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THE ROI OF SOCIAL MEDIA MANAGEMENT



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From Altimeter, a Prophet Company
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salesforce

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INTRODUCTION

The return-on-investment (ROI) for social media management tools is connected to the continued expanding practice of social media to achieve business goals (“Social Business”). Beyond the use of social media for marketing, social platforms are used to enable selling and commerce, recruit employees and then engage them internally, manage influencer relationships, augment live events, be a source of business intelligence, and of course support customers.

As use cases widen, social media management tools must keep pace and support smooth hand-offs among disparate teams who need the right data at the right time to support the near real-time decisions that must be made in social media.

While our research has shown a strong overall ROI for social media investment (77%), we expect investment results to broaden and reflect this increasing use of social business.

The purpose of this paper is to examine the benefits, challenges, and features of social media management tools that support positive ROI.

This research is the result of interviews with social media managers and industry thought leaders and a survey of social media managers.

THE SOCIAL TEAM FEELS POSITIVE ABOUT THEIR SOCIAL SPEND ROI

Q: “We have a strong business case for social media investment.”



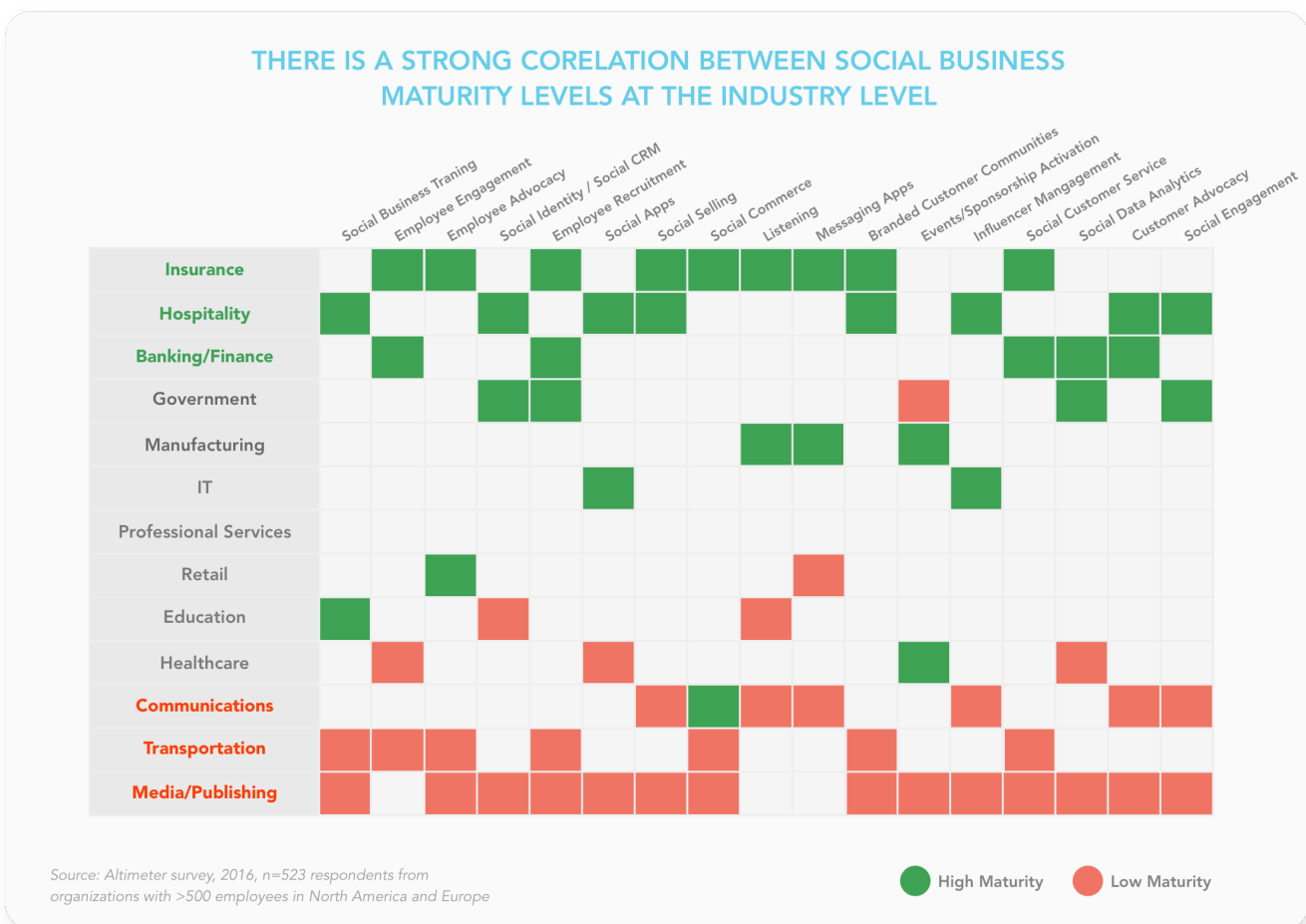
Source: Altimeter survey, 2016, n=523 respondents from organizations with >500 employees in North America and Europe

