

ENGAGE

THE **SIX** STEPS TO SUCCESS WITH CHATTER



“YOU NEED A PLAN IN PLACE,
OR YOU WON'T HAVE SUCCESS.
TO GET TO THAT SOCIAL
TRANSFORMATION STAGE,
YOU NEED ENGAGE.”

ADAM CAPLAN, CEO, MODEL METRICS



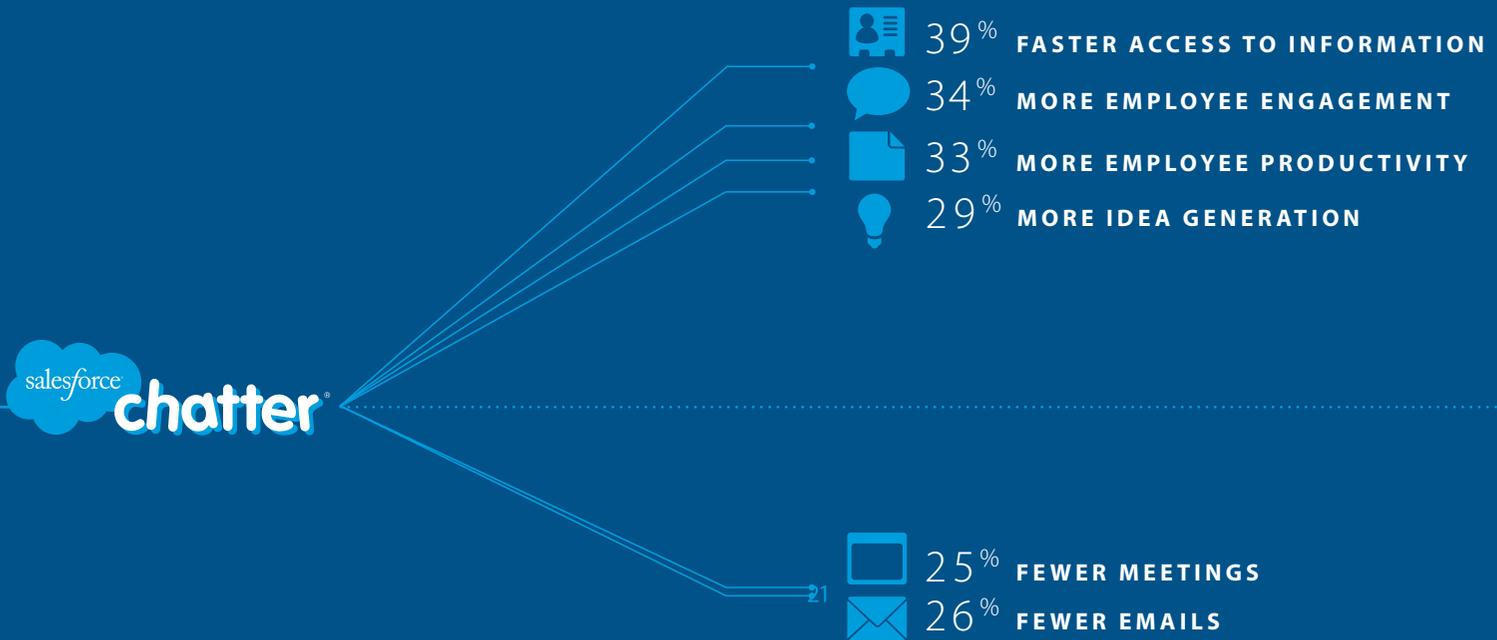
We've built social collaboration into our business process... and it's dramatically reduced our approval cycles.

DEANNA JOHNSTON CIO, BELKIN

WELCOME TO THE ENGAGE FRAMEWORK.

If you're ready to roll out Chatter at your company, then you need ENGAGE. We've gathered research from customer interviews, data analysis, and expert consultations to help you understand what you can achieve with Chatter. And where to start.

WITH ENGAGE, CHATTER USAGE IS TAILORED TO YOUR COMPANY'S UNIQUE BUSINESS PROCESSES SO YOU GET BENEFITS LIKE:



AND AS WE OFTEN FIND, skyrocketing productivity + newfound free time = innovation. Ready to get started? It all boils down to six simple steps that make up the ENGAGE framework.

