next

journey to customer-first

Do you have
what it takes?

This book is for people who want to use customer engagement at scale to reach the next level of performance and value creation. Two principles apply:
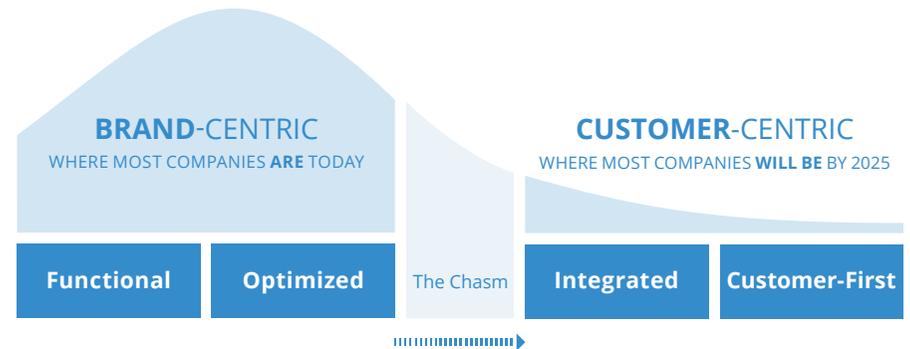
Human-first is a way of doing business, an approach to engaging with people as human beings who have their own needs and desires. Building meaningful connections requires more than great technology and smart employees. It requires intuition, understanding, and empathy.

Enterprise engagement calls for mobilizing your entire organization to create, measure, predict, and optimize the experiences of every customer. Wherever, whenever.

So far, so good.
Now what?

getting there

Maturity doesn't come easily, no matter what the arena. Teenagers know it. Parents know it. Even great athletes like Michael Jordan and Serena Williams started as novices, growing to achieve best-ever status only after connecting with great coaches and playbooks for winning. Your brand's ability to deliver great customer experiences as a priority over everything else is a journey that will likely have a similar arc.

Brand leaders understand that enterprise social engagement is a capability they have to develop to become a customer-first company. Most brands are not there yet. They need a framework to help assess where they are today and identify what steps to take next. That's what this book is about.

BRAND-CENTRIC
WHERE MOST COMPANIES **ARE** TODAY

CUSTOMER-CENTRIC
WHERE MOST COMPANIES **WILL BE** BY 2025

| Functional | Optimized | The Chasm | Integrated | Customer-First |

the functional stage

Functional means you are in the game – focused on basic monitoring and responding on social channels. You don't have an engagement strategy, however, and you may be struggling to build one. The result? Random, ad hoc acts of social pop up all over the place leaving you scrambling to control rogue people and processes. Customers can see that you're starting to meet them where they are, but your performance is spotty and inconsistent.

Ah-ha moments

- *We're putting customers at risk because we can't move fast enough.*
- *Competitors are eating our lunch in social media.*
- *Someone needs to own all this stuff.*
- *We need a plan – and real leadership.*
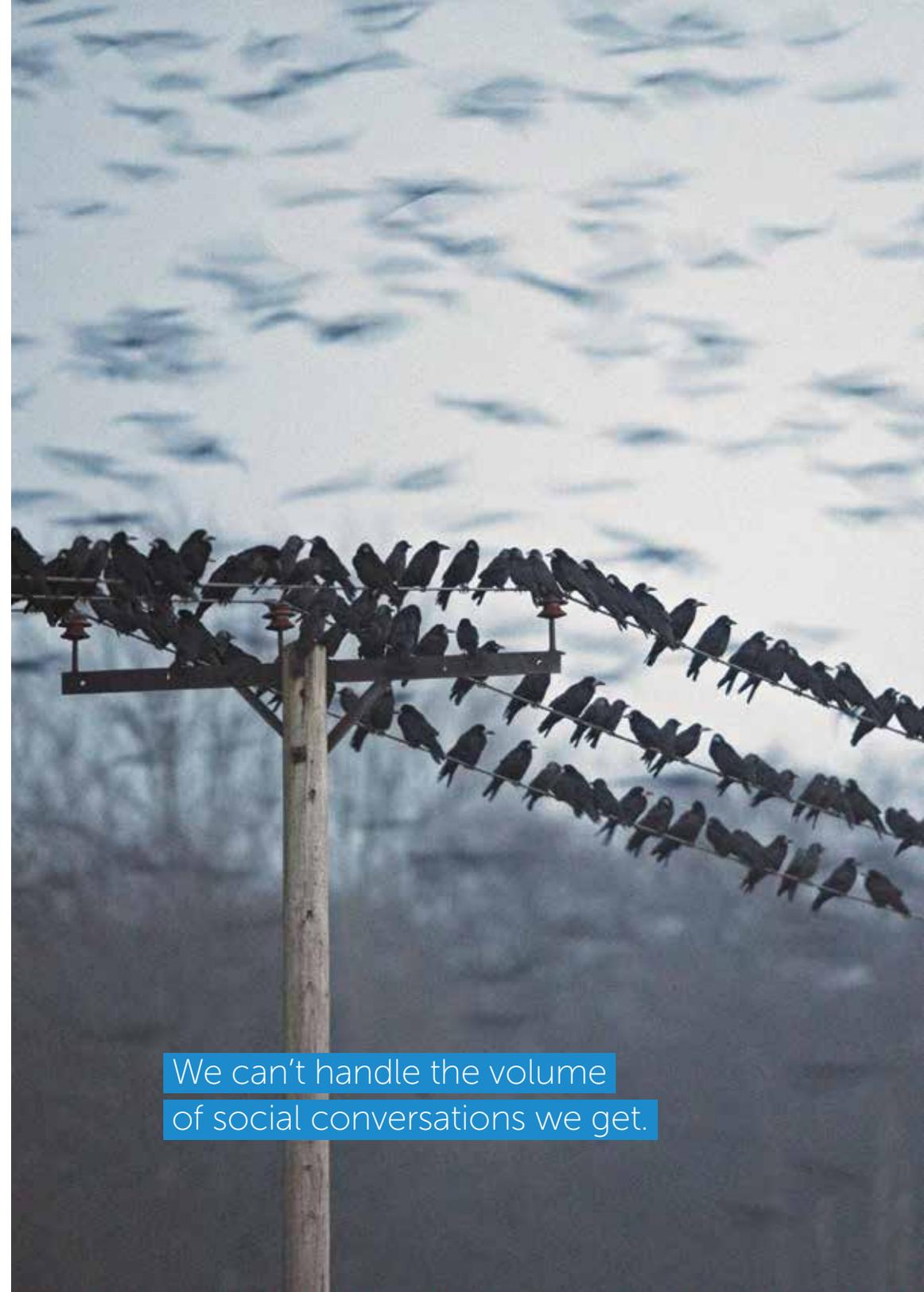
We can't handle the volume of social conversations we get.

