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- Maximize digital media for customer service
- Develop content that gets results from your online community

**Kyle Lacy**  
**Stephanie Diamond**  
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# ***Social CRM*** FOR **DUMMIES®**

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



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John Wiley & Sons, Inc.

## Social CRM For Dummies®

Published by  
**John Wiley & Sons, Inc.**  
111 River Street  
Hoboken, NJ 07030-5774  
[www.wiley.com](http://www.wiley.com)

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

Published simultaneously in Canada

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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



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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](http://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](http://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](http://www.MarketinMessageBlog.com).

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**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.





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## **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:

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# Introduction



**G**reetings 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.



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