

How to Determine the Role of Social Media in Your Customer's Journey

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Social media plays a critical role in the customer journey, but not always in the way organizations have planned. IT application leaders supporting the customer experience must identify whether to position social media as a destination or facilitator based on their business goals.



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Key Challenges

Many organizations' social media teams are positioned within, but separate from, traditional teams in customer service, digital commerce, marketing and sales. This leads to:

- Social media strategies confined to the social media channel, starting and ending at a social media property.
- Social media strategies that don't account for the existence of customer engagement taking place away from social media.
- Social media strategies with unclear business impact, as teams lack access to business and customer impact data.

Recommendations

For IT application leaders:

- Outline customer purposes for visiting your social media properties.
- Determine whether your social media properties should facilitate the progression of the customer to a destination where business will be conducted, or serve as a customer destination for business to be conducted.

- Develop a means for tracking customer movement within your social media properties that extends to the broader, nonsocial customer journey.

Table of Contents

Introduction.....	2
Analysis.....	3
Outline Customer Purposes for Visiting Your Social Media Properties.....	3
Determine Whether Your Social Media Properties Are Facilitators or Destinations.....	4
Develop a Means for Tracking Customer Movement Within Your Social Media Properties That Extends to the Broader, Nonsocial Customer Journey.....	6
Summary.....	7
Gartner Recommended Reading.....	8

List of Tables

Table 1. Ten High-Level Customer Purposes and Their Corresponding Business Units.....	4
Table 2. Customer Purposes on Social Media: Facilitation or Destination.....	6

List of Figures

Figure 1. Social Media as a Destination.....	4
Figure 2. Social Media as a Facilitator.....	5

Introduction

Social media is often managed within siloed teams, something that becomes increasingly evident to IT leaders who note that their customer service, digital commerce, marketing or sales teams are present on social media, but the extent of that presence is unknown. Unfortunately, the management of social media within siloes makes for a conflicted customer experience on the part of customers who view social media as one among many channels for connecting with an organization (see "Three Signs Your Social Media Strategy Is Harming Your Customer Experience, and What to Do About It").

Gartner estimates that more than 60% of organizations are managing social media within siloed teams, rather than at a centralized business (approximately 38%) or IT (approximately 2%) level. When social media is managed at siloed-team level rather than at holistic organizational level, strategies often start and end with social media rather than take advantage of multichannel touchpoints frequented by customers on their journey with an organization. As a result, social media

teams have insisted on leveraging social media as a destination for conducting business, rather than a channel that facilitates customer decision making along their journey.

While there are exceptions to the rule, having a social-only strategy more often leads to missed marketing and sales opportunities, conflicted customer service scenarios, and a failure to capitalize on digital commerce conversions. This is because the real customer journey is not dependent on an organization's team-level objectives, but by what the customer needs to accomplish.

IT application leaders supporting the customer experience should work with their partners across the organization to take inventory of social media properties. They must then follow three best practices to ensure that social media is complementing the customer journey, rather than detracting from the customer experience:

1. Outline customer purposes for visiting social media properties (for example, a company's own Facebook page or Twitter handle).
2. Determine whether your social media properties should facilitate the progression of the customer to a destination where business will be conducted, or serve as a customer destination for business to be conducted.
3. Develop a means for tracking customer movement within your social media properties that extends to the broader, nonsocial customer journey.

Analysis

Outline Customer Purposes for Visiting Your Social Media Properties

There's a finite number of reasons why a customer may seek out an organization on social media. IT leaders play a critical role in helping their customer service, digital commerce, marketing and sales counterparts understand the purpose behind customer touchpoints across the entire organization, rather than within their immediate teams.

In Table 1, we outline 10 high-level customer purposes and align them with the most likely business unit responsible for managing the touchpoint.