the optimized stage

Optimized means engagement has become a managed competency across select teams. In this stage, many companies have established social centers of excellence to coordinate the basics – PR, marketing, and customer care are typically first-movers. Social policies and procedures have been documented and distributed. Reporting on social activity and performance informs functional teams on a regular basis. Channel-specific engagement programs enable customers to interact with brands in social channels of their choice.

Ah-ha moments

- *Governance of social activity has been established.*

- *Change agent(s) have emerged in key functional teams.*

- *Executives are beginning to pay attention to social activity.*

- *Technology systems are starting to make social management more organized and efficient.*

You're organized.
Well done.

crossing the chasm

You've made progress. You're Optimized. You've built the mechanics of enterprise social engagement, which means you're capable, organized, and operational across many important teams. Customers are responding, but they're only beginning to believe you're really there to serve them.

The next two stages are radically different from Functional and Optimized. The game is faster. Executives move from skeptics to converts. Strategies trump tactics. Cross-functional alignment and planning becomes a requirement for every customer-facing team. Individual groups and divisions unite into cohesive teams. The whole company is re-focused to serve customers.

Getting to customer-first requires crossing a huge chasm of philosophical, operational, and technical capabilities. You can't do that without four must-have elements.

must-have elements for crossing the chasm

1. Change agents

Social change agents can be either a single person or a small group who understand social media. Self-taught, they've learned by trial and error to leverage social tools, technologies, and protocols to avoid the disruption and risk typically associated with social media and instead create positive consumer sentiment and long-lasting business value.

They are a unique breed – part social media practitioner, part technologist, part visionary, part entrepreneur, part evangelist, part coach, and part mentor.

As young digital natives, many change agents began their social journeys more than a decade ago on MySpace, Friendster, Tumblr, or blogs. Today, many are envied for their passion and smarts. They've carried the torch for social and used it to rally the organization around serving customers. To these mobilizers, social is not a game or fad. It's a way of doing business. The only way.

2. Executive sponsorship

As your organization moves through the early stages of the journey, change agents are the ones who make it happen. To cross the chasm, however, they need help.

To evangelize the customer-first vision to every customer-facing employee, you need the power of an executive mandate. It's this step – ***public acknowledgement of and commitment to enterprise social engagement from senior leaders*** – that empowers change agents to bring the uninitiated on board.

Executive sponsorship accelerates program activation and decision making (such as purchasing a system of engagement) that have been mired in bureaucracy. And, an executive mandate assures everyone in the organization that its commitment to serving customers is a company-wide, long-term, non-trivial, and non-negotiable investment.

3. Systems of engagement

Change agents are enamored with social technologies. They're proudly attracted to shiny objects and experiment with them all the time. Many can code in Python and recognize the shortcomings of a new tool's poorly written API connector. They understand data model architecture. The bits and bytes of social – starting with technology – is the air they breathe.

