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Arguably one of the more complex challenges companies will encounter in embracing social media is blending the new, dynamic social media processes and technology with traditional technologies and infrastructure. This is especially true as companies move from experimenting with social media to making it a core part of their enterprise. The experimental phase was largely about tools: Companies deployed components of social media such as blogs, product ratings, discussion forums, and customer comments as one-offs- isolated and often uncoordinated initiatives that were bolt-ons to the existing technical infrastructure.

Today, however, social media must be seen in a larger, more strategic context-in the way companies manage their entire customer relationships (data, channels and processes). This is the business transformation phase of social media, and it requires much more planning, resources and experience than the experimental phase that preceded it. In this new phase, organizations must move past stand-alone, outside-the-firewall skunkworks initiatives, and focus on linking social media technology with their core data, analytics and channel systems. Indeed, without an integrated approach to social media technology, a company's responses to and interactions with customers will be disjointed, which ultimately will erode the firm's reputation and jeopardize customer relationships with technologically-savvy customers - one step forward with the two steps back.

Yet many companies today struggle with the remnants of their original, un-integrated experimental approaches to social media. Their data from online customer interactions resides in multiple silos. They installed social media applications as point solutions to point problems-for example, a blogging tool, or customer discussion forum site, or a product review webpage. Each one has its own rules. Each one focuses on its part of the CRM process. A customer who tweets a complaint may be the same customer who sounds off on the company's product review site. But because the applications were implemented separately, the company can't see the connection that is obvious to the customer. Another customer may post gripes on the company's new online customer forum, but that system isn't linked to the CRM system, so the company can't positively identify the source of the gripes to do something about it.

### The Agile Social Media Platform - Back to the Basics

What's the solution? Managers must apply some of the same rules they learned in the dot-com growth era = taking a more thoughtful approach to selecting the right technologies, building a sustainable and scalable infrastructure, and developing and delivering applications that make the change happen and sustain it. One key element of this approach is what we call a social media platform.

A social media platform is the interwoven technologies that enable a company to identify and aggregate all of its interactions with customers as well as the social media insights, chatter and engagement of those customers with the company (in addition to noncustomers who take to blogs, discussion boards, and the like). The role of this platform: Find out who is talking about the company and its products, policies, and so on through social media and get that information to the people in the company who can take appropriate action.

Currently the agile social media platform cannot be bought from one software vendor; some software companies provide key pieces of the platform, but none sells the entire suite. As a result, companies must build the platform more or less from emerging component parts in the market.

So what does an agile social media platform look like? As they set out to construct their social media platforms, organizations should ensure they incorporate six core components: community services, integration with external social media channels, work flow tools, text analytics, measurement and analysis, and CRM integration.

### Community services: Technology for building the social media channels a firm can control

Perhaps the most basic components of the social media platform are the ones that let companies build and maintain onboard communities. These technologies provide such social media services as:

- **Blogs:** Enable firms with multiple product brands and internal bloggers to contribute to a corporate blog.
- **Ratings and reviews:** Allow Web viewers to rate products and services and comment on the quality of those reviews.
- **Referrals and sharing:** Give users display badges for sharing content through traditional and social media.
- **Forums:** Multi-brand, multi-topic bulletin boards that let customers participate in

discussion groups.

- **User-created content management:** A multi-brand, multi-user media-sharing platform for video, images, audio, and text.
- **Member profile management:** These tools let customers decide what information they want to provide on a web site, such as photos, information preferences, linked channels, and privacy settings.
- **Social networking:** Integrated multi-brand networking platforms that allow for friend/follow, organic groups, calendars/events, direct messaging, tagging, and activity feed.
- **Cross-channel synchronization:** Supports seamless integration of the user experience across all in-house social media channels.
- **Ideation or idea management:** Takes input from internal or external sources in the form of ideas that could include text, images, videos, or documentation.

### Integration with external social media channels

This component links a company's social media capabilities to the social media channels that are outside of its control-for example, Facebook, Twitter, and external blogs. It enables a company to "fish where the fish are"-comb the Web's many places where customers and noncustomers hang out and provide content as short as a comment on a blog and as long as a one-hour video on YouTube. There are several key elements of this technology component:

- **Social application framework:** A reusable application framework for social platform apps (e.g., Facebook apps, Google Gadgets) that reduces development costs and lets a company rapidly build new applications and plug into relevant platform services.
- **API backbone:** An abstraction layer that is platform-agnostic, and lets a company minimize the impact of changes made in the underlying social APIs (application programming interfaces).
- **Spiders:** Advanced algorithms that parse the Web looking for structured and unstructured data in search of comments about a company, its products, people, policies, and the like.
- **Connectors and wrappers:** Utilities that connect a company to external social media services (Facebook, Digg, and other social networking sites), and provide common web site features that let viewers print and translate documents and download PDFs.
- **Referrals:** Services such as ShareThis, which can be used to share branded web site content using e-mail addresses.

