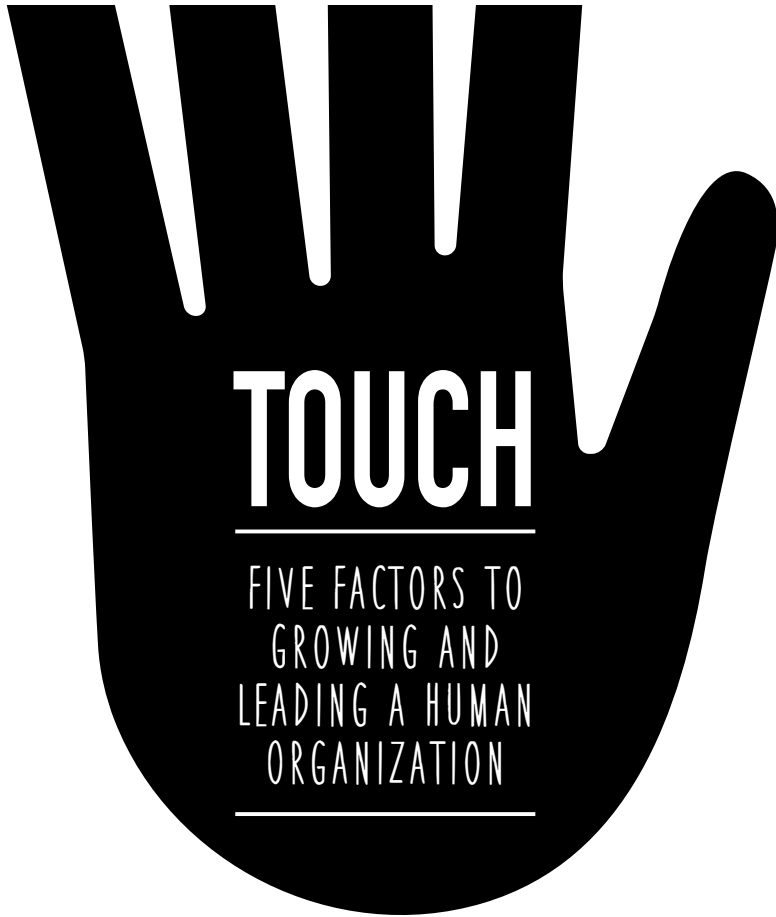


TOUCH



**TOD MAFFIN
MARK BLEVIS**



**DUNDURN
TORONTO**

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CHAPTER 1

A LETTER TO YOU FROM US

Dear Leader:

First, the good news. The digital world has fundamentally changed how organizations hire staff, market their services, and connect with stakeholders and the public. It's provided cost savings and greater efficiency. And it's helped start-ups bootstrap themselves into NASDAQ-listed companies in a heartbeat.

Not without a cost.

The same technology that helped organizations overcome geographically dispersed workforces that crossed the International Date Line also drove a wedge in localized workforces. By trying to make life easier for young families and reduce facilities-costs through telecommuting, organizations instead discovered that team members being distant in the same city created a new series of complications.

Many organizations have embraced digital business tools at the expense of retaining humanity in all of their dealings. In an effort to use high tech to connect with people more effectively, we are losing the human “touch” — that critical person-to-person connection — which is still the engine of commerce.

- Hiring is done by automated keyword searches.
- Offices have regressed to sterile, highly controlled environments.

TOUCH

- Communications staff increasingly rely on scripted responses.
- Websites are designed for search engines, not people.
- Leaders focus on arbitrary “best practices” metrics.

This erosion of humanity in business isn't a story that's often picked up by the business media. After all, it's not sexy and it doesn't fit the narrative of advanced technology solving all business problems. It's become clear that in a world filled with complicated web forms and digital marketing services, we have lost the human element in how we run our organizations.

