

# 50 WAYS TO BECOME A SOCIAL ENTERPRISE

Transform every department:  
The how-to guide



# THE WORLD'S GONE SOCIAL.

There's no denying the social revolution. Over 1 billion people have joined Facebook and Twitter, and more get started every day. Current world events prove that social media has no bounds on what it can change. People are connected to each other like never before.

Your employees and customers live in the social space, and they expect responses in real time. So how do you join the conversation? How do you become a Social Enterprise?

Imagine creating deeper, more meaningful relationships with everyone. Imagine an environment where ideas and expertise transcend hierarchy and flow across geographies. Where your employees feel heard at every level, and are passionate and engaged with their work. Where you can stay in tune with the needs of your customers. And those customers are delighted in brand new ways, because you've made them the heart of your business.

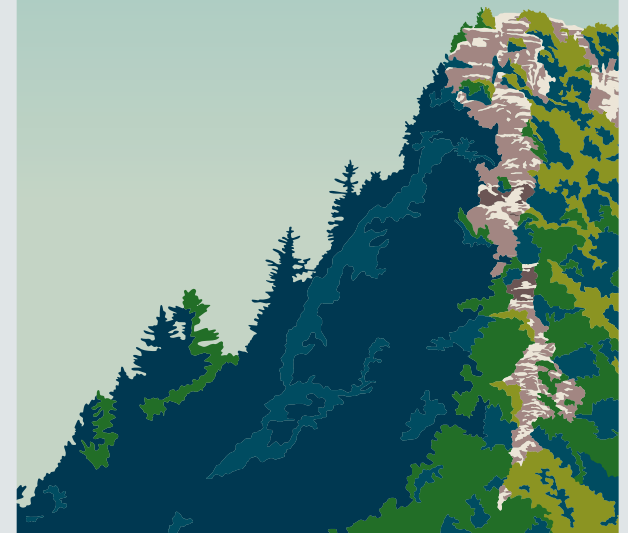
See how the “World's Most Innovative Company<sup>\*</sup>” collaborates across every department as a social enterprise.

**\*Forbes**

**Chatter makes it all possible. That's why Chatter is the heart of the Social Enterprise.**

Consider this your internal playbook – 50 ways across 10 different departments – to transform the way you work and help your business become a Social Enterprise.™

**YOUR SOCIAL TRANSFORMATION AWAITS.**



## **CEO**

### **1** Drive Innovation

Break down hierarchies. Post questions, encourage employees to voice opinions, and let interesting new ideas bubble up. Reveal experts, regardless of hierarchy. Recognize contributors.

### **2** Make Customers the Heart of Your Business

Focus conversations around customers and bring them to the forefront, aligning your company resources around customer needs.

### **3** Ignite Company Culture

Create groups around employee affinities: volunteer events, company parties. Start an advocacy group where employees can voice constructive criticism, and you can post your personal responses.

### **4** Connect With Your Employees

Create a dialogue during all-hands meetings and leadership off-sites by hosting them in Chatter. Employees get answers in real time, creating a flatter organization where everyone has a voice.

### **5** Align Leaders

Private groups let you connect with your organization's leadership in one place. Discuss growth strategies, address pressing issues, or evaluate acquisition opportunities



“When we first introduced Chatter, the company reorganized itself in days. I learned more about my company in a few months than I had in the last three years.”

– **Marc Benioff**,  
Chairman and CEO, Salesforce  
#SOCIALENTERPRISE

# SALES

## **1** Get Answers Fast

Use @mentions to loop experts into key sales conversations. Easily build and maintain momentum throughout the deal process.

## **2** Sell as a Team

Organize meeting agendas and craft account plans in internal deal rooms.

## **3** Collaborate With Customers

Use customer groups to submit RFPs, share proposals, and collaborate on meeting agendas and materials. Engage customer champions and quickly answer their questions.

## **4** Get Real-Time Deal Updates

Follow high-value deals and collaborate with your team, all in the context of your opportunity and account records. Submit approvals in the feed and get updates on your mobile device.

## **5** Gather Competitive Intelligence

Get the latest information, files, materials and updates straight from your competitive intelligence group. Ask questions, crowdsource answers from peers, and use hashtags to index #competitivewins and #bestpractices.



“In the sales world, the big breakthrough is global alignment in front of the customer, especially on our biggest accounts. It’s huge.”

– **Hilarie Koplow-McAdams**,  
EVP, Worldwide Sales,  
Salesforce  
#COMPETITIVWIN

# SALES PRODUCTIVITY

## **1** Make New Reps Productive Faster

Create new hire groups so reps feel comfortable asking newbie questions. Bring training announcements and documents into Chatter. Connect faster through relevant recommendations for people, groups, files, and records to follow.

## **2** Crowdsource Best-In-Class Sales Tools

Share key documents like pitch decks and data sheets within pre-defined sales enablement groups, such as product industry groups. Identify sales best practices with #hashtags and make them searchable.

## **3** Supercharge Your Sales Conference

Make reps active contributors instead of passive observers. Project Chatter on the walls, run interactive exercises, and get instant feedback on new initiatives.