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SOCIAL MEDIA ROI & BUSINESS PERFORMANCE

To understand social media ROI, we sought to discover the relationship between social business maturity and key business metrics like Net Promotor Score (NPS) and net margin. Social business maturity represents the range of experience in various social media programs from early pilots to full enterprise-wide deployments.

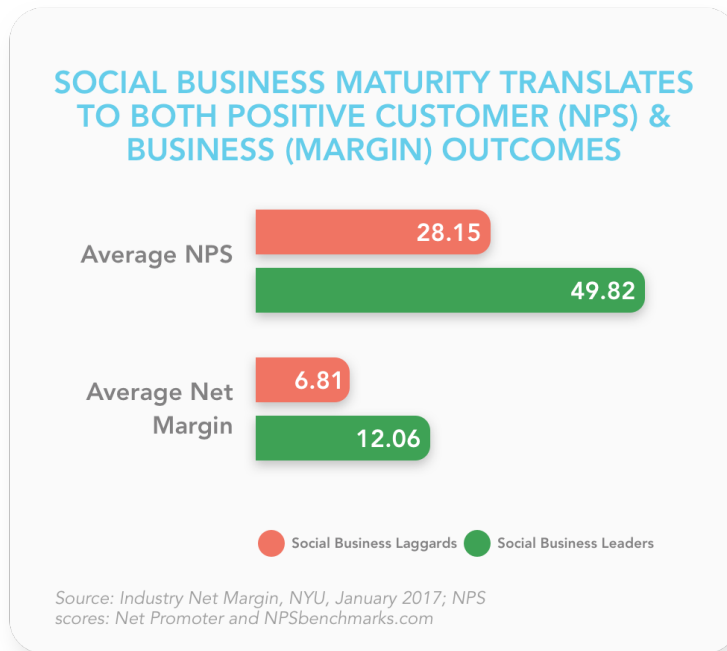
We analyzed data from our most recent Altimeter State of Social Business report, comparing the maturity of 17 social business programs by industry. The range of maturity for each program varies from early planning and pilots to the most mature programs that scale enterprise-wide. For each program, such as social customer service and listening, we identified the most and least mature industries. A strong pattern emerged:



The green boxes show which industries scored highest in maturity for each social business program, the red least mature. For example, looking at the top row, insurance’s high maturity scores show leadership in most programs, from Employee Engagement to Social Customer Service. In contrast, media/publishing businesses lack maturity for most programs, as shown by the red boxes in the last row.

This pattern shows that some industries have been more successful than others at building the culture, tools infrastructure, strategy and governance needed to succeed in social business.

We next wanted to understand how social business maturity correlates to business results, as measured by Net Margin, and customer satisfaction as measured by Net Promoter Score (NPS). This analysis led to an exciting insight: **the most mature social businesses are both more profitable and have more loyal customers compared to social business laggards** (see figure below).



While these insights show strong business results for those that invest in social business, there remains the question of what is driving social business maturity.

