The Social CRM eBook

a collier pickard publication
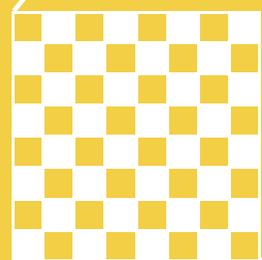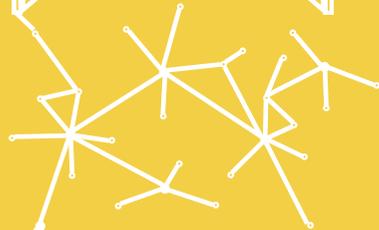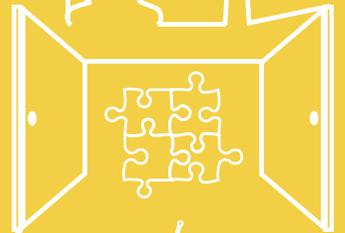
THIS WAY

"This social-mobile reality means that there's nowhere to hide anymore. It used to be that you owned your brand message. You communicated it out. But now, the brand is in the hands of your customers."

Don Peppers, Peppers & Rogers Group

Foreword

In 2009, we published the first edition of
The CRM Pocket Book, subtitled
"What works … What doesn't".

The pocket book includes a chapter entitled
CRM components, which identifies Operational CRM,
Analytical CRM and CRM Best Practice as components in
the world of CRM. It also identifies Social CRM as an
emerging component for CRM (at that time) – but Social
CRM has come of age since 2009 and now merits comment
in its own right.
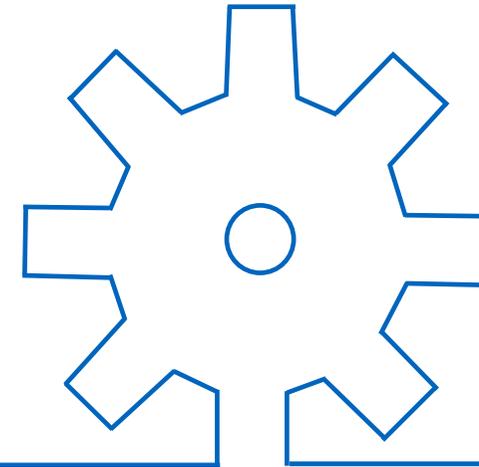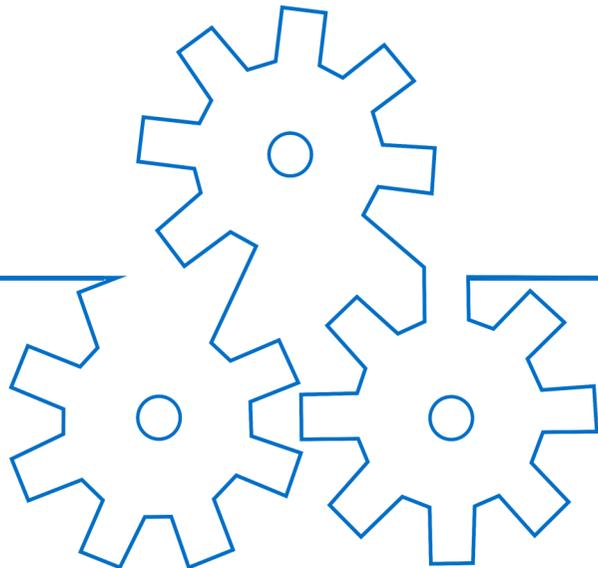
This eBook is one of a series, which examines in more detail
the following:

- **Operational CRM**
- **Analytical CRM**
  and
- **Social CRM**

The eBook in the series also examines CRM Best Practice
within the context of each of the CRM components.

The world is changing

Businesses aren't buying in the same ways that they did ten years ago. The change, which started in the B2C space, has been gradual but prevalent.

Back in the early/mid 2000's, buyers began researching products and services online before making purchases. The growth of social media and constant refinement of search engine algorithms allowed reviews (good or bad) to be found and shared easily and quickly between peer groups.