Here is what we offer in terms of restoring the human touch:

- **Leadership:** defining your organization's human values, speaking the business language of humanity, becoming a “Chief Humanizing Officer”;
- **Customer service:** combatting the death of loyalty, fostering a new ethic in your call centres, defining the role of the “brandividual”;
- **Web/social:** understanding the new human digital metrics, creating a people-based online experience, doing web workflow the right way;
- **Marketing:** identifying influencers and leading brand advocates, exploiting personal data pools, exploring next-generation human marketing;
- **Crisis communications:** responding to those with “digital personality disorder,” implementing the SWARM methodology, managing your brand reputation the human way; and

A LETTER TO YOU FROM US

- **Legal:** approaching necessary legal communications more humanely.

We believe the same telecommuting technology that had its origins in time- and place-shifting our interactions has evolved into “telecommuniting” technology that allows us to have meaningful real-time, and even time-shifted, interactions within an organization as well as with stakeholders, the media, and the public.

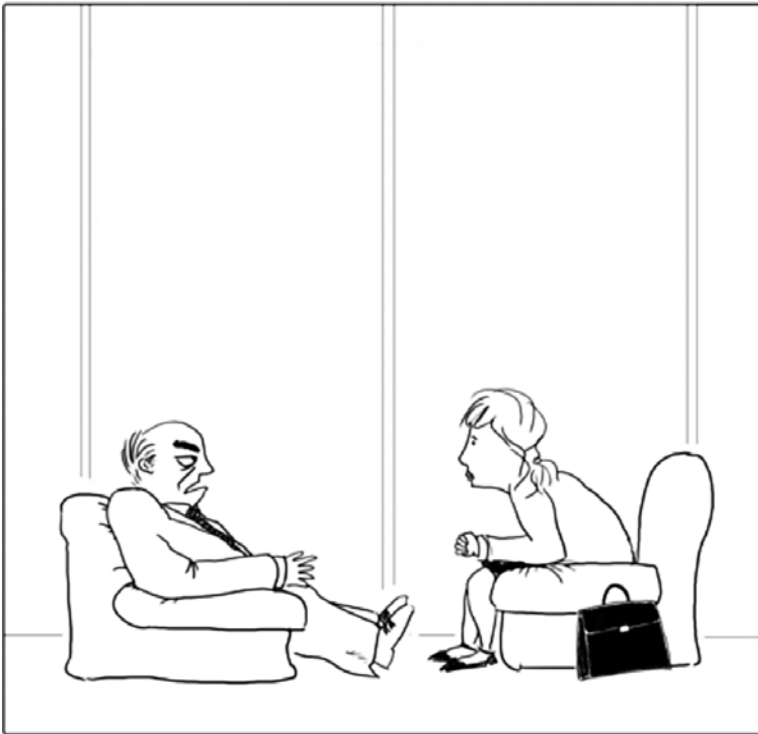
Our book will help you discover why and how.

Thank you for picking up a copy and reading this far. Your journey is just beginning.

Sincerely,
Tod and Mark

CHAPTER 2

THE FIVE FACTORS



I like you, Lenahan. I see in you things I see in myself... in particular, a spiritual quality that recognizes there must be more to human existence than the single-minded accumulation of obscene amounts of wealth at all costs. Which is why I've called you here today: to impress on you the absolute importance of ensuring that spiritual quality never, in any way, shape or form, finds voice in this company.

THE FIVE FACTORS

Infusing your organization with more humanity isn't as simple as following a recipe. There's no easy step-by-step solution that you can implement. Rather, increasing what we call the TOUCH factor in all areas of your operations is an evolving process, measured with softer metrics than some leaders are sometimes comfortable with. After all, KPI (key performance indicators) dashboards don't often measure the soft stuff.

Based on our own experiences and conversations with countless business and community leaders, we've identified five overall factors which are key to growing and leading a human-based organization. As you'll see, they're not tactical steps to check off a list. Rather, they're an overall ethos that must become a part of your organizational commitment to human values.

We'll spend just a bit of time on these five factors, then spend the rest of the book discussing how you can instill these values in all aspects of your organization.