We did not find that higher budgets correlated with maturity. In fact, looking at the Insurance industry—which reported the highest levels of maturity—budgets were 7.65% lower than the average across industries. The variable that’s difficult to account for is time. It takes time to become a mature social business, so it may be that these industries were early adopters, whose head start is now translating to higher margins and customer satisfaction.

Our research found that social business maturity is much higher (2X) among businesses that use Integrated Suites than users of Point Solutions for social media management. It’s likely that as social media programs mature, businesses are seeking integrated suites to accommodate the spread of social to more and more teams and use cases in their organization. Salesforce’s Social Studio is an example of an integrated suite that—when used with related Salesforce tools, such as CRM—enable its users to work within a tightly integrated system. This approach ensures efficient hand-offs between sales and service and enables easy reporting.

SOCIAL MEDIA'S PRIMARY BUSINESS OBJECTIVE: CUSTOMER EXPERIENCE

SOCIAL MEDIA STRATEGY OBJECTIVES

Question: In 2016 what are your top five external social strategy objectives?



Source: Altimeter survey, 2016, Base: respondents from organizations with >500 employees in North America (n=321) and Europe (n=202)

Over the years, Altimeter has surveyed social media managers to understand their social business objectives. In our most recent research, we measured an important shift from traditional brand health-oriented objectives to a focus on customer experience objectives. We found Customer Service and Relationship Building tied as top objectives for the first time.

Since businesses have supported customers on social platforms for more than a decade, it surprised some that customer service would rise to the top objective, surpassing emerging, innovative practices such as messaging apps and employee advocacy.

This is evidence of the industry's overall shift to customer experience as a differentiating factor to drive loyalty and advocacy. Consumers trust "people like them" more than any competing source of information, such as advertising, company employees or CEOs. It makes sense for businesses to find paths to drive customer advocacy given both these trust factors and the overall trend of social platforms like Facebook toward "pay to play" advertising to reach consumers. One of the best paths to influence consumers is through the advocacy of fellow consumers, and providing great experience in social is the starting point.

FIVE KEY SOCIAL CUSTOMER SERVICE BENEFITS

A focus on customer experience and service in social media enables a wide range of business returns, from risk management to enabling new opportunities:



1

Crisis Management

Businesses today build out detailed crisis management plans, whether they be focused on recovering from a natural disaster or a PR incident. Brands that take the mitigation of crises seriously will tell you it's all in the preparation: having the right lines of communication open; having leaders available to make decisions; and planning advance statements and approaches for the most probable incidents.

The same preparedness is crucial in social, but—unlike other channels—the preparation for a crisis occurs through everyday goodwill building among consumers. Businesses need to build a ready audience of advocates by regular exposure to brand values consumers can relate to through their routine posts and responses in social media.

A good example of this is Maersk Line, a shipping business few would think needs social media to succeed. A crisis hit in 2012 when one of their ships hit a whale in the waters outside Rotterdam. Maersk posted a transparent, heartfelt report of the incident on Facebook. While another brand may have been bombarded by consumers angry about the incident, Maersk had engaged regularly with their community in social media long before, and so had an audience open to their side of the story. In addition to not turning into a major social media crisis, a clear majority of comments on their post reflect positive sentiment, including this one praising Maersk's transparency, "After reading this post, I am amazed at Maersk Line's honesty and wish more Corporate's [sic] follow such practices."

2

Early Warning System

Due to the ubiquity of social media use, even high-profile news events are often reported on platforms like Twitter before emergency services or news media can respond. Listening and analyzing data in near real-time, social media listening tools give businesses the ability to quickly spot issues that could, if not addressed quickly, turn into a crisis that could harm brand reputation or cause other damage. Brands can find issues and measure their velocity by tracking volume and sentiment of conversations in real-time, and perhaps avoid a crisis through timely response.

