

Making Everything Easier!™

Social CRM

FOR DUMMIES®

Learn to:

- Create new marketing communications quickly
- Engage and collaborate with your customers
- Maximize digital media for customer service
- Develop content that gets results from your online community

Kyle Lacy
Stephanie Diamond
Jon Ferrara



Get More and Do More at Dummies.com*



Start with **FREE** Cheat Sheets

Cheat Sheets include

- Checklists
- Charts
- Common Instructions
- And Other Good Stuff!

To access the Cheat Sheet created specifically for this book, go to
www.dummies.com/cheatsheet/socialcrm

Get Smart at Dummies.com

Dummies.com makes your life easier with 1,000s of answers on everything from removing wallpaper to using the latest version of Windows.

Check out our

- Videos
- Illustrated Articles
- Step-by-Step Instructions

Plus, each month you can win valuable prizes by entering our Dummies.com sweepstakes. †

Want a weekly dose of Dummies? Sign up for Newsletters on

- Digital Photography
- Microsoft Windows & Office
- Personal Finance & Investing
- Health & Wellness
- Computing, iPods & Cell Phones
- eBay
- Internet
- Food, Home & Garden

Find out "HOW" at Dummies.com

*Sweepstakes not currently available in all countries; visit Dummies.com for official rules.



Social CRM
FOR
DUMMIES®

**by Kyle Lacy, Stephanie Diamond,
and Jon Ferrara**



WILEY

John Wiley & Sons, Inc.

Social CRM For Dummies®

Published by
John Wiley & Sons, Inc.
111 River Street
Hoboken, NJ 07030-5774
www.wiley.com

Copyright © 2013 by John Wiley & Sons, Inc., Hoboken, New Jersey

Published by John Wiley & Sons, Inc., Hoboken, New Jersey

Published simultaneously in Canada

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning or otherwise, except as permitted under Sections 107 or 108 of the 1976 United States Copyright Act, without either the prior written permission of the Publisher, or authorization through payment of the appropriate per-copy fee to the Copyright Clearance Center, 222 Rosewood Drive, Danvers, MA 01923, (978) 750-8400, fax (978) 646-8600. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at <http://www.wiley.com/go/permissions>.

Trademarks: Wiley, the Wiley logo, For Dummies, the Dummies Man logo, A Reference for the Rest of Us!, The Dummies Way, Dummies Daily, The Fun and Easy Way, Dummies.com, Making Everything Easier, and related trade dress are trademarks or registered trademarks of John Wiley & Sons, Inc. and/or its affiliates in the United States and other countries, and may not be used without written permission. All other trademarks are the property of their respective owners. John Wiley & Sons, Inc. is not associated with any product or vendor mentioned in this book.

LIMIT OF LIABILITY/DISCLAIMER OF WARRANTY: THE PUBLISHER AND THE AUTHOR MAKE NO REPRESENTATIONS OR WARRANTIES WITH RESPECT TO THE ACCURACY OR COMPLETENESS OF THE CONTENTS OF THIS WORK AND SPECIFICALLY DISCLAIM ALL WARRANTIES, INCLUDING WITHOUT LIMITATION WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE. NO WARRANTY MAY BE CREATED OR EXTENDED BY SALES OR PROMOTIONAL MATERIALS. THE ADVICE AND STRATEGIES CONTAINED HEREIN MAY NOT BE SUITABLE FOR EVERY SITUATION. THIS WORK IS SOLD WITH THE UNDERSTANDING THAT THE PUBLISHER IS NOT ENGAGED IN RENDERING LEGAL, ACCOUNTING, OR OTHER PROFESSIONAL SERVICES. IF PROFESSIONAL ASSISTANCE IS REQUIRED, THE SERVICES OF A COMPETENT PROFESSIONAL PERSON SHOULD BE SOUGHT. NEITHER THE PUBLISHER NOR THE AUTHOR SHALL BE LIABLE FOR DAMAGES ARISING HEREFROM. THE FACT THAT AN ORGANIZATION OR WEBSITE IS REFERRED TO IN THIS WORK AS A CITATION AND/OR A POTENTIAL SOURCE OF FURTHER INFORMATION DOES NOT MEAN THAT THE AUTHOR OR THE PUBLISHER ENDORSES THE INFORMATION THE ORGANIZATION OR WEBSITE MAY PROVIDE OR RECOMMENDATIONS IT MAY MAKE. FURTHER, READERS SHOULD BE AWARE THAT INTERNET WEBSITES LISTED IN THIS WORK MAY HAVE CHANGED OR DISAPPEARED BETWEEN WHEN THIS WORK WAS WRITTEN AND WHEN IT IS READ.

