

**Solutions. Excellence. Social**

# Chatter Business Case

# Drive collaboration, get real-time updates and communicate more effectively using salesforce Chatter

"We love Chatter at SolIX!" says CEO Sally Torkington. "It's radically changed the way we communicate with colleagues and customers. It's helped us collaborate more closely and share knowledge more effectively. We've closed deals more quickly, responded to customer queries more efficiently and gained even tighter control of salesforce projects."

[Chatter > People > Sally Torkingt](#)



"The SolIX management team also make extensive use of Chatter 'feed tracking' on opportunities and projects – which means fewer interruptions for everyone else!

"Our customers are also gaining these benefits by making extensive use of Chatter within their own organisations.

"However we've found there's more to successful Chatter deployment than simply switching it on! So read our Chatter Business Case to get the full story."

## What's wrong with using email?

Like many organisations, if someone at SolIX was trying to solve a problem, get feedback on a document or find out information on a potential customer, they used to send a large-circulation email.

Some people would reply to everyone, and some would just reply to the sender – either way the email thread quickly got jumbled and become a mess.

Using Chatter the problem solving process becomes a conversation rather than a series of disjointed emails. People can interact and spark new ideas. There's no ambiguity over which is the current version of the document. Other employees can be brought into the conversation using the @ function. The whole process is a much smarter way of working.

## What's wrong with using the phone?

Let's be clear – nothing. The phone - and of course face-to-face conversation - is never going to be replaced in business. At least we hope not!

But we can't be on the phone all the time. Sometimes other people simply aren't available when we want to speak to them. And sometimes there's so much we want to ask there simply isn't enough time to phone everyone.

At SolIX we use Chatter in two ways to deal with these challenges. First, we communicate using Chatter directly on the salesforce record to ask questions and give feedback. It's short, quick and to the point. And the other person can respond as soon as they're available.

Second, we 'follow' important Opportunities and Projects. If an important deal is won then we get to know automatically - immediately and without having to call anyone. If a Project moves from Green to Amber the management team know straightaway. That means we've got the right information at the right time to take action.



**"I'm swamped with email, now I'll be swamped with Chatter posts as well"**

"At least that's what I feared. But we've found that much communication that would have taken place by email now takes place by Chatter. And because Chatter is a much more collaborative mechanism than email there's been an improvement in the quality of communication. People tend to be more concise. Comments are less political, and we have avoided the mess that results when some people 'Reply All' and others just 'Reply'.

"But it's also a question of filtering. In our organisation we follow the people, records, groups and files that matter to us as individuals. If other people want to bring me into the conversation they can @ me.

So rather than being swamped, I've found that we've more time to focus on the important priorities. And I get a lot less email!"

*Gary Smith, MD SolIX Consulting*

## Chatter Benefits

### Get told immediately when something changes

Tracking the status of important deals is a perennial problem for sales executives. And it's the same for customer service managers – they want to know immediately when a severity 1 case is escalated. Sure, this information is on the salesforce dashboard. But Chatter feed tracking goes a step further and informs you immediately when the Stage of that key deal is advanced. Or when the critical case you've been following gets resolved.

### Receive input from unexpected quarters

No-one knows everywhere each one of our colleagues has worked in the past or who they know. Or what previous experiences they've had. So how can we possibly know that someone in our team – or even in a different department – has some insight that can help us win a deal or resolve an issue? But Chatter helps us reach-out to a wide audience to ask for help and input – without bombarding them with company-wide emails.

### Keep everyone up to date on important developments

Chatter Groups is the answer if you need to keep a disparate audience informed on a particular topic. Create an Industry Trends or Competitors group to share marketplace information. Or a Product Development group to help everyone keep up to date on new features. Or a Sales Team, Service Team or Finance Team Group to communicate on things that are only relevant to specific people. Or an 'Acme' Group to share information with everyone that works on your most important customer account!

### Collaborate more effectively

So often in business we need to work with colleagues to win deals, resolve customer service issues or deliver projects. And how well we collaborate determines how efficiently and effectively we'll meet our business objectives. Chatter plays a crucial role in helping us to achieve this – and in a far more effective way than traditional methods. And now of course we can choose to bring customers directly into the conversation using private Chatter Groups.