3

Education & Brand Building

Customer Service is increasingly proactive through educational content. Educated customers will choose the product right for them, make best use of the product, make more informed advocates, and help prevent costly service calls. Due to the high visibility of service interactions on social, successful brands realize their content must be skillfully crafted to both drive awareness of prospects, as well as be proactive with current customers to avoid issues that could escalate to a costly complaint. An important part of brand building here is for the business to demonstrate that they “get” social media, supporting customers in the channels of their choice. Without this engagement, brands face the perception—especially by younger generations of consumers active in social media—that the brand isn’t relevant to them.

4

Advocacy

Well supported, educated customers lay the ground work for advocacy through loyalty building. According to American Express, customers who have used social platforms for customer service “...tell significantly more people about their service experiences, and say they’d spend 21% more with companies who deliver great service – compared to 13% on average.” While we tend to think of customers as using social media to vent frustration, slightly more say the primary reason they use social media for customer service is to “praise a company for a great service experience.” The flip side of using listening as an “early warning system” is to find instances where positive brand experiences are being shared, and then leveraging social—and other platforms—to amplify those customer experiences by “liking”, sharing or even incorporating consumer content into advertising.

5

Business Intelligence

As product development cycles decrease to meet the demands of quickly evolving, competitive markets, social listening tools provide a vital asset to the innovation objectives of brands who battle to maintain relevance. While insights mined from social data may not always paint a complete picture, when combined with other data sources it can validate trends as a catalyst for innovation. In addition to innovation, businesses today use

social insights to create more effective content (across all channels), analyze competitors, and make operational improvements that both create better customer experience and save money.

Effective social media management tools support ROI, in part, by supporting crisis management, acting as an early warning system, educating customers, supporting branding initiatives, driving advocacy and business intelligence.

SOCIAL MEDIA MANAGEMENT TOOL CHALLENGES

Context: Suites vs. Point Solutions

Among the first decisions that social media managers must make is whether to: configure a social media enablement tools stack using an end-to-end integrated suite as a backbone; integrate separate point solutions that each support limited use cases; or, pursue a combination of the two. Social media thought leader Neal Schaffer told us of the journey many social media managers take, and the tradeoff between suites and point solutions. "Most companies begin with a silo'd approach [point solutions]. The danger of that is lack of CRM integration, making it hard to fully understand the customer. But suites have to keep up with innovations in best-in-breed."

The spread of social business to more teams demands seamless integration between the social management tools stack and enterprise systems, such as CRM, which together create a complete picture of the customer across marketing, sales and service.

Suite solutions on the market like Salesforce's Social Studio provide an end-to-end set of tools that enable marketing, sales, communications, and service within of a consistent user interface and tight data integration. Social media managers are increasingly under pressure to get the practice of social media out of a silo, and instead be managed as part of enterprise-wide systems that efficiently support seamless customer engagement (among other use cases) across channels.

The lines are blurring between social media and related tools that support sales/leads management, marketing automation, digital advertising and of course customer support and management systems (CRM). Social media enablement tools must be selected within this broader enterprise context as the walls continue to fall between teams that have traditionally operated in silos. Advanced businesses now pursue an integrated, cross-channel approach to customer experience.

When architecting a social media enablement tools stack, the following factors are important to consider.

1

Prevent Organizational Silos

The spread of social business across the enterprise has significantly widened the scope of who uses social media management tools and so broadened the use cases that must be supported.

Unfortunately, this spread has caused significant fragmentation of tools and practices across the organization. As new use cases emerge, such as employee advocacy or social selling today, narrow point solution tools that solve a single use case have appeared, creating silos of content and metrics which make hand-offs between teams inefficient. Adding to this complexity is the “omni-channel” nature of customer experience today, which recognizes that consumer journeys must be orchestrated among many digital and non-digital channels for effective results.

Many social media managers we interviewed spoke of the challenge of internal organizational silos that make the goal of serving a common customer holistically a challenge. As one social media manager told us, “Even when a single tool is available, it is just the start of an internal journey to get customer experience to work across channels. Data ties all of it together.”