As our use of social media and the web has become more commonplace, this approach to buying has shifted into the B2B world as well.

Now, it is just as easy for a customer to research the merits and flaws of their item of interest, taking their time to learn more about the product, absorbing information from multiple sources, across multiple channels, before committing to a purchase.

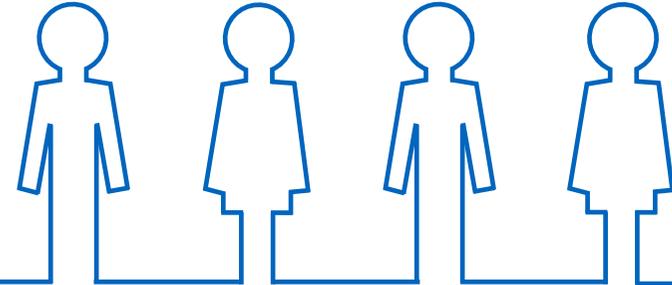The **buyers** have changed their approach, but have the **sellers**?
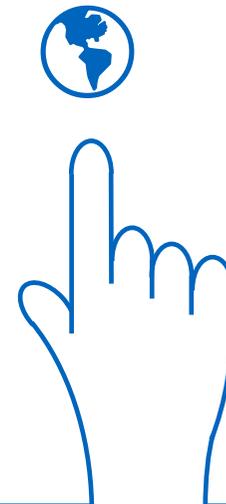
Acquire, develop, retain ... socially

For businesses to succeed, they need to adhere to the job of acquiring, developing, and retaining customers:
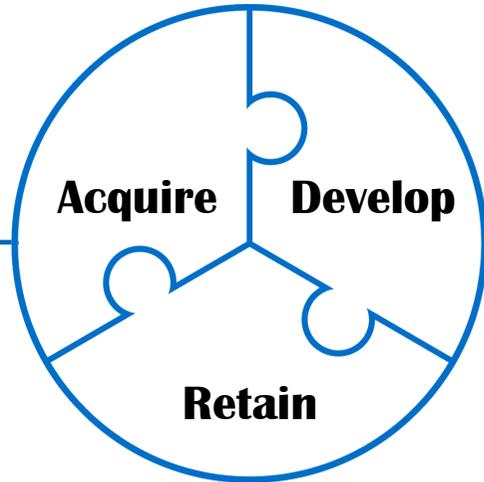
But we know that already, right? So what's different here?

Well ... everything actually. It's gone social!

In order to **acquire** new customers, you need to find them. The days of purchasing email lists and blasting a sales message to the masses are (thankfully) pretty much over. Instead, businesses should look to the relatively new sciences of Inbound Marketing and Search Engine Optimisation (SEO) to drive prospects to their websites and achieve conversions.

Develop your customers by engaging with them on the social platforms they use. Share interesting information, take part in conversations, whilst keeping an eye out for opportunities to cross-sell or up-sell.

Similarly, you should look to **retain** your customers through consistently offering them excellent value from your product/service, and open and accessible communication channels. Look to create brand advocates and evangelists from your customer base.

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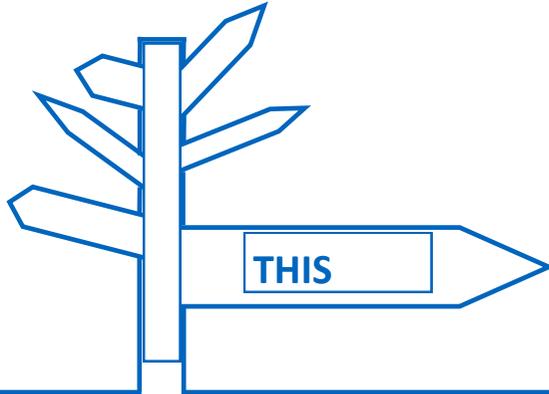
Inbound Marketing

If mail shots and cold calling aren't working anymore, what is?

Helping your prospects **find you** is the answer. And the term Inbound Marketing has emerged.