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EXPLORE
BUSINESS
PROCESSES

NAVIGATE
ROLLOUT

GET
SPONSORS

ACTIVATE
USERS

GAUGE
SUCCESS

EVOLVE

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EXPLORE WHICH BUSINESS PROCESSES COULD BE SOCIALLY ENABLED

“SOCIAL” IS A WAY TO CONNECT PEOPLE TO INFORMATION FASTER.

That’s what we mean when we talk about social. It helps people get questions answered quickly from anyone in the company, and can do so much to improve your company’s specific business processes and goals.

GET THOSE TRANSFORMATIVE RESULTS SPECIFIC TO YOUR COMPANY.

To do this, it’s important to define a succinct vision for what social should be and do for your company. This vision is an outline of the big goals your company wants to accomplish using Chatter: Global alignment? Speed to market? International communication?

ONCE YOU’VE DEFINED YOUR GOALS,

you can think in detail about how each department can use Chatter.

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**THINK ABOUT EACH DEPARTMENT.
LIST OUT ITS BUSINESS PROCESSES.**

THEN ASK: WHAT CAN BE IMPROVED WITH SOCIAL COLLABORATION?

Any process that requires emails, meetings, and/or spreadsheets is usually a good candidate.

We've developed a nifty guide to help you figure out which processes Chatter can improve. Take a look to get ideas and see how every role across your company can use Chatter.

CHATTER: 50 WAYS TO TRANSFORM EVERY DEPARTMENT

salesforce.com/assets/pdf/casestudies/chatter-50ways.pdf

Every department's business processes can be improved with Chatter.



Collaborating with Chatter now gives our business teams around the world a way to connect and work together in real time.

BETH COMSTOCK CMO, GE

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NAVIGATE ROLLOUT. PLOT YOUR USES, THEN FOLLOW THE PLAN.

Now that you've listed uses for Chatter in every department, where do you start?
And what should you avoid?

THE CHATTER ROLLOUT GRID ON THE NEXT PAGE

is the magic sauce that helps you sift through and prioritize all these use cases to create the greatest value for your business. Don't worry, we'll show you how to use it. Once you plot out your list on the grid, it's easy to see where to start and what to avoid, so your rollout is massively successful.

On the next page, you can see that all the ways to use Chatter fall into four basic categories: Quick Wins, Low-Hanging Fruit, Social Transformation, and "Fool's Gold."

So, what exactly does that mean?

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LET'S BREAK IT DOWN BY QUADRANT.

PHASE 1: QUICK WINS

This is your first step. Take it slow and start with Quick Wins – they're easy to implement and have a big business impact.

PHASE 2: LOW-HANGING FRUIT

These processes are easy to implement and have less business impact, but are quick and easy ways to encourage people to connect and keep coming back to Chatter.

PHASE 3: SOCIAL TRANSFORMATION

This phase is harder to implement. But once you do, your company will experience a fundamental shift with profound results.

PHASE 4: FOOL'S GOLD

These processes might sound good, but realistically are difficult to implement and have little business impact. Avoid them.

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EXAMPLES FROM SALESFORCE.COM



On the following pages, you'll see examples from other companies.