The IT team can play a role by “guarding the gates”—that is, preventing the unnecessary spread of similar or even identical tools. Better yet, for many larger enterprises, a cross-functional Social Business “Community of Excellence” team is created to seek agreement on tool requirements and to share cost. Critical here is to include key stakeholders like sales and service teams, who hold the most data about customers. Connecting those internal customer profiles to external social network profiles give service and sales agents supporting customers the most context possible to successfully resolve issues or take advantage of opportunities, such as identifying sales prospects.

To prevent organizational silos, include teams that represent the breadth of social business use cases in your tool evaluation process.

2

Ensure Operational Efficiency

The social team is stressed by two forces which impede efficient operations: on the one hand, more departments are using social to address new business use cases; and on the other, the pace of innovation on social platforms (like Facebook) makes it difficult to keep up with new content types, new formats (like live video), and an ever-expanding array of consumer engagement scenarios, such as chat bots and augmented reality.

To ensure that the social team can empower emerging teams and their use-cases efficiently, use of tools must be supported by best-practice playbooks, training and tech support.

Another key operational efficiency component to consider is the number of tool vendors that must be managed ongoing. By limiting the number of tools in your stack, you minimize the number of contracts, coordination among vendor support teams, maintaining data

integrations and software license negotiations over time.

From an industry perspective, many of these new, narrowly-focused point solution tool makers have yet to make a profit and so survive on early stage capital investments. As that funding runs dry, tool vendors have under the best circumstances resulted to mergers and acquisitions to survive, and in the worst conditions, gone out of business. I've worked with large global brands that have had to completely replace their social tools due to a tool vendor's insolvency.

To ensure operational efficiency, create a journey map of who will use social media management tools, the use cases they support and the data needed between handoffs. Be efficient by selecting as few tools as possible to do the job.

3

Plan Enterprise System Integration

As the practice of social business spreads, it impacts more enterprise systems that store core operational data, such as customer records. The brands we spoke to listed high on their list the importance of an open platform that supports either custom application interfaces, or vendor-supplied integrations to ensure user access to this enterprise data.

A significant cost social media managers pointed out is the portability of data among tools. In our research, getting accurate, consistent metrics was the leading challenge of point solution users (65% vs. 48% among integrated suite users).

Lack of common standards for key social media metrics like "engagement" impedes the ability of data analysts to both discover meaningful strategic trends as well as make sense of more immediate operational data, such as case resolution and customer sentiment. While for some, spreadsheets and scripts are used to exchange data among tools, larger enterprises have been known to build costly "data lakes" or data warehouses to connect data. Adding to complexity of this data interchange is the unstructured nature of many data types in social media, such as comments or conversations that need to be analyzed, scored and routed among teams.

Ensure tools you evaluate have open, flexible APIs to support interfaces with operational enterprise systems.

4

Operational Governance

Often an afterthought, governance often becomes a barrier to executing social business strategy. At the heart of governance is clear articulation—and cross-functional agreement—on roles, responsibilities, process and decision-making. Businesses must ensure the tools they consider are flexible enough to support flexible operational governance, such as processes that span handoffs between teams.

For example, consider the sales team. Increasingly, social media impacts them as the nature of selling today requires closer coordination than ever between Marketing, Sales

and Customer Service. As Altimeter Principal Analyst Charlene Li wrote in her report on the transformation of selling, “Most companies have an overabundance of technology but lack the integration between those platforms to keep customers at the center.”

To keep the customer at the center, tools used by each team must share customer data to ensure each customer touch point is optimized. As the social media channel manager, internal social teams act as integrators between other teams by ensuring process is clear —especially hand-offs between teams—and data is available, whether they are responding to comments on Facebook marketing posts, supporting customers on Twitter, or engaging in deeper conversations on LinkedIn with decision-makers. Many businesses combine best practice playbooks for smooth operational excellence and ongoing training for deeper learning to ensure success.

Consider the flexibility of process management in the tools you evaluate to optimize each customer interaction in social that span teams.