For general information on our other products and services, please contact our Customer Care Department within the U.S. at 877-762-2974, outside the U.S. at 317-572-3993, or fax 317-572-4002.

For technical support, please visit www.wiley.com/techsupport.

Wiley publishes in a variety of print and electronic formats and by print-on-demand. Some material included with standard print versions of this book may not be included in e-books or in print-on-demand. If this book refers to media such as a CD or DVD that is not included in the version you purchased, you may download this material at <http://booksupport.wiley.com>. For more information about Wiley products, visit www.wiley.com.

Library of Congress Control Number: 2012952204

ISBN 978-1-118-24249-0 (pbk); ISBN 978-1-118-28313-4 (ebk); ISBN 978-1-118-28421-6 (ebk); ISBN 978-1-118-28704-0 (ebk)

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2 1



About the Authors

Kyle Lacy is Senior Manager of Marketing Research & Education at ExactTarget. In this role, Kyle leads an effort to build and distribute an ongoing research series that sets aside theories and assumptions about consumer online preferences. This series instead focuses on solid data collected through a combination of focus groups, experiential research, and online surveys.

Kyle is the author of three books, *Twitter Marketing for Dummies*, *Branding Yourself*, and *Social CRM for Dummies*. Prior to joining ExactTarget, Kyle co-founded a marketing technology company, helping over 350 clients build and deliver digital marketing experiences. You can follow him on Twitter at @kyleplacy or visit his blog at KyleLacy.com. He lives in Indianapolis, IN, with his wife, Rachel, and their dog-like cat, Harley.

Stephanie Diamond is a thought leader and management marketing professional with over 20 years of experience building profits in over 75 different industries. She has worked with solopreneurs, small business owners, and multibillion dollar corporations.

For eight years, Stephanie worked as a Marketing Director at AOL. During her tenure, subscriptions grew from fewer than 1 million to 36 million. She had a front row seat to learn how and why people buy online. While at AOL, she developed, from scratch, a highly successful line of multimedia products that brought in an annual \$40 million dollars in incremental revenue.

In 2002, Stephanie founded Digital Media Works, Inc. (MarketingMessageMindset.com), an online marketing company that helps business owners discover the hidden profits in their business. She is passionate about guiding online companies to successfully generate more revenue and use social media to its full advantage.

As a strategic thinker, Stephanie uses all the current visual thinking techniques and brain research to help companies to get to the essence of their brand. She continues this work today with her proprietary system to help online business owners discover how social media can generate profits. You can read her blog at www.MarketinMessageBlog.com.

Stephanie's other books include *Prezi For Dummies*, *Dragon Naturally Speaking For Dummies*, and coauthor of *Social Media Marketing For Dummies*.

Stephanie received a BA in Psychology from Hofstra University and an MSW and MPH from the University of Hawaii. She lives in New York with her husband and her Maltese named Colby.

Jon Ferrara, a social entrepreneur at heart, founded GoldMine Software and lead the company until it was sold ten years later. GoldMine helped pioneer

the Sales Force Automation (SFA) and Customer Relationship Management (CRM) markets, and GoldMine was used by millions of companies.

After realizing that social media was going to forever reshape customer engagement, Ferrara entered the start up world again when he noticed a distinct lack of any products that effectively combined relationship management, social listening, and engagement with sales and marketing. Jon founded Nimble to create an social business platform to fill this gap.

Dedications

Kyle Lacy: To my wife, Rachel, and to all the digital marketers of the world who are pushing to drive change in their organizations.

