

Social Media Means Serious Business



by Sheryl Kingstone and Zeus Kerravala | June 2010

Executive Summary

Businesses must understand that social media is no longer just a marketing initiative for generating leads. Businesses are now focusing on how social media, combined with customer service and other revenue-generating initiatives, can help make the relationship between a company and its customers more effective for both. To discover the synergies between business and social media, Yankee Group conducted groundbreaking research examining how social media is changing consumer behaviors and what businesses can do to succeed in a connected world.

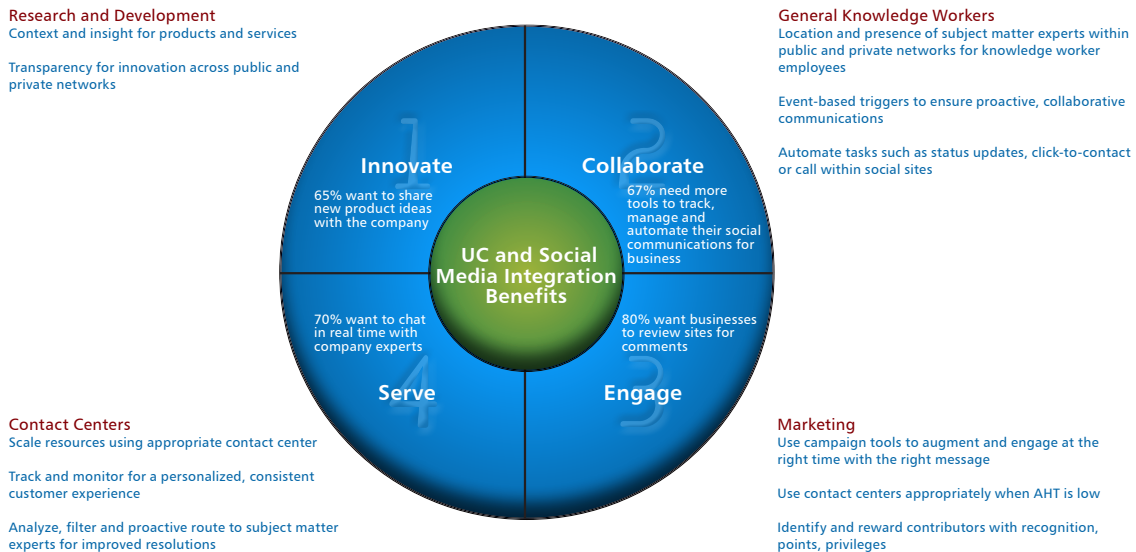
Our key findings include:

- 80 percent of survey respondents believe businesses should review social media sites to see what people are saying about them.
- 70 percent of consumers want to be able to leverage social media sites to see real-time availability of company experts in technical support, billing, etc.
- 58 percent of consumers say regular communication with a business via social networking sites improves their loyalty to that business.
- 67 percent of employees need more tools to track and manage their social communications for business purposes.

Businesses are taking note. They are exploring new social media investments to improve the customer experience and employee effectiveness. For example, the integration of unified communications (UC) and social media sites can provide multiple benefits across the organization (see Exhibit 1).

Exhibit 1: Broad-Reaching Benefits of Integrating UC and Social Media

Source: Yankee Group, 2010



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Integration of UC and contact center operations can improve key metrics, including average handle time, first contact resolution rates and customer loyalty. Similarly, the integration of UC throughout the rest of the enterprise can increase employee communication and effectiveness, ensure contextual information gets to the right person at the right time and help automate specific tasks to remove the significant human latency built into business processes.

But as with all tools, the best results come to those who plan and implement well. Yankee Group recommends that companies considering integrating social media and UC seek out vendors with broad portfolios, standards-based software solutions and strong partnerships with leading collaboration vendors.

They should also ensure that any solution they choose leverages current social media and UC platforms—neither consumers nor employees want to use separate social media toolsets at work and at home. Plus, they should ensure that all segments of the business—from the contact center, to marketing, to sales—can access the solution and leverage it for success.

Above all, remember the basics. Having a presence on Twitter or Facebook won't help sales representatives close more deals if they can't properly position their products according to the needs of the customer. The goal is to use integrated UC and social media to learn, monitor, measure and engage when appropriate.

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I. Social Media Communications Dominates Daily Lives

Social media has been widely adopted by consumers, forcing businesses to make substantial changes across their entire organization: Contact centers want to improve care, marketing needs to create unique dialogues with customers and knowledge workers want to improve team collaboration.

Yankee Group conducted a survey to assess the ways social media tools are changing consumer behavior and impacting businesses. The social media revolution has dramatically changed the way businesses and employees interact, resulting in new investments. The integration of UC and social media sites will improve not only the customer experience, but also employee collaboration. Additionally, many business processes can be streamlined or fully automated, bringing corporate productivity to new heights.

Methodology

For this study, Yankee Group conducted an online survey of 750 consumers and employees to identify their opinions and needs related to social media usage and their interactions with businesses. The survey was fielded in March and April 2010.

Consumer Use of Social Media Is a Powerful Force

The findings indicate that social media adoption is already changing the behaviors of consumers and employees, and that businesses need to take their social media strategies seriously. Customer interaction channels have evolved significantly over the last 25 years (see Exhibit 2). Contact centers are no longer simply handling

traditional voice calls; they are fielding all forms of electronic interactions, including e-mail, Web and now social media. The study illustrates the importance of integrating social media interactions along with traditional communications channels (voice and e-mail). The social media phenomenon now means serious business.

Businesses must understand that it is no longer simply about how to develop audiences, but how to maintain audiences, build revenue and make the connection itself more effective for both the company and the consumer. Social media is no longer just about chats, tweets and Facebook pages; it's about the blending of immediate information anytime from a trusted community.

