



100-Point Social Media Customer Service Checklist For CPG & Retail Brands

Cultivating Connections: Beginner, Advanced, and Expert
Strategies for Mastering Social Media Customer Service

Social media customer service is a pivotal aspect of modern consumer packaged goods (CPG) and retail business strategies.

This strategy of social care is particularly crucial for retail and CPG brands because it serves as a direct line of communication with consumers, fostering immediate engagement and relationship building.

These industries thrive on customer loyalty and satisfaction, which can be significantly enhanced through real-time, personalized interactions on social media.

Furthermore, the highly visible nature of social media feedback can greatly influence public perception and brand reputation, making effective social customer service not just a support tool, but also a vital component of brand marketing and consumer trust.

Our checklist is tailored for businesses in the CPG and retail sectors with an existing social media presence, aiming to elevate their customer service game.

It will guide you through strategic enhancements, effective engagement, and advanced tactics to leverage social media for superior customer satisfaction and business growth.

Additionally, the checklist is strategically segmented into three proficiency levels - Novice, Proficient, and Expert – to cater to businesses at different stages of their social media customer service journey.

- **Novice:** Brands new to the intricacies of social media can start with the Novice section, which focuses on strengthening foundational practices and setting up efficient customer interaction systems.
- **Proficient & Expert:** Those with a more established presence can jump to the Proficient or Expert sections, where the focus shifts to growth strategies, deeper customer engagement, and innovative, cutting-edge practices.

Let's get started!

Novice Social Media CX Pros

Strengthening Foundations

For businesses familiar with social media basics, this section helps with strengthening your foundational practices, ensuring efficient and effective customer engagement.



1

Set clear customer service goals

Define what success looks like in your interactions. For instance, your goal could be to reply to every mention your brand receives on social media channels within one hour.



2

Audit your current social media strategy

Review what's working and what's not. Place an emphasis on the channels where your brand has the most conversations with its audience, customers, or prospective customers as they're related to sales or support.

About 67% of consumers are seeking resolutions for issues through Twitter (X), Facebook, and other social media networks. [\[Big Commerce\]](#)

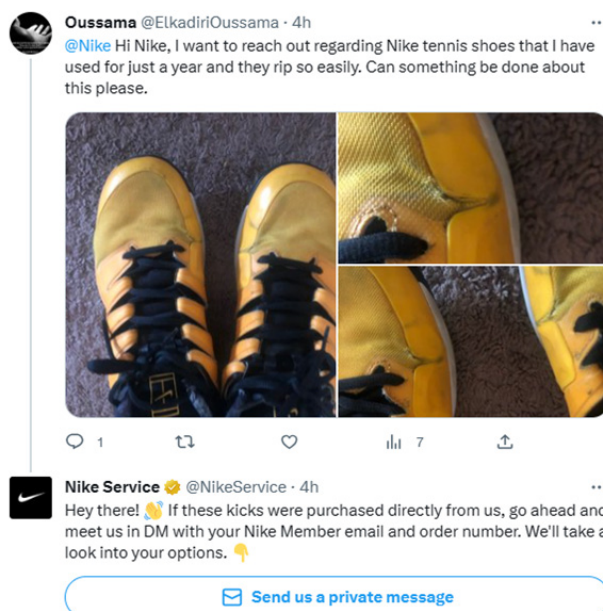


3

Create a dedicated customer service handle

If warranted, separate from your main brand account for focused support. For example, the larger your e-commerce store gets, the more support questions and sales requests you'll receive. As it becomes more and more difficult to handle more inquiries, you might consider adding a social channel dedicated to support.

Here's a real-world example of this with Nike and their @NikeService support channel on X.



**4**

Train your team on the tone, style, and ethics of customer interactions

At B Squared Media, we build out a 'Rules of Engagement' document with each of our clients. This ensures that everyone on the frontline knows how to engage based on situations that arise, including when someone is angry.

**5**

Audit your current social media strategy

Tailor responses to each individual's situation to minimize sounding robotic or scripted.

**6**

Standardize response templates

Standardize response templates for common queries while maintaining a personalized touch.

**7**

Implement a basic social listening tool

Monitor brand mentions and relevant conversations. Tools we love and recommend for social listening:

- [Sprout Social](#)
- [Emplifi](#)
- [Talkwalker](#)
- [Mention](#)

And, if you're just getting started with social listening, be sure to download our guide on how to do that efficiently!

Complete the Sprout Social + B Squared Media social listening workbook on your own time to help discover your true listening goals.



bsquared.media/workbook.pdf



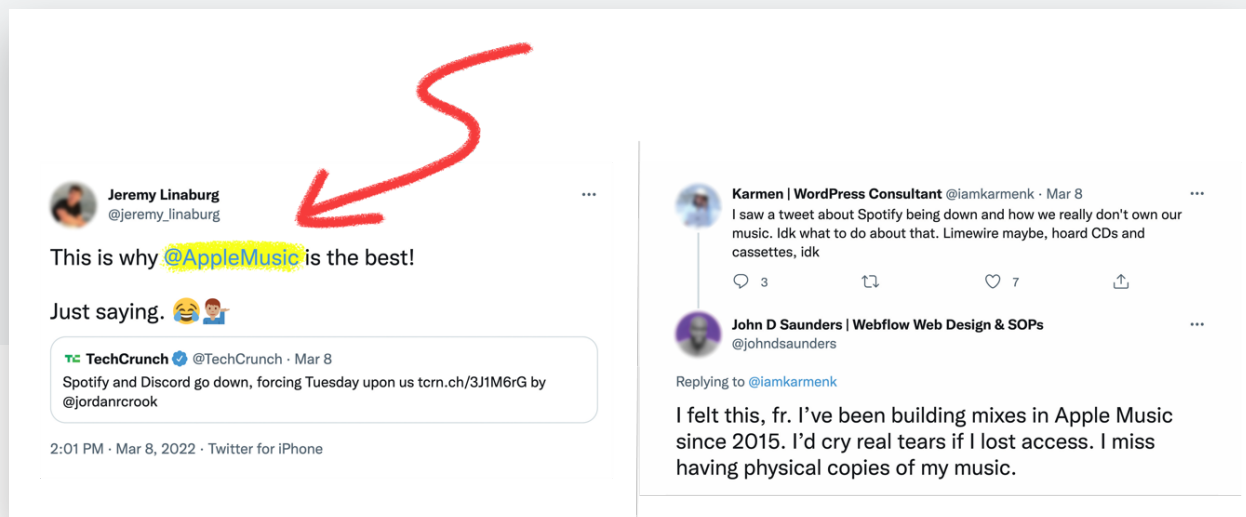
8

Monitor all platforms

Customers may reach out on any platform where you have a presence. Make note of which channels receive the most incoming messages, tags or mentions (ex: @yourbrandhere).

Additionally, you should use social listening to see where people have mentioned your brand or products **without directly tagging you**.

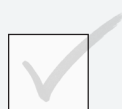
Below, you can see that Apple Music is tagged on the post on the left, but the brand is not tagged on the post on the right. Without social listening, Apple Music would not receive a notification of the post on the right. This means you would not be able to address or collect data on this post.



9

Maintain a positive tone

Even when handling complaints or negative feedback. Ensure your team responds with empathy. But also, you must ensure they have internal support as social media customer service can sometimes be a negative place.



10

Train your team in empathy

Empathetic responses can defuse tense situations. We use the A³ method. You can see this method along with 25 scripts for empathy on our article entitled, [25 Scripts For Aligning With Empathy With Your Customers](#).



11

Respond promptly

Set a standard response time goal for all customer inquiries.

Not too long ago, a 24-hour response time might have been acceptable for many customers. But today's consumer, empowered by the instantaneous nature of social platforms, expects a significantly quicker reply.

- **Twitter (X) users**, for instance, often expect a response within an hour, especially if they're voicing a complaint.
- **Facebook and Instagram users** might be a tad more patient, but even they anticipate a response within a few hours.

Brands that consistently meet or exceed these expectations can boost their image, loyalty, and customer satisfaction.

On the flip side, delayed responses can quickly escalate into PR crises, especially if a customer's concern goes viral.



12

Acknowledge receipt of messages

Even if you need more time to resolve an issue. There's absolutely nothing wrong with replying promptly to let a person know that you've received their inquiry and are working on getting an answer.

The best option is to give a timeframe in which you will have this answer (and then make sure you stick to it!).



13

Utilize customer service chatbots wisely

For initial contact and simple questions. We find that chatbots for FAQs (frequently asked questions) are the most successful for brands. This is because they can answer easy questions 24/7 with 100% accuracy, giving your human team more time to spend on complex issue handling.



14

Set up automated responses for off-hours

Inform customers when they can expect a reply. Set up a nighttime or weekend bot if you tend to get a lot of FAQs or conversation happening during hours when your team is unavailable.



15

Offer multiple contact options

Some customers prefer direct messaging over public posts. Always encourage customers to take the conversation to a private place, like DMs (direct messages) or more traditional channels like email or the phone if that's their preference.



16

Use customer feedback to improve

Treat social media as a two-way communication channel. We have used social media feedback to fix everything from bug in a cash-back app that was ruining CX, to downtime complaints, to changing the packaging for a product. Social listening is such an easy place to find what we call "potholes" on the path to purchase.

For instance, take our e-commerce cash-back app. Customers use the app to shop for deals and get cash back for shopping those deals. On social media, we saw an uptick in customers complaining they couldn't see their cash back rewards – even though from the backend of the app we could see them.

We immediately asked to be put in touch with the app developer, who found the bug and was able to fix the problem within a couple of days.

This not only showed our customers we were listening, but the improvement also allowed our team to focus on other areas of improvement instead of answering customers repeatedly without a solution.