TOP SOCIAL MEDIA MANAGEMENT TOOL REQUIREMENTS

Although social media management tools must support a wide range of use cases, given the importance of customer experience today, we focused our research on social customer care and listening use cases. Social media managers have a range of tool options to manage social media customer experience, from using a tightly integrated suite supporting most use cases for social business, to selecting separate point solutions, or a combination of the two. In our research, we wanted to understand how today's users of suites like Social Studio versus point solutions fare. First, a look at prioritized features and challenges reported by social media managers.

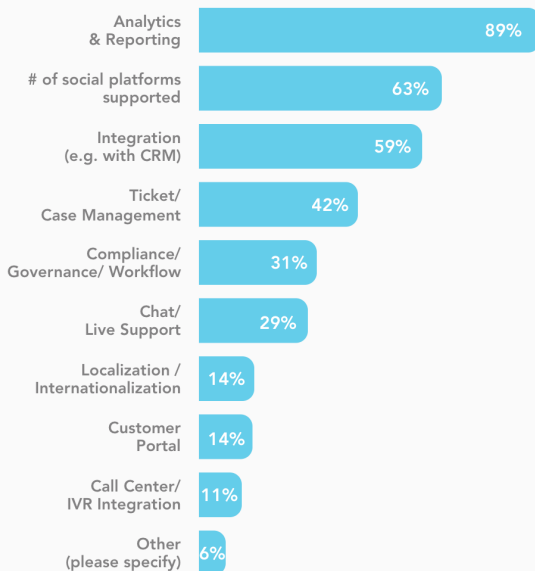
CUSTOMER SERVICE TOOLS

Our research found social media managers reported a consistent set of priorities for social customer service tools. Among the list of key features on the left, social media managers were asked to select 4 most important to them. By far, the leading feature was Analytics & Reporting (89%), followed by the breadth/number of social platforms supported (63%) and Integration with CRM (59%).

Given the increasing use of social media by sales teams, CRM integration came up in several of our conversations with social media managers and thought leaders.

Bernie Borges, CMO at Vengreso told us, "CRM integration is becoming increasingly important as brands embrace the transformation of selling. Integrating sales, marketing and service is critical. Selling is now a team sport. CRM is a central repository for key customer touch points."

TOP FEATURES NEEDED OF SOCIAL CUSTOMER SUPPORT TOOLS



Question: For social customer listening tools, which features are most important? Choose up to 4.

Source: Altimeter survey, June 2017, n=65, base of social media strategists

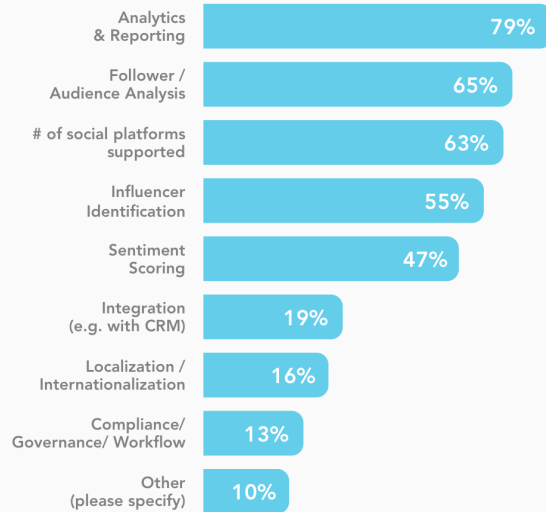
SOCIAL LISTENING TOOLS

Listening starts the process of responding to customers and prospects. Key features social media managers reported were: Analytics & Reporting (79%); Follower / Audience Analysis (65%); Number of Social Platforms Supported (63%); Influencer Identification (55%); conversation Sentiment Scoring (47%) and Integration with CRM (19%).

When looking at these features together, it's clear that a precise understanding of who the business might engage with in social media is vital. Understanding the existing customer relationship (based on CRM or other core enterprise systems), audience trends, and identification of influencers arm customer support representatives responding to social media posts with the much-needed context to respond properly, if at all. Imagine how this comes into play with a brand like McDonalds, who is mentioned more than 69,000 times/day. Customer-facing teams need to prioritize where to place their response efforts, rather than spreading themselves too thinly by attempting to respond to everyone. Having customer context information available from within listening platforms is essential.

