 218  
 real-time analytics, 51-52  
 reciprocal altruism, 188  
 relevancy, measurement metrics, 120  
 relevant content, 207-208  
   adding value to conversations, 208-210  
   authentic and believable, 212-213  
   building trust with communities,  
     213-214  
   increasing organic search results,  
     215-216  
   increasing reach of branded messages,  
     214-215  
   listening, 210-211  
   positioning the brand as a trusted  
     advisor, 211  
 request for information (RFI), 138  
 request for proposal (RFP), 138  
 researching social media/digital agencies,  
   136-137  
 response processes, social CRM, 96-98  
 responsibilities, social CRM, 102-103

RFI (request for information), 138  
 RFP (request for proposal), 138  
 Riley, Connor, 61  
 Robert Half (IT staffing firm), 62  
 ROI (return on investment), 111-112  
 roles, social CRM, 102-103  
 RowFeeder, 195  
 rules of engagement, 65

## S

sales team, social CRM, 102  
 SAP Community Network (SCN),  
 153-156  
 SAP EcoHub, 154  
 Schwartzman, Eric, 75  
 SCN (SAP Community Network),  
 153-156  
 ScoutLabs, 46  
 Seagate Technology, WebEx Event  
 Center, 43  
 search results, increasing through relevant  
 content, 215-216  
 share of voice, measurement metrics,  
 120-121  
 SharePoint, 41  
 silos, 14  
 Yahoo!, 13  
 SMART framework, 168-169  
 SMPs (social media practitioners), 234  
 social business, 10  
 driving cultural change, 10-12  
 evolution of, 11  
 implementing, 34-36  
 social business evolution  
 EMC, 223  
*early days of social media*, 224-225  
*internal community growth*,  
 225-226  
*opening the corporate firewall*,  
 229-230  
*organizational model and gover-*  
*nance*, 231  
*social footprint*, 230  
*starting internally first*, 226-228

Intel, 231-232  
*early days of social media*, 232-234  
 social channels, measuring influence of,  
 121-122  
 social CRM (customer relationship  
 management), 93-95  
 applications of  
*collaborative customers*, 100  
*customer advocates*, 101  
*future customers*, 101  
*passive customers*, 100  
*used-to-be customers*, 100  
*venting customers*, 99  
 definitions of, 95-96  
 response process and workflow, 96-98  
 roles and responsibilities, 102-103  
 vendors, 103  
*Nimble*, 106-107  
*Pivotal Social CRM 6.0*, 104-105  
*SugarCRM*, 103-104  
 social customers, 9, 78  
 social listening software, 44  
 Lithium Technologies, 46  
 Meltwater Buzz, 47-48  
 Radian6, 44-45  
 social media  
 activating employees to engage in,  
 21-23  
*community management*, 24-26  
 employees and, 60-62  
 integrating customer support, 83-84  
*Best Buy*, 85-86  
*Comcast*, 85  
*Zappos*, 86-87  
 integrating with owned and paid  
 media, 179-181  
 owner of, 34  
 soliciting product feedback and  
 innovation, 87  
*Dell IdeaStorm*, 88  
*Intel*, 89  
*MyStarbucksIdea*, 88  
 Social Media Business Council, 71  
 Social Media Center of Excellence (COE),  
 32-33  
 Social Media Center of Excellence (Intel),  
 234-236  
 social media footprint, 236  
 social media ownership, 237