TECHNOLOGY

It might seem counterintuitive to put technology at the top of the list of factors necessary to humanize your organization. The fact is, technology can be your strongest ally. There are thousands of web services, software as a service (SaaS) products, and digital tools which can help you inflect more humanity into the mix.

Let's start with some important guideposts.

Hire Your Technology

Stop thinking about your technology as nothing more than a computer. You should treat your business technology as you would an actual human employee. Have a job description for which a technological solution may apply. Then, conduct regular performance reviews (luckily, your technology won't ask for a pension).

- Does the technology that serves your organization still do as good a job now as when you first brought it on board?

- Is it taking too many sick days (downtime)?
- Do you have a growth and succession plan in place for when you exceed its capabilities?

In far too many cases, the answer to these questions is either “No” or “I have no idea.”

We’re not talking about a general sense of these items either. Schedule annual performance reviews of your CRM (customer relationship management) system. Invite the people who work closest with it. Ask them to submit reviews of the system’s job performance over the past year. Ask these colleagues of the technology to advise on when it needs to be promoted (more money invested in it) or fired.

This regular performance review (call it a “tech audit” if you’re uncomfortable with the human language) is critical because your business grows, your stakeholders change over time, and your objectives shift. Your business technology should evolve with these changes.

Work Backwards

The first technology decisions that contribute to the dehumanizing of organizations often come from forcing your people or customers to adapt to your technology and not the other way around.

You’ve probably been on the receiving end of this. At one time you and your outsourced designer were just fine sending emails back and forth. In an effort to achieve greater efficiency, she brought on a complicated project management website. Now, you have to make sure you’re emailing the right Dropbox address, you’re not sure which members of the team are receiving your replies, and you can’t view attachments without logging into the new platform. Hell, where *did* you put that password, anyway?

To align your business technology with the humans you serve and lead, you must start with the customer or employee experience and work backwards to the technology.

Steve Jobs said it best:

THE FIVE FACTORS

You can't start with the technology and try to figure out where you're going to try to sell it. I've made this mistake probably more than anybody in this room and I've got the scar tissue to prove it, and I know that it's the case. As we have tried to come up with a strategy and a vision for Apple, it started with 'What incredible benefits can we give to the customer? Where can we take the customer?' [It's] not starting with 'Let's sit down with the engineers and figure out what awesome technology we have and how are we going to market that?'¹

Anticipate, Don't React

Here's one reason the robot overlords haven't seized control of Earth yet — we humans have instinct, gut feelings, and the ability to anticipate needs with greater accuracy than machines. (Though this is a close race — IBM's Jeopardy-playing robot, Watson, was able to predict when it was likely to get an answer wrong. In one question under the category "U.S. Cities," Watson guessed "Toronto?????" — complete with the five question marks. Because Watson was able to doubt the strength of the answer, the computer bet only a fraction of its money pool, prompting host Alex Trebek to shout, "Oh, you sneak!")

Remember there are many human-centric steps in any decision cycle, whether it's a purchase decision, hiring decision, or management decision. Steps like "consideration" are often ignored by technology platforms. Instead, we get marketing automation tools which merely keep bugging people until they buy something.

Some companies are working toward anticipating purchases before customers even commit to buying. A recent patent filed by Amazon reveals its plan for "anticipatory package shipping." Amazon's system identifies near-purchases (like the act of placing items in a digital cart, adding items to a wish list, or even long cursor hovers over specific items listed on its website) and begins the process of shipping based on that behaviour. Packages are sent to shipping hubs or directly to trucks in anticipation of the Purchase button being clicked. This

would let Amazon ship copies of a popular book on the day it's published, for example. To reduce the number of returns, Amazon says it might offer a steep discount to deliver the product anyway or, if it's a low-cost item, provide it as a thank-you gift. It's a simple tactic, yet one which makes the company more connected to the real-world day of its customers.

On the human resources side, being able to forecast issues through surveys or by simply tracking them on a calendar can alert you to needs which are likely to arise.

