THE LITTLE BLUE BOOK OF

SOCIAL ENTERPRISE TRANSFORMATION

AN ESSENTIAL GUIDE FOR EXECUTIVES

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20 PRINCIPLES FOR LEADING CHANGE

Introduction

Let's face it: Part of you—or maybe all of you—wonders how important and lasting this social phenomenon will ultimately end up being. Is it worth dedicating some of your organization's valuable time and resources to this?

The answer is yes.

Now is the time to get serious about social and put your business fully on the path to becoming a Social Enterprise. This book will show you how to get there through a series of short—but impactful—principles. Read it, start thinking, and then do something social: Share it with someone in your company who can help make it happen.

Lay the Groundwork
for Social Success

Convey clear benefits to your business, customers, and employees

By now it should be clear that social is not a fad. Everything from how we process and consume information to how we engage with customers, prospects, partners, employees—and everyone—has changed forever.

Today, one in every five minutes online is spent on Facebook, 250 million tweets go out every day, and YouTube has morphed from a hub for crazy cat and baby videos into a bona fide entertainment destination and the third most-popular website in the world (after Google and Facebook), according to Alexa.

Almost overnight, brands have moved from 1-to-1 customer conversations to 1-to-1-millions. Your communities have a voice, and thanks to social networks, it's a louder and more powerful one than any other time in history. These networks are so influential because they're powered by people and designed for their benefit. People like your customers and prospects are at the center of this customer-led revolution —and that's what makes social a game changer for business.

No one knows your unique business better than you. That's why you can't exactly copy someone else's Social Enterprise blueprint and apply it to your own company. Your specific social strategy must account for the

technologies, trends, and objectives that are a match for your larger business goals. Only then will you be ready to operationalize your organization for new social opportunities.

Symantec.

"The biggest game-changer over the next five years in business productivity will be how companies use social media."

Enrique Salem
CEO, Symantec

PRINCIPLE

1

Define the Vision

Everything begins with conveying what social media means to your business, your customers, and your employees— and how everyone will benefit.

Before we take any steps forward, let's step back and think about the possibilities. How can social media improve customer and employee relationships? What do these relationships look like over the course of one, two, or even three years? These types of forward-thinking questions set the foundation for the vision.

In defining your vision, remember that social channels are designed for two-way conversations; they're not just another marketing channel for broadcasting your message.

Expectations of engagement, listening, and learning are inherent. It's not just about getting closer to customers and employees; it's about empowering them, learning from them, and leading them.

Your vision should inspire your internal audience, certainly. But it should also be inspirational to people outside your organization. Challenge yourself to write something that makes your communities think, "That's a company I want to do business with."

Either business gets **social** or it gets left behind

(Source: Gartner, Business Gets Social)

PRINCIPLE

2

Set Clear Social Goals

Once you've articulated your vision, it's time to **define your mission and give more details on how your organization will invest in social technologies**, modify relevant processes as necessary, and empower champions to lead the social transformation at every level.

It's no simple task, of course. The explosion of social media sites and technologies means the possibilities are virtually endless. Consider starting small with a few key social channels, then making modifications and additions as you spread your social wings. Don't lose sight of the fact that technology is not the end game and social media—in and of itself—is not a strategy.

At every step, be sure that your mission (and your vision) aligns with business priorities and objectives. Set milestones and checkpoints to ensure that your Social Enterprise transformation is on course. Document expectations and set clear goals that support your overall corporate goals.

70% of enterprises achieve business objectives with social media yet only **43%** have a formal social roadmap to address their goals

(Source: Altimeter Group)

PRINCIPLE

3

Create Purpose

Social media is a very personal and emotional landscape. As such, your Social Enterprise strategy requires a purpose to motivate your team and customers to join you in this important journey. Think about it this way: If your vision is 'what' you're striving for and your mission is 'how' you're getting there, your purpose is 'why' you're doing it at all.

With a clear vision, established goals, and the best intentions of improving relationships and experiences through social media, the next step is to **give your colleagues a reason to believe**. Why should they enlist in this mission? Why should they believe in your vision for transformation? And perhaps most importantly, how everyone will win in the process.

