

Getting Started on Chatter

Helping You Get The Most Out of Your
Career With Chatter



SELL. SERVICE. MARKET. SUCCEED.

 /chatter
 @chatter
 in/chatter

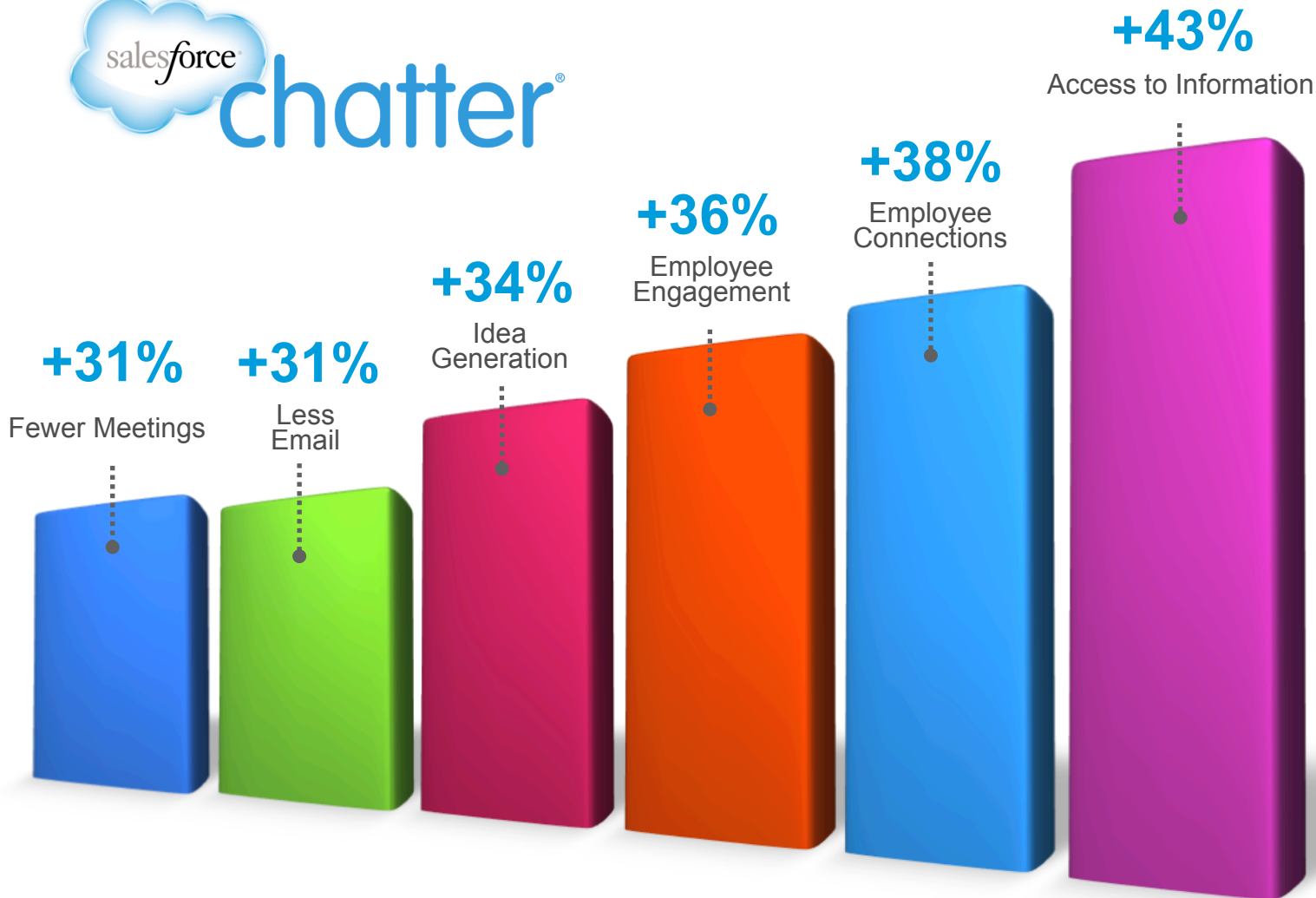
Chatter Is....

Chatter is a private Enterprise Social Network connecting employees inside of your company with each other, business data and content for peak individual and team performance.





Chatter Delivers Real Results For Your Company



Average Percentage Improvements Reported by Customers

Source: Salesforce.com Customer Relationship Survey conducted March 2013, by an independent third-party, Confirmat Inc., on 5,200+ customers randomly selected. Response sizes per question vary.



But What's In It For You?

Old Tools Don't Work In Today's Reality

Employees Struggle to Stay Productive



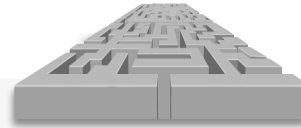
Hard to stay updated
Information in disparate sources
Difficult to share content

Content is Difficult to Find and Access



Fragmented across repositories
Inaccessible on devices
Separate from business data

Great Expertise, Ideas and Insights are Buried



Surfacing information is impossible
Expertise is buried
Geographies create informational divides

Customers and Partners are Disconnected From the Organization



Engaging customers and partners is difficult
Forums do not leverage data
Portals are transactional

14 hrs a week in email

4.3 hrs

Managing approvals each week

3.5 hrs

Searching, but *not* finding, documents each week

9.6 hrs

Time spent looking for information

72%

increase in sales cycle in past 5 years

But Being Connected Makes You A Rockstar

What's in it for you?

You'll get out of Chatter what you put in. While your company has organization-wide goals and benefits it expects from Chatter, you can feel its effects in your individual job. Participating in Chatter will help you do the following:

Work smarter

- Get work done faster and better
- Get feedback faster so you can course correct
- Communicate seamlessly across teams about projects and customers

Be noticed

- Let your achievements be known
- Build relationships with cross-functional stakeholders and execs
- Be known as the expert in your field
- Move your career forward

Be better informed

- Stay on the cutting edge of your functional area
- Connect with experts
- Have visibility into company-wide and industry-wide happenings
- Discover existing content to use in your projects

Let's dive into the how-to's to help you get the most out of Chatter!

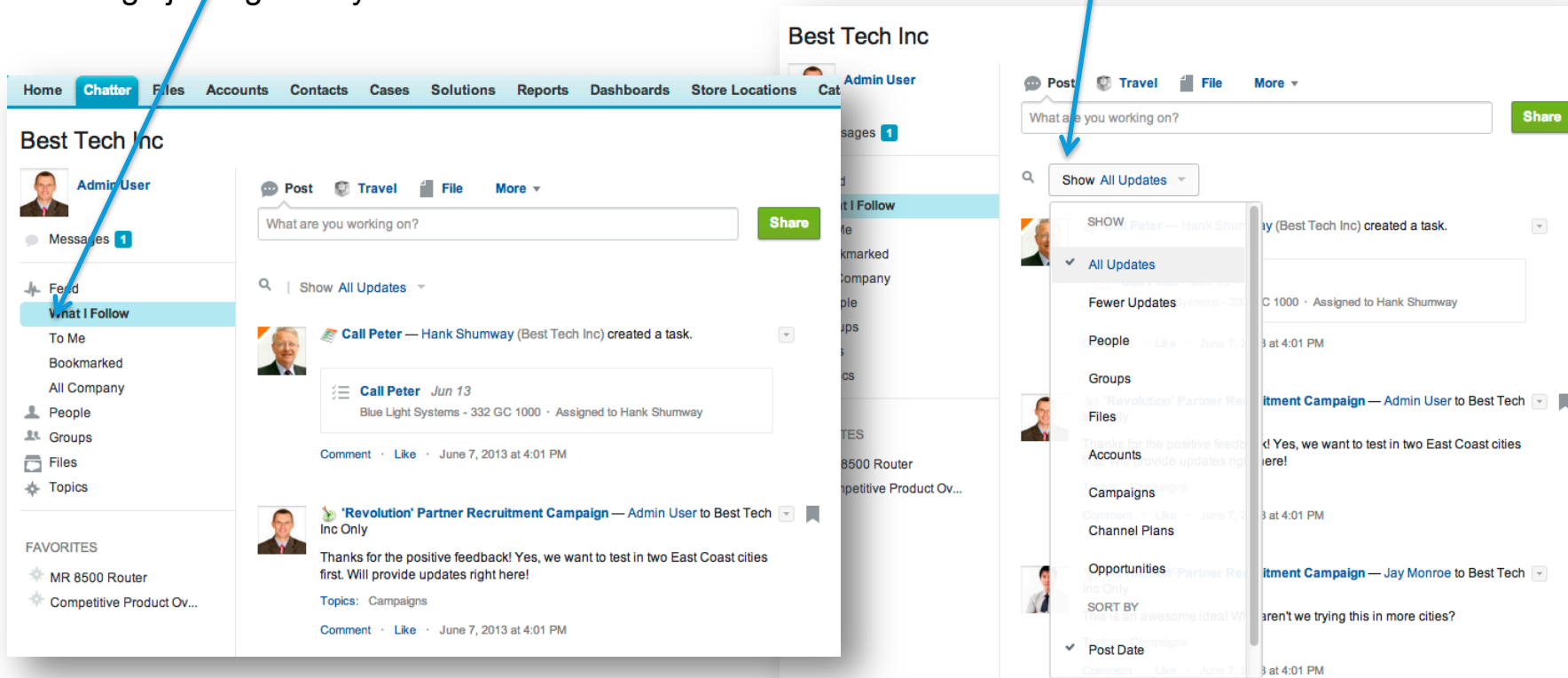


The Basics: The Feed

The feed is a stream of everything in Chatter that's relevant to you. It delivers the right content and insights to you when you need it, the way you need it