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AN ENTERPRISE EXAMPLE: BAYER PHARMACEUTICALS

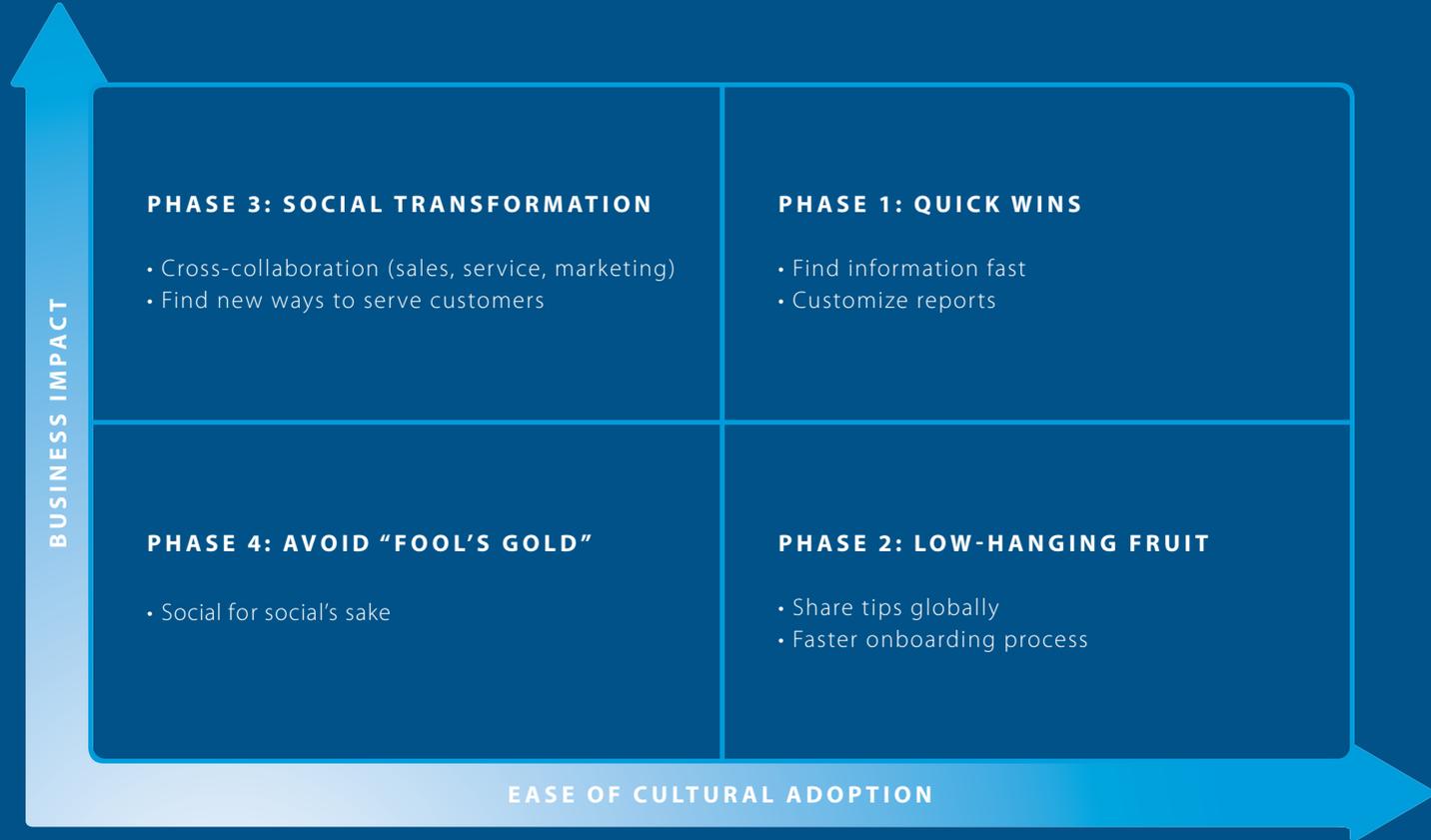
The pharmaceutical division of Bayer HealthCare Canada sells prescription drugs by working closely with the doctors that prescribe them. The company had been using a cloud-based CRM system to track sales calls, invitations to events, and samples distributed, but performance was slow and information wasn't readily available on mobile devices. Customizing reports and getting important data in real time was also difficult.

A private Chatter social network lets employees in sales, marketing, and market research share product information instantly and collaborate to help customers. "Reps in Montreal are now sharing tips with reps in Vancouver," says Alexei Marcilio, Manager of CRM. Hundreds of employees are using Chatter to share and collaborate across teams and more efficiently on-board new employees. The world is going social, and now Chatter helps us serve our customers in new ways."

Now that Bayer has moved to Salesforce, reps use iPads and iPhones to access data from anywhere. "Our reps are saving several hours a month with Salesforce, and more accurately targeting doctors," explains Marcilio. "This translates to increased selling time and revenue gains."