Consumers that are always connected—what we call Anywhere Consumers—are transforming their behavior in ways that are changing the face of business interactions. Yankee Group data clearly demonstrates that both consumers and businesses find all forms of social media prominent in their daily lives. Ninety-four percent of respondents say text messaging is the most important. Use of photo-sharing, chat, YouTube and consumer social networking rank just below text messaging in importance, ranging from 82 percent to 89 percent. Professional networking, video conferencing, Twitter and blogs rank lower, but still pretty high on the importance scale at 75 percent.

These new connected consumers care very much about social networks, instant messaging (IM), text messages and blogs, and they are also no longer just passive participants on the Web (see Exhibit 3 on the next page). They write blogs, rate reviews, re-tweet interesting news, create content and answer questions. Mobility also plays a large role, with 37 percent of respondents saying they use their mobile phone several times a week to collaborate on social sites.

Exhibit 2: Evolution of Communications Channels

Source: Yankee Group, 2010

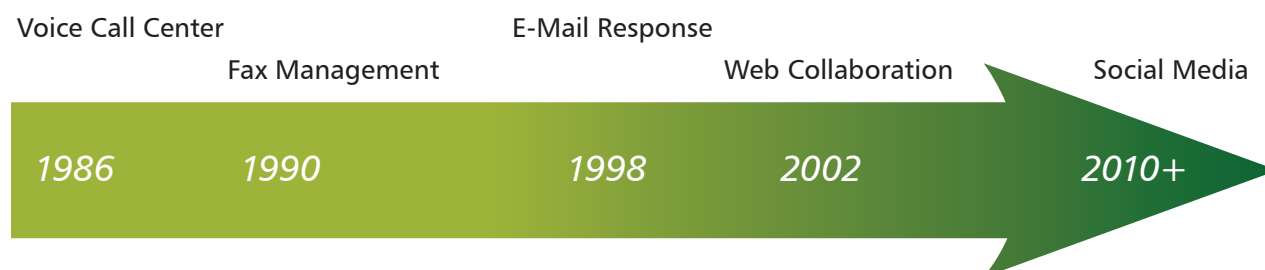
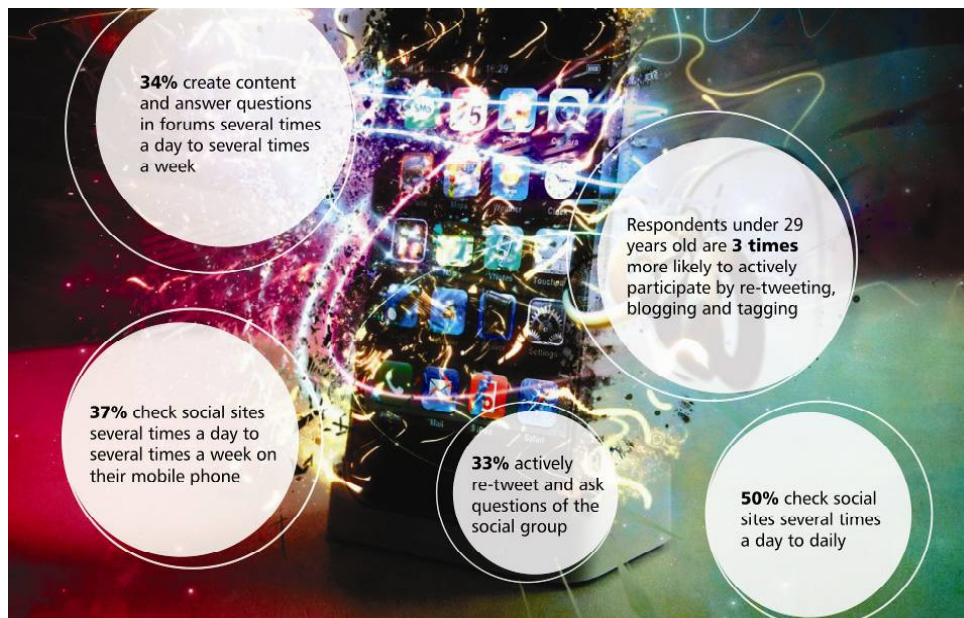


Exhibit 3: The New Socially Connected Consumer

Source: Yankee Group, 2010



While social media is very important across all generations, there are generational differences that will affect the future of business communications. For instance, on a scale of 1-10, 18- to 29-year-olds say social networking rates a 9 in importance, compared to the over-40 crowd, who rate it only a 6. While text messaging is important for all generations, the 18- to 24-year-old group was the only category that rated it a median of 10 out of 10. When it comes to truly active social participants, under-29-year-olds were three times more likely to write content, re-tweet, post videos and tag content.

With the exponential growth in importance of social media, the implications for business are far reaching. Social media not only changes how customers participate in the conversation, but also how businesses must respond. Customers are now in the driver's seat, with Web information and social media tools such as Twitter, YouTube and Facebook creating volumes of information. Do a search on YouTube, and you can easily find several video complaints that spread virally and hit the front pages of magazines. Companies are either helped or harmed in a second by 140-character Twitter tweets. Social media has already snuck its way into our daily lives, with online communities and content being read and spread via millions of conversations taking place anywhere—from Web sites to mobile phones.

Social Implications for Businesses

This brave new world is raising a host of concerns for employers, who want to tap into the power of social media to connect with customers and clients, but who can't always control not only the outcome, but also employees' use of social channels. Businesses must understand that not only are consumers actively connected and engaged, but employees are also using these tools at work.