"We see the dollars even though you don't" is not fixing the root of the problem, or pothole. When you don't have to dwell on a problem, you save both time and money.



17

Follow up on resolved issues

Ensure the customer is satisfied with the solution. Close the feedback loop! This is one of the most-missed areas we see with social care programs that haven't existed for very long.



18

Develop a crisis management plan

Prepare for potential social media crises. This is why social listening is such a fundamental part of a social care program.

Social media monitoring proves invaluable by uncovering the root of a crisis, pinpointing who took action, along with the timing, reasons, and methods behind it. Additionally, it enables you to conduct an analysis of brand sentiment, assessing the balance between positive and negative perceptions.



19

Regularly update FAQs

Regularly update FAQs based on common customer inquiries. Your frequently asked questions should continuously be updated, especially as you "triage" issues that arise. The goal here should be to document as many FAQs as you can so the frontline can quickly and easily answer most inquiries without having to escalate an trivial issue to an internal team.



20

Develop a comprehensive FAQ section

And guide customers to it for quick help. According to a [survey by Zendesk](#), 67% of customers prefer self-service over speaking to a customer service representative.

Ensure you invest in self-service options like knowledge bases, apps (see the Walmart example highlighted at the end of this Novice section), chatbots, or online forums.



21

Create video content

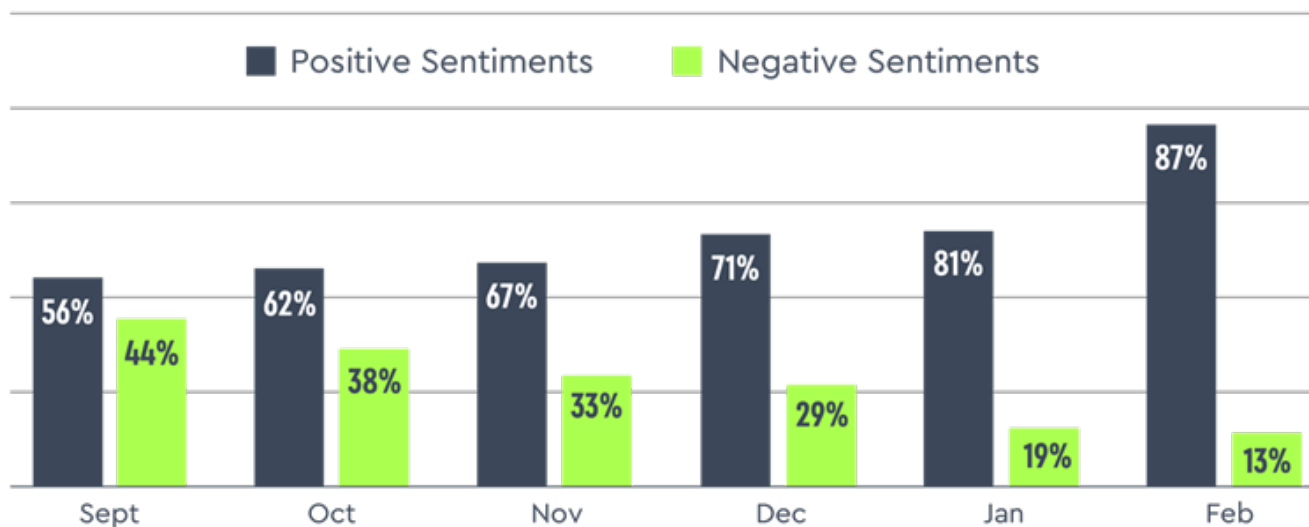
To explain common solutions to frequent issues. The best example I have here is one of our retail clients in the luxury appliance space.

They launched a new product, a cappuccino machine, and expected to see a high volume of positive online conversation – as we usually do when a new product launches. Instead, we saw an onslaught of negative conversations. Digging in with social listening and direct messages sent to the brand on social, we discovered that while people loved their machines, they had a hard time figuring out how to change the coffee filter.

When we approached the client with this “pothole” they told us that every machine comes with a service manual where they can see a diagram of how to do this.

However, we knew this solution wasn't enough. For one, customer attention spans are shorter than ever, and two, luxury audiences expect just that – the white glove experience.

So, we encouraged this client to make a video of how to change the coffee filter and add it to the product page. Once they did this, you can see that not only did negative sentiment go down by 31% in a six-month period, but positive sentiment also increased to 87% during that same time.





22

Have a clear escalation process

Direct customers to where they can get help quickly if it's something the frontline team isn't able to solve themselves. Make sure everyone is involved and on board so escalations can get solved quickly.



23

Be transparent

If there's a problem, acknowledge it and outline your steps to resolve it. In a crisis, the biggest thing your customer wants is communication. The first response, or first touch, is crucial, but if you can't solve their issue without escalating them to another department, let them know how that process normally goes (and how long it takes — BE HONEST.)



24

Keep your team informed

About new products, policies, and promotions. I can't tell you how many times the social care team isn't notified about promotions, offers, return policies, etc. when they clearly exist in other departments. **Stop operating in silos; customer care IS everyone's job!**



25

Match your physical store

If needed, match your physical store to your online presence to make the buying experience seamless. Use your brand's style guide (logos, fonts, brand colors, etc.) to ensure your online or digital presence matches your brick-and-mortar experience.



26

Ensure consistency across channels

Maintain a unified voice and policy. Every social media channel, though unique, should feel seamless to a customer. Twitter should match Instagram, which should match email and ads, etc. A customer should know which brand page they're on based on visual cues alone.



27

Map out the digital customer journey

Understand where social media fits in. Document your digital touchpoints. If you need help with this, check out our article entitled, [The Path To Success: Mapping The Customer Journey With Your Customer Care Efforts](#)





28

Develop a content strategy for customer service

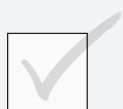
Share helpful information proactively. There is so much data being shared on social media when it comes to your brand, its products/services, and stakeholders. Be sure to share reporting on this data with departments outside of marketing and social media – including sales, product development, UX teams, internal support, etc.



29

Encourage your team to share insights

Everyone should be involved in improving service because everyone's job depends on having enough customers.



30

Host regular live sessions

To answer questions in real-time and build trust. Adobe is a brand that does this very well. They also have their brand ambassadors help do this! Check out their [YouTube channel](#) for inspiration.



31

Use social media insights

To understand peak times for customer interactions. Once you have a handle on which social channels you receive the most care needs on, you'll be able to pinpoint the biggest times of need, often by day, time, and other factors, like days you host a Facebook Live or when a product launches. Just keep in mind that these days and times change often!



32

Recognize and reward positive customer interactions

Encourage a culture of excellence. Make sure your internal team – whether they be your social care team or your customer support team – feels supported.

Inspire and incentivize them to share success stories.

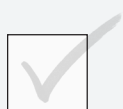


33

Encourage customers to share their service experiences

To gather testimonials and feedback. Whether you choose NPS (Net Promoter Score) or CSAT (customer satisfaction score), make sure you're asking your customers for feedback.

And make sure you're asking for feedback frequently.



34

Celebrate your customer service wins

Share stories of great customer service on your feed. Once you've got #32 on this list down, share!

One of our clients, a top-rated credit union, shares these customer success stories in both their internal newsletter and their customer newsletter.



35

Regularly update your knowledge base

Reflect the latest queries and solutions. Nothing in social care is stagnate. In fact, it moves at breakneck speed.

Be sure to continuously update your FAQs, Rules of Engagement, approved responses, triage processes, etc. to keep up. Ensure you're storing these documents in a project management system or somewhere where everyone can easily access them.



36

Record and analyze complaints

To identify patterns and areas for improvement. Negative feedback is a superpower! It is the only place where there's a catalyst for improvement or change. Learn to embrace negative feedback so you can identify "potholes" and make the path to purchase smoother for your customers.



37

Use direct messaging to handle sensitive issues

Keep private matters confidential. Social media inherently encourages sharing. However, not all information is meant for public view. When customers reach out for assistance or raise issues, they sometimes inadvertently share personal or sensitive data.

And while you may be thinking this is uncommon, we've had addresses, phone numbers, and even social security numbers shared publicly with our team!



38

Maintain a helpful, informative tone

Across all customer service communications. Emotional intelligence (EQ) is the ability to recognize, understand, and manage our emotions and interact empathetically with others. In customer service, EQ is paramount. It ensures interactions are not just transactional but also relational.

This is significant in social care because social media platforms are not just channels of communication but vessels for emotion. When customers reach out, it's often with emotions, be it frustration, confusion, or joy.

Recognizing (and soliciting!) these emotions and responding appropriately can be the difference between retaining a loyal customer or losing one.



39

Continuously train and develop your customer service team

Invest in their skills. While digital tools continue to evolve, the core skills for human representatives need evolution too.

- **Effective Communication:** Training teams not just to respond, but to listen, is essential. Sometimes, what a customer says might not reflect the root of their issue. Trained representatives can identify underlying problems and offer better solutions.
- **Empathetic Interaction:** Role-playing and regular training sessions can prepare teams to handle varied scenarios. By placing them in the shoes of the customer, social care agents can better understand their perspectives and respond empathetically.



40

Stay informed about social customer service best practices

Adapt and adopt continually. The brands positioned to thrive are those that remain adaptive and receptive.

The ability to anticipate changes, harness emerging tools, and yet never lose sight of the core mission—genuine, empathetic, and effective customer engagement—will differentiate the trailblazers from the pack.