We found that users of both integrated suites (48%) and point solutions (76%) choose to use a listening tool outside their suite. This is likely due to a combination of factors. Social media managers use reports from native social platforms, such as Facebook, to ensure completeness, gauge data accuracy or to incorporate metrics only available on the native platform. Additionally, social media platforms have been known to alter their APIs (which tool providers rely on to obtain data) unexpectedly, causing gaps in metrics that can be resolved only using native platform metrics.

TOP FEATURES NEEDED OF SOCIAL LISTENING TOOLS

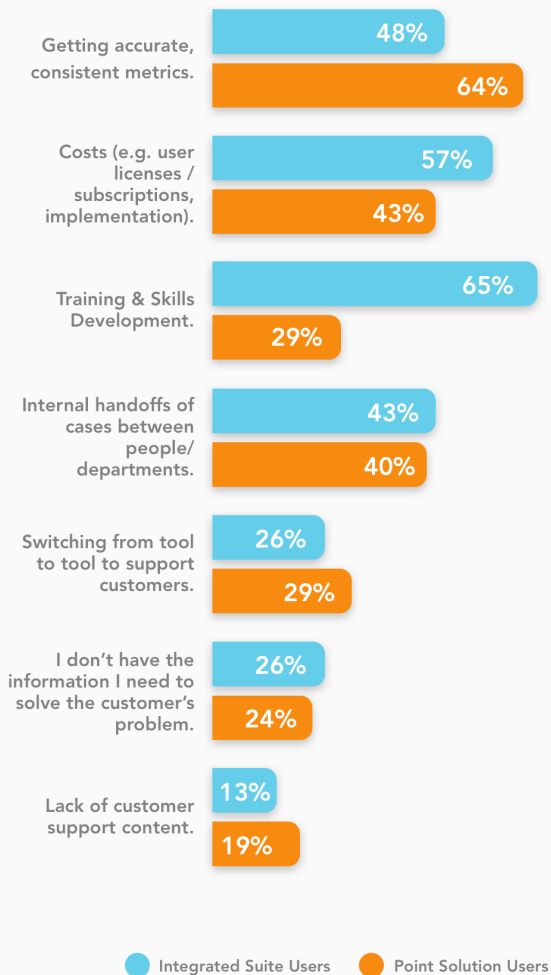


Question: For social customer listening tools, which features are most important? Choose up to 4.

Source: Altimeter survey, June 2017, n=65, base of social media strategists

KEY CONSIDERATIONS

FOR SOCIAL CUSTOMER SERVICE, POINT SOLUTION USERS IDENTIFY GETTING ACCURATE METRICS A TOP CHALLENGE, WHILE SUITE USERS CITE TRAINING & SKILLS DEVELOPMENT



Question: What are the biggest challenges you face, with regards to your social customer support initiative? Please choose your top 4 only.
 Source: Altimeter survey, June 2017, n=65, base of social media strategists

When asked about the challenges faced by users of social customer management tools, there were two interesting differences between those who use social media management suites versus point solutions. The top challenge reported by point solution users is getting accurate, consistent metrics (64%), while users of suites report training and skills development as their top challenge (65%, see figure to the left).

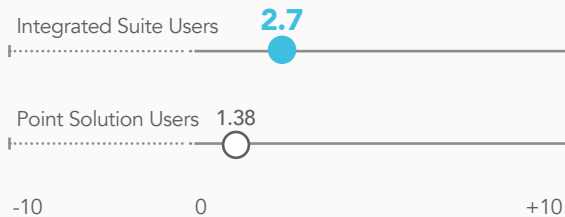
It is understandable that users of point solutions find it challenging to get consistent metrics. Many social media managers we spoke with confirmed their use of custom interfaces—or even basic spreadsheets—to combine data from each tool silo to make sense of it as a whole. Given their number one priority for tool selection is “Analytics & Reporting” features, this can be a significant issue for many point solution tool users.