### Follow Documents as well as People

Need to know when a product specification changes? Or when the company overview presentation is updated? Or when the proposal template is modified? Then use Chatter to follow the document. That way you'll be automatically informed when a new version of the document is uploaded. And you'll have the opportunity to provide comments, feedback and suggestions for further improvements.

**"People will post inappropriate content"**

"It depends what you mean by inappropriate" says Gary. "Our employees don't create Chatter posts with details of their private lives or social activities. They're no more likely to do this than they are to send out a company-wide email with the same information. I'm not saying it can't happen, but it hasn't happened at our company.

"That doesn't mean to say we don't have rules on what is acceptable on Chatter. In my own business we use Chatter extensively for business purposes. However several of our employees have recently had babies and they've posted a picture of the baby on Chatter. Other people have wished them well using Chatter.

"In our organisation that's an acceptable use of Chatter. It's part of the social fabric that binds us together as a company.

"With some of our clients the policy on Chatter is to keep it strictly to business issues. That's also fine. Just let people know where they stand in terms of how Chatter should be used."





Many employees will be immediately familiar with the Chatter user interface. After all they use similar tools in their personal lives. But by taking a few simple steps it's possible to really drive the adoption of Chatter in your organisation and maximise the benefits it delivers.

## About Me

Add a short bio so that people know about your skills, experience and previous roles. Adding a link to an external website will also give other people important information about you.

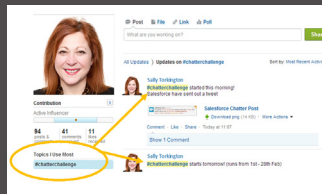
## About Me

Sally has 20 years' experience in global organisational change, customer service excellence and technology deployment within a range of industries. She has long been an advocate of Cloud Computing, recognising the powerful combination of effective technology, streamlined business processes and people excellence achieving outstanding business results.

This month I'm participating in the #chatterchallenge  
<http://blog.solxconsulting.com/2013/01/the-solx-chatter-challenge.html>

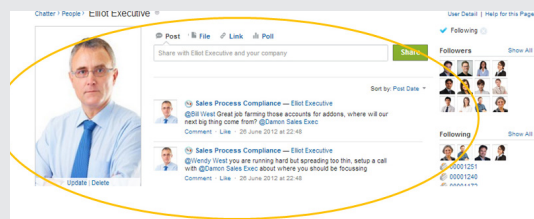
## Topics I use Most

Use hashtags to highlight topics that interest you most. That way they'll be easy to find – just go to the 'Topics I use Most'.



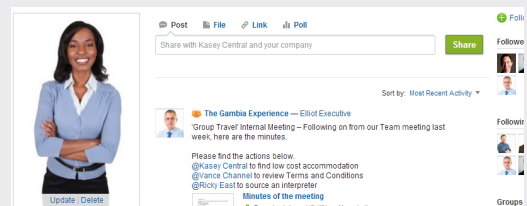
## Get Executives involved from the start

Get Executives and Managers involved from the start. It's tempting to let Chatter usage be driven from the ground-up. But really driving the benefits means that senior managers have to provide visible approval – and participation – in Chatter.



## Add profile pictures

Chatter provides a far more personal communication than email. We all like to see the person we're talking to – so get people to add a pic!



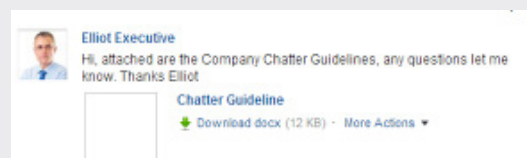
## Plant some seeds

Ever felt like you've been missing out on something good? Don't present users with a blank canvas when they first login.



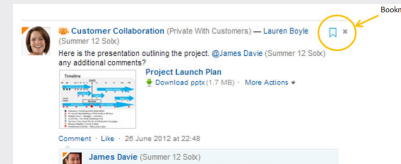
## Set the ground rules

In some organisations it's acceptable to post about subjects that are not strictly work related – a new baby for example. In other organisations Chatter is the preserve of work subjects only. Both policies are fine – providing you let employees know where they stand.