You can't do this alone. Now that you have a vision, mission, and purpose documented, it's time to pull together a trusted group of change agents. These stakeholders will each represent key functions and LoBs to ensure that social transformation is thoughtful and operationalized. Together, change and market leadership is imminent.

PRINCIPLE

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Establish a Social Taskforce

Now it's time to start pulling together the people who will make your Social Enterprise transformation happen. Your Social Taskforce should include people from across your organization that are savvy about social media and knowledgeable about your business and its goals. It should include stakeholders from all relevant lines of business and functions, including HR, legal, marketing, sales, and customer service.

Think of your taskforce as a centralized resource for defining social media policy and establishing governance, best practices, and policies that supports cross-functional teams and business units. Most importantly, they'll ensure your social media strategy ties back to key business objectives.

73% of companies with shared social media have clear leadership, compared to **31%** of those without

(Source: Altimeter Group)

Know Your Customers
Like Never Before

Gain social insights to understand what really matters

If a conversation takes place online and you're not there to hear it, did it happen? The answer is YES. In a social world, what you don't know can—and probably will—hurt you. At the same time, knowing what people are saying and how they're interacting in social networks can really help you.

Social media isn't a nuisance—it's one of the greatest gifts your business could ask for. The conversations that take place in social networks will give you new-found awareness of what people are saying about your brand and your competitors. Social media makes that powerful "word of mouth" that is so valuable and yet so elusive not only discoverable but measurable. You can learn more than ever about your customers based on what they 'like' on Facebook, the thoughts they share on Twitter, and who they're connected to on LinkedIn. These insights can be translated into more meaningful conversations between your customers and employees, more-effective marketing strategies, and ultimately, better products and services.

BURBERRY

"You have to be totally connected with everyone who touches your brand."

Angela Ahrendts
CEO, Burberry

PRINCIPLE

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Make Your Customer King

Today's customer has more power than ever. It's time to recognize and embrace the fact that customers are now in the driver's seat, thanks to social technology.

Everyone knows that referrals from friends are far more valuable than messages from a company. The problem for business was always that generating referrals was an inexact science. Then along came social media. The viral velocity of social networks have made referrals a way of life for consumers—do everything you can to encourage your customers to vote with their influence.

While social media can spread powerful endorsements at unprecedented speeds, mistakes can also be broadcast at the speed of social. Customers now air their complaints to thousands or even millions of people online in an instant; these negative posts last forever and can pop up 24 hours a day, 7 days a week.

Several longstanding companies have been brought to their knees due to a single unhappy—and socially influential—customer. **Protect your business by placing your customers at the heart of everything you do**. Your customers will thank you with their repeat business and referrals.

97% of customers identify as "somewhat influenced" to "very influenced" by other customers' comments about companies

(Source: Clickfox "Social Media: An Emerging Customer Service Channel")

PRINCIPLE

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Get One View of Your Customer

You probably already have basic contact info for your customers and prospects in a database. And many of you actively manage how these relationships track to the sales funnel. But yesterday's sales processes fail to take into account the new social touch points that are so important to build connections with today's customers.

To get a socially relevant customer view, you must **consolidate, track, and manage social customer data in one place**. Connect the social Web to your customer database to establish a holistic profile of your customers.

You'll get a complete view into your customers so you can engage with them in more meaningful ways, correct unforeseen mistakes, enhance their perception of your brand, and gather intelligence to improve your products and services.

Percentage of enterprises using social information to support business critical decisions:

28% in 2010
85% in 2020

(Source: IDC, ICT Market Outlook: What's Next?)

Connect and Collaborate
With Colleagues Instantly

Flatten your organization, uncover expertise, and improve productivity

Imagine a work environment where ideas and expertise transcend hierarchy and flow across geographies. Where your employees at every level are passionate and engaged and feel like their voices are heard. Where it's easy for them to get answers, find experts, and share information with each other. In the Social Enterprise, that's happening now.

Employee social networks break down barriers, elevate good ideas, keep processes moving, and help everyone—from sales to service to the back office—work more collaboratively and productively.