CPG & Retail Brand Examples

Walmart

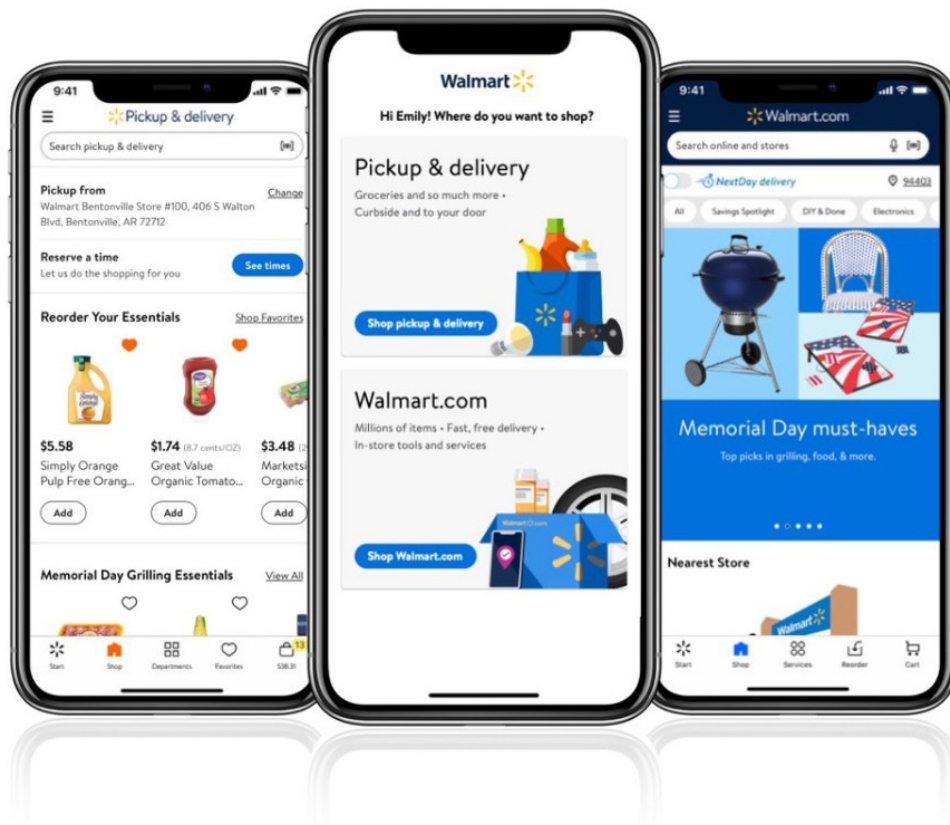


GOAL: Improve response times for online frequently asked questions (FAQs).

Walmart is the world's leading retailer. With over approximately 10,500 stores and clubs in 19 countries, Walmart prides itself on serving nearly 265 million customers weekly.

In 2020, as many of Walmart's customers moved to digital channels to shop and make customer support requests because of COVID, they made a move to bolster their digital footprint & engagement, as well as serve their customers much faster.

In March of 2020, [Walmart combined](#) their Walmart Grocery app to their already-present Walmart app.



"[We're] excited to announce we're adding Walmart Grocery to our flagship Walmart app. Now, customers can access everything Walmart has to offer in one, definitive experience – the Walmart app."

Some of the categories of the frequently asked questions in the app are:

- Online buying and tracking
- Online payment methods
- Returns, refunds, and replacements of gift cards.

"Over the past several weeks, we've seen another impact of COVID-19 – a surge in adoption of online and mobile shopping, with millions of shoppers relying on Walmart to get what they need for their families. In fact, leading mobile data and analytics platform App Annie recently noted that our [Online Grocery app was No. 1 in the App Store](#) as customers turned at an unprecedented pace to pickup and delivery services – which is why we think there is no better time than now to integrate our two apps and bring them an even better, more comprehensive experience. We don't ask customers to make two trips to the store, one for groceries and one for all the other things they need, so we shouldn't ask them to visit two apps."



OUTCOME: Walmart was able to improve response time by using standardized answers for common online customer inquiries through their app, which also tracks and collects user data for better digital customer care.

Additionally, they made the customer's path to purchase – whether physical or digital – seamless.

Proficient Social Media CX Pros

Growth and Engagement

This section is for businesses looking to expand their reach and deepen customer engagement through more sophisticated strategies.

These tips are aimed at growing engagement, leveraging more sophisticated tools, and refining the brand's customer service approach.



1

Enhance social listening

Employ advanced tools for a deeper understanding of customer sentiment and trends. Choosing an advanced social media listening tool is crucial to going to the "next level" of social listening. Advanced tools, like the ones mentioned below, often have additions that basic tools do not, such as automations, advanced analytics, data and analytics reporting, and can also manage your content with a social media management component as well.

Tools we love and recommend for advanced social listening:

[Sprout Social](#) | [Emplifi](#) | [Talkwalker](#)

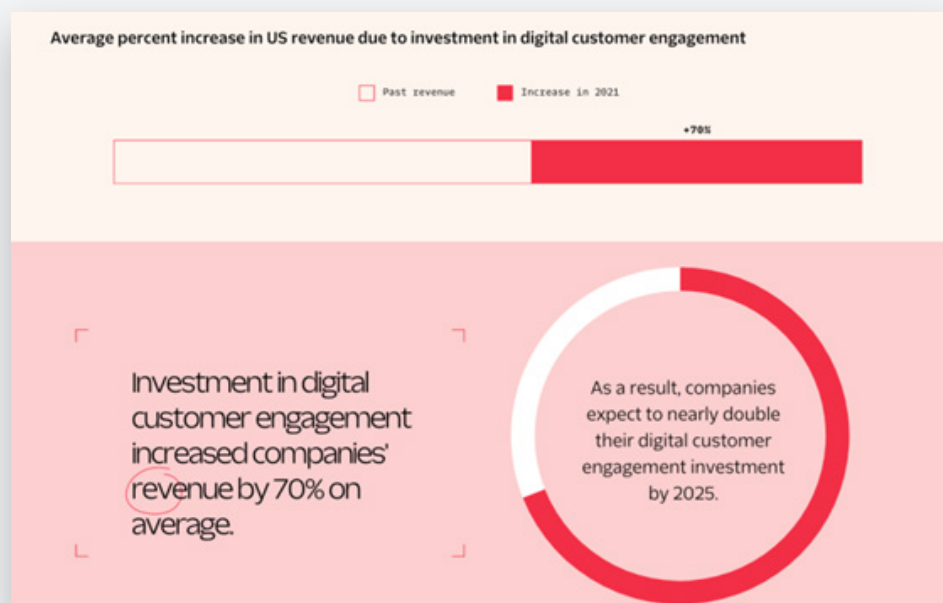


2

Engage in two-way conversations

Proactively initiate discussions and seek out customer feedback. Data often speaks louder than words, and one statistic that majorly stands out is from a [2022 report from Twilio](#).

On average, a staggering 70% of top-line revenue increased among companies that leaned into digital customer engagement.





3

Leverage user-generated content

Encourage the sharing of customer reviews and testimonials. Then, use this content for not only brand awareness and praise but also for social selling.



4

Run targeted social media campaigns

Utilize customer data to create personalized experiences. One of our favorite ways to use social listening is to create differentiated campaigns based on what our competitors' customers are saying.

An example: You're a running shoe brand and through social listening you find that the majority of your top competitor's customers complain about how soon their laces break. Couldn't you use that information to run a campaign that differentiates your brand and talks about how your shoestrings last for at least one hundred runs?

Hint: YES, you can!



5

Integrate chatbots for instant responses

Use them to efficiently handle routine inquiries and improve response times.

[Meta even has their own Messenger Bots](#) you can use on their channels to talk with customers.

**6**

Conduct regular team training

Keep your team up to date with the latest social media trends and tools. Our [Mastering Social Media CX Course](#) has been a favorite with clients and social CX pros alike!

**7**

Optimize CRM integration

Ensure that your customer relationship management tools are fully synchronized with your social media platforms.

Did you know? Our favorite social media tool, [Sprout Social](#), integrates with Salesforce to create a unified CRM – perfect for customer experience tactics from social media channels.



8

Customize chatbot interactions

Tailor your automated responses to align with your brand voice and customer needs. Our biggest tip here is to always have a menu option on your bot to "connect with a human."

Even if your humans aren't available 24/7, you can set up timed responses where the bot says something cute like, "Our humans are sleeping right now, but they'll get back to you within [x] hours on a weekday [Monday-Friday]."

And then make **absolutely sure** your humans reach out before or within the timeframe you promised.



9

Refine your escalation process

Develop a streamlined system for escalating complex issues to the right team members.

To develop a streamlined system for escalating complex issues to the right team members, consider the following advice:

- **Establish Clear Escalation Protocols:** Define what constitutes a complex issue and outline clear steps for escalation. This includes specifying which issues should be escalated, to whom, and in what order.
- **Use a Tiered Support Structure:** Implement a multi-tiered support system where the first tier handles general inquiries, and subsequent tiers handle increasingly complex issues. We also call this strategy, "triage."
- **Implement an Efficient Ticketing System:** Use a ticketing system that automatically routes complex issues based on keywords, problem types, or customer history to the appropriate team or team member.
- **Train Customer Service Representatives:** Ensure all team members are well-trained to identify and understand the nuances of complex issues and know the escalation path (aka your "triage" strategy).
- **Regularly Review and Update the Escalation Process:** Continuously improve your escalation process based on feedback and the evolving needs of your customer service operations.



10

Advanced analytics utilization

Use social media analytics to inform and adjust your customer service approach. Make sure you include data points from your social media conversations that point to acquisition or retention efforts, social listening, and any other voice of customer (VOC) data you collect.