## **4** Update Reps In Real Time

Create an all-sales group to inform reps about incentives, promotions, new products, and new sales tactics, no matter where they're located. Crowdsource answers to questions and loop in experts with @mentions.

## **5** Foster Healthy Competition

Celebrate big wins and sales achievements in real time, and recognize top performers. Post a leader board in the Chatter feed to energize your sales team.



“Before Chatter, it took months to educate reps and see results. Now, it just takes a matter of days. We’re motivating, educating, and aligning our sales teams faster than ever.”

– **Elay Cohen**,  
SVP, Productivity, Salesforce  
#AWESOME

# MARKETING

## 1 Make Employees Brand Ambassadors

Create a social brand through social employees. Make sure they are aligned with the corporate message and mission. Get them up to speed with technology and social media so they can represent your brand at its best.

## 2 Create Social Customer Experiences

Build a customer community. Let them generate content, interact with each other, and evangelize your brand and your products. Connected customers generate a halo of good recommendations.

## 3 Stay in Lock-Step With Sales

Break down the barriers between departments. Have real-time conversations with sales and get instant answers regarding pricing, collateral, etc. so all materials always reflect the latest information.

## 4 Manage Campaigns in One Place

Collaborate on campaigns to ensure alignment with all departments' goals. Pull in the right experts at the right time. Coordinate all creative media buyers, vendors, and agencies across locations with ease.

## 5 Message Globally, Act Locally

Maintain a consistent global message across all locations and let teams tweak per region. Announce and share new campaigns so everyone sees and coordinates with the latest work from your department.



“With Chatter, we’re more connected than ever before. We share best practices across regions, and create one unified global message.”

– **Kraig Swensrud**,  
Chief Marketing Officer,  
Salesforce  
#SOCIAL

## **R & D**

### **1** Create An Innovation Hub

Inspire breakthroughs. Encourage cross-functional and cross-product collaboration, and centralize those conversations. Then create and pursue visionary ideas that your people are passionate about.

### **2** Manage Product Lifecycles

Plan product timelines, set priorities, debate trade-offs, and manage agile product development with teams across geographies.

### **3** Collaborate With Customers

Stay abreast of feature requests and deal blockers. Respond to customer complaints instantly and cultivate trust. Maintain a dialogue with sales and marketing to get faster feedback and share product updates.

### **4** Know and React to the Marketplace

Understand what your users want and keep an eye on the competition to make sure you're always ahead. Create groups to evaluate competitive products, and share market research and the results of user testing.

### **5** Pilot New Products

Internally test new technologies and share new ideas within your organization. Incorporate customers, gather feedback from participants, and make improvements before they reach the marketplace.



“In any development cycle, how do you bring in the right experts at the right time? Chatter helps us connect all tiers of support, from account team all the way back to the developers. That collaboration was super hard to do before Chatter.”

– **Parker Harris**,  
Co-Founder, Salesforce  
#BIGIDEA

# EMPLOYEE SUCCESS

## 1 Recruit Top Talent

Refine your hiring strategies and involve the entire organization in the recruiting process. Configure a recruiting app to manage structured data and social conversations all in one place.

## 2 Accelerate On-Boarding

Create an external group where new hires can access all necessary on-boarding info and network with other new hires even before they start. Include benefits information and “who-to-follow” lists so they get a running head-start.

## 3 Develop Leaders

Create private groups for small teams to collaborate and facilitate post-training coaching, and diversity groups to develop leadership. Publicly recognize excellence, identify experts to follow, and connect people with the essentials of their role.

## 4 Curate Company Knowledge

Retain institutional knowledge by storing conversations within groups, and all versions of files. Search through these saved insights anytime, and flag important information with #hashtags.

## 5 Democratize Change

Allow employees to self-organize to make your company better through new programs and policies. Seed groups with information and documents to keep everyone updated, and allow other employees to answer questions.



“In the war for talent, if we’re meeting the world where the world is – and the world is social, and it’s mobile, and it’s open – then we must be all those things and lead the way.”

– **Monika Fahlbusch**,  
SVP, Global Employee Success,  
Salesforce  
#DREAMJOB





“With Chatter, we’re creating an environment where employees can do the best work of their lives.”

– Woodson Martin,  
SVP, Employee Success, Salesforce



“Go to 27% fewer meetings.”

**2011 survey of 6,000 customers on Chatter**



# FINANCE

## 1 Close the Books Faster

Drive status transparency, triage roadblocks, and ensure alignment on deadlines and deliverables.

## 2 Manage Board Updates and in Vestor Relations

Collaborate across teams to pull together important board presentations and investor updates while ensuring file version control and confidentiality.

## 3 Run On-Time and On-Budget Projects

Dynamically collaborate across locations, time zones and borders. Facilitate structured and ad-hoc communication channels for change management success.

## 4 Communicate New Policies

Provide employees with updates and changes in travel, expense, and other policies. Create groups for employees to ask questions and give feedback, and provide updates with links and shared documents.

## 5 Optimize Cash Collections

Track the status of contracts and invoices. Align closely with sales to accelerate cash collections.