Businesses that use social technologies internally **cultivate a deeper level of employee engagement**, distinguish themselves as leaders, and create work experiences that attract and retain the best talent.

KELLY ®
SERVICES

"As a Social Enterprise, everyone in the company is a subject matter expert. It's been totally transformational for us."

Carl Camden
President and CEO,
Kelly Services

PRINCIPLE

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Empower Your Employees With Social Tools

Social networks empower the individual like no other technology before. On public social networks, people are building personal brands and creating massive amounts of influence. Now the same thing is happening among employees inside of companies via enterprise social networks.

Many companies make engaging customers a top priority, but fail to engage their own employees and turn them into brand representatives. In this social economy, blocking employees from social networks is doing them—and your customers—a huge disservice.

Embrace the fact that your employees have aspirations and ambition. They want to believe in your vision. Help them. Guide them. Empower them. **Make social engagement—internal, external, or both—a criteria to become a top performer**. When employees engage with influencers and the general community online, your story, and your vision can connect people both within and outside the organization.

51% of employees using social software say they are more productive during the workday

(Source: Forrester, The Enterprise 2.0 User Profile 10.31.11)

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Tear Down Departmental Silos Instantly

In many organizations, social media operates solely within the silo of the marketing department. But becoming a Social Enterprise means breaking down barriers. Customers don't care about your departmental silos. They see a single company, and they expect every department to act like they're connected. It's critical that your Social Enterprise provide routes and resolution for all facets of your business.

Everyone in your organization is responsible for collaboration, because **true collaboration requires all employees to share, communicate, and be open**. For example, employees in your sales, service, and

product development teams can collaborate in an employee social network and solve customer issues quickly or to identify up-sell opportunities. Or, your marketing team can use social tools to quickly respond to materials requests from the sales team.

66% of employees say social networking increases sharing

(Source: Altimeter Group)

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Turn Weak Ties Into Strong Connections

Because you all work at the same company, all your employees are tied loosely together by default. But an enterprise social network can make those weak ties become stronger connections where mutual interests and context around customer needs or business problems become immediately apparent.

The power of an enterprise social network is that an employee looking to get an answer from one colleague will often get a faster reply from another colleague—who they may not even know—who saw the social interaction in passing. A simple question about whether someone knows the CIO of a company you're selling to might instead lead to the discovery that the company's CEO is the brother of an employee.

Or imagine a salesperson who posts to the enterprise social network asking how to pitch a certain product to address a customer's business problem. The next thing she knows, her colleagues are jumping in with advice and ideas, and the sales rep suddenly gets swept into an opportunity to sell multiple new products.

These serendipitous moments don't happen when you're sitting at your desk or sending emails only to certain people you know well. They happen when your employees are completely connected and can uncover each other's expertise and insights in a matter of minutes. Suddenly, the expertise of your entire company is lined up to service your customers at a moment's notice.

> The Web and social technologies **enable access** to nearly unlimited ideas and practices.

(Source: Predicts 2011: Executive Focus on Revenue Growth Puts Added Pressure on CIOs)

PRINCIPLE

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Build a Results-Driven Workplace

At the heart of every organization is its culture. To be an effective and transparent Social Enterprise, **you must foster an employee-centric culture**. This means working with your HR department to ensure every employee feels that they're contributing to the company's success, and everyone feels like part of something bigger than just their individual role.

Motivate and improve employee performance by establishing social goals, providing continuous feedback, and giving meaningful recognition. Replace traditional performance reviews with an easier, more collaborative, and social review process

that includes an ongoing dialogue among teams and between coaches and employees. This way, your employees always know where they stand and can build their work reputation. And the whole organization has a richer body of information that's collected as things happen—rather than having to rely on memory when review time comes around.