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AN ENTERPRISE EXAMPLE: BAYER PHARMACEUTICALS



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AN EMERGING BUSINESS: LIVINGSOCIAL

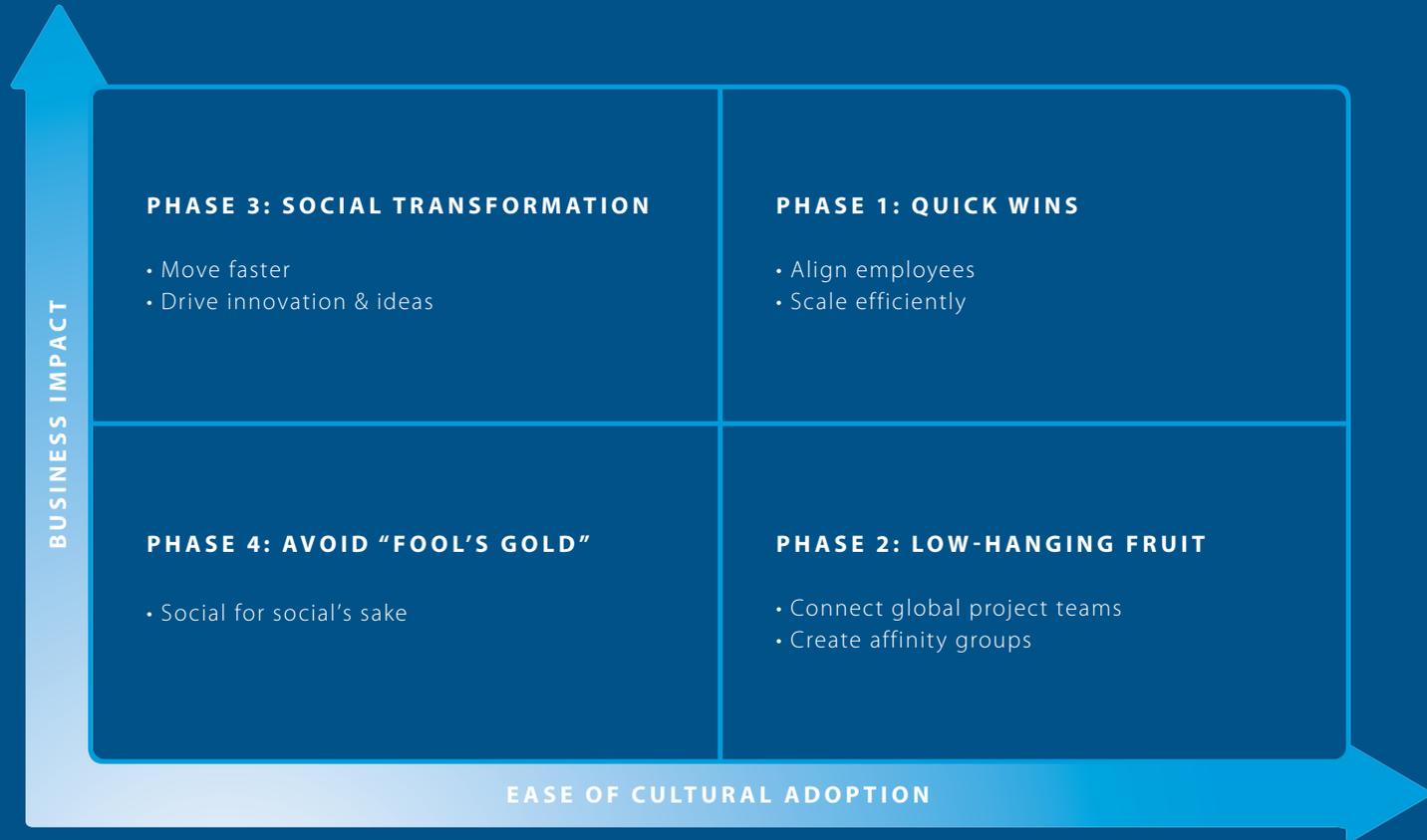
Every day, LivingSocial helps more than 67 million people on six continents discover great new experiences by connecting them with the best businesses in their neighborhoods and even travel escapes, curated adventures, live events, and gourmet experiences. “Live hungry” is one of LivingSocial’s corporate mantras, igniting great ideas and bold moves that have fueled the company’s meteoric growth and pace of innovation.

And their customers love it. To keep up, the company boomed from 600 employees to nearly 5,000 in just one year. Many companies would collapse from the weight of their own success, but LivingSocial’s hunger for innovation and early adoption of social technologies helped align its employees quickly and scale its success.

“Creating a go-to hub for local commerce takes constant innovation,” says CEO Tim O’Shaughnessy. “A connected team moves faster and thinks bigger.” From marketing consultants in the field working with businesses, to the deal quality and scheduling teams, to customer service, LivingSocial’s entire team collaborates and shares information to grow its army of happy customers quickly and efficiently.