11

Expand proactive customer outreach

Anticipate customer needs and reach out with solutions before they encounter issues. Our approach involves analyzing customer behavior, purchase history, and feedback to identify potential challenges or needs our clients' customers may face.

By addressing these proactively, you can anticipate solutions and support before the customer even recognizes the issue themselves.



12

Implement cross-functional social media training

Encourage knowledge sharing between departments for cohesive customer service. Steal a few of our tactics from our social care playbook:

1. **Centralized Information Repository:** Create a shared digital space where information from all departments can be stored, updated, and accessed by everyone. This could be an intranet, a cloud-based platform, or a company wiki.
2. **Cross-Departmental Meetings:** Schedule regular meetings that bring together representatives from different departments to share updates, discuss challenges, and brainstorm solutions.

3. **Integrated CRM System:** Implement a CRM that is accessible to all departments. Ensure that it captures all customer interactions, feedback, and transactions, allowing for a 360-degree view of the customer.
4. **Collaboration Tools:** Use collaboration tools that allow for real-time communication and information sharing, such as Slack, Microsoft Teams, or Asana.
5. **Knowledge Transfer Sessions:** Encourage departments to hold regular knowledge transfer sessions where they can share insights, best practices, and learnings.
6. **Cross-Training:** Create opportunities for employees to learn about the roles, challenges, and workflows of other departments through cross-training initiatives.
7. **Feedback Loop:** Establish a feedback loop to ensure that customer feedback is shared across departments and used to make improvements.
8. **Customer Service Liaisons:** Appoint customer service liaisons within each department who are responsible for communicating customer care-related information.
9. **Documentation:** Maintain up-to-date documentation of policies, procedures, and FAQs, and ensure they are easily accessible to all staff.
10. **Leadership Support:** Ensure that knowledge sharing is a prioritized and valued activity at the leadership level, setting a culture that encourages openness and communication.



13

Develop dynamic response strategies

Create adaptable templates for various situations, including real-time events or crises. These "playbooks" should constantly be updated and treated as living, breathing documents.

**14**

Deepen customer feedback analysis

Regularly examine feedback for insights to inform product and service improvements.

One of our favorite things to do is to use AI (artificial intelligence) to review a year's worth of call center transcripts or social media conversations and tell us the top three issues customers face, the top three things they love about us, and to ask for any other patterns and trends that can be noted.

*ALWAYS make sure you have permission to use AI at your company and follow guidelines to ensure privacy measures are met.

**15**

Build a customer-centric content strategy

Develop and share content that addresses common questions and concerns. Your social media customer service team should absolutely be informing your social media content team; collaborate to create content your customers want to see.

**16**

Enhance omnichannel service consistency

Ensure uniform service quality across all customer touchpoints. Now that digital transformation is no longer a luxury but a necessity, the customer experience (CX) landscape is witnessing a paradigm shift.

Customers today are not just interacting with brands through a single channel but across a myriad of touchpoints, both online and offline. This arrival of an integrated approach to customer engagement is what we now refer to as "Omnichannel CX."



17

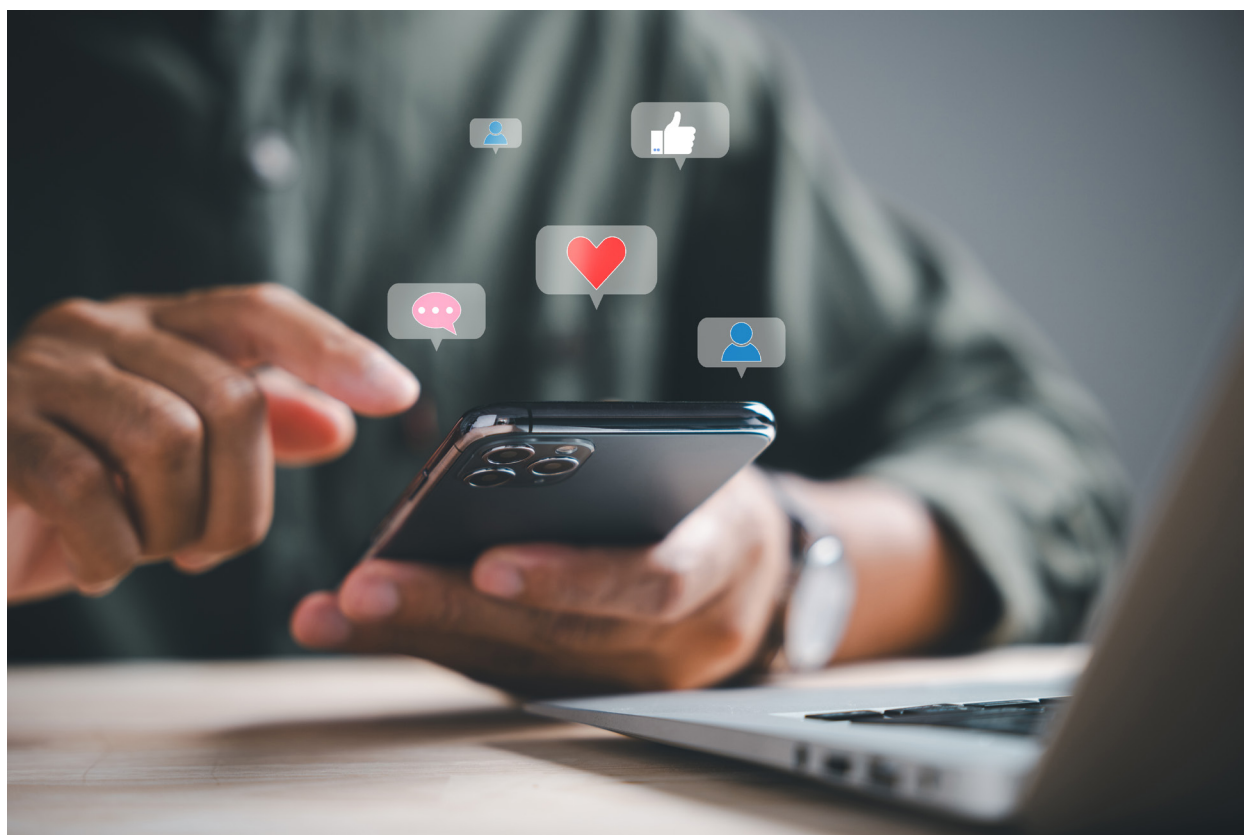
Create customer advocacy programs

Encourage satisfied customers to share their positive experiences.

Your happiest customers are probably already talking about you with their friends and across social, but if you aren't providing direction and opportunities to harness these conversations effectively, you're missing out on valuable word of mouth that could be utilized across campaigns.

Start by working with your CSM team to identify the customers with the highest NPS and ones who are always sharing positive feedback and that they want to do more with the brand.

Look for positive brand mentions in your social listening efforts to see who is championing you for free. Imagine how many of your customers would love to share their brand love and experience, if they were provided the opportunity and perks, such as swag, meetings with leadership and products teams. Customer advocacy is a testament to power of CX and positive reinforcement.





18

Map detailed customer service journeys

Trace the path of customer interactions to identify service optimization opportunities. Data provides an unparalleled window into the behaviors, preferences, and desires of consumers.

Each interaction, be it a website visit, a purchase, or even a pause on a particular product page, tells a story. By aggregating and analyzing this data, you can construct a detailed profile of your audience segments.

It's no longer about broad demographics; it's about micro-segments.

- A young mother browsing organic baby food ...
- A tech enthusiast frequently watching reviews ...
- Or a sneaker collector always hunting for rare finds ...

Mapping helps you understand these nuanced personas, enabling your organization to cater to them individually.



19

Monitor and adapt to platform updates

Stay agile with changes to social media functionalities and policies.



HOW TO STAY UP-TO-DATE WITH SOCIAL MEDIA CHANGES

It can feel like social media changes every day, and it is nearly impossible to keep up. We recommend following [Social Media Today](#) for regular updates and news impacting social media platforms and social media managers. They also offer a free newsletter to make it even easier to stay up-to-date. For Instagram and Threads news, you must follow Head of Instagram, [Adam Mosseri](#). He regularly provides video updates on his profiles.



20

Utilize influencer partnerships for service campaigns

Collaborate with influencers for authentic customer service messaging.

Friend and Adobe Influencer, Goldie Chan, had this to say when I asked her about her partnership with Adobe and their willingness to innovate with Ambassadors and customer experience:



"One of the most thoughtful parts of working with Adobe is how much care they take with live customer feedback – a great example is Adobe Live, where I've answered questions and solved 'bugs' live with the Adobe staff as an ambassador."



Goldie Chan

CEO, Warm Robots / Adobe Express Brand Ambassador
warmrobots.com



21

Implement KPIs for service performance

Track key performance indicators to measure and refine customer service success. Check out our article entitled, [The Best Social Media Customer Service Metrics to Measure in 2024](#), to see what we're eyeing.



22

Strengthen community engagement

Foster a sense of community among your followers with regular interactions and discussions. A metric we coined – and feel is critical to both organic social media and social care success – is Return on Conversation (ROC).

Your customers are increasingly using social media to discover new brands, research products, and make buying decisions. As a result, they expect to be able to converse with your brand for assistance on these same channels.

In the [Publicis + Twitter study "#LetsTalkShop"](#), they found:

- Ninety-two percent of people surveyed said they actively seek out comments about brands, products, or services on social.
- Sixty-eight percent said their impression of a brand was changed as a result of experiencing brand conversation.
- More than half of shoppers are impacted by brand conversations.
- More importantly, brand conversations are just as important as brand reviews



Brand conversations on social media are a trusted, everyday part of the shopping and research process. This is why ROC should be one of the social media marketing & social care metrics you focus on.