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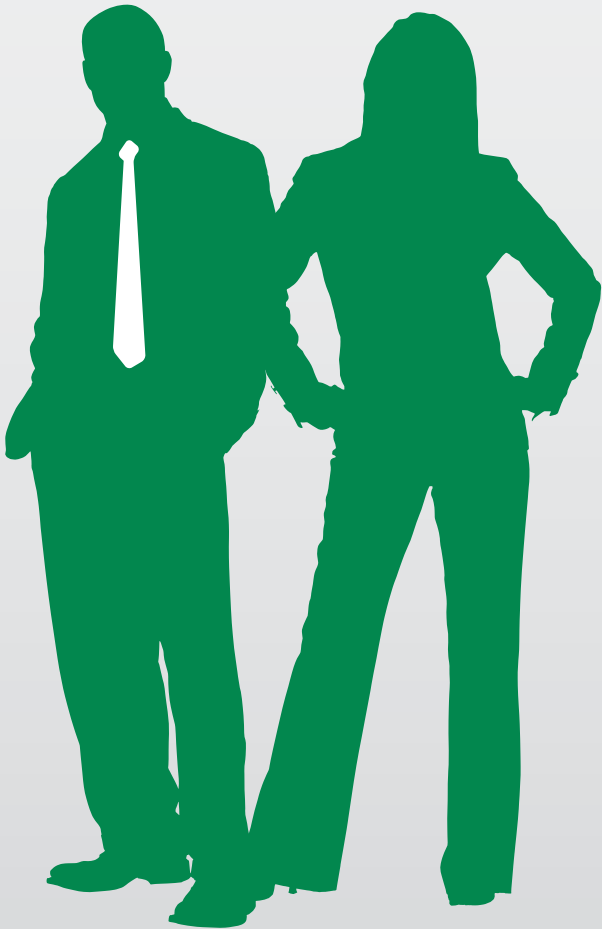
Make Social Part of Every Business Process

Hiring one social media expert into your marketing organization is not enough to transform your company into a Social Enterprise. Social needs to be an integrated strategy for every department and every business process and function across your organization. When social becomes part of your corporate DNA, everyone from marketing and HR to finance and customer service will be more effective at communicating, collaborating, problem solving, and serving customers and stakeholders.

Social technologies can help everyone do a better job. Marketers can launch campaigns that colleagues from across the company and the globe can help shape.

Customer service agents can collaborate to resolve customer issues faster. HR can leverage employees and their respective peer networks to recruit top talent. Product development can crowd-source new product ideas or prioritize innovation currently in the pipeline. By building social into every business process, you'll build a more effective and productive workforce and create a more relevant business.

20% of enterprises that use social media beyond marketing will lead their industries in revenue growth by 2015

(Source: Gartner, Inc., You Need an Enterprise Strategy for Social Business Initiatives)

Build Deeper Relationships by Engaging Customers in New Ways

Collaborate in real time with customers, prospects, and partners

Customer expectations have changed. Customers no longer need to come to you to learn about your products and services. They're joining conversations online and getting a more unbiased perspective on social channels. They prefer engaging with you alongside their colleagues and other customers like them. This new level of openness and transparency has fundamentally changed the conversation between companies and customers.

The most successful businesses today are embracing this shift to distinguish themselves as thought leaders in their industries, earning the trust of their customers ahead of their competition. They're joining existing communities—or creating their own—where customers, partners, and even products can all join the same conversations and share ideas. These businesses care about the needs of their customers and are responding faster and with more transparency thanks to social technology. **Faster responses, deeper engagement and stronger trust**: That's what's fueling the growth of today's leading companies.

As a leader, you set the charter for the customer experience. You have the ability to build the bridges that connect your brand and products to your social customers and deliver remarkable experiences that meet and exceed their expectations.

enterasys
Networks that Know

"When users communicate with their devices via the social networks they already use, productivity skyrockets."

Vala Afshar
Chief Customer Officer,
Enterasys Networks

PRINCIPLE

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Treat Your Prospects Like Trusted Partners

Social collaboration tools inside your company make it easier for sales reps to close deals because they're now connected to everyone and everything they need. The engineer. The new marketing deck. The competitive expert. The latest discount matrix. The executive with platinum connections. This level of connectivity within a Social Enterprise is the new sales reality.

But how does this benefit the relationship with the customer or prospect? After all, that's what selling is all about.

