



# Social media playbook: 7 steps to supercharge social customer care

May 27, 2021

With an estimated 3 billion people using social media, it's not surprising that more customers are using it to connect with businesses when they have questions, compliments, or complaints. Yet, while the Online Marketing Institute estimates it costs \$1 to solve a customer service issue on social media compared to customer call centers, which can cost six times as much, brands generally spend only 2% of their time and resources in customer care, according to Spr

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<https://hgs.cx//press-releases/hgs-digital-recognized-by-frost-sullivan-for-its-complete-social-media-customer-care-solution/> for its compelling social media strategy and solutions portfolio including HGS EPIC™ Social Care program, understands the importance of crafting and implementing a strategic playbook to execute successful social customer care.

Consider the case of a Fortune 10 retailer [https://hgs.cx//case-studies/fortune-10-retailer-supercharges-](https://hgs.cx//case-studies/fortune-10-retailer-supercharges-social-strategy-to-address-digital-needs-of-new-age-customers/)



[social-strategy-to-address-digital-needs-of-new-age-customers/](https://hgs.cx//case-studies/fortune-10-retailer-supercharges-social-strategy-to-address-digital-needs-of-new-age-customers/)

that was struggling with developing a social strategy that would resonate with the digital needs of today's new-age customers. Challenged with negative sentiment about its customer service which adversely affected the brand's bottom line, HGS helped revamp the social strategy by employing hyper-personalization and in-channel conflict resolution. As a result, HGS helped the brand resolve more than 35,000 customer queries within 24 hours, for a savings of \$200k annually.

In another instance, HGS designed a strategic social media plan that helped a food and beverage giant achieve a  ease in productivity, a 2X increase in response time thanks to better tagging

tagged via automation.

## Create an EPIC social media playbook

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Considering all the places where conversation about your brand can come from, it's important to know how and when to interact. For instance, "owned" mentions occur on social media channels created and managed by your brand (e.g., Twitter, YouTube, Instagram). Think of it as people who are talking directly to your brand.

In contrast, "earned" mentions occur when ideas and opinions about your brand are exchanged through channels that your brand doesn't own (e.g., blogs, review sites, third-party Facebook feeds and, often times, frustrated tweets). Responding to these can be very impactful. Acknowledging and adding context to reviews, engaging playfully with influencers, and meeting detractors head-on can neutralize and convert.

But how do you determine which mentions to act on, and how?

### Create a playbook

Whether you have 4 or 400 community managers, a social media playbook should be central to your program, as it explains how the brand comes alive on social.

Applying an **EPIC approach** [<https://hgs.cx//epic-social-media-customer-care/>] can underpin your playbook:

- **Engage** – In-channel, using creative and authentic responses
- **Protect** – Stop rumors, correct inaccuracies, respond to IP, and neutralize negative sentiment

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through regular reporting and analysis

- **Create** – Amplify opportunities, post engaging content, and build relationships
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These easy-to-remember EPIC pillars can unite and inspire your social team members, but they also need step-by-step instructions.

## **Include 7 key topics in your playbook**

Documenting social media processes sounds old-school, but it's a sure-fire way of building a scalable social media team, bridging the needs of social stakeholders, providing quality social care, configuring social media management and CRM software, and executing your social media strategy.

Every brand manager has goals for social, whether they are articulated or not. Some want to use social for customer care, some for promotion, and some for business insights. Having a comprehensive playbook that prioritizes and provides a roadmap makes the goals easier to achieve.

But what specifically should a social care playbook include?

1. **Rules of engagement and best practices.** Spell out the elements of a “great” post or response; build on your brand guidelines to describe the desired tone of voice and differentiate from competitors.
2. **Processes and workflows.** Identify how mentions get captured, filtered, sorted, triaged, addressed, measured, and improved. Explain how to review posts, vet customer

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post elements.

3. **Quality management.** Detail how to achieve customer and business expectations.

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4. **Targets and key performance indicators.** Explain the quality, speed, volume, sales, CSAT, etc. levels needed to meet targets.
5. **Case management and escalations.** State how to handle complex interactions and escalations. Describe how customer concerns are documented, tracked, addressed, and escalated. Ensure operations, social, PR, legal, and marketing are all on the same page.
6. **Ideal agent/community manager profile.** Outline the skills, experience, attitude, etc. required to execute your social strategy.
7. **Training program.** Structure the playbook as a training tool. Our playbook is built in PowerPoint (sometimes 100 slides!). Include copious examples of what to say and not to say, along with key resources for community managers to consider.

## Keep your playbook up to date

At HGS, we make a point of updating our playbooks at least semi-annually. If there are world events, product changes, organizational policies, new competitor approaches, major issues and crises, etc. that affect the playbook, we revise more frequently. Being diligent in making process and procedural updates along the way will keep your community management team performing at their peak, as well as consistently align with your intended outcomes and your social media program.

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webinar, "Award-Winning Social Media Strategies for the CX Generation," <https://hgs.cx/webinars/social-media-strategies-cx-generation/> (with experts from Frost & Sullivan, Sam's Club, and Alaskan Dream Cruises). Get a free competitive analysis of your social performance with the **HGS EPIC™ Social Media Score Report** <https://hgs.cx/white-papers/get-your-social-media-score/>.

**Tags:** EPIC Social Care, social media strategy

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