- Social Media Club (EMC), 228
  - social media executive councils, 72-73, 76
  - social media experts, 79
  - Social Media Listening Command Center, Dell, 210
  - social media ownership, Intel, 237
  - social media policies, 62-65, 73-76
    - moderation guidelines, 66-68
    - transparency and disclosure, 66
  - social media practitioners, 78-79
    - corporate profiles versus personal profiles, 81-83
    - hiring, 79-81
  - social media practitioners (SMPs), 234
  - Social Media Roundtable, 19
  - social media strategic plans, 165-166
    - audience segmentation, 170-173
    - mission of social media, 167-168
      - goals and objectives*, 168-169
      - strategy*, 169
      - tactical plans*, 169-170
  - social media tactical plans, mission statements, 169-170
  - social media usage
    - APAC (Asia-Pacific Countries), 177-179
    - Europe, 174-175
    - Japan, 179
    - Latin America, 176-177
    - South Korea, 179
  - social media/digital agencies
    - agency point of view, 142-144
    - choosing, 135-136
      - evaluating*, 138-139
      - listening to*, 137
      - researching*, 136-137
      - RFP (request for proposal)*, 138
    - company point of view, 139-142
  - Social Mention, 58
  - social relationship management
    - applications, 48
    - Awareness, 49
    - Hearsay Social, 50-51
    - real-time analytics and publishing, 51-52
    - Sprinklr, 49
    - Syncapse Platform, 49
  - social strategy, mission statements, 169
  - social technologies, 38, 56-57
  - Solis, Brian, xvii, 205
  - Sony, transparency and disclosure, 66
  - South Korea, social media usage, 179
  - Souza, Dawnmarie, 60
  - Sprinklr, 49
  - SSO (single sign-on), 133
  - St. Elmo Lewis, E., 112
  - standard organizational models, 29-33
  - Starbucks, 88
  - strategic plans for social media, 165-166
    - audience segmentation, 170-173
    - missions, 167-168
      - goals and objectives*, 168-169
      - social strategy*, 169
      - tactical plans*, 169-170
  - strategic thinking, 130
  - “stream,” 205
  - Strout, Aaron, 143
  - studies
    - 2008 Cone Business in Social Media Study, 23
    - 2009 Consumer New Media Study, 23
    - Deep Brand Engagement Correlates with Financial Performance*, 26, 89
    - Managing Your Facebook Community, Findings on Conversation Volume by, 52
  - successful failures, communication, 16
    - Domino's Pizza, 17-18
    - Motrin, 18-19
    - Qantas Airlines, 16-17
  - Sugar Feeds, 104
  - SugarCRM, 103-104
  - Sun Microsystems, social media policies, 65
  - support models, 134
  - Surowiecki, James, 91
  - Syncapse Platform, 49
  - Sysomos, 214
- ## T
- Tamas, Muller, 61
  - team charters, 167
  - tearing down organizational silos, 13-15

Technographics Profile, 173  
 technology, 12  
 technology feature sets, 133-134  
 technology partners, choosing, 130-131  
   maintenance considerations, 135  
   support models, 134  
   technology feature sets, 133-134  
   training, 134  
   understanding internal technology  
   suites, 132-133  
   understanding organization, culture  
   and leadership, 131  
 technology suites, internal, 132-133  
 Tibbr, 42  
 TIBCO, Tibbr 42  
 Tobin, Jim, 143  
 training, 68-70  
 transparency, social media policies, 66  
 true reach, 122  
 trust, building with communities through  
 relevant content, 213-214  
 Trust Barometer, 206  
   Edelman, 21  
 trusted advisors, positioning brand as, 211  
 Twelpforce (Best Buy), 86  
 Twitalyzer, 121-122  
 Twitter, 175  
   awareness, 113  
   consideration and preference, 114  
   Dell, 66  
   Eloqua case study on brand  
   advocacy, 199  
   global considerations, 173-174  
   profiles, 81  
 Twitter Sentiment, 58

## U

---

uptime, 135  
 used-to-be customers, social CRM, 100

## V

---

vendors  
   choosing, Cisco case study, 144-146  
   social CRM, 103  
     *Nimble*, 106-107  
     *Pivotal Social CRM 6.0*, 104-105  
     *SugarCRM*, 103-104  
 venting customers, social CRM, 99  
 virtue, 123  
   Managing Your Facebook Community,  
   Findings on Conversation Volume by  
   Day, 52  
 volume, organic searches, 216

## W

---

Walsh, Martin, 95  
 web analytics, consideration and  
 preference, 114  
 Web Trust, Intel, 232  
 WebEx Event Center, 43  
 WebEx Meeting Center, 43-44  
 White label solutions, 131  
 Williamson, Debra, 162  
 workflow, social CRM, 96-98

## Y

---

Yahoo!  
   Bartz, Carol, 54  
   silos, 13  
 Yammer, 42-43  
 Yolton, Mark, 153  
 YouTube  
   consideration and preference, 114  
   Domino's Pizza, 17-18  
   "Motrin Moms," 19

## Z

---

Zappos, integrating customer support into  
 social media, 86-87  
 Zuberance, 116  
   advocates, 192-193  
   choosing advocate programs, 197  
 Zuckerberg, Mark, 53, 162