Table 1. Ten High-Level Customer Purposes and Their Corresponding Business Units

Customer Purpose	Aligned Business Unit
Complain about a problem	Customer service
Get an answer to a question	Customer service
Give product or service feedback or reviews	Customer service, digital commerce
Buy something online	Digital commerce
Browse products or services	Digital commerce
Get customer opinion on a product or service	Digital commerce
Find a coupon or a deal for a product or service	Digital commerce, marketing
Find more information or specifications on a product or service	Marketing, sales
Buy something offline	Sales
Upgrade an owned product or service	Sales

Source: Gartner (June 2015)

The purposes in Table 1 are general, and organizations should look at their respective customer behaviors to build out a more focused table based on customer experience. The above examples do, however, help organizations understand customer intent and the importance of designing the social experience to meet that need as either a facilitator or destination.

Determine Whether Your Social Media Properties Are Facilitators or Destinations

Today, it is most likely that the social media team within your organization starts and ends with social media when it comes to its customer strategies — we call this social media as a destination (see Figure 1). In this means of planning, social media properties are what customer service, digital commerce, marketing and sales teams drive customers to.

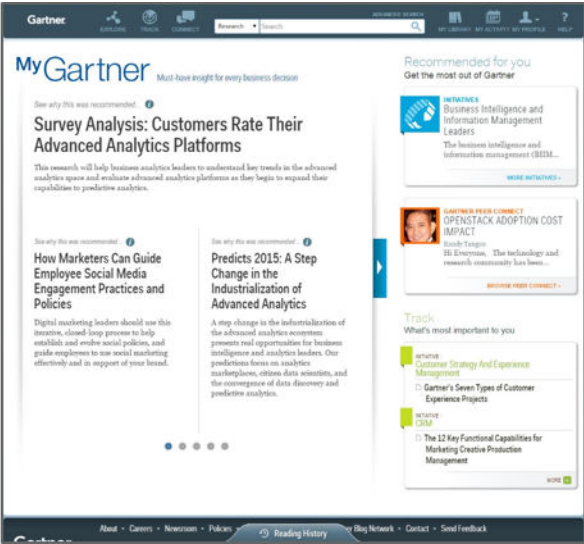
Figure 1. Social Media as a Destination



Source: Gartner (June 2015)

However, in the grand scheme of the customer journey, social media properties are often facilitators that guide customers in their progression through the journey, rather than serving as full stops on the customer journey (see Figure 2).

Figure 2. Social Media as a Facilitator



Source: Gartner (June 2015)

In Table 2 below, we expand on three of the customer purposes outlined in Table 1 and give examples of what a destination strategy versus a facilitation strategy would look like for social media.

Table 2. Customer Purposes on Social Media: Facilitation or Destination

Customer Purpose	Example of a Destination Strategy	Example of a Facilitation Strategy
Give product or service feedback or reviews.	Customer goes to restaurant's Yelp page and leaves a positive review. Restaurant manager responds to review on Yelp.	Restaurant features positive Yelp reviews on its website and encourages website visitors to leave their reviews on Yelp with a link to the restaurant's Yelp page.
Find more information or specifications on a product or service.	Customer looks at a manufacturer's YouTube channel to see if there are any videos providing specs on a refrigerator the customer is looking to purchase.	Customer visits a manufacturer's website and navigates to the product page for a refrigerator they are looking to purchase. On the product page, there is a YouTube video explaining product specs and functionality.
Upgrade an owned product or service.	Customer reads insurance lender's blog and identifies an opportunity to refinance their home. Customer leaves comment on blog, to which the company responds only via the blog.	Customer runs a Google search for advice on refinancing their home. The customer is directed to an insurance lender's blog and identifies that they have an opportunity to refinance their home. Customer leaves comment on blog, and an agent reaches out to make the change to the account.

Source: Gartner (June 2015)

If social media plays a destination role, IT must support the customer service, digital commerce, marketing and sales teams in making transactions possible from social media. Destination strategies often make sense in high-level customer service scenarios, or when offering coupons or deals, but they're not appropriate everywhere. Just because a destination strategy where transactions take place over social media might be technologically possible, it does not always account for customer behavior.

Many customers prefer a facilitation strategy, particularly when it comes to the exchange of private information like payment or account history. This is particularly true in sales and several digital commerce use cases. Facilitation strategies demonstrate an organization's ability to provide a true, seamless, multichannel experience that recognizes that, while social media plays a critical role in the customer journey, it is often something that guides customers to an action as opposed to a place where they perform an action.