23

Streamline social commerce processes

Make purchasing as easy as possible for customers on social platforms. Integrate a seamless, easy-to-use shopping cart system within your social media platforms and employ one-click purchasing options that store customer payment and shipping information securely for future transactions.

One tool we hear positive things about is [Shop Pay](#).

Additionally, ensure that product discovery, selection, and checkout procedures are straightforward and accessible directly within the social media interface to minimize friction and drop-off rates.



24

Employ advanced social listening for crisis detection

Use sophisticated listening tools to preemptively identify and address potential issues. By monitoring real-time online conversations for negative sentiment spikes or emerging patterns of complaints, you can identify and respond to issues before they escalate.

Furthermore, tracking brand mentions across various channels can pinpoint the source and nature of dissatisfaction, enabling proactive management and mitigation.

Use our B.I.C. Method for a well-rounded listening strategy:

- B** Brand keywords
- I** Industry keywords
- C** Competitor keywords



25

Leverage customer service bots for preliminary diagnostics

Before routing to human agents, use bots to gather basic issue details. Bots can be programmed with an extensive knowledge base to automatically respond to incoming FAQs by using natural language processing to understand and provide accurate answers to common customer inquiries, ensuring 24/7 support and immediate responses.

You should also consider integrating bots with a ticketing system to escalate more complex questions to human agents.



26

Promote team autonomy in customer interactions

Empower your staff to make on-the-spot decisions to enhance customer satisfaction. In my book, [Conversations That Connect](#), I offer the advice of having a "bar tab" for your social media frontline.

In essence, it's merely having things that your social care team can give away if there's a hiccup ... much like a bartender saying, "this drink is on me" if there was an extra-long wait for service.

The Kindle version is only \$5.99 right now on Amazon!





27

Regularly refresh your social media customer service playbook

Keep your strategies and guidelines up to date with evolving best practices. To keep your social media customer service playbook up-to-date, regularly incorporate insights from customer interactions, feedback, and team reviews, and stay informed of the latest social media trends and platform updates that could affect customer engagement.



28

Cultivate a responsive brand personality

Develop a brand voice that is known for being attentive and responsive on social platforms. Actively monitor your social channels for customer queries and feedback, ensuring timely and thoughtful responses. Engage with your audience through direct communication and participatory content, thereby demonstrating your brand's commitment to its customers and community.



29

Incentivize and reward customer service excellence

Recognize and celebrate team members who provide outstanding service.

Visit our article entitled, [How To \(Better\) Appreciate Your Customer Experience Professionals](#), for 40 ways to do this.



30

Foster a culture of continuous learning and improvement

Encourage ongoing education and adaptation in customer service approaches. By fostering a culture of growth and innovation, you empower social media customer experience professionals to explore new ways to improve, experiment with fresh ideas, and contribute to the ongoing evolution of customer experiences.



CPG & Retail Brand Examples

Coca-Cola



GOAL: Enhance customer satisfaction by regularly posting user-generated content (UGC) on social media.

Coca-Cola employs a social media approach that strongly promotes user-generated content (UGC). This leads to more than just business interactions; it fosters a connection rooted in common experiences and affection for the brand.

This deepens customer loyalty and expands the brand's presence through the testimonials of satisfied customers.

They also focus on joining conversations proactively. Take @trishieeann's engagement post, for example:



The mega brand, likely using social listening, reached out to the happy couple to ask for permission to share their content (UGC). This, no doubt, highlights how Coca-Cola is a key part of important celebrations.



OUTCOME: By capitalizing on the excitement, originality, and genuineness of their customers, they effectively broaden their brand's influence. This strategy transforms their customers into voluntary brand advocates, sharing their own experiences with Coca-Cola.

Expert Social Media CX Pros

Advanced Strategies and Innovation

This final section is aimed at brands at the forefront of social media customer service.

In this section, we'll unpack innovative and cutting-edge practices, especially those that use artificial intelligence (AI), generative AI, and predictive analytics.

**1**

Implement AI and machine learning tools

For example, using predictive analytics in customer service and trend analysis. Artificial Intelligence (AI) stands at the forefront of innovation, redefining the interaction between brands and consumers.

By harnessing AI's capabilities, companies are delivering hyper-personalized, efficient, and accessible support experiences that anticipate and meet customer needs with unprecedented precision.

Beyond that, AI can also analyze customer behavior patterns to anticipate issues before they arise, enabling brands to proactively address potential problems or upsell relevant products/services.

**2**

Personalize customer interactions using data analytics

Deliver tailored recommendations and services. Personalizing customer interactions using data analytics involves analyzing customer behavior, purchase history, and preferences to tailor conversations and offer customized recommendations, solutions, and content that resonate with individual customers' specific needs and interests on a one-to-one basis.

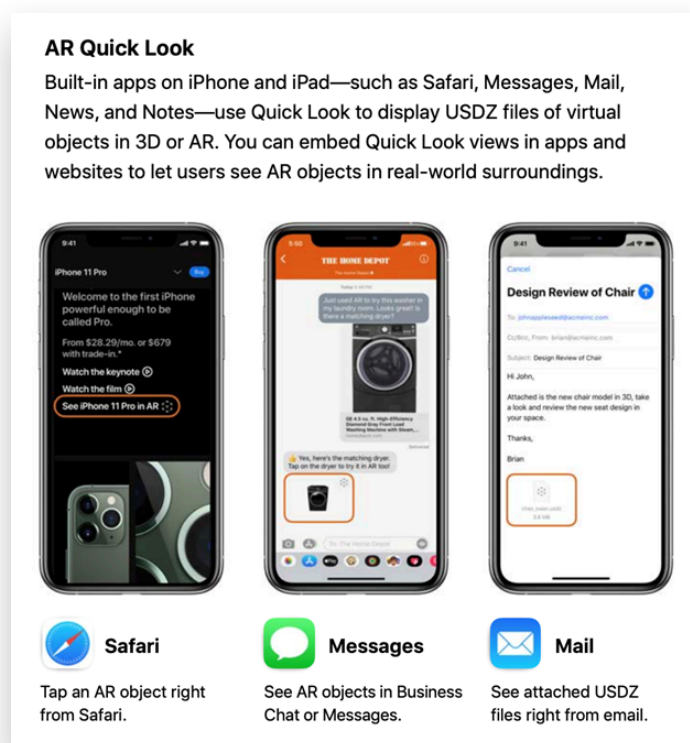
Hyper-personalization will be key!

**3**

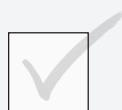
Utilize AR/VR for innovative product showcases

Create immersive experiences to engage customers.

Imagine a customer struggling with setting up a product. Through [AR, like Apple Vision Pro](#), they can share their live camera feed, and customer service can overlay instructions directly onto the real-world item they are struggling with.



Or think about virtual store navigation & shopping. Customers shopping online can use AR to navigate virtual store layouts, enhancing the online shopping experience to feel more like in-store browsing.



4

Create an online community

If you haven't already, cultivate a space for brand loyalty and peer support. Facilitating connection and belonging to your customers can elevate the customer experience. Creating and nurturing a community is a long-game initiative, but it can be fulfilling for brands and community members when done well. If you're interested in starting a community, we recommend starting with the [Community Canvas](#), so you can isolate your goals, personas, onboarding experience, guidelines, communication plan, and more. It's a great way to start building out the foundation for the community you'll create.



5

Measure ROI of social care efforts

Use advanced metrics to refine strategies and justify investments. If you're struggling with this, try tracking key performance indicators such as:

- Response time
- Customer satisfaction scores
- Resolution rates, and
- Changes in customer retention pre-and post-engagement.

Additionally, assess any increases in positive sentiment, brand loyalty, and cost savings from deflected traditional support channels.



6

Explore and utilize new platforms and technologies

Stay ahead by adopting cutting-edge tools. This doesn't mean adding more social media channels (unless warranted). It's more about adopting tools that make the path to purchase easier; less clicks, a seamless digital ecosystem, etc.



7

Leverage influencer partnerships

Collaborate for authentic and impactful customer engagement. Seek to collaborate with influencers who resonate with your target audience.

Use their credibility and reach to amplify your brand's message, showcase your products or services, and engage with customers through authentic storytelling and personalized interactions. [Check out the Adobe example in section two.](#)



8

Develop a customer data platform (CDP)

To centralize customer data for a unified view. To develop a customer data platform (CDP), start by integrating data from various sources such as sales, customer service, and social media interactions to create a unified customer profile.

Then, use advanced data management tools and technologies to centralize, clean, and organize this data, ensuring it's easily accessible for real-time analysis and personalized marketing efforts.

One tool we use and love for data management and predictive analytics is [Akkio](#).



9

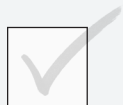
Implement conversational AI for sophisticated interactions

Elevate chatbot conversations with natural language processing. Retail and CPG brands have a competitive edge when it comes to implementing conversational AI – so use it to your advantage!

Start by integrating chatbot technology into your customer service channels, such as websites, social media platforms, and messaging apps. These AI-driven chatbots can should be programmed to assist with:

- Product inquiries
- Providing personalized recommendations
- Handling basic customer service queries (FAQs), and
- Escalating complex issues to human representatives ...

... thereby enhancing customer engagement and streamlining your social media service process.



10

Utilize blockchain for customer verification

Enhance security and trust in customer interactions. Blockchain technology can be used for customer verification by creating a secure, decentralized ledger that stores customer identity and transaction data.

This approach ensures high levels of security and trust, as the blockchain's immutable nature makes it virtually tamper-proof, allowing for reliable verification of customer identities and transactions in a transparent and efficient manner.