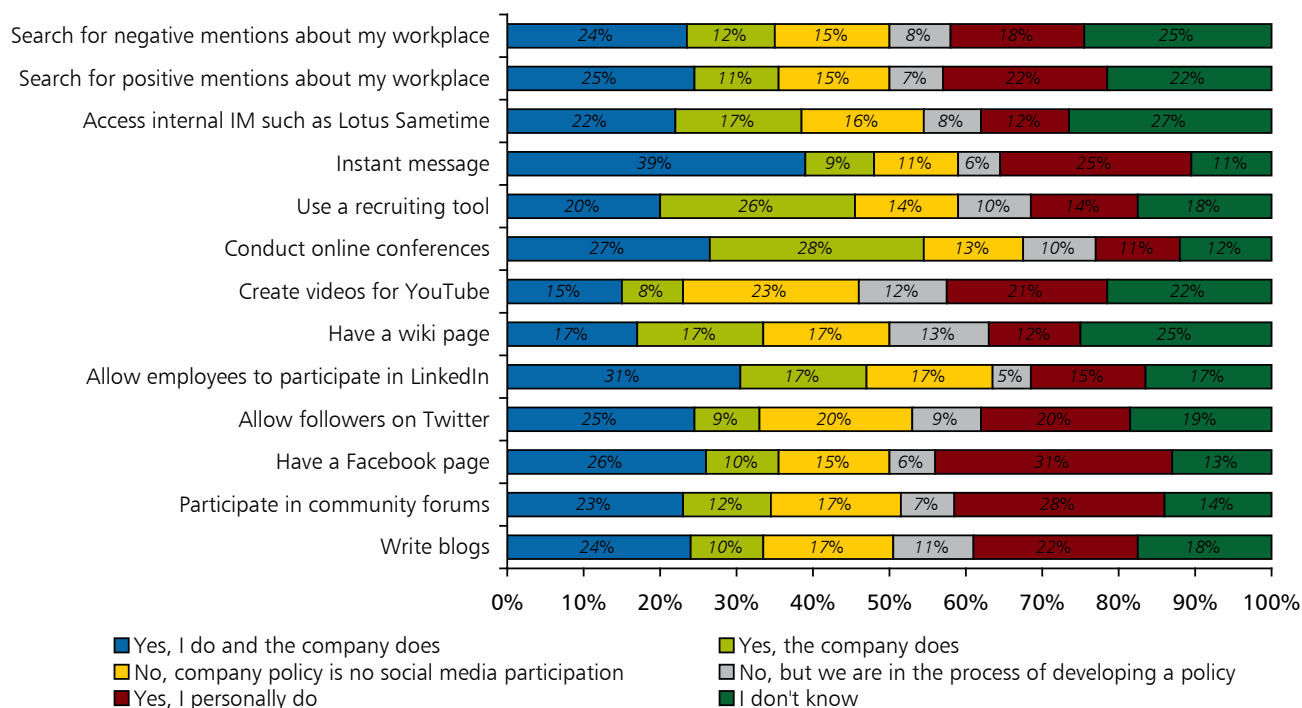
While tools such as video conferencing, corporate chat and workplace forums are primarily work tools, text messaging, blogs, consumer social networking and chat are important for both work and personal reasons (see Exhibit 4 on the next page).

The data clearly shows social media permeating all aspects of our lives for both work and play. While IM and corporate social networking are at the top of the list, businesses and employees are actively participating in all forms of social interactions, from searching sites to actively writing blogs and participating in forums.

Exhibit 4: Social Media at Work

Source: Yankee Group, 2010

Do you or does your workplace participate in any of the following social habits?



The lines between the personal and professional are easily blurred with social media, prompting some organizations to adopt policies providing guidance on how and when employees may post status updates or tweet their friends—or in some cases, banning social media sites outright in the workplace. Eighty-two percent of respondents agree that they prefer to keep their personal and work life separate in the social world, but it is not easy.

Businesses are also struggling with policies and procedures for not only employee usage of social media, but their own social media-focused business strategies. While an average of 30 percent of businesses already use some form of social media tools, another third have no formal processes in place, do not allow the use of social media at work or have no idea if their company participates in social media.

This is an alarming statistic on multiple fronts. While some companies are understandably still formulating their plans for social media, others are just blindly participating without any formal processes, controls or engagement strategy.

This creates an environment full of clutter that impacts not only business initiatives, but also consumer engagement. Businesses must understand:

- The younger generation acts differently.** If the average 50-year-old executive makes decisions based on his or her own usage of social media, that business' social media plans will fail. For example, 51 percent of respondents over the age of 50 state that it is not at all important for a business to have a presence on a social site. By contrast, only 6 percent of 18- to 24-year-olds say it is not at all important and 43 percent say it is very important. Mobile phone usage is also dramatically different. Forty-three percent of 18- to 24-year-olds are very interested in using their mobile phone to interact with a company—for example, allowing text messaging to their cell phone for product discounts or responses to blog posts. Sixty-nine percent of respondents over 50 say it is not at all important for businesses to send text messages.

- **Customers want businesses engaged.** Eighty-one percent of respondents say it is important for companies to review social media sites to see what people are saying about them. And 75 percent believe companies should look at specific comments placed by individuals. It is important for businesses to formulate plans to formalize their social media initiatives. Since only 10-20 percent of respondents say they are unwilling to share their social media user name, it is important for business to actively embrace this communications tool.
- **Employees are already using the tools.** Seventy-three percent of respondents say they use social media tools at work. Considering roughly 40 percent of respondents participate in blogs and/or social networking for both work and personal use, companies must take social media seriously. Salespeople are using social media tools to help them sell and service their products. Marketing departments are analyzing sentiment and engaging in customer dialogues, and many employees are using social media to improve team collaboration and communications.

II. Social Media Changes Business Communications

As employees and customers continue to move from passive consumption to active participation, common sense principles still must apply to day-to-day business. If companies don't have the ability to track and measure social channels, the outcome will be detrimental to the business.

Big Brands Go Social with Mixed Results

Big brands have moved from small pilots to formalized social presences. Now that social media has become much more mainstream, how does a big brand use social media to its full potential? Our survey shows consumers are aware that big brands are using social media. On average, 60 percent of survey respondents visit brands on social sites. However, more than half the respondents over 50 have never even visited a site. Best Buy had the highest awareness factor, with 36 percent of consumers familiar with its social presence; for 18- to 24-year-olds, that number is even higher (45 percent).

We also asked participants who were aware of brands using social media about their overall satisfaction with the brands' social media initiatives. Overall, companies receive an average ranking of 5-10 on a scale of 1-10, with 1 representing "very bad" and 10 "excellent." The average satisfaction for these brands is 65 percent, which is not really that fantastic. While Zappos and Dell achieve a 71 percent satisfaction rating, overall most brands need to improve their customers' satisfaction with their social media channel.