Make your website as user-friendly as possible. Optimise it for the **keywords** your prospects are searching for. Create **remarkable content** that has value in their eyes. Spread your presence across the web, engaging your prospects across multiple channels.

Once they've found you, **convert** them!

Keep generating that remarkable content but this time make it content that will help drive prospects from the top of the **sales funnel** to the middle of the funnel. Bringing them closer to the point where marketing can hand them on to sales for an **easy close**.

But keep **analysing** your approach. Are your landing pages converting a high enough percentage of visitors? Are your calls-to-action appealing to your prospects? Is your social media presence growing sufficiently?

Assess and reassess, again and again. Keep **refining** your approach to ensure the best possible performance.

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Buying habits have changed

Today's buyer in both the B2B and B2C sectors is internet savvy and fully empowered to search and research. This is a far cry from the world of the 1990s and early 2000s when the salesman was the **information king**. As a buyer, you used to rely on the salesman for industry knowledge and product information.
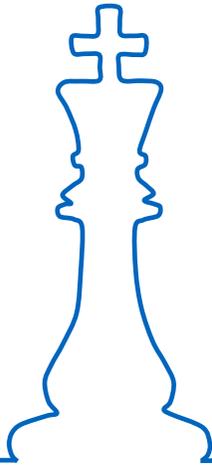
The savvy buyer of the past would speak to many salesmen before making a decision on what to buy, when to buy it, and how to set a realistic budget for total cost of ownership (**TCO**) and return on investment (**ROI**).

But now, the salesman is no longer king – the **buyer** is! Searching and researching using websites, blogs, social communities, and forums – the buyer builds a knowledge of both the marketplace and the players therein, way before ever talking to a potential supplier or its sales people.

So now there's a sort of **honesty** forced into proceedings. The salesman can no longer promote some details and obscure others – the buyer already **knows**. The salesman cannot unfairly knock the competition – the buyer already understands the strengths and weaknesses.

Today's buyer has changed the **rules of the game**.

And the savvy sales organisation will turn itself from a sales machine into an outfit that **promotes service** and **partnership** to its customers.
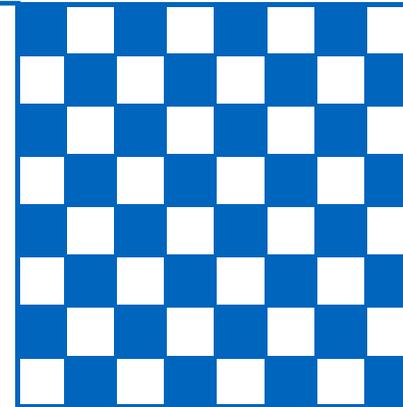
Customer service and reputation

If your customers have a problem and don't feel they are getting the support they need from you, it's very easy for them to take advantage of the social networks to broadcast their complaint. Try searching Twitter for "poor service" and see for yourself!

But with a good Social CRM approach you can turn this situation around. **Engage** with your customers. **Address** their concerns. By putting a friendly, helpful face in front of your customers – one who is empowered to resolve their issues – you can enhance your **brand loyalty** and encourage others to buy from you in the future.

Ignoring these complaints or entrusting your customer services to someone without experience can prove disastrous. But the process doesn't have to be very time consuming. 5-10 minutes a day may well be enough to check the networks where your clients are active.

Crowd sourcing

Beat your competition with the help of your user-base.