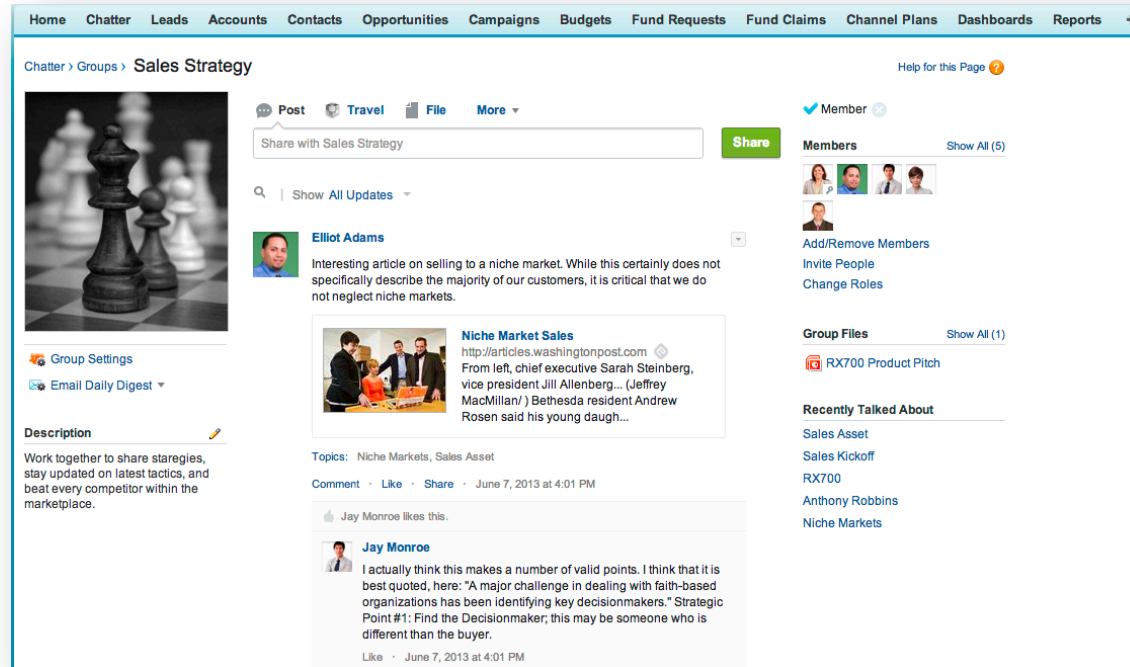
Your feed is made up of posts made by people and objects you follow, and groups you are a member of. You have **full control** of what goes into it by following / joining what you need.

You can tweak the feed as you see fit to display all of the posts you subscribed to, or just some



The Basics: Groups

Groups help organize content and discussions. Think of them as containers of knowledge. Each group can be public or private. Each group has its own feed, and by joining a group, you get all posts from that group in your Chatter feed. You can also proactively navigate to any group and check out what's there – if you have the right permissions.

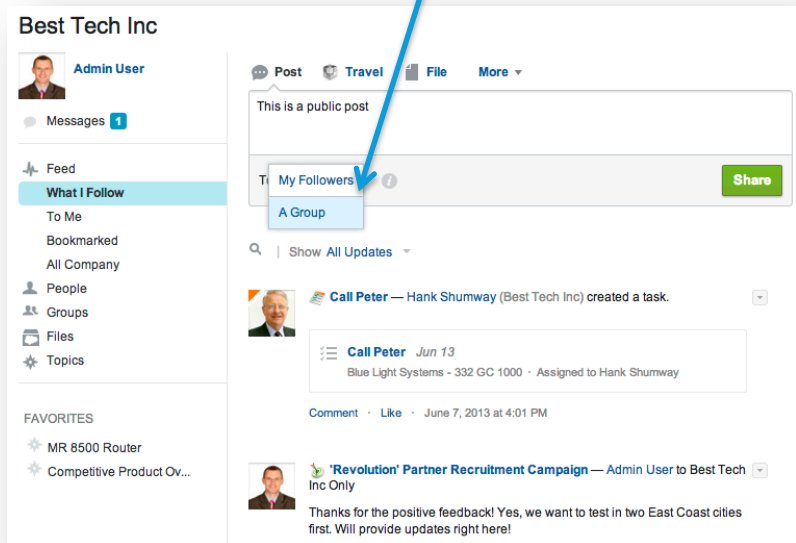


The screenshot shows a Salesforce Chatter group page for "Sales Strategy". The top navigation bar includes links for Home, Chatter, Leads, Accounts, Contacts, Opportunities, Campaigns, Budgets, Fund Requests, Fund Claims, Channel Plans, Dashboards, and Reports. The group page features a header with "Chatter > Groups > Sales Strategy" and a "Help for this Page" link. Below the header is a post area with a "Post" button, a "Travel" icon, a "File" icon, and a "More" dropdown. A "Share with Sales Strategy" input field and a "Share" button are also present. The main content area displays a post by Elliot Adams, dated June 7, 2013, at 4:01 PM. The post includes a photo of chess pieces and a link to an article titled "Niche Market Sales". Below the post, a comment by Jay Monroe is visible, dated June 7, 2013, at 4:01 PM. On the right side of the page, there are sections for "Members" (with a "Show All (5)" link), "Group Files" (with a "Show All (1)" link), and "Recently Talked About" (listing "Sales Asset", "Sales Kickoff", "RX700", "Anthony Robbins", and "Niche Markets").

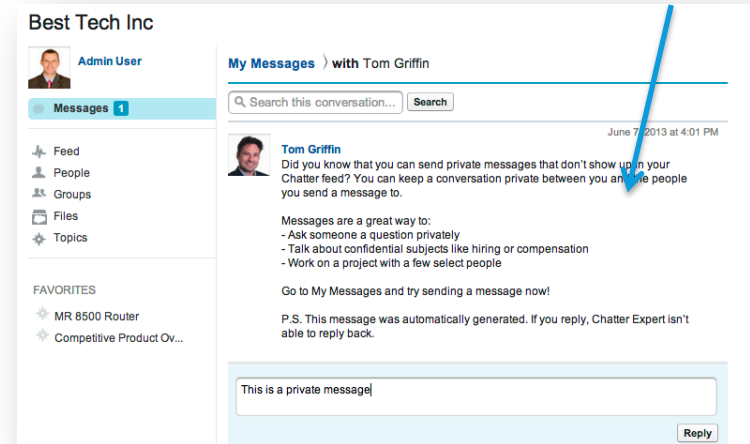
In the right side of the group, you can check out other group members, popular files and topics

The Basics: A Post

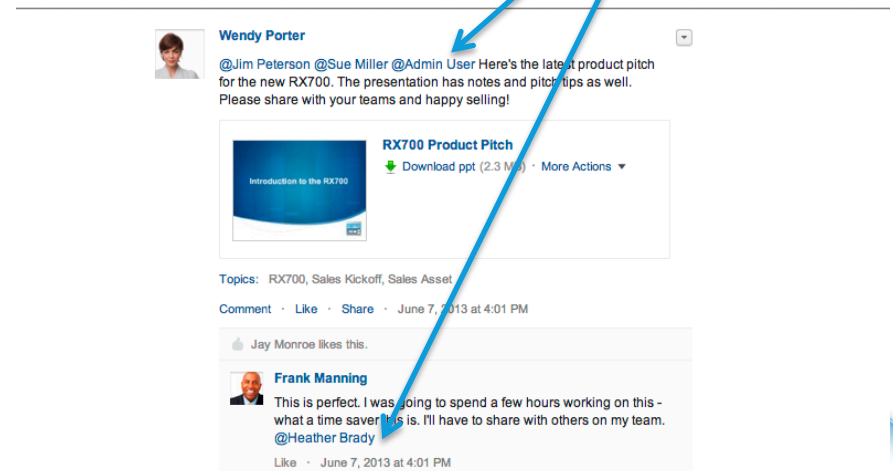
Posts are the building blocks of feeds and groups. You can post anything: a file, a text post, a picture, a URL. Public posts can be made into groups or to people's profiles. Everyone in that group or following that person can see them.



You can also communicate with other people in a private message. Only people who are part of that conversation can see it.



You can also @ mention people in public posts to draw their attention to what you're posting.



The Basics: People and Profiles

Each person in your network has a profile – just like on your consumer social networks . When you follow a colleague, you will get his / her posts in your “Followed” feed.

You can read about your colleague to decide if you want to connect with and/or follow. It’s a great way to get connected to people you have never met before – and ones you have!

Chatter > People > Jay Monroe

Feed Overview

Post File Link Poll

Share with Jay Monroe and your company

Sort By Post Date

00001001 — Admin User to Best Tech Inc Only
@Jay Monroe Can you help with this?
Comment · Like · June 7, 2013 at 4:01 PM

00001006 — Admin User to Best Tech Inc Only
Tori, I think @Jay Monroe might have solved a similar case.
Comment · Like · June 7, 2013 at 4:01 PM

00001001 — Jay Monroe to Best Tech Inc Only
Sure, I solved a similar problem recently.
Comment · Like · June 7, 2013 at 4:01 PM

Contact

Director of Service
sjayachandran@bt.com
1 Market St
San Francisco, CA 94105
US

Contribution

Home Chatter Leads Accounts Contacts Opportunities Campaigns Budgets Fund Requests Fund Claims Channel Plans

Chatter > People > Sue Miller

Start Chat Send a message Following

Feed Overview

Post File Link Poll

Share with Sue Miller and your company

Sort By Post Date

Sales Strategy — Wendy Porter

@Jim Peterson @Sue Miller @Admin User Here's the latest product pitch for the new RX700. The presentation has notes and pitch tips as well. Please share with your teams and happy selling!

RX700 Product Pitch
Download ppt (2.3 MB) · More Actions

Topics: RX700, Sales Kickoff, Sales Asset

Comment · Like · Share · June 7, 2013 at 4:01 PM

Jay Monroe likes this.