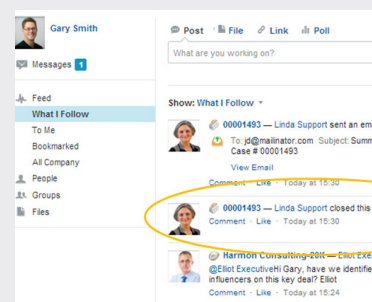


## Give Training

Creating a Chatter post is simple. But what about bookmarks, hashtags, messenger, @ symbols and favourites? If you want users to really adopt and get the best from Chatter, give some simple training on how to do it. And follow up by regularly posting reminder tips on Chatter



## Enable Chatter feed tracking



This means that anyone following a specific record will get an automated Chatter post when an important field changes. So make sure you've enabled this feature. And think carefully about the fields that should be tracked (less is often more!).

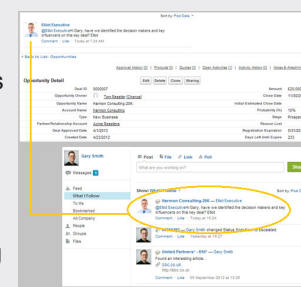
## Communicate the benefits

Don't keep it a secret! In particular get executives and managers to highlight examples of how Chatter has helped them resolve issues, close deals or driven projects.



**Ask questions about deals - on the record!**

So much communication about the sales pipeline, important customer service cases or business projects relies on email. Make sure managers know how to get updates on important deals by creating Chatter posts directly on the salesforce record – nothing is more likely to drive adoption among the sales team!



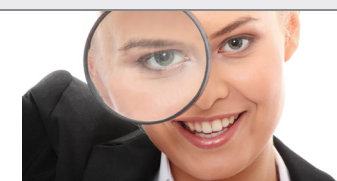
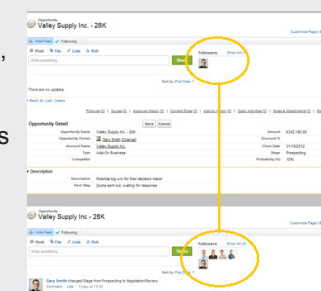
## Monitor chatter adoption

Encourage managers and team leaders to use the Chatter statistics on posts, comments and likes during appraisals and reviews.



## Deploy Chatter Swarm

This free app lets you create business rules on Opportunities, Cases and Leads so that users automatically follow specific records based on business rules that you specify.



## Chatter for free!

Here's one more feature you might not know about. If your organisation uses the salesforce Enterprise or Professional CRM Edition then your other employees can also use Chatter – for free!

Find out more details from the salesforce website <http://www.salesforce.com/chatter/editions-pricing.jsp>

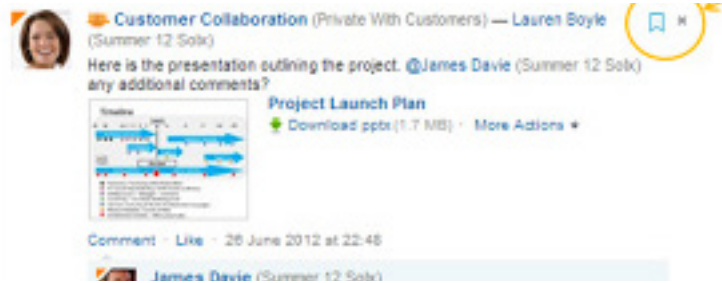


# Five Chatter features you might not know about

There’s much more to Chatter than meets the eye. Take advantage of all of the features and you really do have a powerful communication tool.

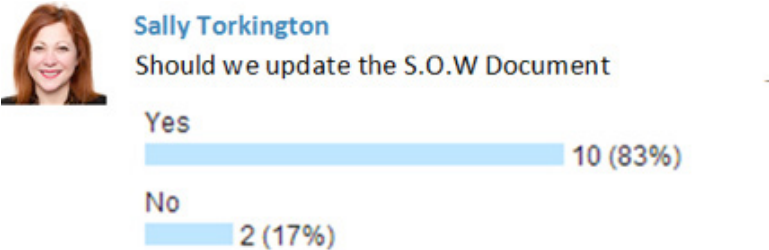
## Bookmarks

Bookmarks allows you to ‘flag’ Chatter posts for subsequent follow-up. Use Bookmarks to highlight Posts that you want to review or comment upon later.