Companies today can now create customer social networks to **collaborate with customers and partners throughout the sales cycle**. These communities can be created instantly and act essentially as private deal rooms that create a new level of transparency and trust—where information flows quickly and customers feel like trusted partners. It's all about changing the attitude and getting to "yes" more quickly.

56% of buyers feel connected to brands that engage socially

(Source: Cone Inc.)

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Create Fans for Life

Millions of conversations are happening online right now, among millions of people. Some of them are about your company and your products. As the conversations about your brand increase, how do you scale? Hiring more people to monitor Twitter is not the answer. You'll be overwhelmed quickly unless you automate your listening and route the right conversations to the right agents within your organization for follow-up.

To win fans in the social era, you'll need to **make sure your agents are everywhere your customers are**. When a technical question comes in about a product, make sure it gets to your product or support team. Social is built for speed, so if you're not bringing the right people into the conversation quickly, your customers will start talking to someone else.

62% of consumers handle service issues with social media

(Source: ClickFox, "Social Media: An Emerging Customer Service Channel" Report)

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Crowd-Source Innovation From Your Community

Much to the chagrin of PR departments everywhere, customers feel free to use their social voices when they need help, when they have a problem, or when they've had a negative experience. Why not channel those voices to help your business create better products and services?

Here's how to get there: **Invest in your communities by turning customers and partners into stakeholders**.

Remember, a community is not just something where people belong; a community is defined by the things that make belonging matter. Develop programs to focus community activity on collaborative missions to accomplish great things. Working together to do something great is a great way to foster affinity and loyalty.

Percentage of enterprises getting new product ideas via social media:

30% in 2010

75% in 2020

(Source: IDC, ICT Market Outlook: What's Next?)

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Market at the Speed of Social

In a social world, context and immediacy are prerequisites for the most successful types of online customer interactions. Captivating your customer's attention at the right time and in the right place can trigger the types of interactions and activity that boost your brand and generate sales.

To make it happen, you need to instantly decipher social activity and then present contextually relevant web content that pulls in social data. Your customers are engaging with your company on Twitter and Facebook, and you need to be there too, generating customized web experiences on the fly.

http://www

Listen and Learn From Public Social Networks

Get insights to shape unique experiences for your communities

A funny thing happened as people started using social networks like Facebook and Twitter. They not only became incredibly connected, they also built their own arenas where they take center stage and their friends and followers fill the seats.

Everyone now has a voice. They have a stage and a connected audience to share what they like and also what they don't like. Remember, people on social networks are at the center of their own social universe, and they don't have to connect to your business. Establishing and losing connections are as easy as a 'click.'

It's time to get their attention and earn their support. But you won't capture their mindshare if you treat social media like traditional broadcast channels that only offer one-way communication. It all starts by listening to what people are saying about your brand and understanding where your customers, partners, competitors, and prospects are spending their time.

Let your desire to put people at the center of your business be the driving force behind your listening. Stay on top of social conversations to help customers at the point of need, thank advocates, win over detractors, and capitalize on new growth opportunities for your business.

DELL

"One of the founding principles of Dell is listening and learning from our customers, taking that feedback, and improving."

Michael Dell
CEO, Dell

Social networks reach **82%** of the online population worldwide

(Source: "It's a Social World" by comScore)

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Create a Social Listening Center

Social media opens windows into the worlds of your customers. Set up a "command center" or central area for viewing, monitoring, and reporting on all your company's social mentions in real time across the social media sites where people are talking about you. This is the central nervous system of the Social Enterprise. Picture a room with multiple screens displaying social feeds. Staffers are watching, learning, replying, and distributing information and questions to the right people throughout your organization. **Your monitoring staff knows what's happening as it happens** and brings in other parts of the organization when and where they're needed.

A listening center will help you glean insights into what customers, influencers, press, and the community are saying about your brand. You can also track what's being said about your competition. Listening is the first step. From there you can learn, adapt, and engage your customers to affect change.

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Establish Rules of Engagement

Each social network community boasts its own unique culture. A "one size fits all" approach can fall flat or cause an unintentional uprising. Front line employees who engage with customers on social channels need road signs and guardrails to operate. They also need training and direction on how to best represent the brand through their actions and words in social media.