Frank Manning
This is perfect. I was going to spend a few hours working on this - what a time saver this is. I'll have to share with others on my team.
@Heather Brady
Like · June 7, 2013 at 4:01 PM

Contact

Director of Business Development
sjayachandran@bt.com
1 Market St
San Francisco, CA 94105
US

Contribution

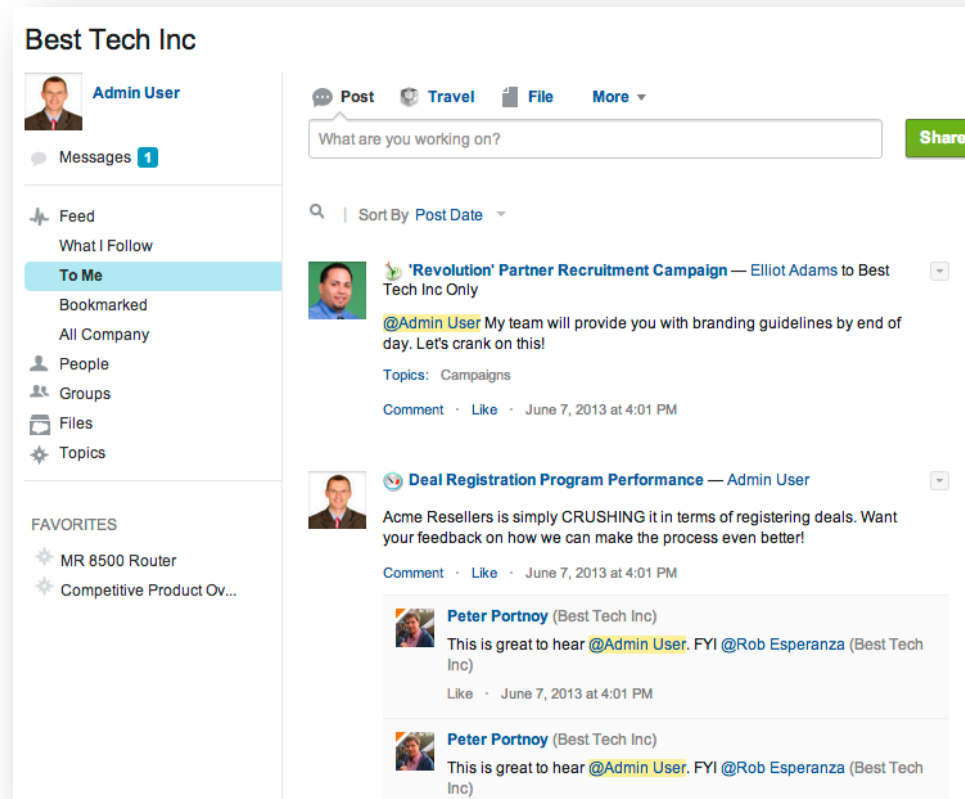
Active Influencer

8 posts & comments 6 comments received 4 likes received

Everything this person posts goes into his / her feed

The Basics: My @ mentions

Your “To Me” feed displays all the posts where you were @ mentioned. When you @ mention others, your post shows up in their “To Me” section. Scan your “To Me” feed to prioritize items that need your attention.

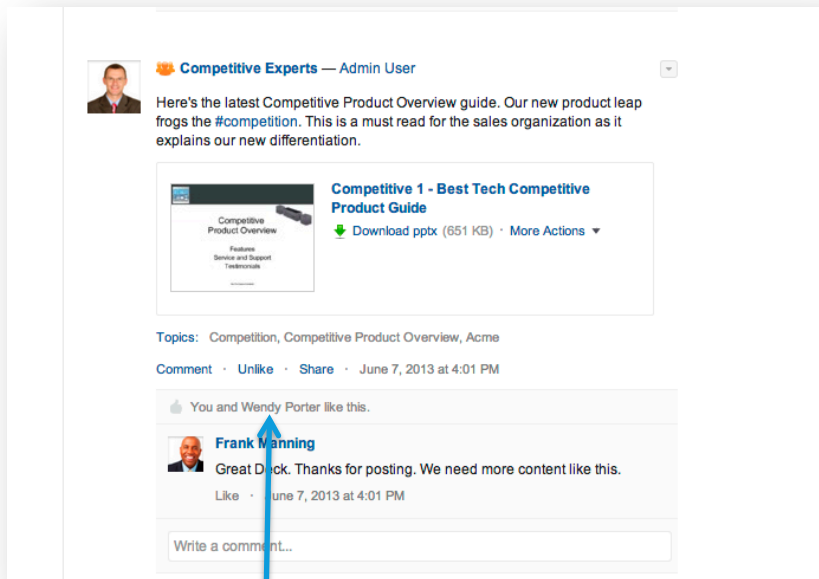


The screenshot shows the Salesforce Chatter interface for a user named 'Admin User' at 'Best Tech Inc'. The left sidebar contains navigation options: Messages (1), Feed, What I Follow, To Me (highlighted), Bookmarked, All Company, People, Groups, Files, and Topics. Below this is a 'FAVORITES' section with items like 'MR 8500 Router' and 'Competitive Product Ov...'. The main content area shows a post creation box with a 'Share' button and a search bar. Below the search bar, the feed is sorted by 'Post Date'. Two posts are visible: one from 'Elliot Adams' about a recruitment campaign and another from 'Admin User' about deal registration performance. Both posts have a comment from 'Peter Portnoy' mentioning '@Admin User' and '@Rob Esperanza'.

Top tip: if you only have a few minutes to check Chatter, start with private messages and @ mentions – because they are directed at you, they are your “must do” items. Then move on to your groups, topics and feeds for discovery.

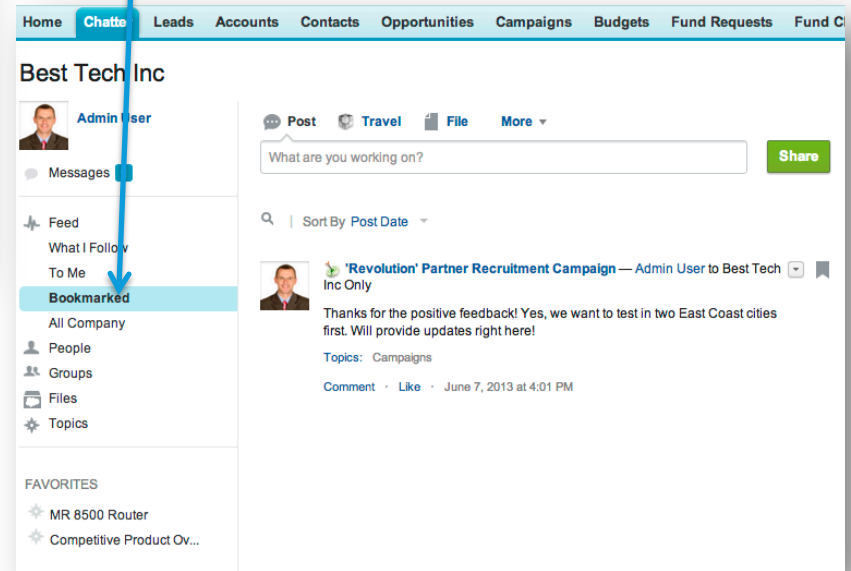
The Basics: Likes And Bookmarks

Other than posting, you can interact with a post by “liking” or “bookmarking” it.



Under each post or comment, you can see who “liked” it.

By “bookmarking” a post, you can “save” a post to refer to later. Everything you bookmark will be in your “Bookmarked” feed.



The Basics: Files

Files are the lifeblood of a company. To start collaborating, just head over to Files tab and peruse existing files – or upload a new one!

All files associated with a group can also be seen on the right

The image is a collage of three screenshots from the Salesforce Chatter interface, illustrating the 'Files' feature. A blue arrow points from the text 'Files are the lifeblood...' to the 'Files' tab in the top navigation bar. Another blue arrow points from the text 'All files associated with a group...' to the 'Group Files' section on the right side of a group page. A third blue arrow points from the text 'The file info page has all the associated information' to the file info page for 'Tristar Win-Loss'.

Files Interface: The top screenshot shows the 'Files' tab selected in the navigation bar. The left sidebar lists 'Files' with sub-sections: 'Recent', 'Owned By Me', 'Shared With Me', and 'Synced'. The main area is titled 'Files I've created' and includes an 'Upload Files' section with a search bar and a table of files:

Actions	Name
	promobanner
	Tristar Win-Loss
	Best Tech Competitive Update
	Competitive 1 - Best Tech Com

Group Page: The middle screenshot shows a group page for 'Sales Strategy'. The 'File' tab is selected, showing options to 'Select a file from Salesforce' or 'Upload a file from your computer'. Below this is a text area for 'Say something about this file...' and a 'Share' button. The right sidebar shows 'Members' (5) and 'Group Files' (1), with 'RX700 Product Pitch' listed under 'Recently Talked About'.

File Info Page: The bottom screenshot shows the file info page for 'Tristar Win-Loss', which is 'Privately Shared'. It includes options for 'Download ppt (2.3 MB)', 'File Sharing Settings', 'Upload New Version', 'Edit Details', and 'Delete'. The file is owned by 'Admin User' and has 'Version 1' selected. The main content area shows a slide titled 'Tristar Win/Loss Report' with a BPS ECH logo.

The file info page has all the associated information

The Basics: Topics

Topics help organize posts in a feed, according to.. Their topics! You can discover popular topics through the Topics feed, or through global search. If you follow a topic, posts tagged with that topic will appear in your feed.

The screenshot shows the Salesforce interface for a page titled "Best Tech Inc". On the left, there is a navigation sidebar with options: Messages (1), Feed, People, Groups, Files, Topics, and All Topics (highlighted). Below this is a "FAVORITES" section with "MR 8500 Router" and "Competitive Product Ov...". The main content area is titled "Topics" and features a search bar with the text "Search Topics" and a dropdown menu set to "Show All sorted by People Talking About This". Below the search bar is a list of topics, each with a name, the number of people talking, and a "Follow" button with a green plus icon.