IT leaders supporting a facilitation strategy must then make sure that the experience is seamless by enabling their customer service, digital commerce, marketing and sales colleagues to operate off a single customer engagement hub where multichannel interactions can be seen and managed. This also requires working with data management colleagues to get as close as possible to a 360-degree view of the customer (see "How to Incorporate Social Data for CRM Into Your Quest for a 360-Degree View of the Customer").

Develop a Means for Tracking Customer Movement Within Your Social Media Properties That Extends to the Broader, Nonsocial Customer Journey

If customers discover, engage and transact only through social media, organizations are in a good position to understand the impact of social media on their value chain. However, most organizations

need a better understanding of social media's role as a facilitator in the customer journey and for that they will need a disciplined approach to measurement and the help of technology.

Since the early days of using social for CRM, organizations have used metrics provided by social networks to understand customer behavior. For accounts owned by the organization, most social networks provide data on impressions, engagement and some aggregate demographic information. Metrics at the individual post level are aggregated in social publishing tools. In addition to on-network metrics, many organizations use custom URLs to track clicks on links they post via social media, and use clicks as a gauge of success. However, just knowing a customer clicked on a link still leaves a big question: What happened when they got to the site to which they were directed?

This is where Web analytics can help, as commonly used tools allow users to look up and sort by "referrer" to track visitors' previous location (if any) and what drove them to the site. Properly labeled URLs will track visitors to a website, mobile site or mobile app to a particular link on social media. Visitors can be segmented based on their source of entry, and an analyst can get insight into their path through the site, actions they took, where they exited, and success metrics such as sales. Other tools, such as multichannel campaign management platforms, also provide social view and engagement metrics for individuals who are part of a particular CRM or marketing campaign.

More holistic approaches incorporate social media as one element in a broader customer journey. For known customers — those who have provided identifiers such as email and social identifiers to the organization — customer journey analytics platforms specialize in combining behavioral data from disparate sources, such as email systems, Web analytics and social media (see "Technology Overview: Customer Journey Analytics"). Usually analyzed at the segment or persona level (groups of people), these tools provide a way for organizations to gain insight into the role social media plays in the context of both social and nonsocial interactions.

Customer journey analytics is useful for understanding known customers, but what about the many noncustomers who engage with an organization's social media? In addition to Web analytics and social listening tools, which can help, some organizations engage in complex multichannel approaches to attribution and marketing mix modeling. Attribution uses browser cookies, mobile IDs and tracking pixels placed into digital assets, such as emails and digital content, to build up a comprehensive individual-level model of the impact of various channels on behavior. It can be used to understand common customer journeys, both on and off the organization's digital properties, as well as to calculate the impact of particular touchpoints (email, for example).

Marketing mix models take a different, top-down approach, building an econometric model incorporating online and offline channels, as well as macroeconomic and other external factors. In this way, the general impact of social media can be seen in a more realistic context. To gain deeper insight into customer (and noncustomer) journeys, and to increase accuracy, many organizations will use some or all of these tracking approaches in concert.

Summary

Recognizing social media as a channel that is in use by the entire organization rather than on a department-by-department basis can help IT leaders and their customer service, digital commerce,

marketing and sales counterparts orchestrate a multichannel, multipurpose customer experience. In an ideal scenario, all business units would work off of a central customer engagement hub where multichannel customer analytics and engagement could be tracked to maintain a 360-degree view of the customer.

While the customer engagement hub may be something futuristic for many organizations, today's IT leaders that can identify social media's role in the complete customer journey will be better positioned to enable transactions over social channels, or facilitate the customer journey from social media to other traditional or digital channels. This more clearly defined strategic goal has revenue-generating and cost-saving opportunities for savvy customer experience leaders.

Gartner Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

"How to Incorporate Social Data for CRM Into Your Quest for a 360-Degree View of the Customer"

"Technology Overview for Customer Journey Analytics"

"Three Signs Your Social Media Strategy Is Harming Your Customer Experience, and What to Do About It"

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