

## Six Steps to Effectively Engage with Customers and Their Communities

Here is a simple six-step process that organizations can adopt to harness the benefits of online communities and become social.

### Step 1: Identify Your Communities of Interest

Choosing which community you want to target first depends on your organization type. For example, a large insurance firm with thousands of agents, or a large retail bank with thousands of branch employees, would greatly benefit if their employees embraced social tools. Service-driven companies with much fewer employees, should focus on customer communities, while marketing organizations and companies that need brand visibility should target consumers and external communities, initially.

### Step 2: Define the Social Intent (also known as social objectives)

Unlike traditional enterprise initiatives (such as ERP or CRM), when you implement programs relating to social communities, it is important to understand that intent and objective precedes strategy.

For example, companies focusing on customer communities might have "increasing revenue" as their social intent. Similarly, businesses focusing on employee communities might have "collaboration" or "innovation" as the social intent. Most retail and consumer goods organizations that target external communities and consumers have "brand management" as the social intent.

### Step 3: Identify Social Use Cases

First, let's understand social use cases. For simplicity, let's define these as elements that help meet the identified social intent. For example, if you are a software vendor targeting the social communities of your customers and the social intent is "product enhancement," you can attain insights relating to features your customers and community are looking for and, perhaps most importantly, the kinds of bugs and usability challenges they are encountering.

In this case, a possible social use case would be product enhancement. A description of the "product enhancement" use case is engaging customers and community members in a common forum to:

- Manage the development schedule
- Discuss usability
- Look for feedback on features needed
- Look for feedback on new features introduced

Identifying a social use case is very important, as it ensures that we relate, support and keep our focus within sight of the broader social intent that this project is intended to address. You would typically start with two to three social use cases in a project. It is also important to note that while the primary social use case would address the core objective, you could end up with others addressing additional objectives, such as revenue generation.

## The Six Steps of Engagement

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Figure 1

### Step 4: Build Your Social CRM Strategy and Road Map

Having clearly defined the social use cases, you are now in a position to build your social CRM strategy and road map. The social CRM strategy defines the social organization structure, the channels in which you will engage and the hardware and software platforms you will use, as well as a risk mitigation plan and metrics to measure the effectiveness of your strategy. In many cases, it will also map your integration plan to existing back-end systems. This effectively becomes your guidebook for the entire project or program.

### Step 5: Communicate, Train Your Team and Implement the Strategy

Obviously, this is the most critical element to succeeding as a social enterprise. It is important to spark and amplify buzz as you implement your plan. To do this, you will need to aggressively communicate the benefits, create an aura of excitement around the program and, importantly, have senior executives participate in and lead these initiatives by blogging or e-mailing their importance.

### About the Author

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Do not underestimate the importance of training your team or anyone else who will be contacted or engaged during and after the social program is implemented. Identify all members who could be remotely connected with this program – including CSRs from your contact center, legal and HR – and have them trained.

Experiment with a pilot set of users. This will help streamline communications, resolve user adoption issues and provide an overall health check for your initiative before it becomes widespread.

Finally, communicate your successes, however small they may be, to keep the excitement coming.

### Step 6: Expand to Additional Social Use Cases or Communities

Once this initiative is operational, expand by adding more social use cases and/or add other community groups mentioned in Step One.

Following these six steps will ensure that you have a robust strategy to engage with your community of interest, the ability to make changes along the way and the resources to address additional experimentation that may be needed based on the results of pilot efforts.



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