You can be sure they'll recognize that moment when your organization's growing portfolio of disconnected point solutions has become a barrier to cross-functional collaboration. That's when they'll become evangelists for moving from individual, independent systems of record to a single, unified system of engagement.

A system of engagement is a software platform that captures all customer data from social channels and integrates it with existing CRM, CMS, call center, and other legacy systems of record. A system of engagement becomes the operating system for all front-office, customer-facing functions, enabling data-driven, real-time interaction between employees and customers across any digital channel or touchpoint.

4. Unified teams and workflow

Rallying to serve customers takes a village. In response to a single social media post, multiple people and teams might be called immediately to action. Marketing has to fulfill a direct-response miscue. Customer care has to enlist warranty to settle a quality problem. Corporate communications senses the problem may go viral and alerts executives. Manufacturing initiates a re-design.

Systems of engagement help all front office functions operate off the same data-driven blueprint, transforming siloed business units into collaborative partnerships.

In the best customer experiences – think Amazon Prime or Uber – removing friction pays massive dividends. The same can be true for your enterprise. The degree to which you remove workflow friction between teams – such as giving customer-facing teams real-time visibility to customer insights – determines the speed and effectiveness with which people can work together to bridge silos.

the integrated stage

Siloed business units, functions, regions, and divisions are the bane of the global enterprise. Which means integrating your new System of Engagement with legacy systems of record is a must-do on the journey to Customer-First. When technologies work together well, people work together well. And more often.

Systems that work together make everyone a lot smarter about understanding who customers are and what they want. So regardless of whether Sam @mentions your care team, responds to an offer from her Yahoo! account, posts a Yelp review, or shares your new product GIF from Instagram, everyone in your organization will recognize Sam.

Executive sponsorship also emerges in this stage, with senior leaders taking a serious view of engagement performance. Everyone's tracking social's impact on revenue growth, cost reduction, and risk management. No longer is the organization interested only in ensuring that customer care becomes socially enabled. Now their bonus is on the line if it doesn't.

Ah-ha moments

- *Change agents collaborate with IT and executives to integrate systems of engagement with legacy systems of record.*

- *Executives engage consistently to drive business value faster.*

- *Teams not active in social request on-boarding and training.*

- *You're achieving performance goals, but brand health still lags.*

Silos are not going away.
You have to be able to bridge them.

the customer–first stage

The sun is shining on all your metrics. Churn is down, stock price is up. NPS is through the roof. Glassdoor ranks you a #1 place to work. But the numbers don't tell the whole story.

You know you've arrived at the Customer-First stage because Chloe, who once derided your brand on Yelp, is now a promoter. That happened because your customer care team worked with marketing and customer experience to surprise and delight her. Information about Chloe's interactions was fed into every customer-facing system. People, no matter where they sit, can see that information, understand what others are doing, and connect the interactions into a seamless web of Chloe-ness. The result? Chloe feels recognized, known, and preferred.

Executives rally the organization top-down through a new, social-led vision – and from the bottom up with a fun, easy-to-use system of engagement.

Ah-ha moments

- *Executives mandate that serving customers matters more than anything else.*
- *Social data enriches and enables a 360-degree view of every interaction.*
- *Every customer-facing employee is using social customer insights.*
- *The company is able to communicate a single brand voice to customers.*

You've made it.
Even though there's no finish line.

where are you?

Where are you on the journey to Customer-First? What do you need to do next? Here's a snapshot of our Maturity Model. Play with it. Show it to coworkers. Re-write some of the descriptors if they don't fit perfectly with your company. Move them around. But whatever you do, take action. Getting to Customer-First is a big lift, and it isn't going to get easier.

	Functional	Optimized	The Chasm	Integrated	Customer-First
Role for social	☐ Get in the game	☐ Build operational proficiency		☐ Drive business value	☐ Ensure customers matter
Social strategy	☐ There isn't one	☐ Centralize and organize		☐ Collaborate cross-functionally	☐ Serve customers
People	☐ Millennials rule	☐ Leaders lead		☐ Executives engage	☐ Customers win
Process	☐ Diving catches	☐ Centralized governance/ local control		☐ Engagement is embedded into workflow	☐ Manage every customer experience
Technology strategy	☐ There isn't one	☐ Function-specific		☐ Unify the front office	
Technology	☐ Multiple point solutions			☐ System of engagement integrated with legacy systems of record	

your journey.
your way.

This booklet maps the four stages a business may go through on its way to becoming a Customer-First organization. While there are some things every company must do – and others every company must avoid – one thing is certain: no two journeys are alike. As you plan yours, make sure you understand where you're starting from. Then you can start to envision what's required to move forward through each stage.

Like many other journeys, this one is likely to be both joyous and painful. But in a new world where people are connected and empowered, there is no choice but to align, unify, and move forward.

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