11

Adopt Internet of Things (IoT) for proactive service

Use connected devices for service alerts and preemptive customer support. CPG and retail brands can use connected devices to send service alerts and provide preemptive customer support by monitoring product performance and usage patterns.

For example, our luxury appliance brand has a smart refrigerator that monitors its own operational health and usage patterns. If it detects a temperature irregularity suggesting a potential malfunction, the system automatically notifies the customer and the service team. This allows the brand to proactively reach out to the customer to schedule maintenance or provide troubleshooting advice, ensuring the appliance continues to function optimally.

This tactic allows brands to identify potential issues before they occur, send timely maintenance alerts, offer proactive troubleshooting, and even automatically reorder products or parts, enhancing the customer experience with the brand's commitment to quality and service.





12

Integrate with voice assistants for customer service

Consider integrating your services with popular voice-enabled devices like Amazon Alexa or Google Home. Customers can use voice commands to inquire about products, check order status, receive support, or even make purchases.

Voice assistant integration offers a convenient, hands-free customer service experience, aligning with modern usage trends and enhancing accessibility.



13

Employ virtual reality for customer service training

Create immersive training scenarios for staff. Brands can train customer support agents using AR environments, while AI provides real-time feedback, ensuring they're equipped to handle real-world scenarios.



14

Incorporate machine learning for sentiment analysis

To gauge the emotional tone of customer interactions. Using AI to assess public posts, comments, or messages about your brand can help gauge overall sentiment and quickly identify potential crises or areas needing attention.

An example we see often is taking a year's worth of online reviews and having AI come up with an overall sentiment analysis for both positive and negative reviews. Using this data, they've been able to spot areas needing improvement while also using positive customer-focused copy for marketing and sales messages.



15

Utilize predictive modeling for inventory management

Anticipate product needs and manage stock effectively.

Predictive modeling is a powerful tool that brands can leverage to anticipate and prepare for customer needs effectively. By analyzing historical data, patterns, and trends, predictive modeling enables businesses to make informed decisions, optimize strategies, and enhance customer satisfaction.

Look at the current data you have access to and identify what patterns and trends there are. Are there customer signals that predate specific buyer behaviors like churning or upselling? Do certain personas have different behavior patterns than others? You can segment your findings and personalize your care to provide care that is more likely to ensure customer satisfaction and retention.





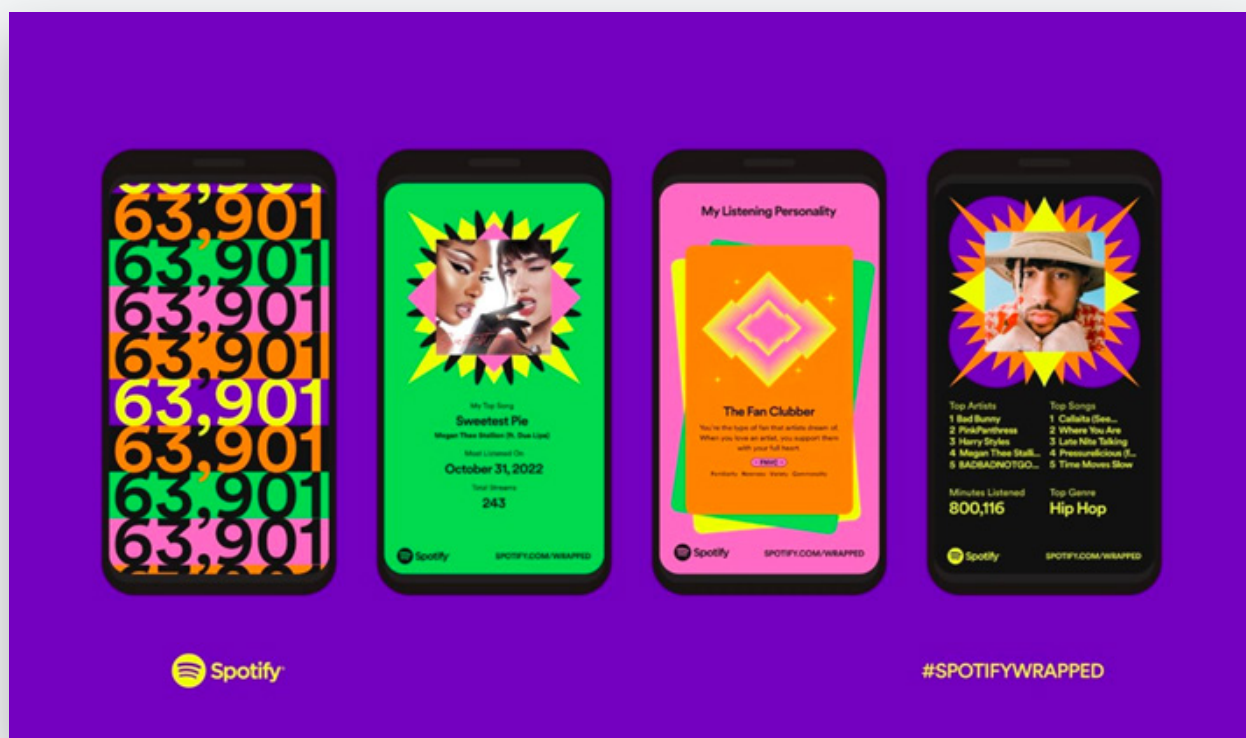
16

Offer personalized shopping experiences through AI

Use customer data to customize the shopping experience in real-time. AI can analyze customer behavior patterns to anticipate issues before they arise, enabling brands to proactively address potential problems or upsell relevant products/services.

An example you're probably aware of comes from Spotify. Their annual "Wrapped" feature provides a personalized summary of each user's listening trends, top songs, genres, and total minutes of music streamed throughout the year.

Instead of feeling invasive, users often share their "Wrapped" insights on social media with enthusiasm. It's a showcase of personalization done right, but what makes efforts like these stand out in a space where consumers are increasingly guarding their data?



Value-Driven Data Exchange: Spotify and similar platforms succeed because they offer a clear value exchange. Users provide data, consciously or unconsciously, and in return, they receive a unique, tailored experience that enhances their interaction with the service.

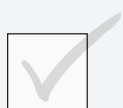
It's not just personalization for personalization's sake; it's meaningful and adds value to the user's experience.



17

Develop advanced escalation paths for VIP customers

Ensure top-tier customers receive the fastest and most personalized service. We've found that certain customers will even pay extra to be "moved to the front of the line" for immediate support.



18

Implement advanced notification systems for service staff

Use sophisticated, centralized alert systems to keep your team informed and agile in response to customer service queries. Below are a few tools we've used and recommend.

- **Slack**: An instant messaging platform favored for its real-time messaging capabilities, integrations, and bot-friendly environment.
- **Microsoft Teams**: Part of the Microsoft 365 suite, it's a hub for teamwork that integrates with Office applications and provides chat, video conferencing, and file collaboration.

- **Asana**: While it's primarily a project management tool, Asana also facilitates communication between team members through task comments and project updates.
- **Trello**: Known for its card/board system, Trello allows for communication within the context of tasks and project workflows.
- **Zendesk**: Offers a suite of tools for customer service, including ticketing systems that centralize communication from various channels.
- **Salesforce Service Cloud**: Provides customer service software that includes case management, AI-powered assistance, and an integrated communication platform.
- **Intercom**: Specializes in customer communication with a focus on chat interfaces that facilitate real-time, targeted, and automated conversations.

Each of these platforms offers unique features and integrates with various business systems, making it easier for teams to stay connected and responsive to customer needs.



19

Deploy two-factor authentication for customer accounts

Enhance security for customer interactions by requiring both a password and a secondary code sent via email or SMS. (I know this seems like a novice tip, but trust us, it's not!)



20

Adopt advanced analytics for cross-platform customer journeys

Track and analyze customer behavior across all digital touchpoints.

Sophisticated tracking and data integration tools that compile customer interactions across various channels into a cohesive narrative. This allows for the analysis of the complete journey, revealing insights into customer behavior, preferences, and pain points, enabling you to optimize the customer experience at every touchpoint and drive targeted, personalized marketing strategies.

Three highly regarded tracking and data integration tools that are commonly used in the industry include:

- **Google Analytics**: A comprehensive tool that offers insights into web traffic and user behavior across multiple channels, often considered the standard for website analytics.
- **Adobe Analytics**: Part of the Adobe Experience Cloud, it provides detailed analytics across various platforms with a focus on customer journey analysis.
- **Segment**: This platform specializes in data integration, collecting, standardizing, and routing customer data across your apps and analytics tools.



21

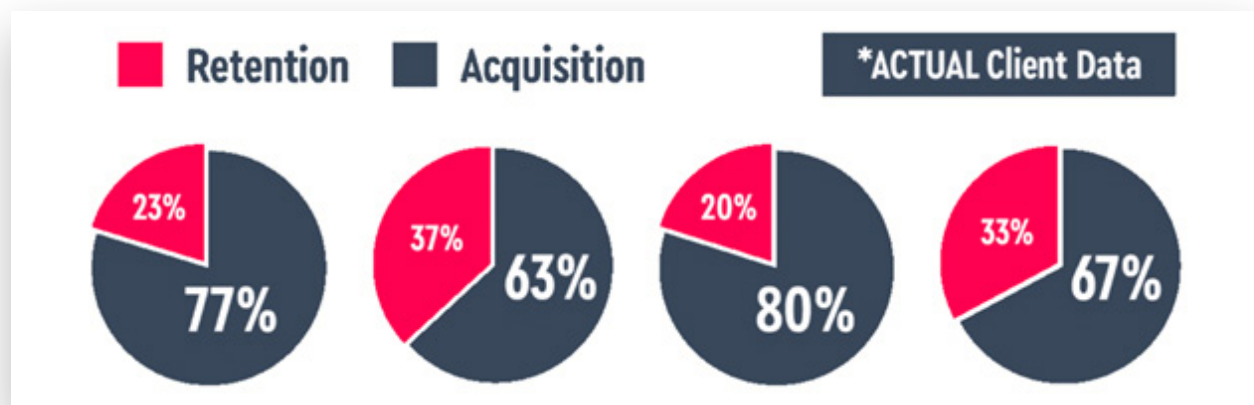
Experiment with social selling and live shopping events

Use real-time interactions to drive sales. At B Squared Media, we work with our clients to build out social selling techniques that are intent-based, not interest-based.