In your customer service department, you should be using tools that let you monitor social chatter which may turn into issues you're forced to deal with. For larger brands, this can be as simple as monitoring mentions of your brand or product names online alongside a list of hot words like "broken," "missing," or "lousy," and popping in with a gentle "Can I be of service?" message. Follow-through is critical.

In public relations and public affairs, resources should be dedicated to monitoring public opinion online, measuring reaction to campaigns, issues, and activities. Proactive research and sentiment analysis will allow you to anticipate changes in opinion and better equip you to change course and communicate effectively before an issue takes on a life of its own — a life in which you have little or no part.

OUTCOMES

You've probably felt it before — the dread of year-end measurement against the same key performance indicators (KPIs). These indicators, like cost per acquisition, customer attrition rate, and bad debt recovery, are important to guide your organization to success.

Far too often, leaders mistakenly direct their focus on measuring hard numbers, often drowning in data without understanding how their activities impact real humans.

Breathing more humanity into these outcomes — and even providing some softer, yet measurable, metrics — will go a long way.

THE FIVE FACTORS

Why, Not What

Human organizations must articulate the sole purpose they have for existing. Reducing customer attrition may indeed be a compelling objective, but it doesn't define *why* you do what you do. Each leader should be able to articulate to their team why the organization exists in the first place.

Consider the vision of Vancity, the largest English-language credit union in Canada. It's clear: "At Vancity, our vision is to redefine wealth."

Their vision statement continues, explaining that the organization feels it needs to "re-envision prosperity as something we can only achieve if we are surrounded by and connected to a vibrant, healthy community that is sustainable for the long term."

It's a welcome change from the usual vision of outcomes like increasing shareholder value. Ask the *benefit* that humans gain from increasing shareholder value. Can they afford better things for their kids? How does it improve their day-to-day life? How will it change how they view the world?

Your first step is to understand and explain the human reasons why you do something. Only then can you measure your success in that space.

Simple, Human KPIs

We need a new model of measuring success in organizations — one that understands the effect your operations have on real people.

As with each of the five factors outlined in this book, this new look at business can and should cross each of your departments.

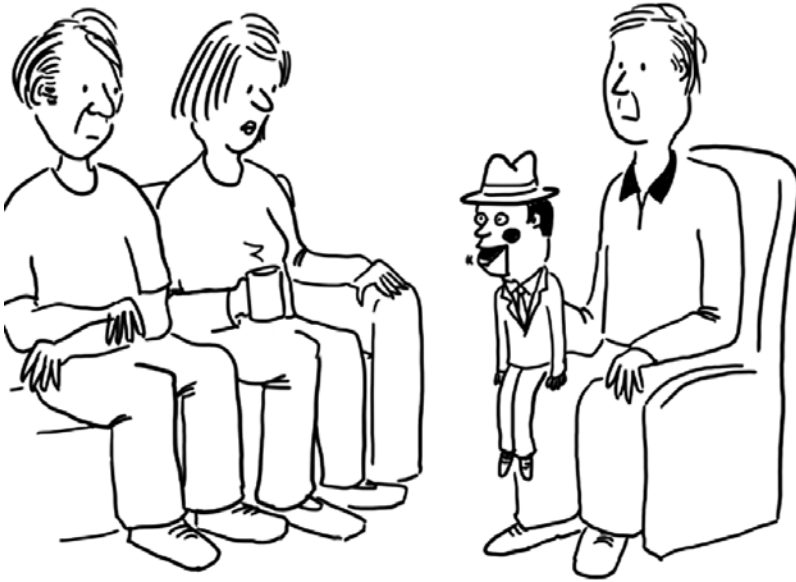
One approach we like is business advisor and strategist Chris Brogan's annual exercise in selecting three words which guide his priorities in each upcoming year. His 2014 focus words are:

Lifestyle — I'm using this to cover my fitness/health efforts, my financial health, my choices in how I spend my time. It's a big one covering much more than the word usually covers.

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CHAPTER 5

COMMUNICATIONS



As a matter of fact, I do have some strong views
about ghost-written blogs.