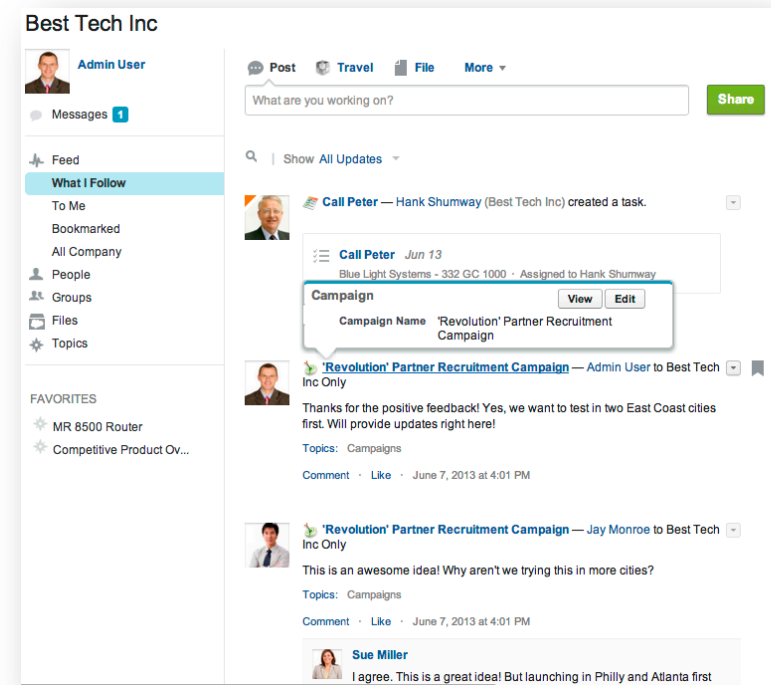
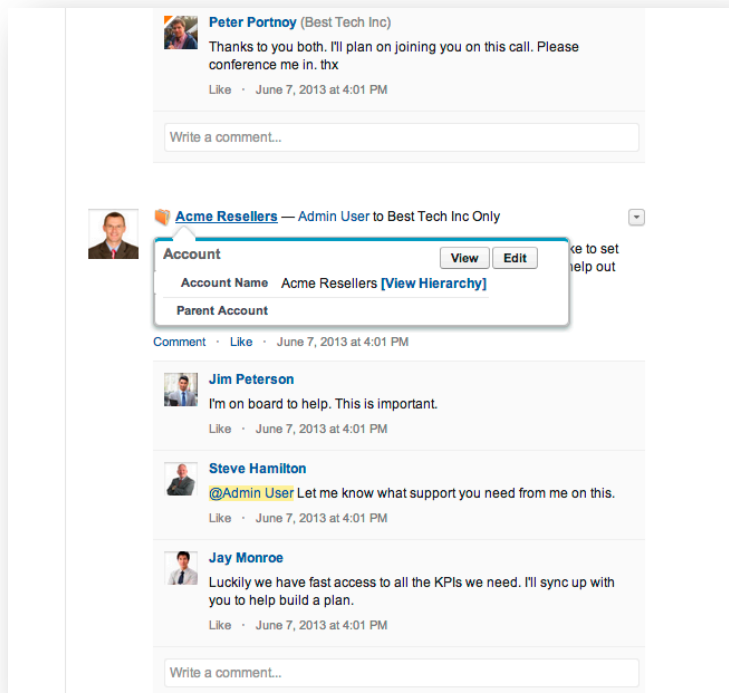
Topic Name	Number of People Talking	Action
Interworld	6 people talking	+ Follow
Financial Services	5 people talking	+ Follow
Competitive Product Overview	5 people talking	+ Follow
Acme-Best Tech QBR	5 people talking	+ Follow
Sales Kickoff	4 people talking	+ Follow
HP700 Laptop	4 people talking	+ Follow
Battery Light Flickers	4 people talking	+ Follow
Sales Asset	4 people talking	+ Follow
Campaigns	4 people talking	+ Follow
Delta	3 people talking	+ Follow
Jet Blue	3 people talking	+ Follow

The Basics: Business Objects

Like files, business objects are where work happens in your company. Just like people, files and groups, you can follow objects so that any changes and conversations can post to your feed. An object can be:

.. an account, opportunity or case, or...

.. a campaign -- or anything that's important to you!



The Basics: Business Objects Have Feeds

Like groups and profiles, objects have their own feeds that contain associated discussions, updates and related objects. For example, the opportunity below includes:

A task

A discussion

The screenshot shows a Salesforce Opportunity page for 'Blue Light Systems - 332 GC 1000'. The feed includes:

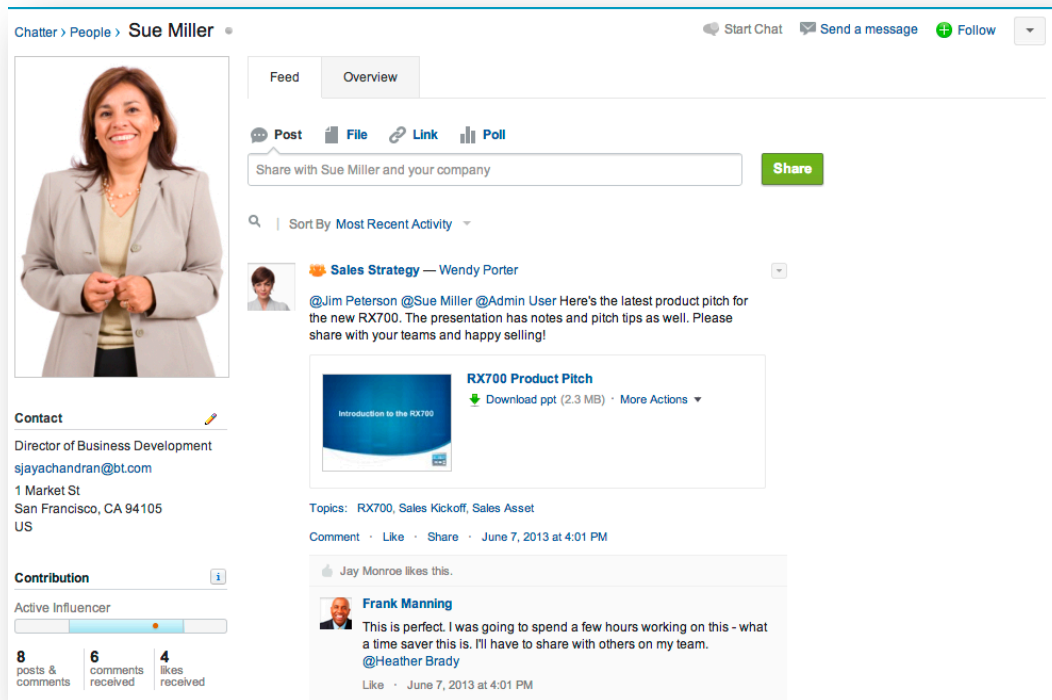
- A task: 'Call Peter' created by Hank Shumway (Best Tech Inc) on June 13, assigned to Hank Shumway.
- A comment: 'This is a very strategic deal for us. Please advise on what resources you're going to need.' by Rob Esperanza (Best Tech Inc) on June 7, 2013.
- A discussion: 'In addition to the resources Best Tech is providing, let's set up a 'Proof of Concept' lab for Blue Light. We could lease and fully equip a customized motor coach with all the hardware we'll spec for the deal, and drive it to their HQ. They step outside their office and into our facility.' by Peter Portnoy (Best Tech Inc) on June 7, 2013. It includes a link to a 'High End Motor Coach' image.

People following this opportunity



Fill Out Your Profile; Upload a Photo

Your profile is like your virtual business card on Chatter. It's what people use to learn more about you, connect with your expertise, and to decide whether or not to help you / amplify your message. People are more likely to work with people they trust – so make it easy to get to know you.



The screenshot shows a Salesforce Chatter profile for Sue Miller. The profile includes a profile picture of a woman in a grey blazer, a 'Contact' section with her title 'Director of Business Development', email 'sjayachandran@bt.com', and address '1 Market St, San Francisco, CA 94105, US'. It also shows a 'Contribution' section with a progress bar and statistics: 8 posts & comments, 6 comments received, and 4 likes received. The main feed shows a post by Wendy Porter titled 'Sales Strategy' with a link to a presentation 'RX700 Product Pitch' and a comment by Frank Manning.

Things to do:

- ✓ Check that your title, department and contact info is correct
- ✓ Fill in your “About Me” section – make sure to include your work, educational history, skills and links to your external blog, website, social media profiles
- ✓ Upload a photo: make sure it shows your face and is in good taste!

Top tip: Your “About Me” section is searchable, so be accurate so people can find you easily.

Use Global Search To Navigate Chatter

Chatter feeds are just as searchable as the rest of your Salesforce data. When looking for existing content or an answer to a question, try searching first. If what you're looking for doesn't exist, use your search results to find the right people and groups to post to.

The screenshot displays the Salesforce Chatter interface. On the left, a user profile for 'Admin User' is visible, along with a search bar containing 'acme'. The main feed shows a post from 'Call Peter' and a post from 'Revolution Partner Recruitment Campaign'. On the right, a 'Search Results' panel is open, showing a list of records and topics. The 'Topics (2)' section lists 'Acme' and 'Acme-Best Tech QBR', both with 0 people talking. A 'Trending Topics' section is also visible at the bottom right.

Search Results

Search Feeds: acme Search Again Options...