Stephanie Diamond: To Barry who makes all things possible. And to my family for their love and support.

Jon Ferrara: To the man who taught me the meaning of relationships, customer engagement and Social Selling, my father, Angelo Ferrara. He taught me the power of listening and engaging customers, nurturing relationships and staying top of mind with customers. To the woman who has taught me the importance of being present with family, friends and who teaches me on a daily basis the importance of art and soul development, my wife, Arleen Ferrara. To my children who on a daily basis teach me about myself and enable me to grow as a human being.

Authors' Acknowledgments

Kyle Lacy: I often say that social media is multiple minds building a creative community, and this book is no different. I couldn't have written this book without the help of some extremely special people. First off, thank you to Amy Fandrei and Rebecca Huehls for their absolutely angelic patience during the writing of this book. I would also like to thank my coauthors, Jon Ferrara and Stephanie Diamond.

I would like to thank the people in my life and my community who helped me gain the knowledge, experience, and insights to product this book. I have two families in my life. My immediate family and my ExactTarget family. Thanks to my wife Rachel Lacy for her patience and love while writing this book. I would be remiss not to thank my parents and siblings for building my understanding of what it truly means to build community.

Also, thank you to all the Social CRM, CRM, social media, and digital marketers who helped form the ideas in this book. There are too many to name, but you know who you are. Thanks for providing content that helps drive change instead of irrelevancy.

Stephanie Diamond: It has been my distinct privilege to write this book. I want to offer thanks to my coauthors, Kyle Lacy and Jon Ferrara, and the *For Dummies* publishing team at Wiley for letting me coauthor this book for their audience of smart readers.

The following people were especially important in creating this book, and I offer very sincere thanks:

To the great creative group at Wiley, Acquisitions Editor Amy Fandrei, Senior Project Editor Rebecca Huehls, and Technical Editor Alison Zarrella. They helped make this project a reality.

To Matt Wagner, my agent at Fresh Books, for his continued hard work and support on my behalf.

Finally, thanks to you for choosing this book to learn about social CRM. I wish you enormous joy on your exciting journey into this up-and-coming trend.

Jon Ferrara: To the greater CRM/SFA community of users, analysts, editors, and VARS who have supported and inspired my entrepreneurial quests, especially to the GoldMine and Nimble communities.

Huge thanks to Kyle Lacy and Stephanie Diamond for bringing me in to help with the book they wrote. Much appreciation to Amy Fandrei, Chantal Kowalski, and Jen Webb from Wiley Publishing for their support, assistance, and guidance during the course of this project.

Publisher's Acknowledgments

We're proud of this book; please send us your comments at <http://dummies.custhelp.com>. For other comments, please contact our Customer Care Department within the U.S. at 877-762-2974, outside the U.S. at 317-572-3993, or fax 317-572-4002.

Some of the people who helped bring this book to market include the following:

Acquisitions and Editorial

Sr. Project Editor: Rebecca Huehls

Acquisitions Editor: Amy Fandrei

Copy Editor: Heidi Unger

Technical Editor: Alison Zarrella

Sr. Editorial Manager: Leah Michael

Editorial Assistant: Annie Sullivan

Sr. Editorial Assistant: Cherie Case

Cover Photo: © Grady Reese/iStockphoto;
© Mark Bowden /iStockphoto; © Yunus
Arakon /iStockphoto; © Mathias Wilson
/iStockphoto; © Stigur Karlsson /
iStockphoto; © Jacob Wackerhausen /
iStockphoto

Cartoons: Rich Tennant (www.the5thwave.com)

Composition Services

Project Coordinator: Sheree Montgomery

Layout and Graphics: Carrie A. Cesavice,
Jennifer Creasey, Joyce Haughey,
Andrea Hornberger, Christin Swinford

Proofreaders: BIM Indexing & Proofreading
Services, Jessica Kramer

Indexer: Valerie Haynes Perry

Publishing and Editorial for Technology Dummies

Richard Swadley, Vice President and Executive Group Publisher

Andy Cummings, Vice President and Publisher

Mary Bednarek, Executive Acquisitions Director

Mary C. Corder, Editorial Director

Publishing for Consumer Dummies

Kathleen Nebenhaus, Vice President and Executive Publisher

Composition Services

Debbie Stailey, Director of Composition Services

Contents at a Glance

.....

