Your social customer service vendor checklist

People share hundreds of millions of Tweets every day - expressing their thoughts, experiences and opinions - making Twitter one of the top channels where customers engage with brands, including airing their customer service woes.

82%
of people on Twitter actively engage with brands[1]

80%
of social care requests sent via social platforms also happen on Twitter[2]

74%
of social media professionals also reported using social platforms to perform some customer care[3]

$1
is the average cost of a social interaction compared to $6 for a call center interaction[4]

It just makes good business sense to go where your customers are, especially if the channel where they're sharing their experiences is public, like Twitter. A negative experience can go viral quickly and silence or inaction can do serious damage to your brand. Plus, this more intimate and immediate way of connecting directly with your customers through a public display of empathy, an apology or even a sense of humor can humanize a brand and ultimately build increased loyalty.

Are you ready to start engaging with your customers on Twitter? There are lots of service providers out there ready to help. The following checklist will help you navigate the vendor selection process and make a more informed decision.

The Social Customer Service Checklist

☐ **Customer Service Analytics**

Key care-focused metrics should include First Response Time, Average Handling Time and Time to Resolution. What metrics are available and will you be able to create custom metrics to align with your specific business needs?

☐ **Approval Workflows**

Will you be able to create permission-based custom workflows for the purposes of agent collaboration, content approval and quality control?

☐ **Customer Experience Auditing**

The ability to access and export the full conversation history and call agent actions is especially critical in highly regulated industries such as financial services.

☐ **Case Management and Ticketing**

Can you create cases or tickets for follow-up and/or escalation? What about connectors or integrations to commonly used case management platforms?

☐ **Customer Service Chatbots**

Can you integrate chatbots? Twitter has deployed a number of features to improve customer experiences such as welcome messages and quick replies. Will you have access to these features?

☐ **Compliance and Information Security**

Whether it's SOC2 accreditation or other certifications important in your industry and/or country.

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The Social Customer Service Checklist (continued)

☐ **Conversation history**

Threading public tweets and private Direct Messages together into a conversation view provides valuable context should an issue need to be escalated or passed to another agent. Twitter has made it easy for brands to move a customer from a Tweet into a private message with the launch of Direct Message deep links.

☐ **CRM & ID Matching**

Can you add tags and notes to social profiles? How are these additions added to your CRM? Twitter allows brands to match user IDs to customer records under specific circumstances - if the user has expressly consented or the matching is being done based on publicly available data and/or data provided directly by the applicable Twitter user that an individual would reasonably expect to be used for that purpose.

☐ **Data Access**

What are the relationships with the social networks being featured? Enterprise level? Whitelisted access to API feeds? These relationships matter, when it comes to your mission-critical customer care operation. Certified Twitter Official Partners can be found here [insert link].

☐ **Routing & Prioritization**

How will social messages be routed and prioritized to appropriate care agents? There are many options including routing based on keywords, influencer score and CRM history. Don't forget language-specific routing for localization and global coverage.

☐ **Customer Care Feedback**

Can you deploy CSAT and NPS surveys as well as track sentiment conversion? Twitter's Customer Feedback feature enables people to privately share their opinions with a business after a service interaction. Will you have the option to access this feature?

☐ **Integrations & pre-built Connectors**

Which third-party software integrations are important to you? If you can access them, how? Are they uni-directional, bi-directional or an iframe? What about custom integrations?

☐ **Customer Knowledge Base**

Is there a built-in knowledge base for care agents with suggested answers based on the context of the message? What about connectors to your existing knowledge base or content management system?

☐ **Onboarding**

What will the onboarding process look like, both for product training and the softer side of social care such as establishing an appropriate tone of voice?

☐ **Credibility**

Specific industries tend to have their own needs when it comes to customer care. Does the vendor understand and have experience in your industry? Ask for case studies and customer references.

Your customers are waiting for you on Twitter.
Are you ready to join them?

Get started at data.twitter.com where you'll find case studies and a list of Twitter Official Partners.