### Social media work flow tools

The work flow component enables companies to define which social media events require

attention, the kind of attention they require, and who in the organization must act. This component also should feature a tracking mechanism to ensure issues are handled. Social media work flow solutions must be tightly integrated with a company's established work flows-for example, the routines that its customer service organization follows in its CRM system.

### Text analytics

These solutions mine documents and other forms of "unstructured" data. They analyze linguistic structure and apply statistical and machine-learning techniques to discern entities (names, dates, places, terms) and their attributes as well as relationships, concepts, and even sentiments. They extract these "features" to databases for further analysis and automate classification and processing of source documents. In helping a company listen to what's being said about it in social media channels, text analysis is technology that:

- **Analyzes the content of these conversations to determine the tenor or "sentiment" of the chatter (positive, negative or neutral).** The technology has the ability to infer from unstructured text a person's emotion and attitude toward an issue, recognizing sentiments that may be language-, syntax-, or context-dependent. For instance, "I hate this product" is obviously a negative sentiment. However, a remark such as "I like your plentiful automated teller machine (ATM) locations, but your ATM fees are too high" is more complex.
- **Performs entity extraction.** This refers to the software's ability to discern people, places, or things in the text, determining the true meaning of a word that may have multiple meanings. This is critical to helping companies understand people, places, and things quickly and automatically (i.e., with as little human intervention as possible).
- **Classifies data.** Another ability of text analytics is classification (also known as faceting and clustering), or the ability to categorize data into related groups. For instance, if a company analyzed 1,000 Amazon.com reviews of its products and its competitors' products, it might classify the entities and sentiments that were expressed by manufacturer, by product, and by positive or negative feedback.
- **Supports natural language processing (NLP).** NLP is technology that can divine the true intent of a writer (or speaker), and is used most often in the world of search engines. For instance, with NLP in place, as a person types more words ( e.g., "the best way to fly from Fort Lauderdale, Fla., to Boulder, Colo.,") the search result should narrow, not expand.

### Measurement and analysis

This component enables a firm to gauge the impact of social media conversations on its business, and track how well it has responded to those discussions. The measurement and analysis component of the social media platform must be tuned to the right metrics. In general, there are five key elements to consider:

- **Buzz analysis and monitoring.** This feature is about analyzing trendy topics and customer sentiment in each social media channel and customer segment, and monitoring the competition. Some technologies allow companies to set thresholds: For example, when 50 customers complain about the same issue, it's time to take action.
- **Social network influence profiling.** Influence profiling identifies influencers and whom they're influencing, empowering companies to change the minds of many people.
- **Social network identity profiling.** Identity profiling is about enriching a company's customer insights with additional attributes derived from profile and activity stream data.
- **Business value attribution.** This ability allows a company to map between social metrics/events and business metrics to be fed into business analytics capabilities (e.g., for use in marketing mix models).
- **Cross-channel identity management.** The same customer may make remarks through many social media channels. This capability allows companies to understand everything a given customer says, consolidating his multiple identities into one.

### The 'last mile' - CRM integration

Social media is a critical new medium for companies to listen and react to customers, but it has only limited value until it is effectively integrated into the channels a company can control - the CRM capabilities.. The contact center, e-mail, traditional marketing and sales campaigns, and the conventional sales forces will not go away soon, if ever. Thus, companies must link their social media platforms to their enterprise CRM systems to get the most out of the speed and competitive advantage in the marketplace. The key elements of a social media platform that link to marketing include:

- **Customer dialogue front end.** This is an enterprise application front end for public relations professionals, marketers, and customer service agents. It lets them interact with customers in social channels across brands and organizations, and typically includes capabilities to measure and manage the impact of viral campaigns.
- **Social dashboard.** This monitoring and reporting capability measures how well a company addresses customers' problems.
- **Centralized moderation.** This element enables a company to centralize the moderation of content on its social media channels. It includes automatic spam detection, smart filters for moderation prioritization, and conflict management tools.
- **Auditing.** This provides historical tracking of conversations and interactions, letting a company monitor its performance and compile documents for regulatory purposes.

Social media introduces substantial impacts across a wide range of tools, business processes and technologies. In fact, effective integration of these processes and technologies creates some of the biggest opportunities, and biggest barriers, for a company to embrace social media effectively. Thus, the social media platform is an essential new element of a company's technology infrastructure. Such a platform enables a company to provide the next-generation customer experience by receiving social media content from many channels; using analytics software to monitor trends, and helping managers decide what to do about those trends in a dramatically accelerated way. The platform is tightly integrated with a company's existing CRM system, which enables a company to feed the data and interactions from all the social media chatter into the traditional "marketing and sales funnel" through which people move from prospects to customers.

And, perhaps most importantly, the platform combines and connects all relevant software and data seamlessly, which enables companies to understand customers more completely and put their best foot forward in all customer interactions.

*The above is based on a chapter from [The Social Media Management Handbook](#) .*

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