<i>Introduction</i>	1
<i>Part I: Welcome to the World of Social CRM</i>	7
Chapter 1: Implementing the New Social Business	9
Chapter 2: Meeting the New Kid on the Block: Social CRM	15
Chapter 3: Overcoming Challenges to Social CRM	29
Chapter 4: Courting the Social Customer	37
<i>Part II: Building Your Social CRM Strategy</i>	49
Chapter 5: Establishing the New Social Business Model	51
Chapter 6: Refreshing Marketing 2.0 for Social CRM	65
Chapter 7: Using the Social Media in Social CRM	73
Chapter 8: Aligning Sales in Social CRM	125
Chapter 9: Building a Customer Loyalty and Advocacy Program	157
Chapter 10: Creating Socially Relevant Customer Service	179
Chapter 11: Supporting the Age of Mobility	209
<i>Part III: Developing a Social and Collaborative Business</i>	225
Chapter 12: Building a Social Organization	227
Chapter 13: Enabling and Empowering Your Employees	237
<i>Part IV: Measuring the Impact of Social CRM</i>	257
Chapter 14: Analyzing Data to Drive Results	259
Chapter 15: Keeping Up with Evolving Technology	271
<i>Part V: The Part of Tens</i>	279
Chapter 16: Top Ten Enterprise-Level Social CRM Solutions	281
Chapter 17: Top Ten Customer Service–Centric Social CRM Solutions	289
Chapter 18: Top Ten Social CRM Thought Leaders	297
Chapter 19: Top Ten Small Business Social CRM Vendors	305
Chapter 20: Top Ten Cross-Channel Marketing Vendors	313
<i>Index</i>	321

Table of Contents

.....

***Introduction* 1**

About This Book	1
Foolish Assumptions	2
Conventions Used in This Book	2
How This Book Is Organized	3
Part I: Welcome to the World of Social CRM	3
Part II: Building Your Social CRM Strategy	4
Part III: Developing a Social and Collaborative Business	4
Part IV: Measuring the Impact of Social CRM	4
Part V: The Part of Tens	5
Icons Used in This Book	5
Where to Go from Here	5

***Part 1: Welcome to the World of Social CRM*..... 7**

Chapter 1: Implementing the New Social Business 9

Accepting the New Social Change	10
Defending the business side of social media	10
Understanding the personal side of social media	11
Defining the business side of social media	12
Connecting CRM History to Today	12
Traveling dirt roads to the computer screen	12
Welcoming the power of computing	13
Crafting the CRM Definition and Philosophy	13
Optimizing customer relationships	13
Predicting the future of CRM	14

Chapter 2: Meeting the New Kid on the Block: Social CRM 15

Defining Social CRM	15
Using social media for CRM	16
Accepting multi-way communication	17
Moving from brand speak to real conversations	17
Discovering the Social CRM Fundamentals	18
Focusing on community building	18
Giving influence to your customers	20
Collaborating with customers	20

Understanding the Differences in Social and Traditional CRM	21
Shifting from selling to relationship building.....	23
Everything social is public.....	23
Defining new metrics of success.....	24
Aiming for customer engagement.....	25
Recognizing the Benefits of Social CRM	25
Increasing customer retention.....	26
Generating leads	26
Converting leads into customers.....	27
Reducing customer support costs.....	27
Identifying innovative ideas	28
Chapter 3: Overcoming Challenges to Social CRM	29
Understanding the Challenges of Social CRM.....	29
Establishing Best Practices and Guidelines	31
Building a Social CRM Team.....	31
Training Your Employees	32
Prioritizing Activities and Resources.....	33
Establishing Your Social CRM Goals	34
Chapter 4: Courting the Social Customer	37
Exploring the Habits of the Social Customer	37
Looking at customers' buying patterns	38
Understanding how customers use mobile devices.....	38
Understanding the change in advertising.....	40
Recognizing how customers use social media.....	41
Influencing the Social Customer	41
Knowing why people share	42
Creating content that people want to share.....	42
Sharing the recommendation.....	43
Talking to the Social Customer.....	43
Taking marketing beyond messaging.....	44
Adding value for your customer up front.....	45
Providing customer service they didn't expect.....	46
Part II: Building Your Social CRM Strategy	49
Chapter 5: Establishing the New Social Business Model	51
Finding the Right Person to Lead the Way	52
Defining Processes That Yield Insights	53
Incorporating Social Into Your Company Branding.....	55
Showing your company's human side	55
Discovering personalization.....	57
Measuring the Impact of the New Model.....	57