Records

- Reports (0)
- Contacts (0)
- Opportunities (0)
- People (0)
- Cases (0)
- Accounts (0)
- Documents (0)
- Leads (0)
- Channel Plans (0)
- Topics (2)

Search All

Topics (2)

Name	Talking About
Acme	0 people talking
Acme-Best Tech QBR	0 people talking

Search All

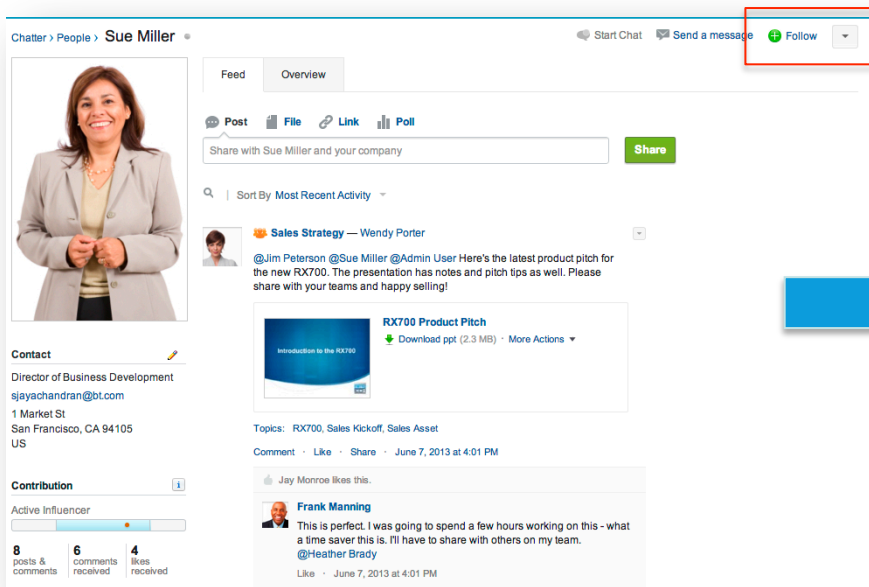
Trending Topics All

Add topics to your posts to increase their visibility. Topics that have a spike in activity are likely to trend.

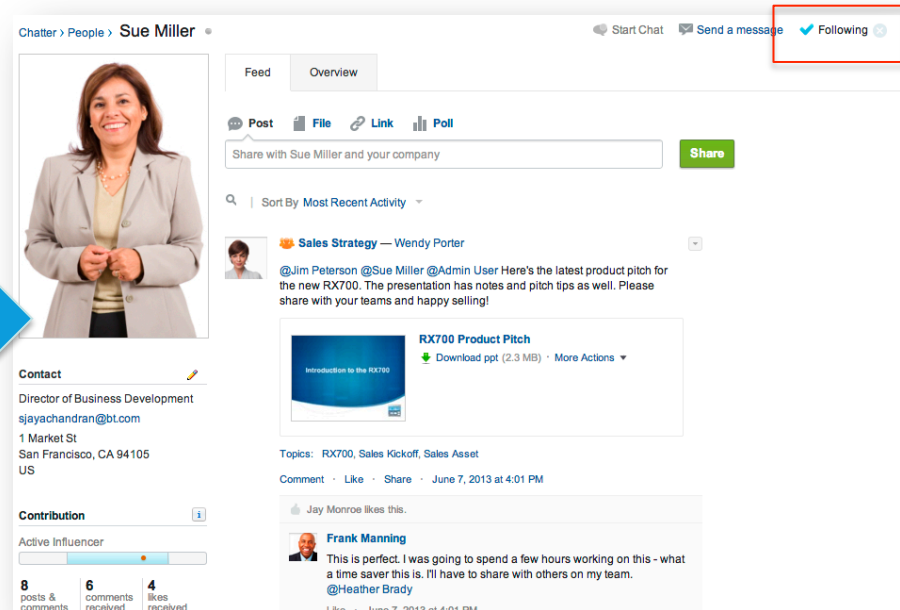


Make Your Feed Meaningful By Following....

You have full control of what goes into your feed. Content that shows up in your feed depends on the people, groups and objects you follow. You can follow pretty much anything with a Follow button.



This screenshot shows the Salesforce profile page for Sue Miller. The page includes a profile picture, a header with navigation options like 'Start Chat' and 'Send a message', and a 'Follow' button highlighted with a red box. Below the header, there are tabs for 'Feed' and 'Overview'. The main content area shows a post from Wendy Porter titled 'Sales Strategy' with a link to a presentation titled 'RX700 Product Pitch'. The post includes a download link for a 2.3 MB PPT file. Below the post, there is a comment from Frank Manning and a 'Like' button. The bottom of the page shows statistics for 'posts & comments', 'comments received', and 'likes received'.



This screenshot shows the same Salesforce profile page for Sue Miller, but now the 'Following' button is highlighted with a red box. The rest of the page content, including the profile picture, navigation options, and the 'RX700 Product Pitch' post, remains the same as in the left screenshot. The 'Following' button is located in the top right corner of the page.

.... And By Joining Groups

Recall that group membership is a key ingredient in your feed usefulness – you have complete control of what you get in your feed by joining groups.

Where to find groups to join?

- ✓ Global search is a great way to find groups – search for keywords of interest
- ✓ Watch feeds and group memberships of people you follow to see where they are active
- ✓ Check out which groups are active in your network (see below)

You can find new groups to join through the left navigation. To join, click the “Join” button



Group ↑	Last Activity	Membership
Competitive Experts 10 Members Owner: Sue Miller	Jun 16	✓ Member ⓘ
InterWorld 2013 Interworld 2013 is going to be the biggest company-wide event of the year. Get your cus... 11 Members Owner: Admin User	Jun 9	👤 Owner
Product Strategy Best Tech' Product Strategy experts and services consulting group. 6 Members Owner: Frank Manning	Jun 16	✓ Member ⓘ

Follow Files, Opportunities and Objects

You can follow files, campaigns, opportunities, accounts – any business object important to you.

This screenshot shows a Salesforce file record for a presentation titled "Tristar Win/Loss Report". The interface includes a navigation bar at the top with tabs for Home, Chatter, Leads, Accounts, Contacts, Opportunities, Campaigns, Budgets, Fund Requests, Fund Claims, Channel Plans, Dashboards, and Reports. On the left, there are options to download the file (2.3 MB), view sharing settings, upload a new version, edit details, and delete. The main area displays a slide from the presentation. On the right, there is a "Follow" button and a section for "Shared With" which lists "Admin User" and "Chatter Group".

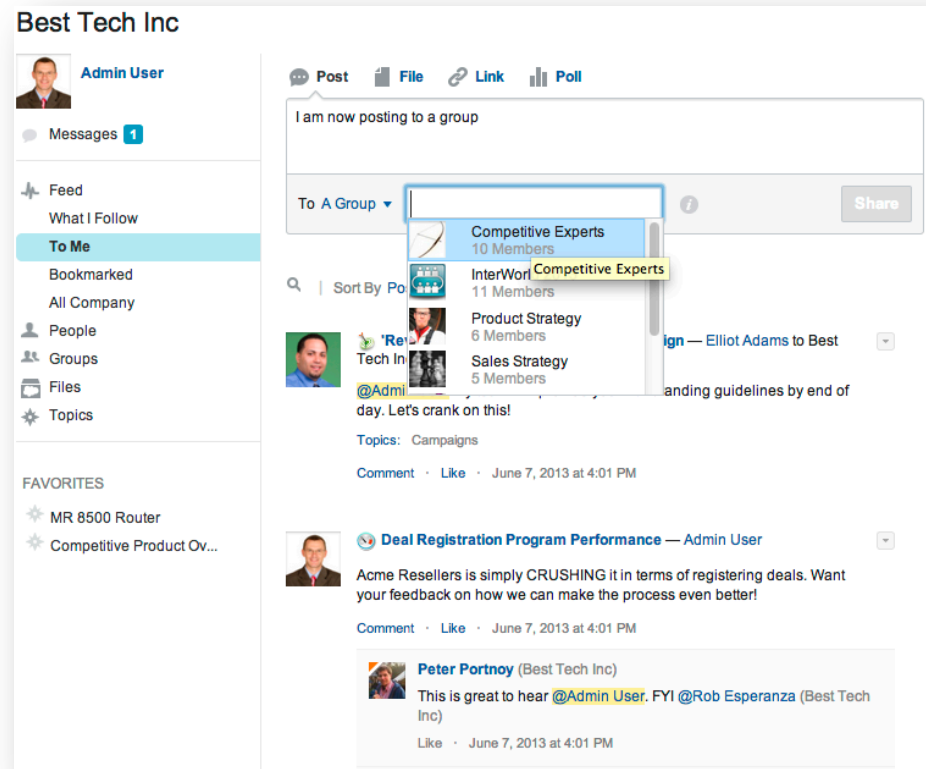
This screenshot shows a Chatter feed for a campaign titled "'Revolution' Partner Recruitment Campaign". The feed includes a "Post" button, a text input field, and a "Share" button. Below the input field, there are filters for "Post", "Travel", "File", and "More". The feed shows three posts from "Admin User", "Jay Monroe", and "Sue Miller", all dated June 7, 2013 at 4:01 PM. The "Admin User" post says "Thanks for the positive feedback! Yes, we want to test in two East Coast cities first. Will provide updates right here!". The "Jay Monroe" post says "This is an awesome idea! Why aren't we trying this in more cities?". The "Sue Miller" post says "I agree. This is a great idea! But launching in Philly and Atlanta first to test...makes sense. Crawl/walk/run!".

This screenshot shows the "My Feeds" settings page in Salesforce Chatter. The left sidebar contains navigation options: Home, Chatter, Profile, People, Groups, #dreamjob central, and Chatterbox. The main content area is titled "My Feeds" and includes a search bar, a "Quick Find" field, and a "Configure your Chatter feeds settings." section. A checkbox labeled "Automatically follow records that I create" is checked. Below the checkbox are "Save" and "Cancel" buttons. A blue arrow points from the text below to the checkbox.