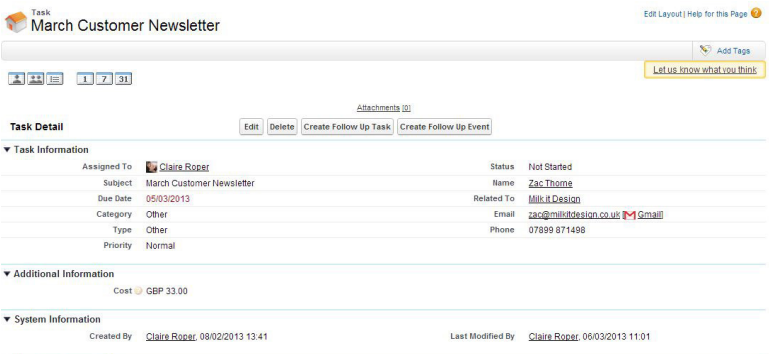
## Polls

Want to get feedback on an idea? Find out what people think about a new product feature? Or even vote on where to hold the Christmas party! Then use Chatter Polls to find out.



## Tasks

Create Tasks directly from the Chatter area on a salesforce record. That way anyone following the record will automatically know what action you’re taking.



## Chatter Approvals

Does your organisation use salesforce Approvals for price discounts or other issues that need management approval?

Then review and process your Approvals directly from Chatter.



## Chatter Mobile

Spend time out of the office or travelling? Keep up to date with your Chatter posts using the free Chatter Mobile app.



# Deploy the Chatter Challenge

Earlier this year the Chatter Challenge was accepted by SolX CEO, Sally Torkington – use Chatter as the primary communication tool for a whole month.

The results were outstanding and Sally has carried on using Chatter as her main method for communicating with the team.

So lay down the Chatter Challenge to your own executives and let them discover the benefits of Chatter!

## Here’s how it works

1. All written communication to employees must be through Chatter.
2. All written communication to Customers currently in Chatter Groups must be through that Chatter Group.
3. All documents, files and images are to be sent direct through a Chatter post.
4. Any questions or comments relating to a salesforce record (e.g. Lead, Contact, Opportunity, Project, Case, Campaign, Document) should be posted directly on the record using Chatter.
5. Email is strictly prohibited to anyone using Chatter.
6. The Challenge begins 9.00am 1st Monday of the Month and ends 5.30pm last Friday of the Month.

Creating a programme of the functions you are required to use may help in assisting them along the way, here's a breakdown of targets they can achieve on a weekly basis.

W1	Day 1	Day 2	Day 3	Day 4	Day 5
	Who can see my chatter & my profile?	Private Groups	Notify me	Private Messaging	Recommendations
W2	Day 6	Day 7	Day 8	Day 9	Day 10
	Who's following me?	@mention	Document Sharing	Day 9 Polls	Hyperlinks
W3	Day 11	Day 12	Day 13	Day 14	Day 15
	Install the Chatter app	#Trends	Install Chatter Swarm	Follow a Campaign	Share a Presentation
W4	Day 16	Day 17	Day 18	Day 19	Day 20
	Bookmarking	Collaboration	Campaign Review	Customer Groups	Poll Results
W5	Day 21				
	The Challenge results				

## Here’s what Sally wrote about during the Challenge

Not only was Sally using Chatter, she also wrote a weekly blog and posted updates on Social Media. Here’s a summary of what she wrote about

[Week 1](#)

[Week 2](#)

[Week 3](#)

[Week 4](#)

## The Chatter Challenge Blog

[Read more about Sally's Chatter Challenge on our blog](#)

## The SolX Chatter Challenge

At the completion of our Chatter Challenge Sally selected Chatter ‘Top Picks’. She highlighted these in a recent blog post.

[Here’s a link to Sally’s Top Two Picks from the Chatter Challenge.](#)

## Your Chatter Challenge

Tweet us at #chatterchallenge and let us know how you are doing, we’ll retweet the most interesting and innovative ways to communicate through Chatter. Get involved and tell us your #chatterchallenge story.

We tweeted about our Chatter Challenge, and received encouragement from customers, suppliers and fellow Salesforce enthusiasts, including Salesforce.com





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