Establishing rules of engagement in a broader social media policy **creates continuity and consistency in your messaging across social channels**. Formally training your internal staff on those rules ensures fewer social missteps.

A few simple guidelines include: thanking people who mention your brand, engaging quickly, and being honest. Be sure to cover what to do when things are going wrong. When there's a problem, acknowledge it quickly say you're working on it.

Follow up is key. Give a little detail about what you're doing to fix it and when you expect resolution. While only one person may be waiting for your direct reply, thousands more could be watching. The transparency and openness of social networking sites makes doing the right thing more important than ever.

What's clear is that social customers not only expect and appreciate engagement, but they also feel better as a result. In fact, after having a dialogue with you that the customer feels good about, this same formerly disgruntled person will return to the same channels where they vented frustration to sing your praises. So, don't delay in responding to your customers. Let them know their voices matter—and that you're listening. Now.

92% of companies allow professional use of social media

(Source: Altimeter Group, Pivot Study)

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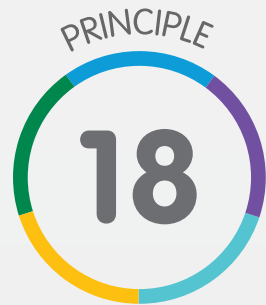
Attract Fans With New Social Experiences

The social Web is fundamentally changing the interactions between companies and their communities. One of the biggest opportunities your business faces today is the ability to **design remarkable experiences through the marriage of social apps and social data**.

Now you can personalize your story for the people you're trying to reach, inspired by their behavior in social networks—what they post, what they do, what they "like."

Imagine delivering tailored products, mobile apps, and Web experiences to your customers. They'll appreciate seeing only relevant information and offers, and you'll experience greater customer satisfaction and more sales.

53% of active adult social networkers follow a brand

(Source: Nielsen)

PRINCIPLE

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Amplify Your Evangelists

As social customers build their personal networks over time, some of them evolve from just another member of the crowd into a person of influence with a large and attentive audience.

Now's the time to **mobilize your influential customers by using listening tools to identify champions and measure their social reach**. Let them know how important they are to your business. Find out what about your company and products excites them, and design official advocacy programs that harness their influence and passion. Before you know it, you'll have an army of people who aren't even on your payroll singing your praises, answering questions guiding purchasing decisions, and defending you against online critics.

90% of online consumers trust known users, **70%** trust unknown users, **8%** trust celebrities

(Source: Erik Qualman, Socialnomics)

PRINCIPLE

20

Bring Your Products Into the Conversation

Your social community can extend beyond your customers, prospects, and employees—now your products can be social, too. **A product social network brings your product into social conversations**, allowing your customers to not only 'like' your product, but to become friends with it.

Each day hundreds of millions of people use social networks to stay on top of the latest news from families, friends, and businesses. Why shouldn't your products share status updates with your customers—just like people do? They can tell your customers when everything's fine, or tweet when something needs their attention.

Imagine your car tweeting, "It's almost time for an oil change." Imagine next seeing an ad on Facebook that your favorite service station has an oil change appointment open at 10:00 on Saturday morning.

Intelligent communicating devices on the network will outnumber "traditional" computing devices by almost **2 to 1**

(Source: IDC)

Start Your Social Transformation Now

As a leader in your organization, it's time to start socializing the idea and assigning people to make it happen.

Only you can help chart a course for the future. Social has created a tremendous opportunity for your company to outpace your competition. If your organization looks to you for direction and inspiration, then **it's up to you to lead the charge in developing a more human, adaptable, and scalable Social Enterprise**.

It doesn't mean starting over. You don't need to reinvent the wheel to become a Social Enterprise. This is a time to evaluate and modernize existing practices and to refocus on the expectations of your social customers.

The journey of 1,000 miles begins with a single step. Use this book as your guide to take the first one. Before you know it, your Social Enterprise transformation will begin, and soon you'll be well on the road to deeper relationships with customers and employees—and greater relevance with social and traditional customers alike.

Salesforce + You = Like

www.salesforce.com/socialenterprise