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AN EMERGING BUSINESS: LIVINGSOCIAL





“ Chatter has flattened our organization and made us more efficient.

MATT ROBERTS CEO, OPENTABLE

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GET SPONSORS. AN EXECUTIVE AND A COMMUNITY MANAGER.

Now that you've plotted those use cases on the grid, pick an executive and a community manager to work together as sponsors for each Quick Win and Social Transformation. These sponsors are your internal Chatter Champions who will lead by example to help drive usage and correct behaviors.

Why? You need project sponsors and execs to buy in now, so that everyone in the middle hops on board. For anyone who's reluctant to use Chatter, executive buy-in carries more weight than if just another colleague does it. This step is crucial to support your bottom-up user base of early adopters and grow the number of users.

FOR EXECUTIVE SPONSORS, we recommend three posts per week: questions, thanks, or status updates.
COMMUNITY MANAGERS should curate content, @mention experts, and repost important posts.

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SPONSOR TACTICS

Company culture is important - it informs how easy or difficult it will be to get people to change their old habits. Here are some great tactics customers have used to encourage the shift to Chatter.

MIGRATE EMAIL CHAINS

When an email chain gets started, ask sponsors to say, "Let's continue this discussion in Chatter so we're not clogging everyone's inboxes" – and then bring it into a public group on Chatter. It's especially effective for email chains of +100 people.

INSPIRATION

Have your sponsors walk around and identify employees with great work. Then tap those employees to share that work only in Chatter. Exclusive content is an irresistible reason to join.

PERSISTENCE

Be friendly and tenacious about doing things in Chatter. Insist on it when you can. Some CEOs have refused all internal emails and phone calls, and only answered questions in Chatter. Remember, IM (instant messaging) took a few years to gain acceptance – now everyone uses it.



Chatter has significantly increased our collaboration and speed to make a difference for people in need.

DOUG MENEFFEE CIO, SCHUMACHER GROUP

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ACTIVATE USERS WITH EDUCATION

IT'S TIME TO EDUCATE YOUR EMPLOYEES.

This is about process change, not technology change. Prepare your users with information on how to get started with Chatter.

WHAT DO YOU WANT THEM TO DO?

Show them those use cases. Help them see the value and what they will get out of it.

HOW CAN YOU SHOW THEM?

Create a video, start an email campaign, make demo webinars, or even set up mobile download stations in the breakroom – get creative. Whatever method you choose, your goal is to build anticipation and help employees understand how Chatter helps them get real work done.

In the back of this book, there's a QR code that will take you to helpful templates you can use for email, webinars, powerpoint, and more.

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As you activate users, it's great to remind them of things Chatter will help them do.