One public affairs officer I spoke with recounted a few occasions when the community defended the PAOs after online postings by some individuals suggested the speed of information was unsatisfactory, a side effect of high expectations in the digital age.

The page was kept busy later in 2011 when fires broke out in Fort McMurray, and it has retained its important status since.

The net effect of the page has been overwhelmingly positive, something PAOs smile about as they recall the difficulties they had convincing managers the tool was a good idea.

THE FIVE PERSONALITIES

Tod's not a jerk. Really, he's not. Although judging from a tweet he sent back in October 2012, you might think otherwise.

He was giving a speech in Seattle and staying at the local Westin hotel. As he often does, Tod had forgotten his razor back home, so he called the front desk and asked if they could send up a toiletries kit. Almost all hotels have them, and most will give one to you free.

The operator said, "Sure, no problem. Twenty-three ninety-five."

By the time he processed what she had said, Tod had already hung up. Twenty-four dollars for a cheap razor? (I mean, maybe if he had been staying at a lower-end hotel, but this was a relatively top-shelf brand. And he was a gold member in its loyalty program.)

So — and here's where the prickish part starts — instead of calling back and asking someone why it was so much, Tod grabbed his iPad and pounded out a brief rant.

@todmaffin – Oct 12, 2010

So @WestinSeattle is charging me \$24 for a disposable razor. Every other hotel — even the cheap ones — will give that to you for free! #fail

There. That was better. He felt vindicated, smug, and secretly hoped his twelve-thousand-plus followers would retweet it. That would teach

the hotel a lesson, he thought — all he needed now was a long moustache to twirl with his fingers while saying “Mwa-ha-ha-ha!”

To its credit, the Westin’s headquarters monitors brand mentions of its hotels like a hawk and, within minutes, they had called the front desk of the hotel and had the manager call Tod.

“It’s not really a big deal,” Tod said, feeling a little sheepish now that he was actually forced to speak with a real human being. “I was just surprised, that’s all.”

“I think there’s been a misunderstanding,” the manager explained. “Our operator was quoting back your room number — twenty-three ninety-five — to deliver it to you. That wasn’t the price. Of course we wouldn’t charge you for a razor.”

“Oh,” Tod mumbled. “Sorry about that.”

An embarrassing misunderstanding.

Like we said, Tod’s not really a jerk. But sometimes he plays one on Twitter.

Tod isn’t the only one who’s popped onto Twitter, Facebook, or a blog to shout angrily at a seemingly unmanned corporate account. Sometimes rants get results, sometimes they get ignored, and more often than not they just end in embarrassment for the person who complained.

This isn’t the way it used to be. Before the Internet, even talking to telemarketers was handled with an ounce of decorum.

Today, entire websites exist to collect consumer reviews — many of them harshly negative — and those reviews have the power to bring down entire companies.

Remember that not everyone who posts something negative about your brand is necessarily out for blood.

As a result of client projects for which we’ve read thousands of comments left on news articles and blog posts, we’ve organized commenters into five main categories. The premise is that you must first seek to understand (and believe us, reading hundreds of comments is an important and valuable commitment) before you can decide on any follow-up course of action. You need to become more familiar with what the issue really is and who you should be reaching out to before you put energy into what should be said.

The following are the five categories of commenters we’ve identified:

- **Involved:** These are the people who are close to or very concerned about the issue at hand. They know the stakeholders, they have intimate knowledge of the contributing elements, and they can analyze the different directions and effects of the issue on the fly. Involved commenters help keep the conversation relevant no matter their stance on the issue.
- **Informed:** These are the people who have taken the time to learn more about the issue and its key players. They tend to know the history and appreciate its impact. Informed commenters generally have a personal interest in the issue. They contribute new ideas to the conversation and help others understand by taking the time to offer valuable responses.
- **Misinformed:** These are the people who have skimmed the article and possibly other resources, may have misunderstood the information they received, and have collected or were fed inaccurate information from other sources. This is the first level of commenter that lets opinion cloud the issue by relying on their own opinions to fill in holes in their understanding. Misinformed commenters aren't necessarily malicious.
- **Uninformed:** This is where the participants in the conversation transition from being people who generally have something to contribute, to being commenters who have a need to be heard. The uninformed choose to let their opinion validate their broken logic. They aren't interested in the backstory and don't know who the stakeholders are. In most cases, they've picked up on a single point of the article or taken a single piece of information out of context. Uninformed commenters like to pontificate and are happiest when they deconstruct what other people are

COMMUNICATIONS

saying, sometimes peppering their comments with personal attacks.