Remember: Interest does not mean intent (to buy)!

If you are tracking your social media conversations and tagging them for acquisition (sales support inquiries) and retention (customer-support troubleshooting), you will start to make sense of your potential social selling opportunities.

For our consumer electronic client, we found that four of their product lines have massive opportunities for revenue growth based on this tactic. Just look at the amount of conversation they receive on social that's sales-related in the charts below.



We're now working with them on our social-selling program that uses intent-based conversations and unique promotional codes to see how much of that revenue we can convert.

Additionally, look to retail brand Evereve for inspiration. They use [Instagram Live videos](#) to showcase new arrivals and during these sessions link to a [special landing page](#) on their website where shoppers can find exactly what's being modeled by Evereve online.



This is another powerful example of social selling with a focus on web traffic, voice of customer data, and best of all, ROI.



22

Deploy AI-driven content curation for customer education

Share relevant content with customers based on their interests.

Examples of AI-driven tools include:

- **Personalization Engines:** These use AI to analyze customer data and provide personalized product recommendations. An example is [Amazon's recommendation engine](#).
- **Visual Search Tools:** Such as [Pinterest's Lens](#), which allows users to take a photo of an item and then uses AI to find similar items or where to buy them online.
- **Voice Assistants:** You can develop your own team skills or apps for voice assistants like Alexa or Google Assistant to engage with customers in their homes.



23

Engage in predictive customer engagement

Anticipate customer needs and address them preemptively. While this isn't an easy strategy to execute, it can be done. And you are on the expert level section of our checklist! [wink]

Predictive engagement is an innovative approach where CPG & retail brands use data analytics and AI to anticipate customer needs and behaviors, allowing them to engage with customers more effectively.

Here are some ways you can engage in predictive engagement:

- **Data Analysis and Insights:** Gather and analyze customer data from various sources such as social media, purchase history, and browsing behavior. This data helps in understanding customer preferences and predicting future behaviors.

- **Personalization:** Using the insights gained from data analysis, you can personalize your interactions with customers. This can include personalized marketing messages, product recommendations, and tailored customer experiences.
- **Proactive Customer Service:** Predictive engagement can enable you to provide proactive customer service. By anticipating customer issues or questions, you can reach out with solutions and support before the customer even contacts you.
- **Dynamic Content Delivery:** Use predictive analytics to deliver dynamic content that is relevant to each individual customer. This could include changing website content, personalized email campaigns, or targeted social media ads.
- **Customer Journey Optimization:** Predictive engagement tools can help you understand and optimize the customer journey. By predicting the paths customers are likely to take, you can streamline the user experience, making it more efficient and enjoyable.
- **Real-time Decision Making:** Use predictive models to make real-time decisions. For instance, you can adjust pricing, inventory, and marketing strategies in real-time based on predicted customer behavior.
- **Predictive Risk Management:** Predictive analytics can help in identifying potential risks or fraudulent activities. This allows you to take preventive measures, enhancing customer trust and security.
- **Feedback and Continuous Improvement:** Continually collect feedback and refine your predictive models. This ensures that your predictive engagement strategies stay relevant and effective over time.
- **Integrating AI and Machine Learning:** By integrating AI and machine learning technologies, you can enhance your predictive capabilities. These technologies can learn from data over time, improving their accuracy in predicting customer behavior.
- **Ethical Considerations and Transparency:** It's **critical** to use predictive engagement ethically, respecting customer privacy and being transparent about how customer data is used.

If you need help with any of the above, we highly recommend our analytics & AI partner, [Trust Insights](#).

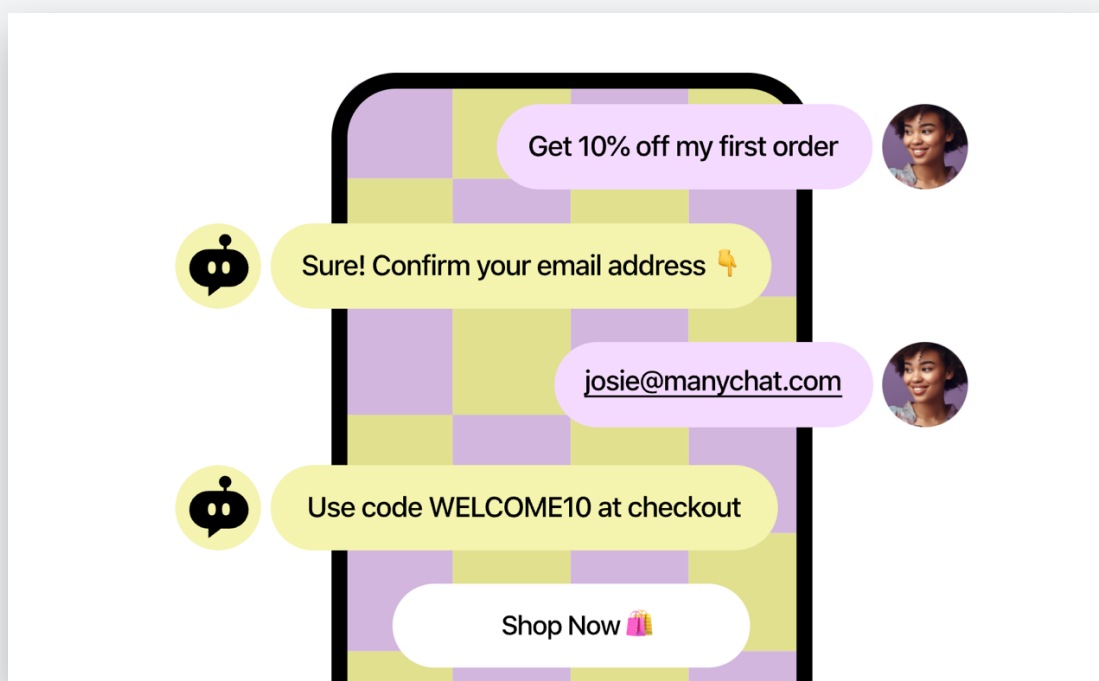


24

Create dynamic, AI-powered FAQs

Evolve your FAQ resources based on common trends in customer inquiries. Here are some popular AI-powered FAQ tools:

- **Chatbots and Virtual Assistants:** Tools like [Intercom](#), [Drift](#), and ManyChat offer AI-powered chatbot services that can be integrated into websites or social media platforms. These bots can understand and respond to customer queries in real-time, using natural language processing (NLP).



[Source: [ManyChat](#)]

- **Knowledge Base Software:** Platforms like [Zendesk](#), [Freshdesk](#), and [Zoho Desk](#) use AI to help create and manage a dynamic knowledge base. They can suggest articles to customers based on their queries and help in optimizing the knowledge base content based on user interactions.
- **Customer Service Automation Platforms:** Solutions like Salesforce Einstein and IBM Watson Assistant offer AI capabilities to automate customer service processes. They can be used to answer FAQs, route queries to the right department, and even provide predictive solutions based on past interactions.

- **Natural Language Processing (NLP) APIs:** APIs from IBM Watson, Google Cloud Natural Language, and Microsoft Azure AI can be integrated into existing systems to provide AI-powered FAQ functionality. They analyze and understand customer queries to provide relevant responses.

When choosing an AI-powered FAQ tool, it's important to consider factors like ease of integration, customization options, language support, and the ability to learn and improve over time.

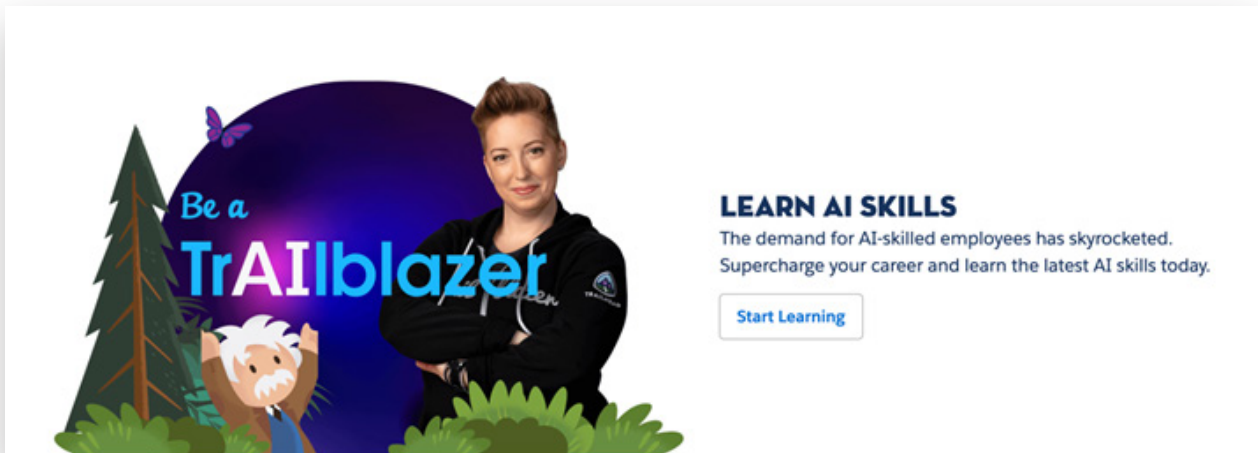
Additionally, ensuring the tool aligns with your specific business needs and customer service goals is crucial for effective implementation.