Engaging in Co-creation	59
Starting with internal co-creation	59
Aggregating information	60
Customizing the overall experience	60
Blurring between the producer and consumer.....	62
Chapter 6: Refreshing Marketing 2.0 for Social CRM	65
Attracting Attention in an Attention Economy	66
Discovering the past marketing economy	66
Redefining attention in the new economy	67
Battling Between Old and New Marketing.....	68
Defining product-centric marketing	68
Meeting the embattled company-centric marketing	70
Welcoming customer-centric marketing.....	70
Chapter 7: Using the Social Media in Social CRM	73
Understanding the Role of Social Media.....	74
Changing CRM with social media.....	75
Dipping into real-time analytics	76
Building the Content Pillars	76
Creating and using content.....	77
Discovering storytelling principles	81
Taking a trip with the customer.....	85
Keeping a content inventory	86
Incorporating Blogging	86
Defining a brand blog	87
Searching the blogosphere.....	88
Planning your posts.....	90
Writing your brand post	91
Fitting SEO into blog content	92
Encouraging readers to leave comments	93
Looking at the available blogging tools	94
Discovering the Podcast.....	95
Defining the value of podcasting.....	95
Benefitting from podcasts.....	96
Planning your podcast	97
Choosing podcasting tools	98
Getting your podcast heard.....	100
Including Video in Your Mix.....	100
Knowing how to use videos.....	101
Understanding video-hosting requirements	102
Considering YouTube for video hosting and distribution.....	104
Tweeting with the Microblog Twitter	105
Understanding the microblog (Twitter)	106
Reviewing Twitter basics.....	107
Looking at some specialized Twitter tools.....	107

Facing the Valuable Facebook	111
Understanding the importance of Facebook	111
Discovering Facebook features	112
Adding Specialized Social Platforms	113
Considering social network alternatives	113
Using visual platforms.....	115
Presenting as a Social Campaign Tool	116
Hosting webinars	117
Extending your reach with slide shows	118
Sharing e-books	121
Mining the backchannel.....	122
Having Influence	124
Chapter 8: Aligning Sales in Social CRM	125
Challenging the New Social Salesperson	126
Identifying your sales team's strengths	126
Encouraging compliance with social CRM	127
Building Sales Intelligence.....	129
Valuing the Collaborative Sales Model	130
Categorizing the social sales ecosystem	131
Embracing the cloud	133
Checking out collaboration tools.....	134
Interacting with the New Social Customer	137
Listening to the customer.....	138
Selling to the buying brain.....	139
Leading the New Lead Generation	140
Connecting ROI with social media.....	141
Following the path of the new social buyer	142
Recognizing the new social media persona.....	144
Creating content for buying.....	146
Closing the social sales cycle.....	147
Becoming the Trusted Advisor.....	148
Establishing a sales profile with content	149
Creating relationships on LinkedIn	152
Using a tablet to be more productive	153
Chapter 9: Building a Customer Loyalty and Advocacy Program . . .	157
Understanding Customer Loyalty	158
Evolving loyalty programs.....	158
Discovering why loyalty programs matter	163
Introducing types of loyalty programs	164
Making your most valuable customers feel loved	165