By opening up the development of your product to your user-base, you can drop the notion of developing behind closed doors and switch to an **agile** development model. In so doing, you can find the most requested and useful changes your customers are asking for and make them … rather than focusing on changes and developments that you think are important but your users do not.
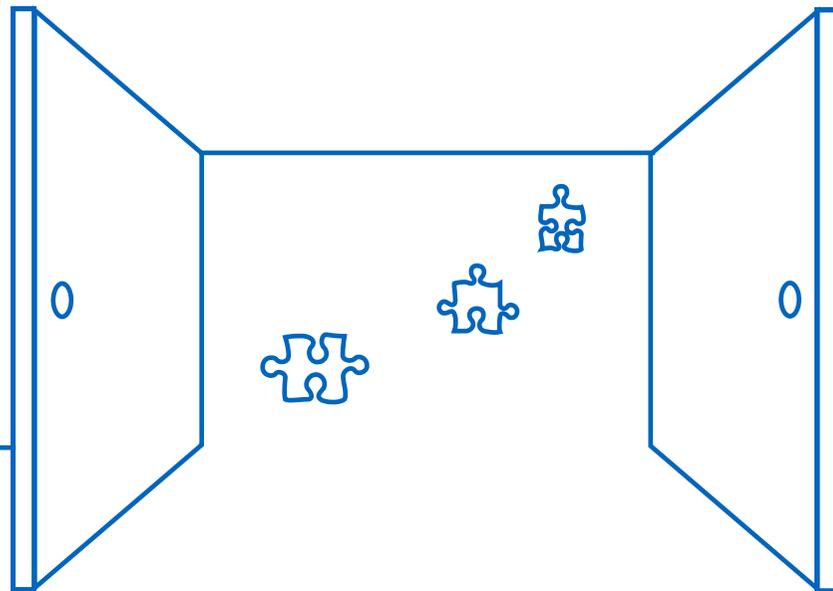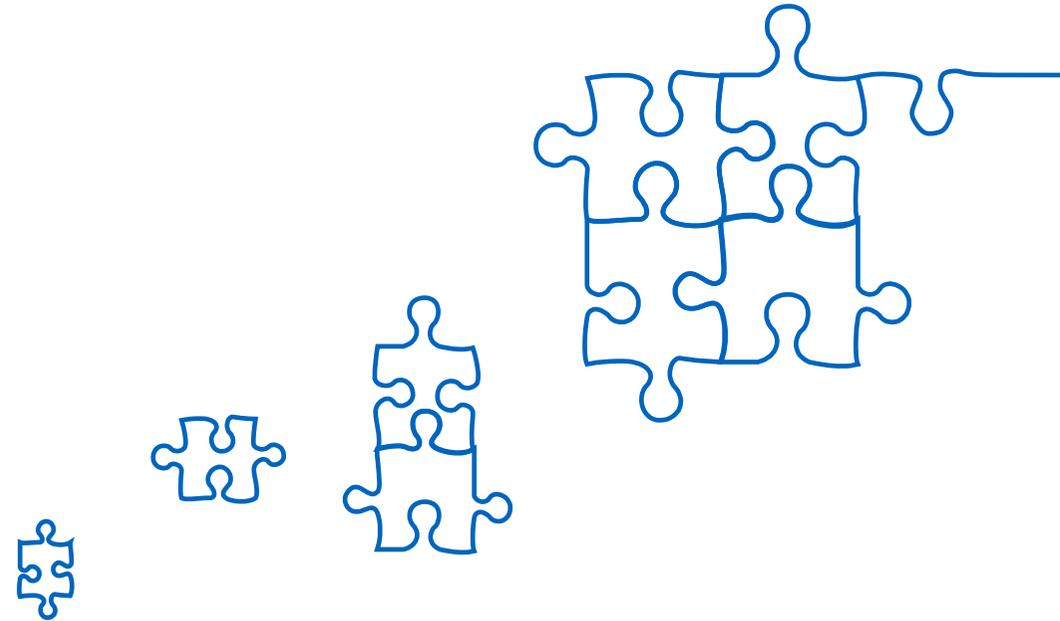
Feeding back to the community in this way will help strengthen the ties your customers have to your product and your brand. Who doesn't like feeling that they are a part of something, responsible for tangible changes in the way things are?

But remember that the process of innovation will still have to come from **within**. Your customers are unlikely to suggest truly innovative changes that will put you leagues ahead of the competition.

Advocates and evangelists

So far we've discussed offering truly **great** service to your customers. There's nothing new in that philosophy of course, but what is new is that if your customers **truly believe** in what you have to offer it's incredibly easy for them to start acting as advocates, or even evangelists, for your brand.