The relatively tepid satisfaction scores are due to a variety of factors. For example, search Facebook for your favorite brand. How easy is it to find the company's official page? Where is the fan page? Is it easy to find specific product pages? This is just the beginning. What about truly engaging the customer experience? What about servicing the customer, anywhere, anytime?

There are still many challenges with the social media landscape. If customers are brand loyalists, do they really want to sift through lots of entries to find the best subject matter expert to answer their question? The landscape is already so crowded that it's hard to find the right signal through all the noise.

Some companies want to start using social media as a form of enhanced customer support, for example, treating social media as a new interaction channel for the contact center to provide responsive first-level customer service and support in near real time. Other businesses have focused their initiatives around marketing to reach customers and prospects with personalized messages, stimulate dialogue and build relationships.

The reason: While social media is fundamentally a new way to reach customers, it is also considered a trusted community. People are not waiting to be sold. They need to be convinced, which takes some warming up—a role traditional advertising typically played in building a relationship. Considering that many consumers believe companies manipulate information in ads, the use of social media can help businesses address trust concerns. For example, 62 percent of our respondents already say they trust the information they get from their social network. People are less likely to throw up barriers and defenses against information when it comes from a trusted source and in a context that makes sense. Trust is critical for businesses to improve their likelihood-to-recommend metrics.

A Better Social Experience Means Serving, Not Selling

Some businesses use social media such as Facebook and Twitter to communicate with their customers in conjunction with other means of marketing communications. Others use social media to answer customer support questions similar to a 1-800 number or Web chat. Sometimes social media is handled by a dedicated small group of employees, while other times, it's the purview of any employee with an account. These haphazard strategies may work to a degree in the short term, but the volume of inquiries through Twitter, Facebook and other social networks may exceed many businesses' capabilities to keep up with demand.

The opportunity to capitalize on connections where people interact freely and in real time anywhere has potential, but only if we reduce the inevitable clutter and noise that come with existing social networks: 75 percent of respondents say there is too much clutter to sift through when visiting social sites. The good news is that 57 percent of consumers do not mind if a business reaches out to them in their social network and believe regular communications improves their loyalty.

Customers want to be serviced, not sold. And they want their voice heard. The question remains: How can businesses effectively use the social channel? What do consumers and employees want? It all comes down to quality and timeliness of an interactive dialogue with businesses.

Exhibit 5 shows the top capabilities consumers desire from businesses on social sites. Top on the list are customer service requirements, from posting and tracking questions to reaching subject matter experts in real time. Consumers also say it is important for them to be able to understand the status and availability of customer service and support from within this channel.

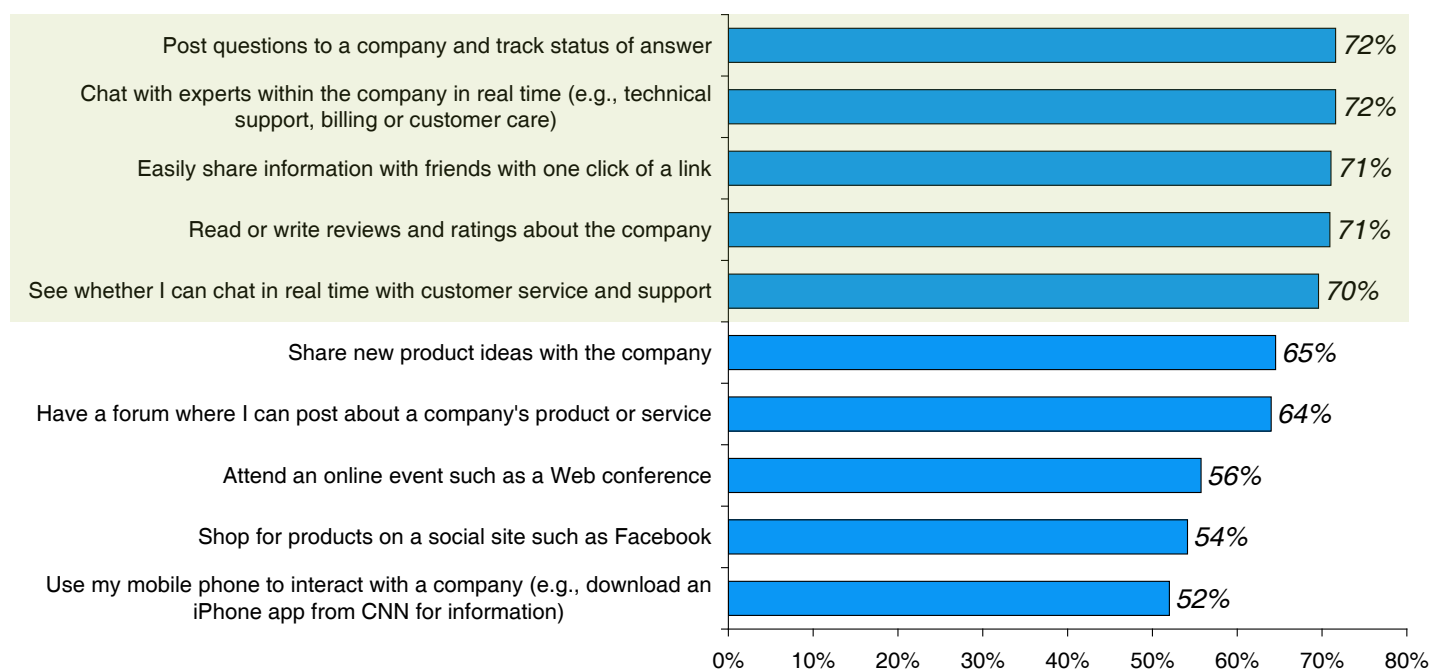
While customer service and support desires take top rankings, customers are also interested in collaborating with the company and peers through forums, sharing product ideas, and reading and writing reviews. The ability to shop for products gets a somewhat lukewarm response.