Understanding the Value of Loyal Advocates and Social Influencers	166
Influencing the influencer	167
Understanding the needs of the loyal advocate	168
Enhancing Customer Loyalty and Advocacy	170
Utilizing customer touch points	170
Hearing what customers are saying	171
Delivering relevant content	173
Using gamification to encourage loyal customers.....	174
Chapter 10: Creating Socially Relevant Customer Service	179
Defining Customer Service	180
Expanding the scope of social service.....	181
Adding social has its benefits.....	183
Understanding the importance of social service.....	184
Encouraging customer engagement	185
Dealing with complaints.....	186
Collaborating with the customer	187
Starting to serve your social customer.....	189
Reviewing the actions of the big brands.....	191
Listening to the Social Customer.....	193
Understanding the social graph.....	193
Recognizing the power of viral.....	196
Monitoring your social reputation	197
Using Community-Based Support.....	200
Building the community-based support site.....	200
Growing your community	201
Creating Goals for Social Customer Service.....	202
Benefitting from a self-serve portal	203
Integrating a self-service portal	203
Defining the social knowledge base.....	204
Recovering from Social Media Uproars Like a Pro.....	207
Chapter 11: Supporting the Age of Mobility	209
Looking at Consumer Trends in Mobile	210
Understanding the needs of the market	210
Using consumer behavior to develop mobile campaigns	211
Locating the location-based device.....	217
Navigating the Mobile Enterprise.....	219
Defining the mobile enterprise.....	220
Benefitting from mobile	220
Using mobile with your employees	221

***Part III: Developing a Social and Collaborative Business* 225**

Chapter 12: Building a Social Organization227

Defining the New Internal Ecosystem	228
Meeting the Needs of a Social Organization.....	229
Getting the CEO on board.....	230
Challenging chief marketing officers to support the social enterprise	231
Supporting business units	232
Realizing the social challenges	233
Establishing an Internal Social Network.....	234

Chapter 13: Enabling and Empowering Your Employees237

Gaining Your Customer's Trust via Social Media.....	237
Changing role of the new social employee.....	238
Using employees' outside connections.....	241
Valuing the social employee.....	241
Creating a Social Media Policy.....	243
Reviewing how organization affects policy	243
Understanding the importance of revising social media policies.....	244
Folding social media policies into the organization.....	247
Dealing with Communication Crises	248
Setting expectations for social media responses	248
Training employees	249
Contributing to the Internal Knowledge Base.....	250
Using SEO to Deflect Questions and Calls	252

***Part IV: Measuring the Impact of Social CRM*..... 257**

Chapter 14: Analyzing Data to Drive Results259

Understanding the Social CRM Data Storm.....	260
Teaching the Different Parts of Data.....	261
Combining Business Intelligence with Social CRM	262
Structuring Data Collection and Reporting	263
Translating Social Media Data Into Metrics	264
Defining text analysis	265
Using data to enhance customer interaction	266
Determining what metrics matter for social CRM	266
Measuring the importance of advocacy	267
Realizing the Net Promoter Score.....	268
Finding a Social CRM System to Meet Your Needs	269
Analyzing the Future of Analytics.....	269

Chapter 15: Keeping Up with Evolving Technology271

Educating on the Future Technology.....	271
Changing the employee outlook	272
Evolving with the customer.....	273
Unraveling the Future of CRM.....	274
Building the customer module of the future	275
Diving into the 360-degree view	275
Pushing Mobility and Embedded Technology	276

Part V: The Part of Tens* 279*Chapter 16: Top Ten Enterprise-Level Social CRM Solutions281**

Oracle CRM.....	281
SAP.....	282
Microsoft Dynamics	283
Salesforce.com	284
SugarCRM	285
Jive.....	286
Pivotal	286
Infor	287
SAS.....	287
IBM CRM	288

Chapter 17: Top Ten Customer Service–Centric Social CRM Solutions289

Sword Ciboodle.....	289
Get Satisfaction	290
Attensity	291
Parature	291
KANA.....	292
Moxie Software	293
Pegasystems.....	293
Astute Solutions.....	294
Contactual	294
Consona	295