Before you know it they can start spreading information on to their **network**. A network that is likely to trust the favourable reviews of a peer over the self-published case studies and marketing collateral produced by the company themselves.
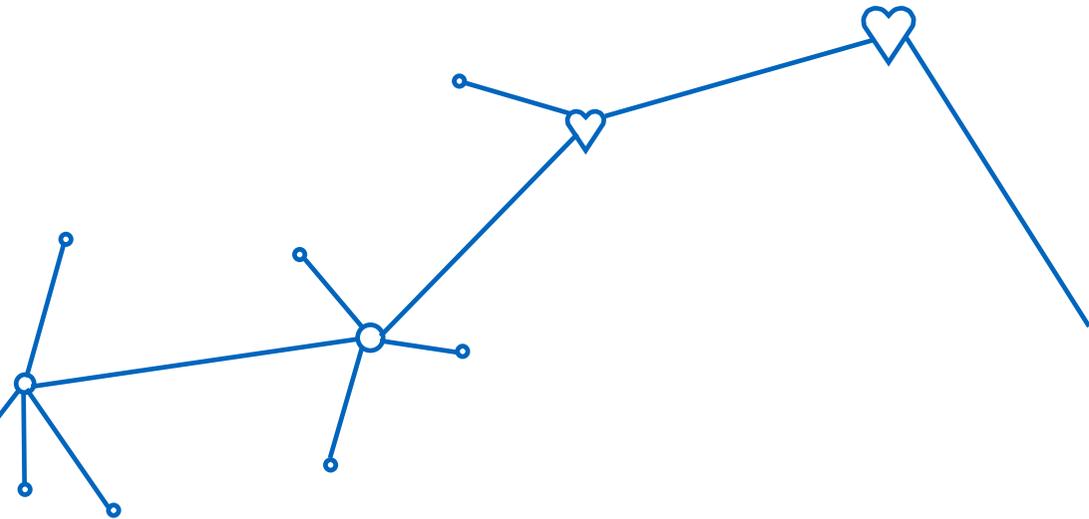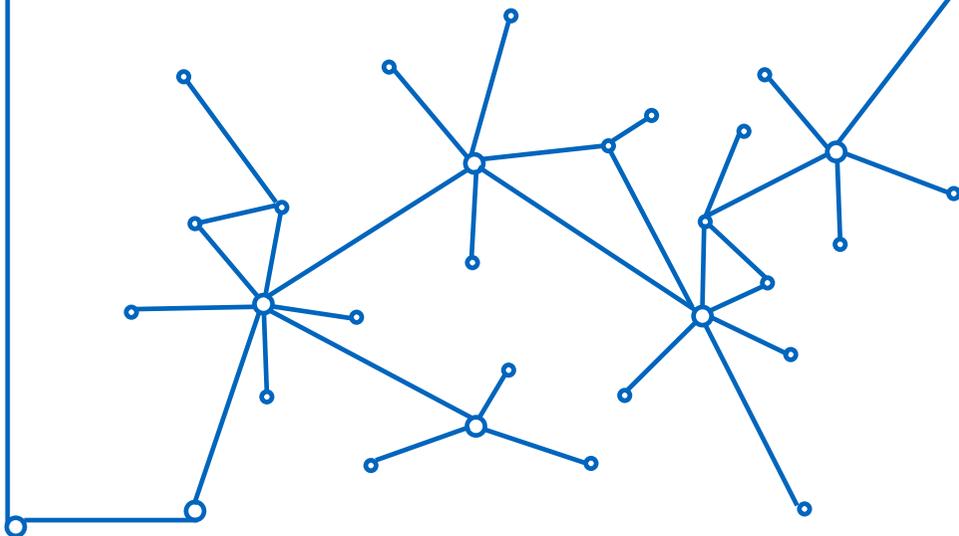
Over time, these people may choose to purchase from you. Assuming everything goes well they may then choose to share news of their purchase over their own networks, respond more to your social media presence and begin '**liking**' and **recommending** you to their network more frequently.