25

Leverage gamified experiences for customer education and engagement

Use game mechanics to educate customers about your products and services. [Salesforce Trailhead](#) is a great example of this.





26

Implement a digital ethics framework

Address privacy and ethical considerations in customer interactions. Especially when and how to use AI.



27

Use advanced data visualization tools

To represent customer data and insights visually for better decision-making. We've heard nothing but the best about [Databox](#).



28

Innovate with social media bots for market research

Use automated interactions to collect customer insights.

Here's how you can use social media bots for this purpose:

- **Customer Interactions:** Implement bots on social media platforms to interact with customers. These interactions can include answering queries, providing product recommendations, or assisting with purchases. During these interactions, bots can collect data such as customer preferences, feedback, and buying behavior.
- **Surveys and Polls:** Bots can conduct surveys or polls through social media. These can be about customer satisfaction, product preferences, or general interests. The responses collected are valuable first-party data.
- **Behavioral Tracking:** Bots can track user interactions on your social media profiles, such as likes, shares, comments, and click-throughs. This data provides insights into user interests and engagement levels.

- **Chatbot Conversations:** Implement AI-powered chatbots that can hold conversations with users. These conversations can be used to gather specific data points based on the questions asked by the bot.
- **Direct Messaging Campaigns:** Utilize bots for direct messaging campaigns, where they can send targeted messages to users and collect data based on the responses.



29

Incorporate advanced segmentation in social media campaigns

Use detailed customer segmentation to deliver highly targeted service messages and support. Many of these tools are built into the social media platforms themselves and offer various ways to segment and target your audience effectively. However, we find that they are often vastly underutilized.

Here's a look at some of the key tools and tactics available on popular social media platforms:

- **Facebook and Instagram Insights:** These tools provide detailed analytics about your followers and how they interact with your posts. You can see demographics, location, engagement times, and more, which can be used to create specific audience segments.
- **Facebook Custom Audiences:** This feature allows you to target ads to a specific audience based on your own data, like email lists or website visitors. You can also create Lookalike Audiences to reach people similar to your existing customers
- **Instagram Stories Polls and Questions:** Use polls and questions in your Instagram Stories to gather insights about your audience's preferences and interests. This interactive content can provide valuable data for segmentation.

- **Twitter (X) Analytics:** Like Facebook and Instagram, Twitter offers detailed analytics about your audience, including their interests, demographics, and engagement patterns. This information can help tailor your content and targeting strategies.
- **LinkedIn Website Demographics:** This tool uses LinkedIn's data to provide insights about your website visitors. It's useful for B2B businesses looking to segment their audience based on professional criteria.
- **YouTube Analytics:** For those with video content, YouTube Analytics can offer insights into who is watching your videos, what they watch, and how they interact with your content.
- **Pinterest Analytics:** Pinterest provides data on the demographics of your audience, the devices they use, and how they interact with your pins. This is particularly useful for businesses in lifestyle, fashion, home decor, and similar sectors.
- **Social Media Polls and Surveys:** Most social platforms allow you to create polls and surveys. These are direct ways to gather information from your audience about their preferences and interests.
- **Engagement Analysis:** Regularly review which posts are getting the most engagement and from whom. This can help identify different audience segments based on their interaction with your content.
- **Retargeting Tools:** Platforms like Facebook and LinkedIn allow you to retarget users who have engaged with your content, visited your website, or are part of your email database.

Each of these tools can be used in different ways depending on your specific audience and goals. It's important to combine these tools with a well-thought-out content and engagement strategy to effectively segment and engage your audience.



30

Apply text analytics for customer feedback analysis

Harness natural language processing to gain insights from customer comments, reviews, and messages, helping to drive strategic improvements in service.

Most generative AI tools can easily help with this. However, as always, we urge you to first ensure that your company allows the use of AI. Strictly follow any company guidelines!



These 30 expert-level tips are designed to position your brand as a leader in customer service innovation.

With them, you should be well on your way to leveraging the latest technologies to enhance customer experience, streamlining operations, and building deeper relationships with customers through social media customer service.

CPG & Retail Brand Examples

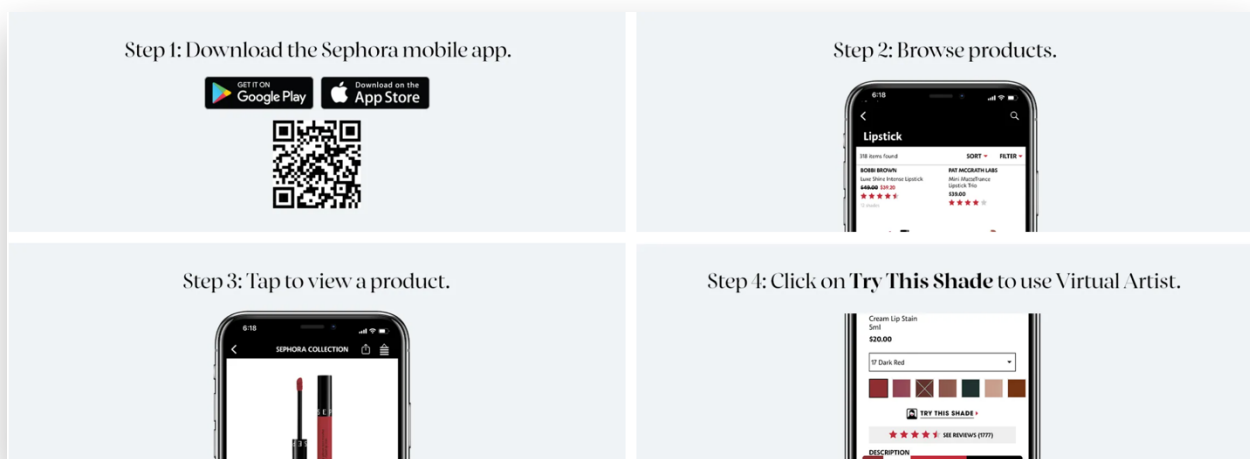
Sephora



GOAL: Enhance customer service with Augmented Reality (AR).

For industries like fashion, eyewear, and cosmetics, AR can allow customers to "try on" products virtually, reducing return rates and enhancing the shopping experience.

Sephora, a cosmetics and beauty brand, uses AR within their app to improve the shopping experience for its customers.



Here are some key points highlighting their success:

- **High User Engagement:** Since launching on the app, the Sephora Virtual Artist feature has seen over 200 million shades tried on and has had more than 8.5 million visits. This level of engagement demonstrates how well-received and widely used the AR feature is among Sephora's customers.
- **Customer-Centric Approach:** Sephora's commitment to understanding and addressing the needs of digitally-dependent customers has been a cornerstone of its strategy. This approach, centered around enhancing the customer experience with technology, has driven the company's direction, and contributed to its success.

- **Revenue Growth:** Between 2017 and 2019, Sephora consistently reached revenues of \$6 billion, which was a near 50% increase from the \$4 billion registered five years prior. This substantial growth in revenue can be partially attributed to the innovative use of technology in enhancing customer interaction and experience.



OUTCOME: Sephora's use of Augmented Reality (AR) technology has contributed significantly to their growth. The company's focus on innovation, customer-centric solutions, and continuous development of new technologies has solidified its position in the beauty retail industry.

Your Action Plan

Whew! That was a lot to cover. But we're not done yet.

Now that we've presented you a comprehensive 100-point checklist for CPG and retail brands, it's essential to guide you on how to effectively utilize the checklist.

1. **Start with Assessment:** Encourage your team assess their current strategies and identify areas that need improvement. This initial assessment will help in prioritizing tasks from the checklist.
2. **Prioritize Based on Impact:** Advise your team to prioritize tasks that will have the most significant impact on your department or business goals. The foundational tips in section one should be addressed first to establish a solid base.
3. **Assign Ownership:** For each point on the checklist, assign ownership within the team. This ensures accountability and effective execution.
4. **Set Realistic Timelines:** Encourage setting realistic timelines for each task, keeping in mind the complexity and resources required.
5. **Regular Reviews and Adjustments:** Conduct regular reviews of progress against the checklist. This allows for adjustments and re-prioritization as needed. With most of our clients, we have a monthly check in for this purpose.
6. **Seek External Expertise When Needed:** For tasks that are beyond the internal team's capability, consider partnering with external experts like us (B Squared Media)! A partner can provide specialized expertise and additional resources to implement more complex or advanced strategies.
7. **Leverage Collaborative Tools:** Use collaborative tools to track progress on the checklist, facilitating transparency and collaboration among your team members.
8. **Celebrate Milestones:** Encourage your team to celebrate milestones as they complete sections of the checklist. This boosts morale and maintains momentum.
9. **Continual Learning and Adaptation:** Friendly Reminder: Digital strategies are continually evolving. You should be open to learning and adapting their approaches as new trends and technologies emerge.
10. **Document Lessons and Successes:** Finally, document lessons learned, and successes achieved. This documentation can be valuable for future strategy development and training new team members.

By following this approach, CMOs and other leaders can effectively utilize our 100-point CPG and retail checklist to enhance their digital strategies and drive growth in their organizations.



Ready to do this? We can help!

**Book a FREE 30-minute
~~consultation~~ chat with
Brooke Sellas**

Discover how our tailored Social Media Care Program can elevate your brand's online presence, creating lasting customer connections and driving real business growth.

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