Across the board, the younger age bracket has a significantly greater interest in all aspects of social interactions. More specifically, 60- to 65-year-olds have very little interest, except when it comes to ease of activities, such as one-click access and getting assistance from subject matter experts.

Exhibit 5: Customer Service Access Is Critical to Social Media Success

Source: Yankee Group, 2010

Do you or does your workplace participate in any of the following social habits?



We also asked employees about improving their social media communications usage. Clutter is a large issue, not only for consumers, but also for employees. Clutter within social sites makes it very difficult for users to find relevant information. We also asked employee respondents to pick statements about social media that most closely match their viewpoints. The top statement is the fact that social media has a future, but only if they can sift through relevant information more easily.

Exhibit 6 highlights employees' top interests for improving their social media usage. Issues that garner the top spots are all about sifting through clutter, automating tasks and improving collaboration with colleagues and customers.

While the use of social media at work is an ongoing debate, any ability to eliminate human latency from business processes, provide contextual information relevant to work issues and improve

collaboration within the social and workplace network is essential for business communications. Social media integrated with UC can deliver the ability to communicate and collaborate with both an internal and external audience over multiple media formats in real time.

III. The Benefits of Social Media/UC Integration

UC and VoIP have been touted as technologies that can help individuals collaborate, improve worker productivity and dramatically lower the total cost of corporate communications. However, despite the promise and hype, the majority of UC applications deployed today revolve around basic conferencing services and unified messaging (see Exhibit 7 on the next page). More strategic UC applications such as presence and mobile integration remain low in both adoption and plans to adopt.

Exhibit 6: Employees Are Very Interested in Automating Contextual Information

Source: Yankee Group, 2010

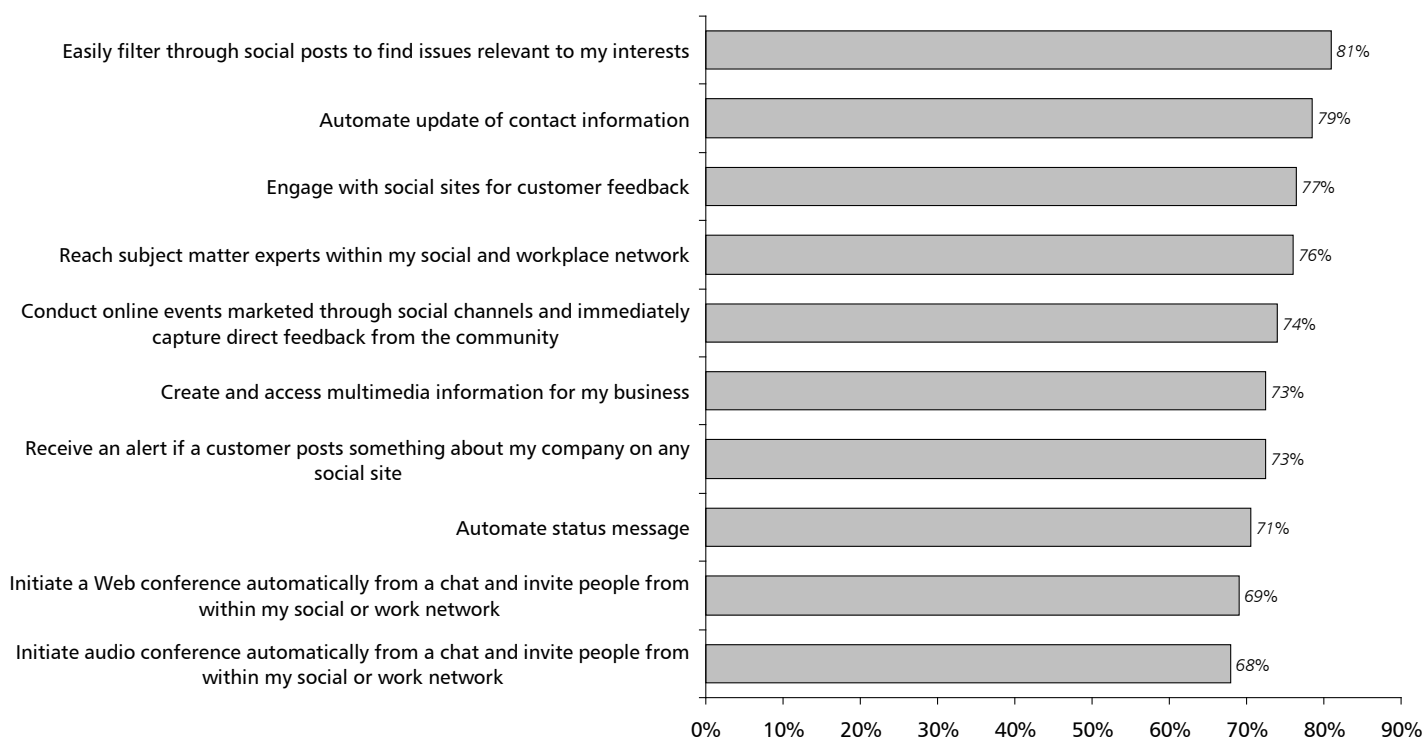
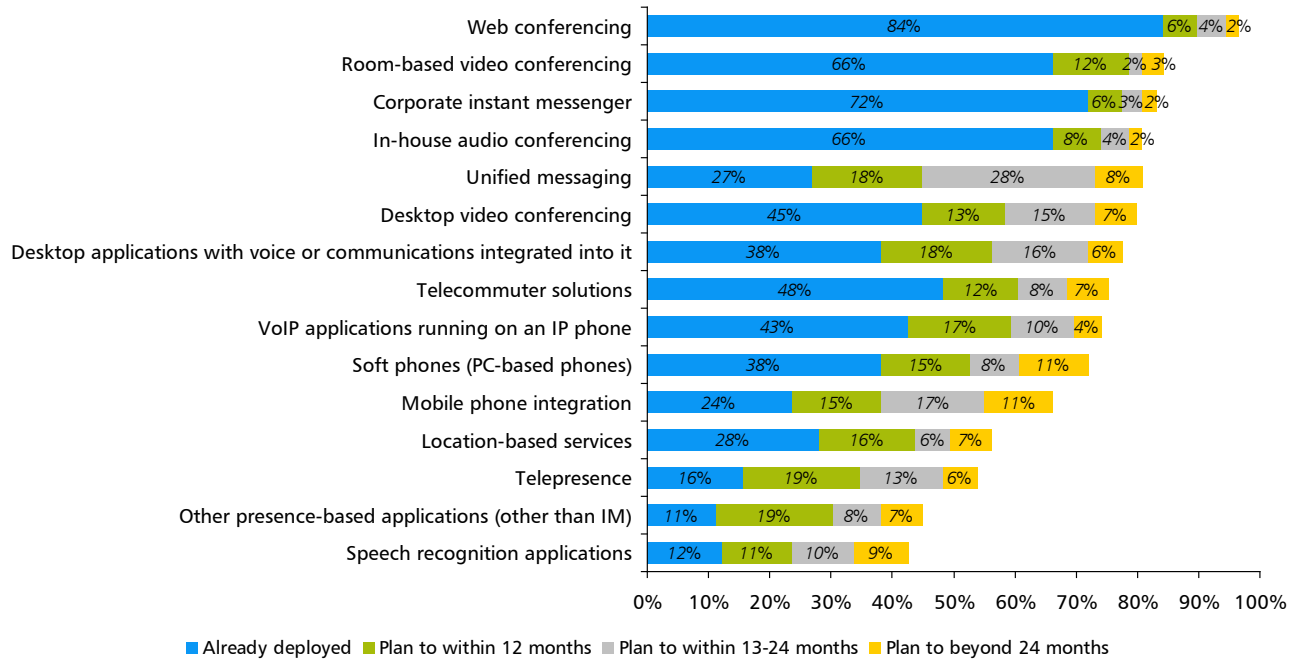