For suite users, training and skills development was the leading challenge (65%). This is understandable given the breadth of features and use cases end-to-end suites must support. Adding to the training challenge, users of point solutions are typically highly trained specialists in a limited use case they support, versus the wide range of people with mixed skill sets that typically use suites. Be sure to budget for adequate training to ensure users with various technical skills can realize the full benefit of a suite.

In another series of survey questions, we found users of point solutions were: 2X more likely to identify “Switching from tool to tool to support customers” a challenge; 1.7X more likely to identify “internal handoffs of cases between people/departments” an issue; and they were 2.4X more likely to report that “getting accurate, consistent metrics” is a top challenge. Each of these insights reinforce the ability of integrated suite users to address the challenges of efficiency and enterprise systems integration more effectively than point solution users.

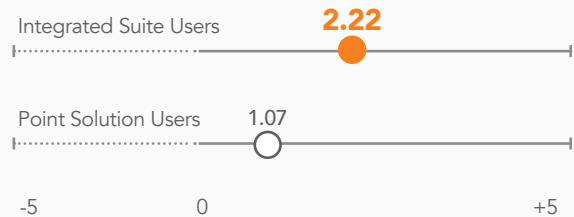
While our research uncovered important features and challenges to overcome when designing a social media enablement tools stack, if a key consideration for you is ROI, we found that satisfaction with ROI is almost 2X higher for integrated suite users vs. point solution users (although there is room to grow, see figure below). **This is likely connected to the fact that more mature social businesses tend to focus on suites over point solutions. Integrated Suite users also reported 2X higher social business maturity than point solution users (see figure below).**

Question: Overall, how satisfied are you with the ROI of your social customer support and/or listening investments?
(-10 to +10)



Source: Altimeter survey, June 2017, n=65, base of social media strategists

Question: Overall, how mature is your use of social tools for listening and/or social customer support?
(-5 to +5)?



Source: Altimeter survey, June 2017, n=65, base of social media strategists



SUMMARY

While businesses report positive ROI in their use of social media to meet business goals, they are challenged to select a tools stack that support both end-to-end customer experience and the many uses of social media that broaden return-on-investment. Our research has found that businesses with mature social business programs tend to experience higher customer loyalty (NPS) and business results (Net Margin). We found those mature social businesses to be much more likely to rely on end-to-end backbone social media management tools as a foundation for their tools stack. As social media managers architect their toolset, they should keep top-of-mind the enterprise systems and data needed to ensure that social media does not live in a silo, but is an integral part of doing business.

END NOTES

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DISCLOSURES

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Before joining Altimeter, Ed was Vice President of Social Media at Wells Fargo, where he led the first blog and social media team of any major U.S. bank. A co-founding brand of SocialMedia.org, he's worked for Apple (still his favorite brand), where he led the development of advanced data visualization tools and data warehouses. At Cisco Systems, he managed its first company-wide Intranet, first e-commerce store, and the development of Cisco.com, one of the first business sites to offer online customer service.

When he's not mastering digital landscapes, he's painting real ones. An award-winning artist, his accomplishments include a cover story in American Artist, the largest artist magazine in the US. His artwork is in collections worldwide.



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ABOUT

About Altimeter Group

Altimeter is a research and consulting firm owned by Prophet Brand Strategy that helps companies understand and act on technology disruption. We give business leaders the insight and confidence to help their companies thrive in the face of disruption. In addition to publishing research, Altimeter analysts speak and provide strategy consulting on trends in leadership, digital transformation, social business, data disruption, and content marketing strategy.

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About Salesforce Social Studio

Founded in 1999, Salesforce pioneered the revolutionary idea of replacing traditional desktop CRM software with CRM in the cloud, making it accessible anytime from anywhere. Today, our innovative cloud platform is the world's #1 CRM solution. Salesforce Social Studio helps you build more meaningful relationships with customers by tapping into the power of social media in your marketing, customer service, and sales organizations. Harness social conversations to listen, analyze, publish, and engage with your customers, on a 1:1 basis. To learn more about how Social Studio can help you, please contact us.

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