You can even tell the system to auto-follow records you create

Post To A Group

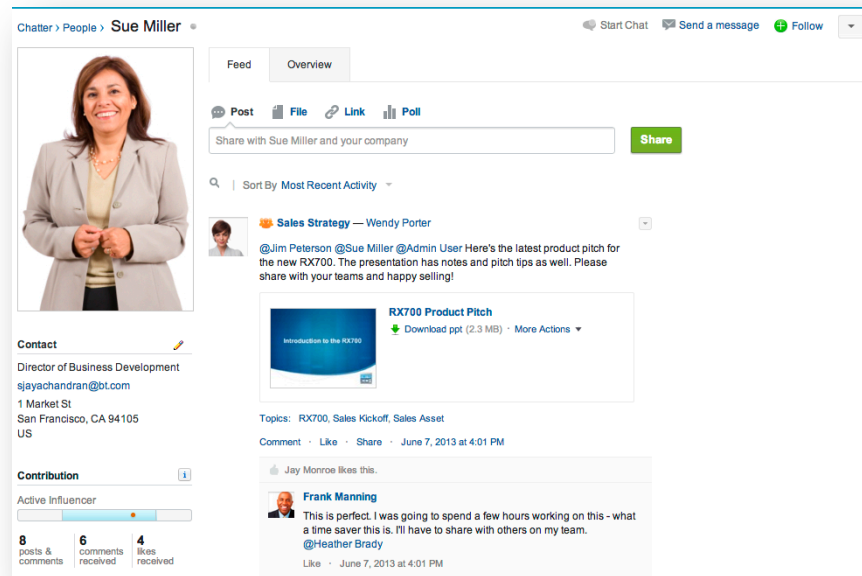
To make sure the right people receive your post and it get saved to the right place for reference later, post to a group. You can post to a public group or a private group. Only members of the private group will be able to see it.



To post to a group, just navigate to the group directly, or post right from your publisher. Just pick the “To: A Group” from the pick list and start typing the group name. A few options will come up from groups you follow

Posts Without A Group Post To Profiles

When you don't have a particular group to post to, you can post to your followers. Anyone following you will see it in their feed. If you post to someone else's profile, people following that person will get it in their feeds.



The screenshot shows a LinkedIn profile for Sue Miller, Director of Business Development. The profile includes contact information and a contribution bar. The main feed shows a post by Wendy Porter from the Sales Strategy group, sharing a product pitch for RX700. The post includes a link to a presentation and a download button for a 2.3 MB PPT file. A comment by Frank Manning is also visible, praising the pitch and mentioning Heather Brady.

Top tip: Anything you post here will be visible for everyone

@ Mention The Right People In Public Posts

To increase the likelihood of the right people seeing your group or profile post, guide their attention to it with an @ mention.

Wendy Porter
@Jim Peterson @Sue Miller @Admin User Here's the latest product pitch for the new RX700. The presentation has notes and pitch tips as well. Please share with your teams and happy selling!

RX700 Product Pitch
Download ppt (2.3 MB) · More Actions

Topics: RX700, Sales Kickoff, Sales Asset
Comment · Like · Share · June 7, 2013 at 4:01 PM

Jay Monroe likes this.

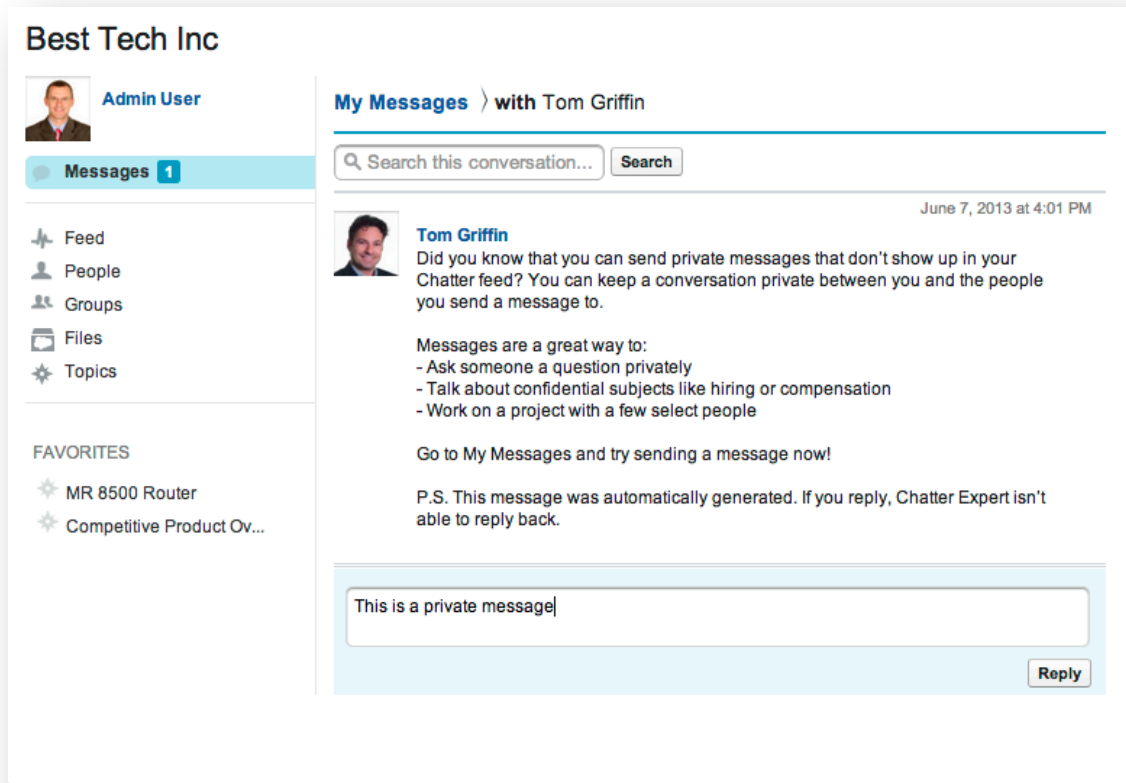
Frank Manning
This is perfect. I was going to spend a few hours working on this - what a time saver this is. I'll have to share with others on my team.
@Heather Brady
Like · June 7, 2013 at 4:01 PM

Thanks @Wendy Porter! This will come in handy as @sue and I pitch Acme Corp tomorrow.

Sue Miller Director of Business Development

... Or Post Privately

Sometimes, you just want to share something with a few people in private. To do so, just post a private message – you can message with one or several people.



The screenshot shows a private message conversation in Salesforce Chatter. On the left is a navigation sidebar for 'Best Tech Inc' with options like Feed, People, Groups, Files, and Topics. The main area shows a message from Tom Griffin dated June 7, 2013 at 4:01 PM. The message content explains that private messages can be used for confidential subjects like hiring or compensation. At the bottom, there is a text input field containing the text 'This is a private message|' and a 'Reply' button.

Best Tech Inc

Admin User

Messages 1

Feed

People

Groups

Files

Topics

FAVORITES

MR 8500 Router

Competitive Product Ov...

My Messages > with Tom Griffin

Search this conversation... Search

June 7, 2013 at 4:01 PM

Tom Griffin

Did you know that you can send private messages that don't show up in your Chatter feed? You can keep a conversation private between you and the people you send a message to.

Messages are a great way to:

- Ask someone a question privately
- Talk about confidential subjects like hiring or compensation
- Work on a project with a few select people

Go to My Messages and try sending a message now!

P.S. This message was automatically generated. If you reply, Chatter Expert isn't able to reply back.

This is a private message|

Reply

Use Topics

Topics help organize information, so remember to use them when posting, so that others can find your content. You can add a topic at the time of posting or after.

The screenshot shows a post from 'Acme Resellers' with the text: 'We'll be meeting customers near Acme's HQ next month and would like to set up a half day meeting to conduct a business review. Who is game to help on this?'. The post has three comments from Jim Peterson, Steve Hamilton, and Jay Monroe. A dropdown menu is open over the post, with options: 'Bookmark', 'Edit Topics', and 'DeEdit or add topics to this'. The 'DeEdit or add topics to this' option is highlighted. A blue arrow points from this option to a topic suggestion box that appears over the post. The suggestion box contains a search bar with 'Acme-Best Tech QBR' and a 'Done' button. Below the search bar, a list of suggested topics is shown: 'Acme' (0 people talking), 'Day Meeting', and 'Acme's HQ'.

To add a topic after the post, use the edit topic menu – the system will suggest topics based on what's in the message. Use that or create a topic of your own

Or you can add a topic right when you're posting the message. Just add the #topic using a hash mark (#), and the system will suggest a topic. Use that or another topic.

The screenshot shows a post from 'Acme Resellers' with the text: 'Let's make sure to also conduct a competitive review on #Acme'. A topic suggestion box is open over the text, showing two suggested topics: 'Acme' (0 people talking) and 'Acme-Best Tech QBR' (0 people talking). A blue arrow points from the text '#Acme' to the suggestion box.

Upload Files

Upload any file to Chatter. You can upload directly into a group post

The screenshot shows a Chatter file sharing interface for a PDF document titled "Tristar Win-Loss Report". The document is 2.3 MB and is privately shared. The interface includes a "Download ppt (2.3 MB)" button, a "File Sharing Settings" dropdown menu with options for "Sharing Settings", "Edit Details", and "Delete", and a "Delete" button. The document is owned by "Admin User" and was last modified on June 7, 2013 at 4:01 PM. The community is "Partners Community". The document is in "Version 1" and has a "Description" field with an "Add Description" button. The main content area shows a blue slide with the text "Tristar Win/Loss Report" and a logo for "Best Tech Inc." in the bottom right corner. The slide is labeled "Slide 1 of 4".