Exhibit 7: UC Deployments Are Limited to Basic Applications

Source: Yankee Group's Anywhere Enterprise—Large: 2009 Transforming Infrastructure and Transforming Applications Survey, Wave 1-12

Has your organization deployed or does it plan to deploy any of the following unified communications components?



This begs the question: If UC has so much corporate value, then why has the technology struggled to be adopted and accepted by businesses? There are three reasons that UC has yet to realize its full potential:

- The audience that corporate UC tools address is limited.
- Traditional UC uses older legacy technologies.
- The future value of UC is dependent on integration with corporate applications and business processes. This has yet to be realized.

Corporate UC Focus

All corporate UC solutions are designed to improve communications and collaboration with individuals from the same organization. However, workers today communicate regularly with individuals from other organizations, meaning traditional UC tools only help streamline communications with part of a worker's personal network. This is why many workers turn to consumer-focused social media tools to augment their collaboration tools.

Many workers, though, will defer to a single set of tools and will actually prefer the consumer-focused tools because they enable communications between the internal and external audience, whereas corporate tools can only meet the challenges of the internal group.

“Legacy” UC Tools

Each generation of workers chooses to collaborate differently than the one before. Two generations ago, the first thing workers did when they arrived at the office was to check for faxes and voice mails. This current generation relies most heavily on e-mail and conferencing tools. The current crop of younger workers, which will make up the next generation, collaborates using a variety of social media tools (Facebook, Twitter, etc.), chat and mobile phones to communicate. While many traditional UC tools have limited social functionality (such as text chat), they don't allow workers to harness the power of an external community, they have limited mobile capabilities and they just don't match the way younger employees and students work.

Future Value of UC

UC has been deployed primarily as a set of applications that run on a worker's phone and desktop. However, most UC solutions are designed to be more of a platform, where companies can integrate the communications tools into corporate applications and businesses processes. This gives rise to the concept of the communications-enabled business process (CEBP), where a business process can be streamlined or created through the integration of communications tools.

For example, if an employee looked up a co-worker in a corporate directory, the directory would show something like the co-worker's e-mail address, desk phone number, mobile phone number and other information. Typically, the worker may need to leave messages on several phones and send an e-mail, taking many steps to contact the co-worker. If the directory had UC integration and the co-worker's presence state was "out of office; call me on my cell phone," the employee would know to try the mobile phone first. This is just a very basic example of how a process could be streamlined through the integration of UC.

UC has a tremendous amount of potential to change the way we work and collaborate. To unlock the full potential, however, UC solutions need to be integrated with social media. The next section demonstrates the value of UC and social media integration through two horizontal scenarios.

IV. UC and Social Media Scenarios

Scenario I: UC and Social Media Integration Improves Contact Center and Marketing Communications

Customer service representatives (CSRs) must use information intelligently to create a lasting bond. As the data shows, customers are turning to the virtual community and their social network for answers and support. Contact centers must become the focal point for all customer interactions, including social media. UC is essential to ensuring that CSRs have all the relevant information at their fingertips, including the presence and availability of subject

matter experts as well as critical information such as complaints, technical questions or opinions on sites like Facebook and Twitter. UC can enhance individual and team productivity responsiveness and collaboration by unifying contact center and social media interactions into the current processes and tools of the contact center.

