



Learn how to put  
**Social CRM** to work  
for your business

Ready to embrace  
social CRM but unsure  
where to start?  
**A best practice guide  
to get you started.**

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You know that the “social revolution” is here to stay and that it requires changes in your business approach and use of supporting technologies – especially your CRM system. Indeed, you’re eager to stop just talking about social CRM and put it into action.

**Odds are that your company has already dipped its toe in the water of Social Media.** For many businesses, Social Media plans have been started half heartedly, generating initial excitement but failing to maintain momentum or form a coherent social strategy, let alone deliver real and measurable business results.

What started out as an exciting initiative to get closer to the customer and generate business value may have lost its way and become just more work, with no real sense of tangible returns.

If this describes your business, don’t despair the good news is that best practices and proven strategies for effective social CRM have begun to be defined, and actual products you can implement today to manage your social presence are readily available. This makes it the perfect time to step back and assess how you can put a true, successful social CRM strategy into action.



5 best practices for social CRM



## 1. Social CRM is part of your overall CRM strategy

To put social CRM into action, you need agreement and understanding as to what it is you are trying to achieve with your “social media” initiative and how you are going to achieve it.

An underlying theme should be the recognition of the opportunity for customer controlled engagement and a strategy for harnessing its value for both the customer and the business.

In devising your social CRM strategy, look first at your existing CRM strategy. Is it working? Are you able to define its value? Do you struggle with user adoption? Is your CRM system flexible enough to accommodate shifting demands and changing business processes – of which social CRM is just one – or have you outgrown it? If you have any qualms about your CRM system’s ability to meet your long-term needs, address these issues before investing in social CRM.



## 2. Prioritise and focus

One of the biggest challenges of any social CRM program is determining which of the many available channels and profiles to adopt. While it's easy to get lost in the array of options, a more logical approach can easily reduce risk.

The simple way to approach this is to go where your customers and prospects congregate.

Do they blog? Do they ask friends for advice on Twitter, share views on Facebook, build their professional profile on LinkedIn?

Different consumer and business groups often show different usage patterns.

Once you determine which social platforms your customers use, develop a prioritised list of which ones to include as part of your social CRM strategy and usage by your customers and prospects, as well as the ease and cost of integration with your CRM system.

Consider also your company's CRM user groups and the extent to which each social platform offers a logical fit and identifiable opportunity for value-generation.

Given the dynamic, rapidly evolving nature of the social media, your social CRM initiative will most likely entail a process of continual expansion, refinement, and enhancement. It may make sense to focus on a single social tool as a test case.



To formulate an effective social strategy start with a solid CRM strategy then look at how and where social media fits into this web of customer interaction.





### 3. Integrate Social CRM

A fundamental goal of CRM is to create a fluid, integrated, consistent and informed experience across all customer-facing departments and functions.

Whether a customer is interacting with your sales, marketing, or service teams, and whether they're dealing with the same service rep they talked to yesterday or a new one, they should encounter the same informed, personalised service and overall customer experience.

The same rules apply to social CRM. Using more platforms increases the risk of fragmentation in both data collection and the customer experience.

Social data is just another piece of a holistic view of your customers and thus it should not be routed off into a separate system.

Likewise, social-media interactions and associated activities typically fall into the same kinds of categories as other CRM activities and workflows, such as marketing communications, lead generation, pursuit of sales opportunities, and customer service.

To implement social CRM in a manner that enriches and expands existing processes, rather than creating new ones, companies must integrate social tools with their existing CRM records and workflows. Customer or prospect intelligence gained from social sources must be integrated into the existing customer or prospect CRM record, not a standalone system.



#### 4. Value First

In defining goals and prioritising your social CRM initiative, keep your focus on value: what value will each social post bring, and how will it be measured?

Bear in mind that social activity is by nature a two-way street, so ideally, the value generated should be reciprocal. After all, how deeply are you likely to engage your customers if there's nothing in it for them?

The best goals therefore combine value for the business with value for the customer: faster, more efficient service responses, for example, benefit both the customer and the business.

Decide up-front how you are going to measure success in social media and establish pre- project benchmarks against which to measure progress.

Metrics might include customer satisfaction and retention, leads generated from social sources, service-ticket times for incidents generated from social versus other sources etc.

Your measurement criteria will likely be a mix of “hard” and “soft” metrics, but be sure that you have a way to tie your social initiative back to genuine value.



Because of the rapidly changing social media world, social CRM initiatives should be conducted with a view to future business agility.

Focusing on value and taking a prioritised, logical approach minimises risk and delay, but it does not diminish the probability that you will in future have to accommodate within your CRM infrastructure something that is today unknown. New social tools and channels will continue to appear and to transform the business landscape.

While you may not be able to anticipate precisely what these will be, you should ensure that your CRM system and social CRM implementation are as open and flexible as possible to accommodate ongoing additions and refinements over time.



## Conclusion

By using a thoughtful and strategic approach to social CRM that follows the best practices set out above powered by a comprehensive social CRM solution such as Intouch CRM, your business can quickly harness the vast potential of the social web for measurable business value.

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