- **Angry:** Known in the online community as “trolls” and “flamers,” this is the angry mob of people who like to berate others no matter what the discussion is about. It’s more often than not the case that they know little about the issue and probably won’t come back to it. They spray their anger and leave. This group gets its energy from lobbing emotional attacks that lack, among other things, logic.

The table that follows quantifies five qualities of each commenter category based on several criteria with ratings of one (lowest) to five (highest), with zero indicating “none.” The qualities cover engagement (how likely the commenter is to provide more than one contribution); understanding (how much knowledge the commenter has on the issue and its contributing factors); credibility (how much believability and insight the commenter offers in the discussion); logic (how likely the commenter’s contribution is to make sense and relate to the issue and its contributing factors); and emotion (how much mood and personal feedback is likely to be present in the commenter’s contributions).

THE FIVE COMMENTERS

	ENGAGEMENT	UNDERSTANDING	CREDIBILITY	LOGIC	EMOTION
INVOLVED	2	5	5	4	2
INFORMED	3	4	4	4	3
MISINFORMED	4	3	3	3	3
ANGRY	3	1	0	0	5

Note that the Involved tend to offer their insight and knowledge in a few credible and logical arguments before they depart from the exchange. These people tend to feel their points have been made and

don't require repetition. It's hard to keep these people around for a meaningful discussion, particularly when the angry mob gets involved.

Misinformed people tend to stick around more. Our observations suggest many of these people seemed genuinely interested in a productive discussion of the issues in order to expand their understanding. They have some credibility in the exchanges because they appear to listen.

The conversation gets much more prickly and unproductive as the uninformed and angry participants become more involved. They're just itching for a fight and will use ad hominem attacks to get a charge out of their targets. They turn the discussion from the issues to the personalities of the participants. And they tend to be reasonably active. They often depart out of fatigue or in protest.

Knowing the qualities of these groups is important. It will help you better prepare your responses, if any are merited, to the conversation.

Remember, you must have a handle on the people in your camp as much as you need to vigilantly watch and react to your critics. Sometimes your greatest informed and misinformed supporters in any category can get testy. To earn credibility, you must protect informed critics from unreasonable supporters as closely as you protect your own interests.

Once you know your commenters by their categories, it becomes easier to figure out who to engage with, how, and when.

MAD-LIB PITCHES AND SOCIAL MEDIA

We've each received many unsolicited pitches from both reputable and unknown sources. There's a long list of stories we could tell. This one is particularly interesting. It involves Mark's wife, Andrea, who is a breast cancer survivor.

Andrea was once pitched by a public relations advisor (Ms. P) about a line of post-mastectomy bras. Ms. P said if Andrea would consider blogging about the bras, she would gladly send along a sample.

While Ms. P may have mined Andrea's email address from her blog, WeCanRebuildHer.com, she had clearly not done her research. At the time of the pitch, Andrea's most current post was a reflection on having survived breast cancer treatment with both of her breasts.

Further, a search of “mastectomy” on Andrea’s blog reveals earlier posts when Andrea decided to have a lumpectomy rather than a mastectomy.

Andrea replied to acknowledge the pitch and draw Ms. P’s attention to her most recent post.

In a follow-up, Ms. P agreed to send some regular bras (which she generously did). However, she also asked if Andrea might consider blogging about the post-mastectomy line. As Andrea notes, the suggestion was that she review a product not intended for her. Andrea rightfully declined, noting in her email that,

Having not gone through the devastating loss of one breast, or two, and all the associated trauma and psychological adjustment, I would never be so insensitive as to express an opinion on post-mastectomy products.