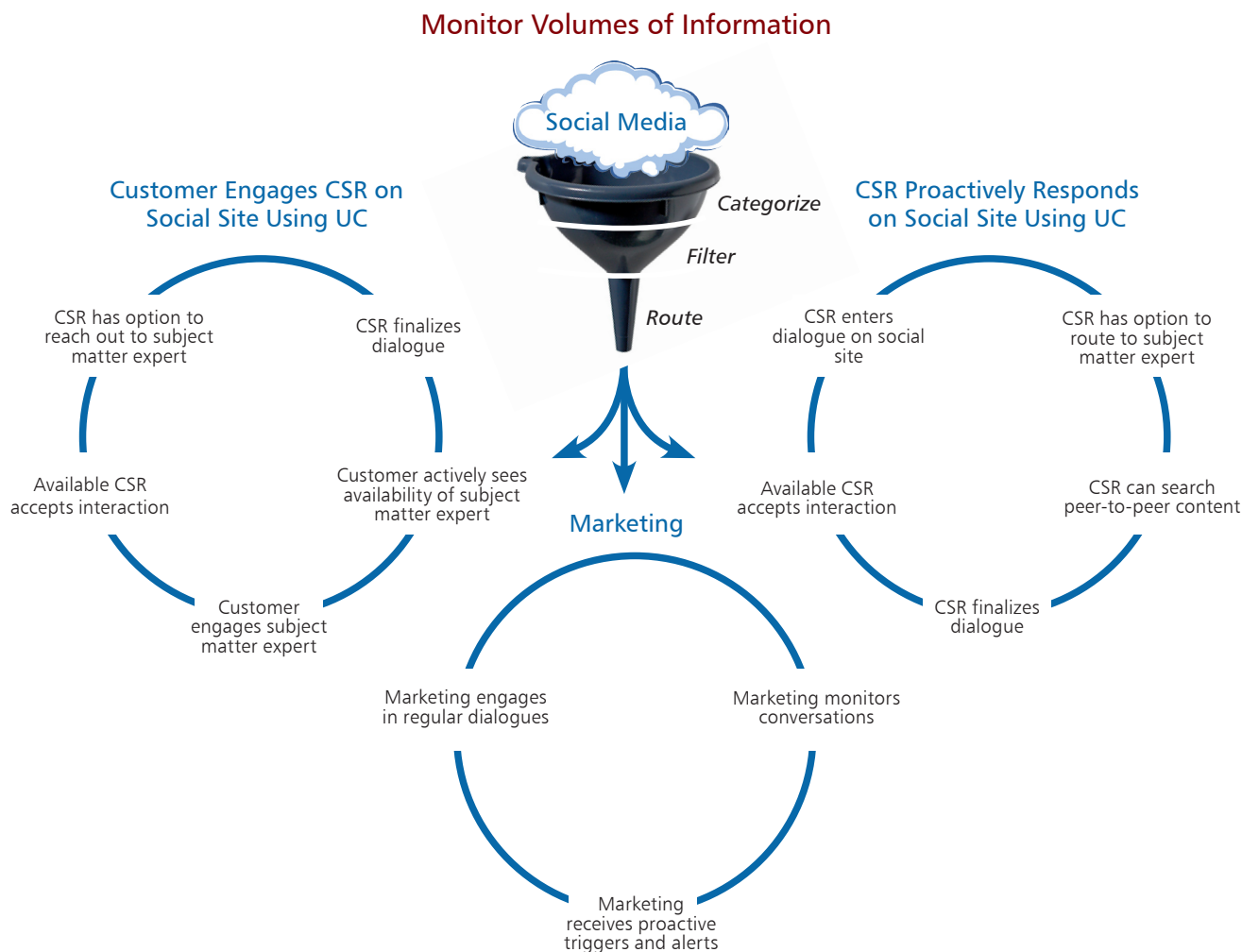
CSRs have a hard enough time handling disgruntled customers, let alone not having all the necessary information and experts at their fingertips. Yet, today most CSRs have limited visibility into issues, posts and resolutions that are outside the corporate knowledge base. CSRs are the best place to turn to handle the volume of inquiries. They are already knowledgeable about how to search for answers to customer queries, navigate through existing contact center technologies and provide engaging and responsive customer service. By bringing the social Web to the agent desktop, companies can use these tools to not only remove the latency of response, but also capitalize on the information no matter where the conversation takes place.

While it is possible to leverage existing investments in staff and processes, new technologies will be necessary to monitor, filter, categorize and route issues to the right subject matter agent at the right time using existing call flow tools. They can also provide aggregated user presence across all interactions, including social media. By doing so, the customer or CSR can easily escalate a social media interaction into a voice, e-mail or Web collaboration. The contextual intelligence in the post or tweets can be used to drive notifications, follow-ups and outreach.

Exhibit 8 on the next page illustrates the immediate benefits that integrating UC and social interactions can provide contact centers and marketing. By providing the ability to monitor, filter and route issues to subject matter experts based on existing work-force management software, contact centers can handle interactions effectively. For example, a customer can post a question, make a comment and/or provide a rating on a social site. UC analyzes the post based on profile and context to ensure the right agent gets the right interaction at the right time. It is also possible to ensure the availability of the CSR is shown within the social site, enabling proactive customer outreach to the right subject matter expert.

Exhibit 8: Using UC and Social Media To Improve Marketing and Customer Service Automation

Source: Yankee Group, 2010



Scenario 2: UC and Social Media Integration Improves Sales Effectiveness

The success of a sales professional is dependent on his or her ability to interact with a large community of both co-workers and external partners. This could include, but is not limited to, the customer, sales managers, product managers, marketing individuals, partners, resellers, subject matter experts and pre-sales professionals. This means the sales professional's success is highly dependent on his or her ability to find, locate and derive the correct information from a vast group of people as fast as possible. To do this, the salesperson must often rely on a knowledge base and corporate directories that are often not kept up to date, leading to quite a bit of extra work.

The process starts with an initial meeting with a prospect, when the salesperson gathers and filters the information as well as possible. When the salesperson returns to the office, a multistep process begins, as key individuals need to be identified and then contacted to help build a proposal. This can be a lengthy process, as the corporate knowledge systems are not real time in nature and often do not provide enough information for the sales professional to accurately identify whether the best individuals have been located.

Once this process is complete, a series of meetings takes place to answer key questions and assemble a solution. This is followed by the re-engagement of the prospect as the proposed solution is delivered. If the prospect has any subsequent questions, the sales professional uses a variety of UC tools such as chat, text messaging and the phone to get the question answered quickly and accurately. Again, the salesperson's ability to answer the questions is only as good as the accrued knowledge he or she can access.

This process is then repeated with several more collaborative sessions and meetings until the proposed solution is accepted or firmly rejected.