“Chatter helps us do things better, faster, and more accurately, like our close process. It’s completely private and secure – very, very important to us.”

– **Graham Smith,**  
Chief Financial Officer, Salesforce  
#ROI

# IT

## 1 Drive IT Projects

Align with other departments' business objectives and keep your engineers and IT specialists in-the-know. Manage projects across functions and geographies with custom objects. Communicate results and exceed business expectations.

## 2 Enable Employee Self-Service

Create a help-desk group to encourage employees to address each other's needs and crowdsource IT support, so you can spend more time addressing larger strategic objectives.

## 3 Unleash the Value of Legacy Systems

Make all your apps social by using the Chatter Connect API to extend Chatter to your legacy technologies. Increase user engagement and create a unified social experience.

## 4 Innovate With New Social Apps

Build your own social apps with point-and-click configuration. Add third-party apps from the AppExchange or use the API and write code to create pixel-perfect social and mobile apps.

## 5 Deliver Apps on Any Mobile Device

Support your internal customers with a social experience. Let them access important information on their favorite mobile devices, including iPhone, Blackberry, Android, and iPad and Android tablets.



“We’re able to solve business needs much faster. We’re building all kinds of tools on our platform, all Chatter-enabled. Once you see what you can accomplish, the ideas come flooding in.”

– **Claus Moldt**,  
Chief Information Officer,  
Salesforce  
#TRUST

# **CUSTOMER SERVICE**

## **1 Enable Self-Service Communities**

Customers can ask questions online and crowdsource answers from each other, decreasing time spent with reps and reducing costs.

## **2 Get Real-Time Notifications on Critical Accounts**

Follow cases on high-value or at-risk accounts. Get automatically notified the instant anything changes.

## **3 Swarm on Escalated Cases**

Mobilize the entire team to resolve customer support cases when they require all hands on deck.

## **4 Access Tribal Knowledge**

Find knowledge and expertise to close cases faster. Search topics and personalize your results to find the most relevant records, files, and experts across your organization.

## **5 Connect Your Agents to HQ**

Bring remote agents closer to the company, and build a sense of community. Encourage their comments on knowledge articles so everyone can access the best solutions. Retain agents and their expertise.



“With Chatter, our new agents can quickly assimilate, get help, get resources right away, and it makes us incredibly productive.”

– **Dean Robinson,**  
SVP, Global Services, Customers  
for Life, Salesforce  
#ONEANDDONE



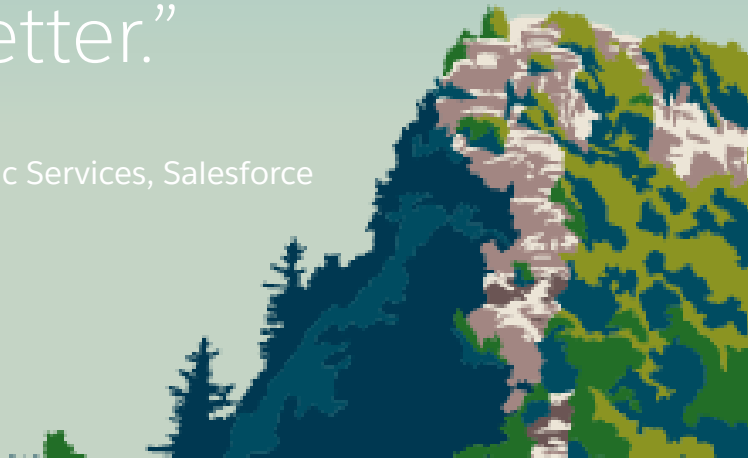
“It’s really access to experts. My team can coordinate with any expert, on any project, around the world. So folks in Australia or Japan or the US have instant access to the right experts in any region. That really helps us serve our customers better.”

– Mary Fratto Rowe,  
SVP, Customers for Life, Strategic Services, Salesforce



“Find the information you need 52% faster.”

**2011 survey of 6,000 customers on Chatter**



# LEGAL

## 1 Proactively Educate Employees

Align with the broader business by providing education in informative public groups, describing everything from regulatory laws to regulatory initiatives. Provide a forum for answering questions.

## 2 Anticipate Business Needs

Follow general discussions, product groups, and interest groups. Share your expertise to help the business navigate legal issues and maintain compliance.

## 3 Publish and Share Important Documents

Easily manage files such as terms and conditions and service agreements, maintain full version control, and securely share them in Chatter.

## 4 Monitor High-Risk Opportunities

Follow high-risk accounts and opportunities, such as government agencies, and companies in highly regulated industries. Get instant updates on status changes and comments.

## 5 Ensure Compliance

Run regular searches on high-risk keywords, or use triggers to prevent users from ever posting specific words. Export conversations into compliance tables to follow your regulatory processes.



“It helps us prevent problems before they arise. We can provide proactive education and protect confidentiality. Even better, it’s auditable, and our compliance team can monitor as much as they want.”

– **John Moss**,  
SVP, General Counsel,  
Commercial, Salesforce  
**#COMPLIANCE**



CONNECT TO YOUR CUSTOMERS  
IN A WHOLE NEW WAY



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