10 WAYS TO USE CHATTER:

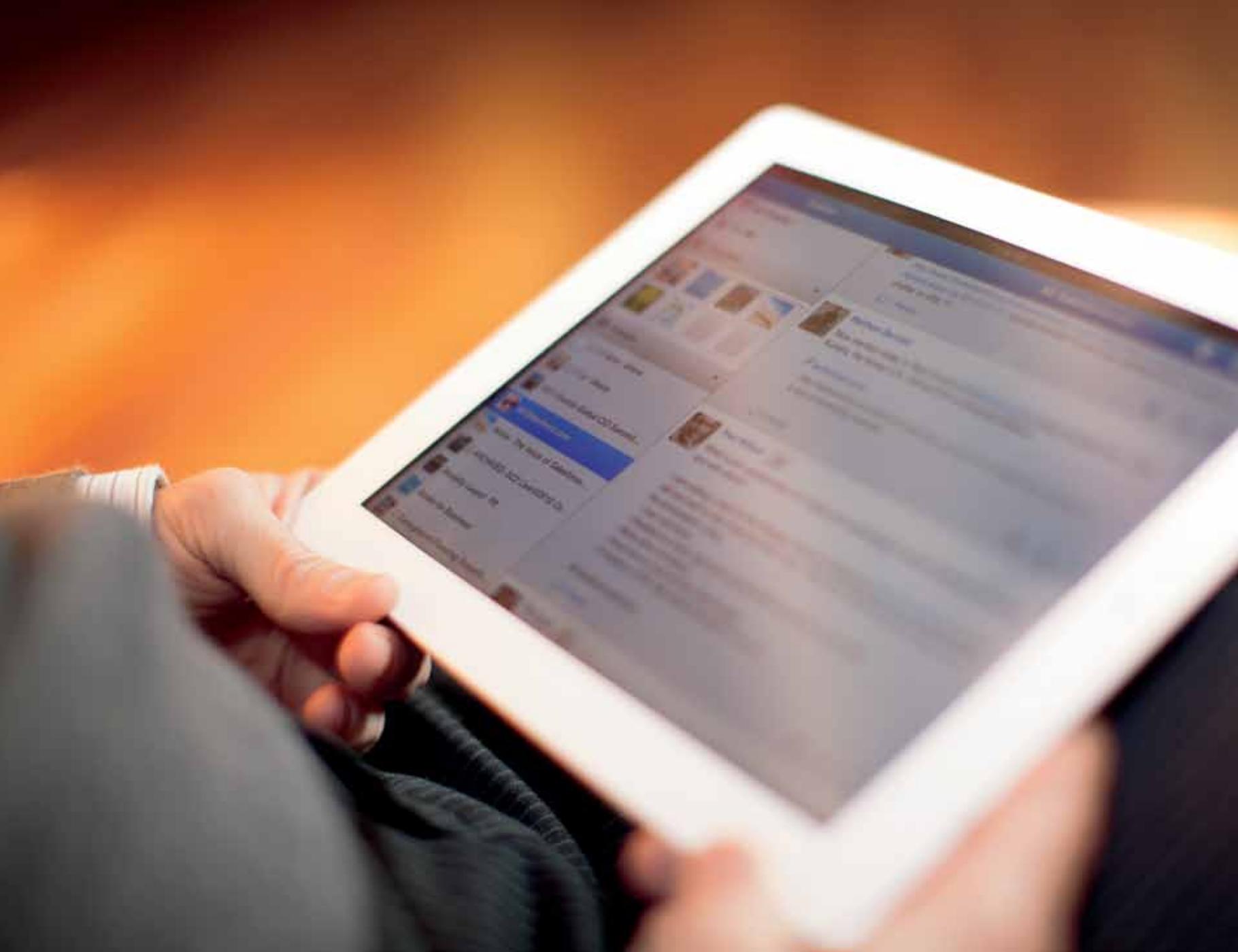
- 1 Get answers (not emails)
- 2 Brainstorm
- 3 Prepare more, meet less
- 4 Share files, effortlessly
- 5 Manage projects, together
- 6 Connect with experts
- 7 Solve customer issues faster
- 8 Share news and relevant content – like sites, videos, and more
- 9 Collaborate without boundaries
- 10 Work with confidence, confidentially

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Now it's time to plan your Chatter rollout timeline on a calendar.
Enjoy your launch – but don't forget, you're only partway through ENGAGE.

KEY MILESTONES FOR YOUR ROLLOUT CALENDAR:

- Define social vision
- Sell the idea of using Chatter internally
- Get executive buy-in
- Identify use cases
- Plot priorities on ENGAGE grid
- Select two sponsors for each use case
- Educate sponsors
- Set participation goals
- Train and excite user base
- Turn Chatter on
- Track your results



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GAUGE YOUR SUCCESS – MEASURE AND MONITOR

ONCE YOU TURN ON CHATTER, PEOPLE WILL START USING IT.

After that, you need to adapt your deployment by understanding when and how people consume their information and use Chatter.

CHATTER USAGE DASHBOARDS

from the AppExchange are a great way to start.

On the next few pages, you'll see some basic pointers on how to approach your analysis.

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ORGANIZATIONAL METRICS

Remember when – before plotting on the ENGAGE grid – you first defined a vision and goals for Chatter at your company? Now you can see how far you've come, and plan your next steps to achieve those goals. First, take an organizational view of how Chatter is being used, and how much.

LOOK OVER THE LAST SEVEN DAYS OF RESULTS AND RECORD:

- Number of feed posts
- Number of comments on feed posts
- Number of groups started
- Which groups have the most members
- Which groups have the most posts
- Who has the most followers
- Who has the most conversations/feed posts

These types of metrics can give you a broad understanding of how much your organization is adopting Chatter usage.