The benefit is plain to see, but impossible to achieve without Social CRM playing a part every step of the way.
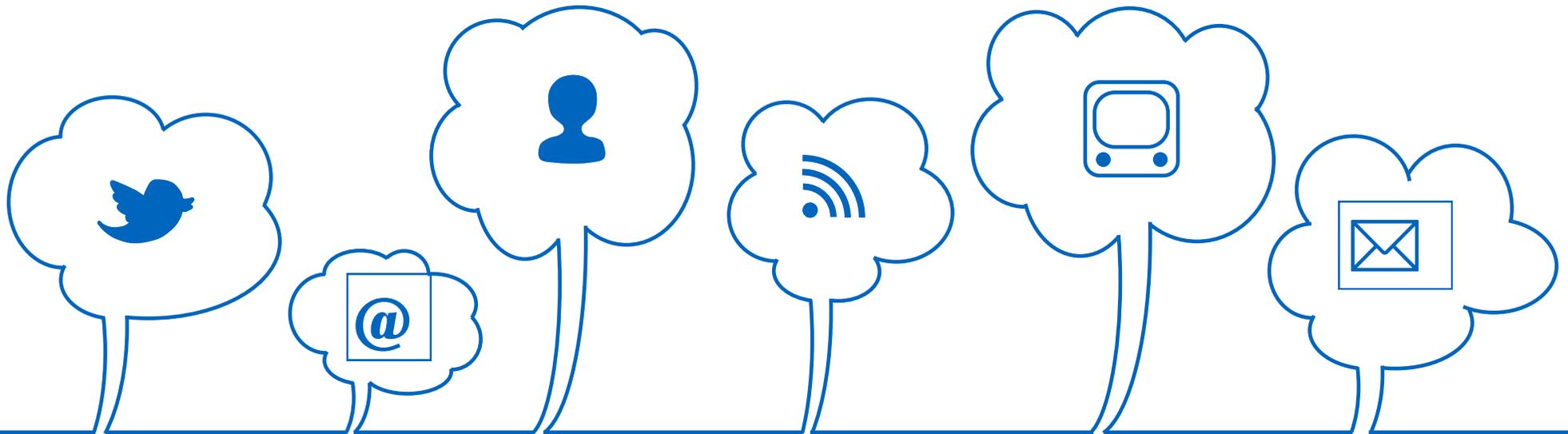
Not all aspects are equal

Running headlong into a social approach without proper planning is unlikely to work. Equally, the prospect of adding multiple new touch points to your workload can seem daunting...

So what do you do?

[Plan your approach](). Decide which areas are right for your business and embrace those first.

Are your prospects discussing their needs on **Twitter**? Get your marketing team involved to start nurturing them towards becoming leads.

Are your customers discussing issues with your product on **Facebook**, **Google+** or **LinkedIn**? If so, have your customer service team start responding and helping your customers achieve their goals.

Don't try to build communities from scratch on platforms your prospects and customers aren't using.
Find where they are already having their conversations, and get **involved**.

Integrating SCRM into your company culture

Social CRM isn't going to work for you if the majority of your team don't see the benefit.

☑ **Marketing** – help prospects find you and qualify themselves by offering great content that helps drive them down the sales funnel.

☑ **Sales** – leads are better informed and better qualified, allowing the sales team to close business more easily and efficiently.

☑ **Customer Service** – no longer have to answer every call as the community starts sharing solutions and experiences.

☑ **R&D** – stay ahead of the competition with the advice and support of your user-base, brand advocates and evangelists.