PR professionals must take care in their pitches. Especially nowadays. It’s extremely important (and very easy) to research the people you will be pitching to make sure they are the right people to approach or, if not, whether they might be able to help find the right people. And it’s equally important to never ask someone to comment outside their own area of expertise and/or experience.

Andrea and Mark have been actively involved in social media for many years. Their success building communities around content creation, children’s books, and Andrea’s journey through breast cancer means they are regularly pitched by organizations looking to benefit from their activities. Nearly all of the pitches they receive are like Mad Libs (a writing game in which the player is asked to provide nouns, pronouns, verbs, and adjectives that are placed in a story, often with extremely humorous results).

Even when a pitch is altruistic, it should still be personalized. Social media creators don’t appreciate being patronized by statements like “I really enjoy your blog” especially when the very next phrase is something along the lines of “I thought you might be interested in helping us promote our own initiative” or “Your blog is a perfect fit for our client/campaign/product/service.”

Andrea has received a lot of these requests because breast cancer organizations and for-profit businesses want a piece of the action, particularly

during October, Breast Cancer Awareness Month. The same is true of people who work in the “pink for profit” mindset, all year round.

So, it’s time to call out a pitch, share our thoughts on where this pitch went wrong, and offer our top five things to do when reaching out to bloggers.

Hi Andrea,

I hope you’re doing well today. I’m writing to introduce my company, [redacted], which is a leading online service for sharing stories through photos. Your inspiring story and battle against cancer caught our eye. Thank you for the encouragement and comfort you bestow to other women (and men)!

The writer starts off by trying to establish herself as important (“my company is a leading ...”) before thanking Andrea for sharing her story online. She doesn’t get into specifics, which proves this is a form letter. If the author really had read Andrea’s blog, she might have congratulated Andrea on soldiering through the most difficult time in her life, congratulated her on her recent return to work, or remarked on that day’s self-deprecating post about Andrea getting used to the return of her eyebrows. The only thing the writer revealed is that she knows how to use Google. The writer goes on to say,

As October is Breast Cancer Awareness Month, we are seeking new ways to help those who have been affected by breast cancer. Today we released a new Breast Cancer Awareness theme for sale in our [redacted]. Through this design, created by breast cancer survivor [redacted], we hope to better enable our community to share stories and support others as you have done via your blog.

Andrea’s just been told the writer’s for-profit business is selling something and Andrea can now determine that the author wants her help promoting this product to the engaged community Andrea’s attracted and

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earned the trust of. The writer has not yet explained what value the product has for Andrea or her community, only that she's selling something.

To show our support for this tremendous cause, [redacted] is donating \$1 to [redacted] for every purchase of the Breast Cancer Awareness theme throughout October.

Ah ... here's the value proposition: The writer will share a very small portion of her revenue with a breast cancer charity. The writer apparently hasn't read Andrea's blog where, she self-identifies as a member of the "No Pink For Profit" team in the Run for the Cure.

Please consider using this digital design to share your own story or to inform your audience about how to help find a cure via [redacted]. We will be featuring all these creations in a community gallery on our site to showcase care stories and to build awareness. For reference, here is our blog post with additional information: [redacted].

Thank you for your time and please don't hesitate to write back with questions or feedback.

All my best,
[redacted]

Community builders work hard to provide value, earn trust, and establish meaningful relationships. They earn social capital and work very hard not to squander it. Those who do it best are selective about what they ask their community for, especially when it comes to hard-earned money. The result is that more people are willing to participate when the call finally comes. For example, Andrea raised \$5,700 in sponsorships for the Run for the Cure — all through her website. The writer of the pitch would have to make 5,700 sales through Andrea's blog for Andrea to have the same impact she's already had with her own community.

Which brings us to our final point. Mark followed the link to investigate the process of purchasing the writer's product. It took him to a