OPPORTUNITY METRICS

To build metrics that help you understand how Chatter is driving business results, organizational metrics help. But you may also want to build opportunity-driven metrics that are specific to a task where you define a tangible business benefit.

For example, choose a specific group or team and narrowly identify a problem that Chatter can help solve, like resolving customer issues. Build a dashboard for that group that shows how quickly this has been done in the past without Chatter and then one that shows how quickly it is done with Chatter.

You can also track some of the same metrics that you track organization-wide to see which Chatter functionality is being used to solve the problem.

The more defined your opportunity, the more focused your dashboards can be.



Chatter allows us to help team members connect around customers, products, projects, and community involvement.

STEVE ELLIS EVP WHOLESALER SERVICES, WELLS FARGO

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EVOLVE CHATTER USE IN YOUR COMPANY

Now it's time to fine-tune Chatter to fit in even better with your company's workflow and employee habits.

With results in hand, go back to the beginning of the ENGAGE framework and see how your needs may have shifted. Use what you've learned to re-evaluate each step of ENGAGE, and customize what works best for the unique aspects of your company.

To do this, look over your analytics results and listen to people's feedback. Then, act on it. By tailoring your Chatter use over time, you'll find better ways for your company to use Chatter, reap a higher ROI, and reach the social transformation stage faster.

Thanks for following along through the six steps of ENGAGE. On the next few pages, you'll find important resources like helpful links, contacts, and more.

IMPORTANT CONCEPTS TO REMEMBER

DATA GRAVITY

When Chatter is first launched, it's crucial that the people on Chatter are not only active, but also post important documents, data, and projects there for others to collaborate around. The more that's there, the more people will be drawn to use it. Conversely, if new users see there's nothing of business relevance going on in Chatter, they're going to write it off.

EXECUTIVE BUY-IN

Executive participation is critical, regardless of age or skill. The key is to help executives see how they'll be able to access raw data and track it with analytics. Senior executives crave an unfiltered view of their business, and most are willing to learn a new interface for it.

HESITATION

Sometimes people are reluctant to put ideas out there. They may feel like they'll encounter a boss's backlash, or that there's a cultural taboo around free speech. Consider ways to put people at ease, like having your C-level actively encourage and reward open ideation on Chatter. Support people with "likes" and call out wins.

VISIBILITY

Flattening hierarchies entices people at the bottom – it's their direct voice to the CEO where they can post a question. In Chatter, everyone gets a voice. In a room full of people, they wouldn't even get time to ask.

INFORMATION BARRIERS

Shorter messages are great, so keep it crisp and straightforward in your Chatter messages whenever you can. Sales reps always say that the biggest benefit is getting information faster or "breaking through information barriers." They get a clearer perspective on business flow and opportunities.

DO THE PREP WORK

Don't just turn Chatter on. Activation is everything from marketing the tool, selling it internally, creating the rollout plan, crafting a launch strategy, and training users. All this prep work helps you avoid common pitfalls like:

- lack of clearly defined business objectives
- sudden Chatter use dropoff 30-45 days after rollout
- too little focus on change management
- bottom-up approach only
- hesitation and uncertainty around how social collaboration fits in with existing tools and processes

LISTEN

Be sure to listen to feedback. This technology not only flattens the organization, it creates expectations of collaboration and accessibility – much like on public social media. So people need to know you're listening to their needs. And don't be surprised if your plan changes a lot. Many companies say that their Chatter today barely resembles Chatter when they first rolled it out.

WORLD-CLASS COMPANIES MAKE BUSINESS SOCIAL WITH CHATTER.

ENGAGE has been used at companies from Bayer Pharmaceuticals to LivingSocial, from enterprise to SMB. With ENGAGE, any business can use Chatter to create social business processes that connect employees to information, projects, goals, and people they need — fast.

NBCUniversal



DMGT



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websense
ESSENTIAL INFORMATION PROTECTION™



BAUSCH + LOMB
See better. Live better.



AVON
the company for women



SAATCHI & SAATCHI

ENGAGE TO SUCCEED

Your strategic roll-out plan helps Chatter bring your social transformation to life. Have any questions? You'll find even more helpful resources at [**SALESFORCE.COM/CHATTER/ENGAGE**](https://salesforce.com/chatter/engage)

THANKS!