Make sure your team knows how Social CRM can help them in their day to day roles. By embracing the new channels and approaches you can begin to offer truly **exceptional service** at all levels of the buying cycle.
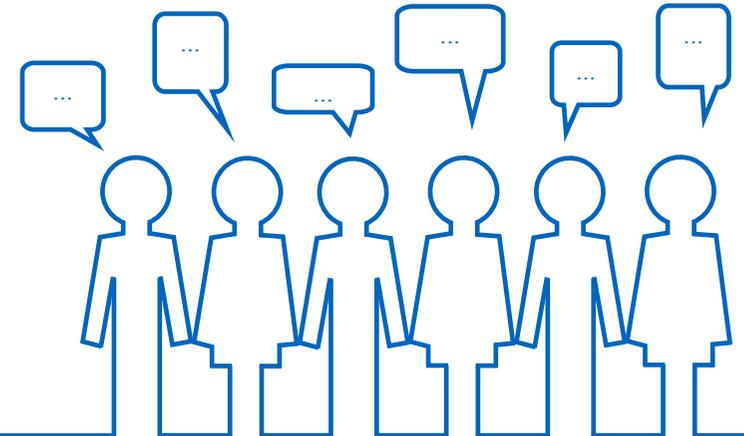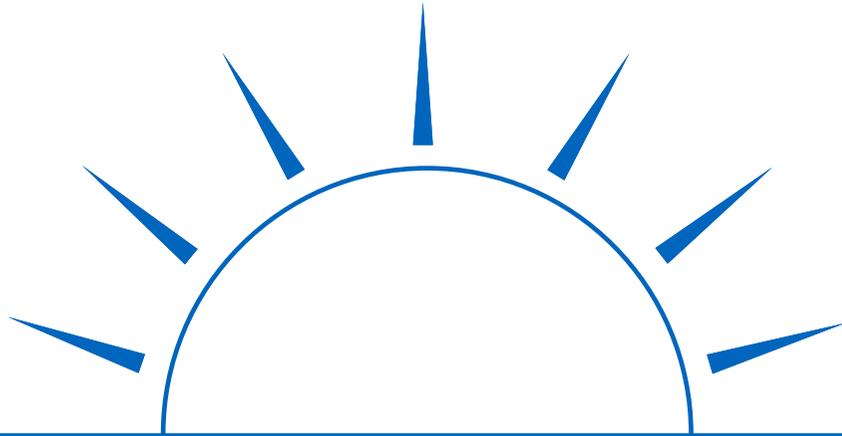
Seize the day

"If you wait until there is another case study in your industry you will be too late."

Seth Godin, author of Permission Marketing.

If you're still hesitant about engaging with social media then consider searching for your competitors online. If they already have a presence on Twitter, LinkedIn, Google+, Facebook and you don't, you're effectively limiting your potential customer base whilst they expand theirs.

Talk about social media for B2B is no longer either rhetoric or philosophy. Your customers are **online**. Your customers are involved in **communities** online. And it's time for you to join in the **conversation**.

What works 😊

	What doesn't 😞
Sharing interesting **content**, asking and responding to questions on Twitter …	Setting up a Twitter account and posting endless sales messages to your followers.
Posting regular, interesting content to your company **blog**, which is optimised around your keywords …	Posting only sporadically or infrequently to your company blog.
Building **landing pages** for every marketing campaign you produce …	Sending all campaign links directly to your homepage.
Using **long-tailed keywords** to drive qualified traffic to your website …	Spamming highly competitive keywords across pages they have no association with.
Responding to your **customers** views and problems on social networks …	Pretending those problems don't exist and hoping they'll go away.
Opening up your **development** process to the suggestions of your users …	Relying on your users to provide the next innovations that will shape your company
Planning your Social CRM strategy and deciding which **networks** are right for your business …	Setting up accounts on every social network you can find without thought for how you will maintain them.
Encouraging brand advocates and evangelists by offering truly great **customer services** …	Believing that once a sale is made, your work with your customer is done.
Offering relevant and useful information about your products and services in ways your customers can easily **find** …	Insisting that your prospects talk to your sales people for information
Being **friendly** and **helpful** …	Seeing social media as a nuisance or a waste of time.

About Collier Pickard

Collier Pickard is a leading CRM consultancy for the mid-market. A **niche** player.

From our UK base we help organisations **align** their **CRM culture** to the top level **goals** of their business ... from start ups to blue chip, global operations.

Our team of CRM professionals has been together for nearly 20 years. We have implemented more than 400 CRM and sales/marketing systems. This gives us a deep **understanding** of best practice – what works and what doesn't.

Collier Pickard –
- Chosen by small firms for local support
- Chosen by multinationals against major consultancies
- Chosen for its depth of knowledge in the niche market that is CRM

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