Chapter 18: Top Ten Social CRM Thought Leaders297

Paul Greenburg	297
Adam Metz.....	298
R “Ray” Wang	298
Wim Rampen	299
Kate Leggett.....	299
Esteban Kolsky.....	300
Martin Schneider	300
Mitch Lieberman.....	301

Bill Ives.....	302
Marc Benioff.....	303
Chapter 19: Top Ten Small Business Social CRM Vendors	305
Nimble.....	305
AddressTwo.....	306
Constant Contact.....	307
Zoho.....	307
Nutshell.....	308
Relenta.....	308
Batchbook.....	309
JitterJam.....	310
BlueCamroo.....	310
Infusionsoft.....	311
Chapter 20: Top Ten Cross-Channel Marketing Vendors	313
Eloqua.....	314
HubSpot.....	314
Marketo.....	315
Net-Results.....	316
Experian CheetahMail.....	316
Neolane.....	317
Silverpop.....	317
Responsys.....	318
SalesFusion.....	319
ExactTarget.....	319
Index.....	321

Introduction



Greetings reader, welcome to the new world of social business and *Social CRM For Dummies*. Pat yourself on the back for picking up this book! You are about to enter a world of customer-focused technology that will revolutionize the way you support and market your business. In our very humble opinion, it's an exciting time for all.

Social CRM (that is, customer relationship management) responds to dramatic changes in the business world. Over the past 23 years, we have witnessed an extreme transformation in how customers deal with brands. Much of the change is directly related to the Internet and the development of social media. Extend a hand and welcome social consumers with social technology at their fingertips! With social media, customers can speak, share, and build opinions and thoughts around *your* brand.

Whether you are an executive of a global business or the owner of a small business, the idea of digital communication is extremely important to your business strategy. The last five years have seen a massive growth in marketing automation, customer service, and sales support technology. And it is forever changing . . . daily.

Although the rapid changes social media has brought can feel exhausting, it's absolutely imperative to have a finger on the pulse of the CRM and social CRM world. *Social CRM For Dummies* is your guide to entering this world. In this book, we help you understand where your business is, where you want your business to be, and how to steer your business toward that goal.

About This Book

If you deal in any aspect of customer communication — internal or external — this book is for you. Whether you're an executive or small business owner, this book will give you an in-depth look at the world of social business and social CRM.

The world of customer relationship management is absolutely massive. The changes in the industry from software development to cloud-based computing have created a scenario of constant development for everyone in the

marketing industry. We wrote this book to help you gain traction in the ever-changing world of social CRM. This book deals with communication. Period. Communication is (or should be) at the center of every business entity.

There is a saying out there, “Relevance is in the eye of the beholder.” Relevance is exactly why we decided to write this book. The customer deems you relevant if and only if you speak to them as an individual instead of the mass. We are in a world where personalization is king and the rest? Just details. Welcome to the world of social CRM. Enjoy the ride.

Also, this book doesn’t look good gathering dust on a bookshelf. Use it!

Foolish Assumptions

Many authors make assumptions about their readers. How are we to judge? Here are some simple assumptions we have made about you. Feel free to use a pen and put check marks next to the one(s) that apply to you:

- ✔ You are innovative and want to change the way you do business in the digital age.
- ✔ You have used at least one social networking site in your lifetime, such as Twitter, Facebook, LinkedIn, Yammer, or Chatter.
- ✔ You have some business experience running a small business or working in an enterprise-level organization.
- ✔ You love your customers and possess an innate desire to cater to their every need.

We also assume that you have some basic web skills, such as knowing how to use Google.

Conventions Used in This Book

We have some consistent things happening throughout the book that you need to be aware of. Consistency equals success right? In this book, those consistent elements are called conventions.

- ✔ Italics are used to identify and define new terms.
- ✔ If you have to type something, you will find the words are **bolded** to keep things clear and concise.

✓ URLs, code, Twitter handles, or e-mail addresses within a paragraph appear in a special font. A URL looks like this: `http://www.dummies.com` (and if you're on an electronic device, clicking or tapping the URL will take you to that website). A Twitter handle, such as Kyle's, looks like this: `@kyleplacy`.

