



Social Customer Service Tool Checklist

Software built for social customer service comes with many different features to listen, analyze and engage. To make sure all your needs are met, use this checklist as a starting point.



Engagement

Workflow

- Contact grouping**
Group messages from same customer
- Assign and approval workflows**
 - Smart assign**
Automatically route mention to agent who was previously handling that customer or specializes in that topic
- Mention and contact locking**
Keep agents from duplicating efforts
- Customizable inboxes**
- Manual & automated routing**
 - Auto-routing folders
 - Advanced automation
- Built-in chat function**
- Publishing guidelines**
Control your external messaging by having the ability to block certain words or sentences
- Built-in social CRM**
 - Integration with Salesforce, Zendesk, Desk.com, and other CRM systems
- (Custom) user roles and employee permissioning**
- Team performance metrics**
- Conversation focus view**
Stop agents from cherry-picking
- Tagging/labelling**
 - Smart Tags
 - Tag prediction

Reporting

- Customer Service metrics**
 - SLA Metrics
 - SLA alerts
Email and push notifications to make sure you never miss goals
 - Handle time
- Command center**
Display KPI dashboards in your contact center
- Business Hours and Team Schedules**



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Analysis

- Community insights**
Geographical, demographical, activity, etc.
- Influencer detection**
- Advanced filtering and comparison capabilities**
- Social media profile insights**
- Custom dashboards & chart builder**
- Sentiment analysis using Natural Language Processing**
- Exporting capabilities**
- Real-time analytics**
- Social feedback management**
- Emotional & root cause analysis**
Uncover more about the emotions associated with your business or detect underlying issues

Architecture/User Interface

- Custom branded interface**
Upload your logo so that your interface is in line with your brand design guidelines
- Open source API**
- Mobile app for iOS & Android**
- Advanced security settings**
Two-factor authentication, IP white-listing, security audit logs

**See how Clarabridge's CX Social helps you check off the list.
Request a demo today.**