Complex sales processes can have long sales cycles due to the amount of human latency built into the process. Searching for and locating the best individual to help the salesperson can be a very lengthy task and can often lead the salesperson down dead ends. UC integrated with social media can significantly reduce the entire sales process.

For example, the above process could be streamlined through the use of UC and social media integration. The process could start in the same way, with the salesperson gathering requirements from the prospect. However, identification of key individuals could start while the salesperson is en route back to the office. A keyword search of all blogs, videos and tweets—using a word related to a particular problem, regulatory issue, technology, vertical or anything other aspect of a particular topic area—could be done to determine individuals' expertise. A threshold of a certain number of "hits" could be used to determine likely fit, all of the qualified users could be ranked, and the list could then be filtered so that only users with a presence status of "available" appear, easing the formation of the collaborative team. Also, by taking advantage of consumer social media tools, the salesperson's entire network could be sorted, not just co-workers.

Once the list of potential collaborators is determined, the UC/ social media solution can search everyone's calendars and send out an invitation for a Web or audio conference at a time that's optimized for maximum attendance.

Days of research, phone calls, redirection and frustration could be completely eliminated, and much of the manual work automated, to help the sales professional find the best individuals in his or her network. Additionally, during the following meeting, any questions from the prospect could be answered through a similar methodology.

The combination of UC and social media creates a unique opportunity for sales professionals to scan their entire professional network for people to collaborate with. The integrated solution can create a laser-focused filtering methodology that could save days of work and automate much of the manual process, giving the organization a significant competitive advantage.

IV. Key Technology Considerations

During any technology transition, it's important to examine not only your incumbent vendor but a wide variety of technology providers to ensure that the best solution is chosen for the organization. UC providers that best enable integration with social media offer:

- **Standards-based solutions.** This may be the most important consideration. The long-term success of the implementation will depend on integration with other solution providers. This can only happen if industry standards are used. Many vendors claim to support standards, even though their solutions have many proprietary extensions. This should be minimized.
- **Solutions that integrate with open, public social media tools.** Some solution providers have their own social media tools that are similar to consumer ones. However, most users do not want separate sets of tools for their personal lives and professional lives. Use a solution that integrates with the tools workers already use.
- **Software-based solutions.** Choosing a software-based solution will provide the flexibility to deploy the technology on a dedicated appliance, on a virtual machine or at a cloud provider. This is key to creating a dynamic, on-demand set of collaboration services.
- **Broad product portfolios.** Communications and collaboration providers can add value at almost every point in the organization. Choose a solution provider that has desktop, telephony, mobile and contact center solutions. Additionally, look for a solution provider that can help with many of the advanced UC features such as CEBP, social media integration and the ability to work in a virtualized environment (see Exhibit 8).
- **Wide-ranging services.** The integration of UC and social media into the organization has many business and technical challenges. Choose a solution provider with a wide range of managed, professional and technical services to help bring some experience to the implementation.

- **Strong partnerships with leading collaboration vendors.** UC and social media cannot be delivered by a single vendor, although many vendors will take this approach. A vendor that has strong partnerships with other leading collaboration vendors, such as Microsoft and IBM, can help guarantee a smooth deployment.

V. Conclusions and Recommendations

UC and social media are two game-changing technologies. Integrating them together and using this technology combination to streamline business processes can help organizations cut costs, improve collaboration and bring productivity levels to new heights. Specifically, UC and social media integration can:

- Create a 360-degree view of the customer that includes information never previously available.
- Deepen customer relationships by communicating with a customer in the method he or she prefers.
- Increase first contact resolution by putting customers in contact with the right individuals immediately.
- Enable better corporate collaboration by providing a broad set of tools to reach both internal co-workers and a user-defined external network of individuals.
- Streamline business processes by automating many of the day-to-day tasks that normally involve human interaction.
- Provide better access to expertise, both within and outside of an organization, by enabling faster access via a company's knowledge base.

To help organizations get started down this path, Yankee Group recommends the following:

- **Remember the basics.** Social media does not replace Sales and Marketing 101. Having an enterprise social graph won't help sales representatives close more deals if they can't properly position the product according to the needs of the customer. Having a presence on Twitter or Facebook won't automatically increase brand awareness. The goal is to learn, monitor, measure and engage when appropriate.

- **Integrate social media interactions into existing communications processes.** Social media can broaden the community of people we interact with on a daily basis. Additionally, it brings a new set of tools, giving workers virtually unlimited flexibility to communicate with whoever they want, in the way they want and over whatever device they choose.
- **Help employees be successful.** Policies and procedures must be well documented—especially training and guidance on how and when to engage with customers and prospects. Investments in automation technology help to monitor, filter and respond to the social Web.
- **Contact centers must support social connections.** Monitor, filter and respond proactively to resolve issues quickly before they turn into catastrophes. Develop a corporate-approved “canned response.” Enable agents to respond to comments via the customer's preferred method of communications.
- **Marketing must engage customers and prospects.** Customers want and expect their voices to be heard. Identify and reward contributors with recognition, points and privileges. Use personalized and consistent communications to improve loyalty.
- **Sales can harness the power of social networking.** Sniff out sales opportunities from social media conversations using monitoring tools and augment them into your lead generation database. Use outbound campaign management to route leads to sales agents and follow up using the customer's preferred method of communications. Automate as much as possible to avoid high-priced salespeople getting consumed by mundane manual tasks.

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Sheryl Kingstone, Director

Sheryl Kingstone is the director of Yankee Group's Enterprise Research group, with expertise in customer-centric strategies. Her research helps businesses improve sales effectiveness, customer loyalty and acquisition. Specifically, she helps enterprise clients make decisions regarding the use of technology, business processes and information to boost sales and optimize top-line business performance. She also assists vendors with custom research projects, messaging and positioning, as well as product road map evaluations. Sheryl researches and writes on the top trends in marketing and sales effectiveness and customer-centric processes, and evaluates all CRM application and delivery strategies.

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