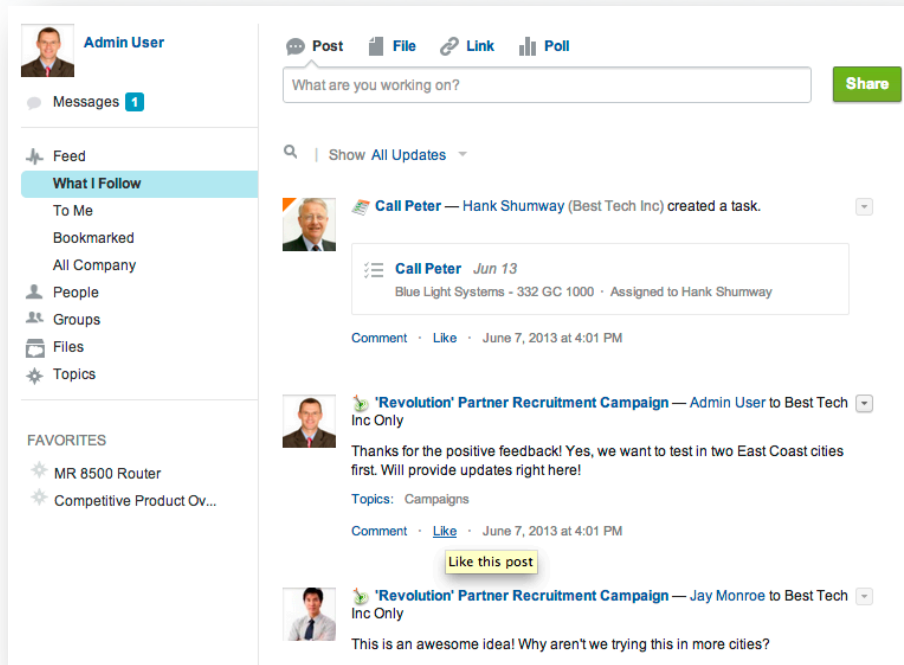
You can decide which groups and people can access or edit the file.

The composite screenshot illustrates the process of uploading a file to a Chatter group and sharing it with specific people. The top part shows a Chatter group post for "Best Tech Inc" by "Admin User". The post is a "File" type, and the file being uploaded is "Chatter templates.pptx" (2.3 MB). The post content is "I am posting a file here". The post is shared with the "Competitive Experts" group. The bottom part shows a "Share with People" dialog box for a file named "Chatter Group Best Practice". The dialog box has a table for selecting people to share with, with columns for "People", "Viewer", and "Collaborator".

People	Viewer	Collaborator
Damon Sales Exec	<input type="checkbox"/>	<input type="radio"/>
Sue Market	<input type="checkbox"/>	<input type="radio"/>
<input type="text" value="Type someone's name..."/>		

Below the table, there is a "Send a message" field with the text "Here is that Group Best Practices I mentioned." and a "Dave" signature. At the bottom of the dialog box are "Share" and "Cancel" buttons.

Like and Bookmark Posts



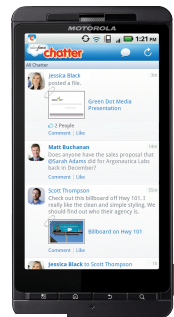
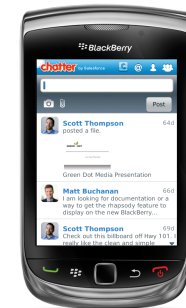
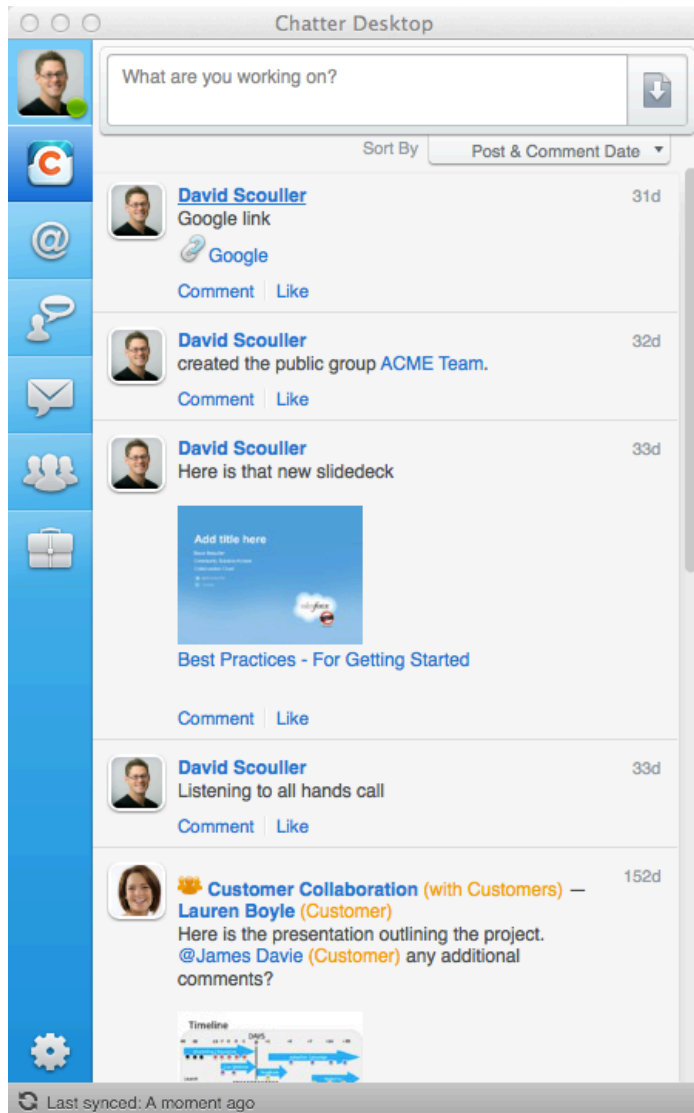
Sometimes a simple “like” is enough. It’s a great and low-friction way to let people know that you:

- Agree
- Like what they are saying
- Acknowledge receipt of the message

Bookmark posts that you want to access later, or perhaps drill into more detail when you have more time.



Be Productive Wherever You Are



Install Chatter desktop application to receive messages and alerts in real-time. Use Chatter mobile apps to stay productive, wherever you are.

Set Your Email Settings

Navigate to Setup > My Chatter Settings > Chatter Email Settings

Email me when someone:

Follows

Follows me

Posts or Likes

Posts on my profile

Shares a post I made

Likes a post or a comment I made

Comments

Comments on my status or a change I made

Comments on a post on my profile

Comments after me

Comments on an item I bookmarked

Comments on an item I like

Mentions or Messages

Mentions me in a post

Mentions me in a comment

Sends me a message

Set frequency for personal digest: [i](#)

Daily

Weekly

Never

Top tip: Set as many or as few notifications as you would like. You will fine-tune your settings over to receive more or fewer notifications

Manage settings per group

- On each post – I'm THE expert, critical to my job
- Daily – I want to stay on top of developments
- Weekly – I want to catch up periodically
- Never – I occasionally ask questions and don't mind updates it in my feed

▼ Groups

Set default frequency for groups I join: [i](#)

Email on each post

Daily digests

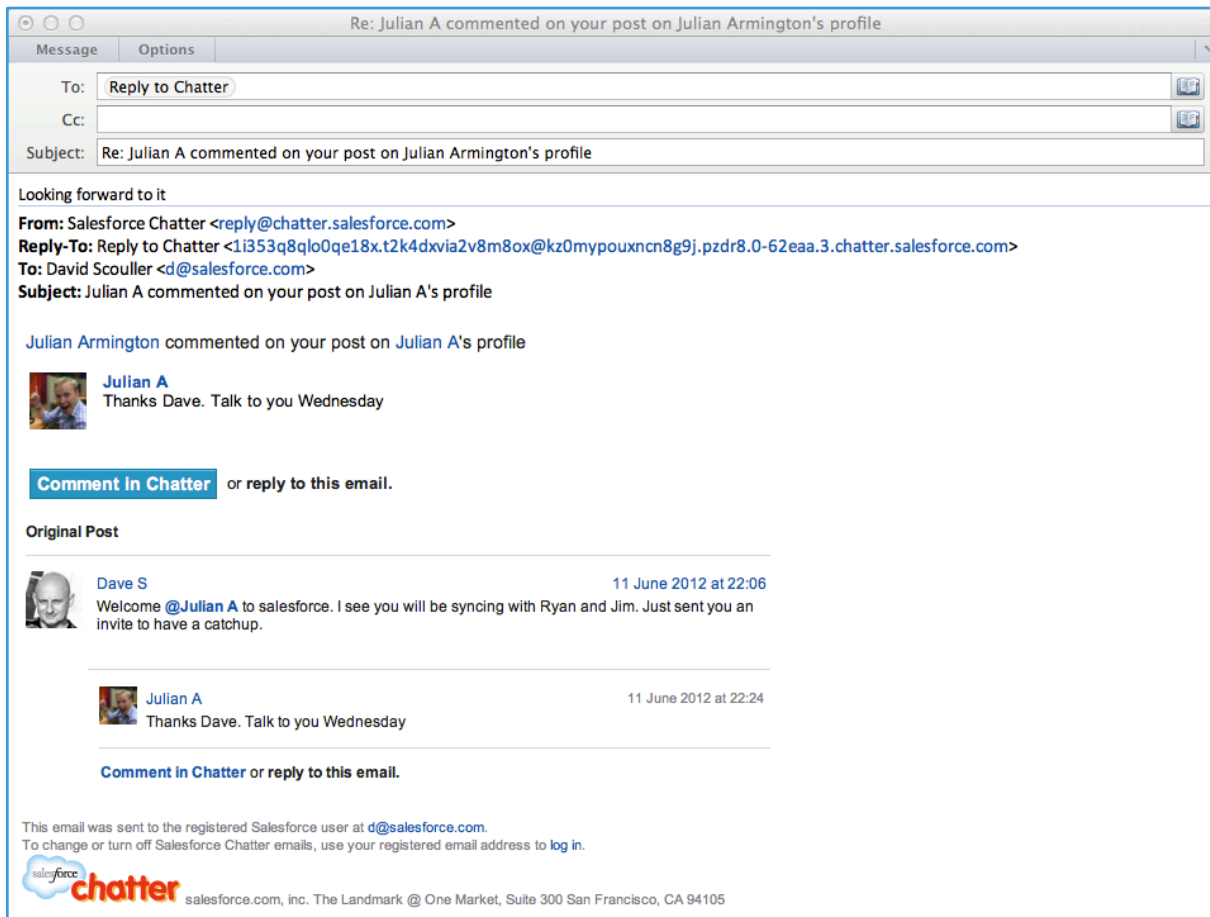
Weekly digests

Never

Chatter Group	Email on Each Post i	Daily Digests i	Weekly Digests i	Never
Competitive Experts	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Customer Collaboration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
DJS Sec	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Product Experts	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Sales Strategy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Respond Right From Email

You can reply to an email notification from Chatter, and your reply will show up as a comment. This is a great tool for easing e-mail centric participants productive on your mobile device.