How This Book Is Organized

The idea of shifting your business to focus more on the consumer can be a daunting task. We have written a wide variety of ideas from strategy to software, which is why this book is broken down in parts and sections. We organized the book in the *For Dummies* way because it is perfect for quick reviewing and reading. If you want to know about certain software for marketing automation, you can go directly to that section. Perfect right?

Let's take a look at how each section is organized and detailed.

Part I: Welcome to the World of Social CRM

This is your complete guide to understanding the beginning of CRM and social CRM. From humble beginnings, the world of data management has shifted dramatically over the years. This is where you learn from where we have come and where we are going.

We define the changing world of the consumer as well as the technology. If you just read Part I of the book (which we don't recommend), you'll have a full understanding of what it means to be a true social business.

Chapter 1 introduces you to the impact social media is having on businesses and how that connects to customers' personal use of social media. You also find out how to connect where CRM was to social CRM today and in the future. Chapter 2 introduces you to the fundamental elements of social CRM, such as multiway communication, collaboration with customers, and customer engagement. You also find out how social CRM supports business's core needs, such as retaining customers, finding leads, offering customer support, and more. Chapter 3 introduces the challenges social CRM poses and strategies that can help lay the groundwork for your social CRM initiatives. Chapter 4 is your guide to the social customer's habits and best practices for approaching the social customer via social media.

Part II: Building Your Social CRM Strategy

Simply put, Part II moves from the 20,000-foot view in Part I to the ground level. Chapter 5 helps you formulate your overall social business strategy, from internal matters (such as finding the right person to lead your social CRM initiative and adjusting business processes) to external strategies (like initiating co-creation with your customers). After you have a better understanding of your big-picture strategy, you're ready to start working within your organization to implement your social CRM plan. Chapter 6 focuses specifically on how to adjust your marketing strategy, Chapter 7 digs into the nitty-gritty of social technology, and Chapter 8 explains how to help your sales team adjust to a social CRM business model. In Chapters 9, 10, and 11, you discover ways to reach out to customers, including creating customer loyalty and advocacy programs, delivering customer service via social media, and effectively reaching out to customers on mobile technologies.

Part III: Developing a Social and Collaborative Business

Employees are customers too! This section details the different ways your employees are affected by social CRM. How do you truly create a social business that thrives under the new technology? (We in the biz call it the Zappos effect. More on that later.) Discover strategies for turning your business into a social organization in Chapter 12. Then, in Chapter 13, you discover different methods and technologies for implementing that strategy.

Part IV: Measuring the Impact of Social CRM

We highly recommend this section for those of you who love analytics and Excel spreadsheets. Success is not only grounded in strategy, but also in measuring the success of a project or campaign. It is imperative to understand the world of analytics and measurement. It will define your campaigns, technology, and business moving forward. Chapter 14 introduces ways you can deal with the massive influx of data that social CRM can bring. You also find help deciding what social media metrics are important to your overall social CRM strategy. Chapter 15 looks ahead to emerging technologies that are likely to become more mainstream in social CRM, including emerging consumer technologies as well as the future of mobile and embedded technology.

- [click The White Boy Shuffle online](#)
- [download Virtual Light \(Bridge Trilogy, Book 1\) pdf, azw \(kindle\), epub, doc, mobi](#)
- [read Vintage Book of War Stories pdf](#)
- **[download online The Book of Drugs: A Memoir](#)**
- [read online Nick's Trip \(Nick Stefanos, Book 2\) pdf](#)

- <http://econtact.webschaefer.com/?books/Edge---Issue-282--August-2015-.pdf>
- <http://www.experienceolvera.co.uk/library/The-Faded-Sun-Trilogy--Kesrith--Shon-jir--and-Kutath.pdf>
- <http://junkrobots.com/ebooks/Farber-on-Film--The-Complete-Film-Writings-of-Manny-Farber.pdf>
- <http://www.1973vision.com/?library/Landscapes-of-the-Jihad.pdf>
- <http://conexdx.com/library/Nick-s-Trip--Nick-Stefanos--Book-2-.pdf>