The screenshot shows an email window with the following details:

- Subject:** Re: Julian A commented on your post on Julian Armington's profile
- To:** Reply to Chatter
- Cc:** (empty)
- Subject:** Re: Julian A commented on your post on Julian Armington's profile

Looking forward to it


From: Salesforce Chatter <reply@chatter.salesforce.com>
Reply-To: Reply to Chatter <1i353q8qlo0qe18x.t2k4dxvia2v8m8ox@kz0mypouxncn8g9j.pzdr8.0-62eaa.3.chatter.salesforce.com>
To: David Scouller <d@salesforce.com>
Subject: Julian A commented on your post on Julian A's profile


Julian Armington commented on your post on Julian A's profile

 **Julian A**
Thanks Dave. Talk to you Wednesday

[Comment in Chatter](#) or reply to this email.


Original Post

 **Dave S** 11 June 2012 at 22:06
Welcome @Julian A to salesforce. I see you will be syncing with Ryan and Jim. Just sent you an invite to have a catchup.

 **Julian A** 11 June 2012 at 22:24
Thanks Dave. Talk to you Wednesday

[Comment in Chatter](#) or reply to this email.

This email was sent to the registered Salesforce user at d@salesforce.com.
To change or turn off Salesforce Chatter emails, use your registered email address to [log in](#).

 **chatter**
salesforce.com, inc. The Landmark @ One Market, Suite 300 San Francisco, CA 94105

Anatomy Of An Engaging Post

There's no such thing as a perfect Chatter post. What works in one company may not work in another – and effectiveness even varies across teams and departments in the same company! However, *the most engaging* posts have this in common:

- ✓ **Are Short:** no one wants to read extra long posts. Get to the point!
- ✓ **Use media:** photos and videos get more engagement than text --- as long as they are relevant.
- ✓ **Are valuable:** will it leave the reader better than before?
- ✓ **Are shareable:** will people want to share it? To be shared, it has to make the reader look good.
- ✓ **Have a topic, are in a group:** by posting to the people who are receptive to the message, you increase likelihood of success
- ✓ **@ mention people:** don't just pile on everyone you know
- ✓ **Have a clear call to action:** what do you want people to do at the end of the post?
- ✓ **Invite participation:** are you talking at people, or working with them. When you leave room for collaboration, that's what you will get.

Using Chatter Etiquette For Maximum Impact

- ✓ Use it like you would at a cocktail party
- ✓ Don't SPAM people
- ✓ Try to add value first before attempting to retrieving it
- ✓ Mix it up: use text, URLs, photos, files. Post questions, answers and updates.
- ✓ Respect people's privacy – don't repost private information they shared with you
- ✓ Don't be "that guy" and publicly shame people
- ✓ Be smart, be respectful

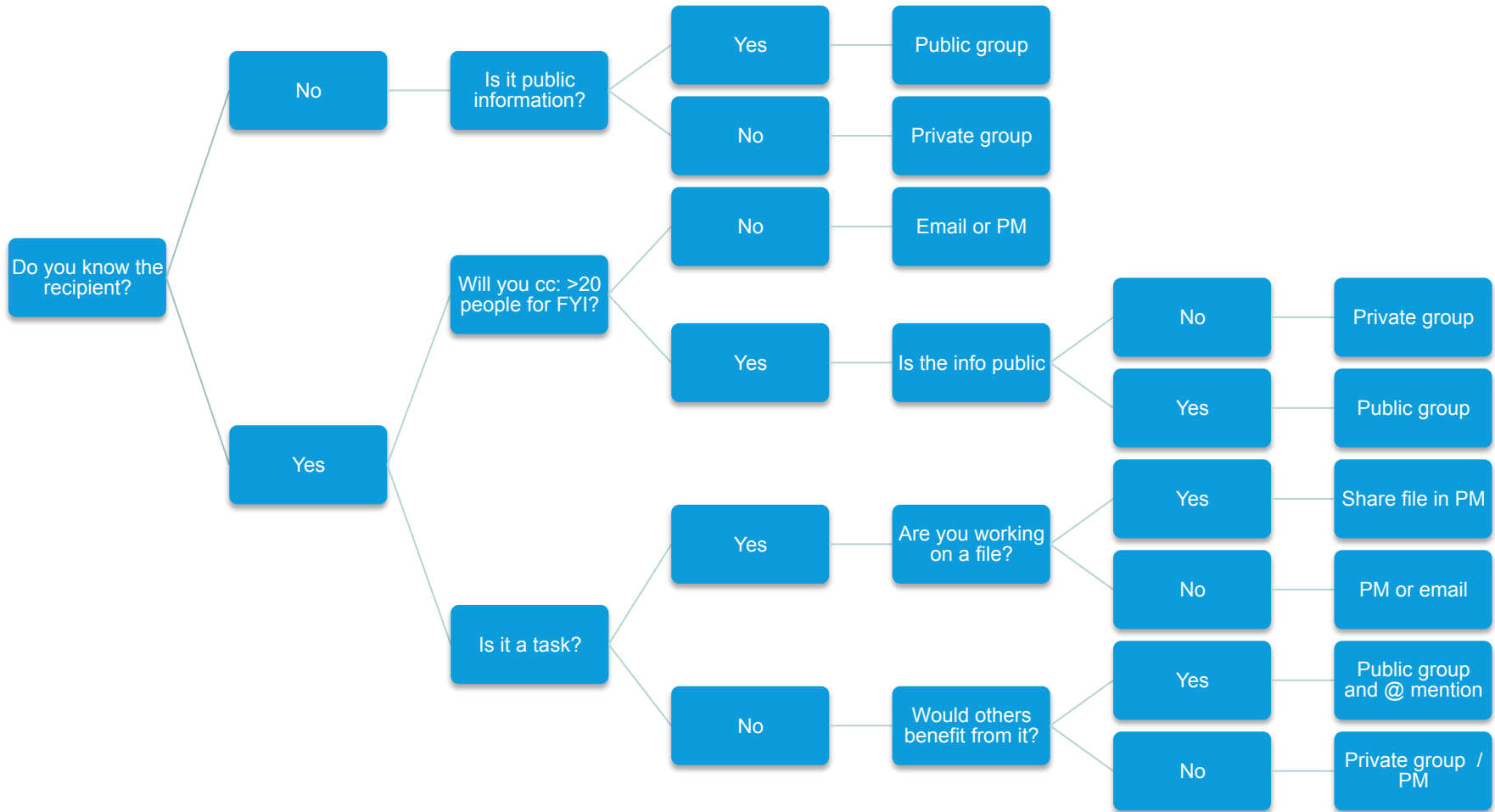


Public vs. Private?

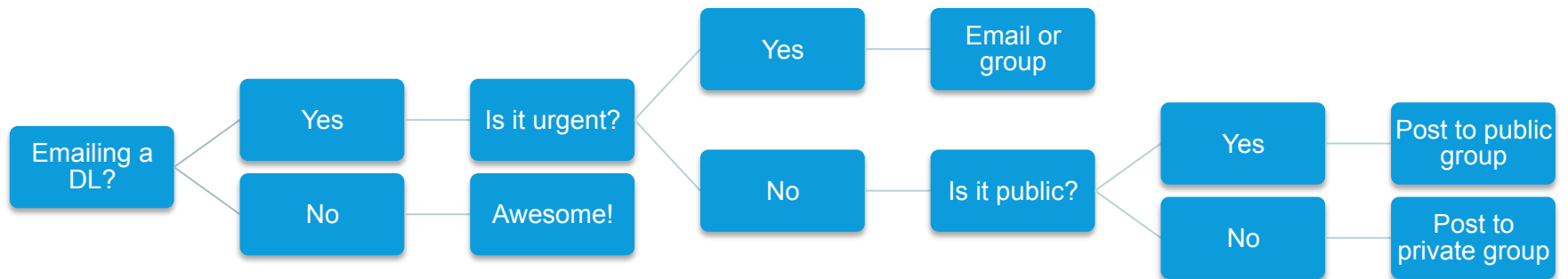
- **Public by default:** unless something *needs* to be private, why not make it public?
 - So others can search and discover
 - So you can get feedback
 - So you can connect with others
- If sharing sensitive information (comp plans, private customer information, some product information): post to a private group

Top tip: Treat it like you would email: if you wouldn't want others to see it, don't post publicly

Chatter vs. Email



Chatter vs. Distribution lists



What's Next?



Developing Your Personal Strategy

What's in it for you?

My job is to...

To do my job, I need to...

Things I need to do my job

- Close deals faster
- Advise customers on product news
- Be seen as an advisor to customers
- Serve customers better

How Chatter can help

- Expand network
- Discover useful content
- Understand what's going on in industry and advise customers
- Work cross-functionally with support teams

5 things I can do today

- Reach out to someone who knows a key contact
- Join groups to stay abreast of product / company info
- Join groups to track industry announcements
- Create a group around a key account, post a customer question and @ mention the right people

Six Things To Get Started

1. Fill out your profile and upload a picture
2. Set your email settings
3. Follow your manager and colleagues
4. Join your team, department and project groups
 - If there isn't an existing group, start one!
5. Follow your customer records
6. Do a search on a topic
 - Follow topics
 - Join groups
 - Follow experts

Not Sure What To Post?

Here are some easy things to get you started:

1. Introduce yourself
2. Working on something?
 - Search on existing content
 - Post file to get early feedback
3. Post a question to start conversation
4. Post an article or something interesting
5. Answer a question from the feed or group
 - Answer yourself
 - @ mention someone who may know answer
6. Share what you're working on each week to your team group
 - @ mention people, use group and topic



Thank You