Getting Started on Chatter

Helping You Get The Most Out of Your Career With Chatter

SELL. SERVICE. MARKET. SUCCEED.

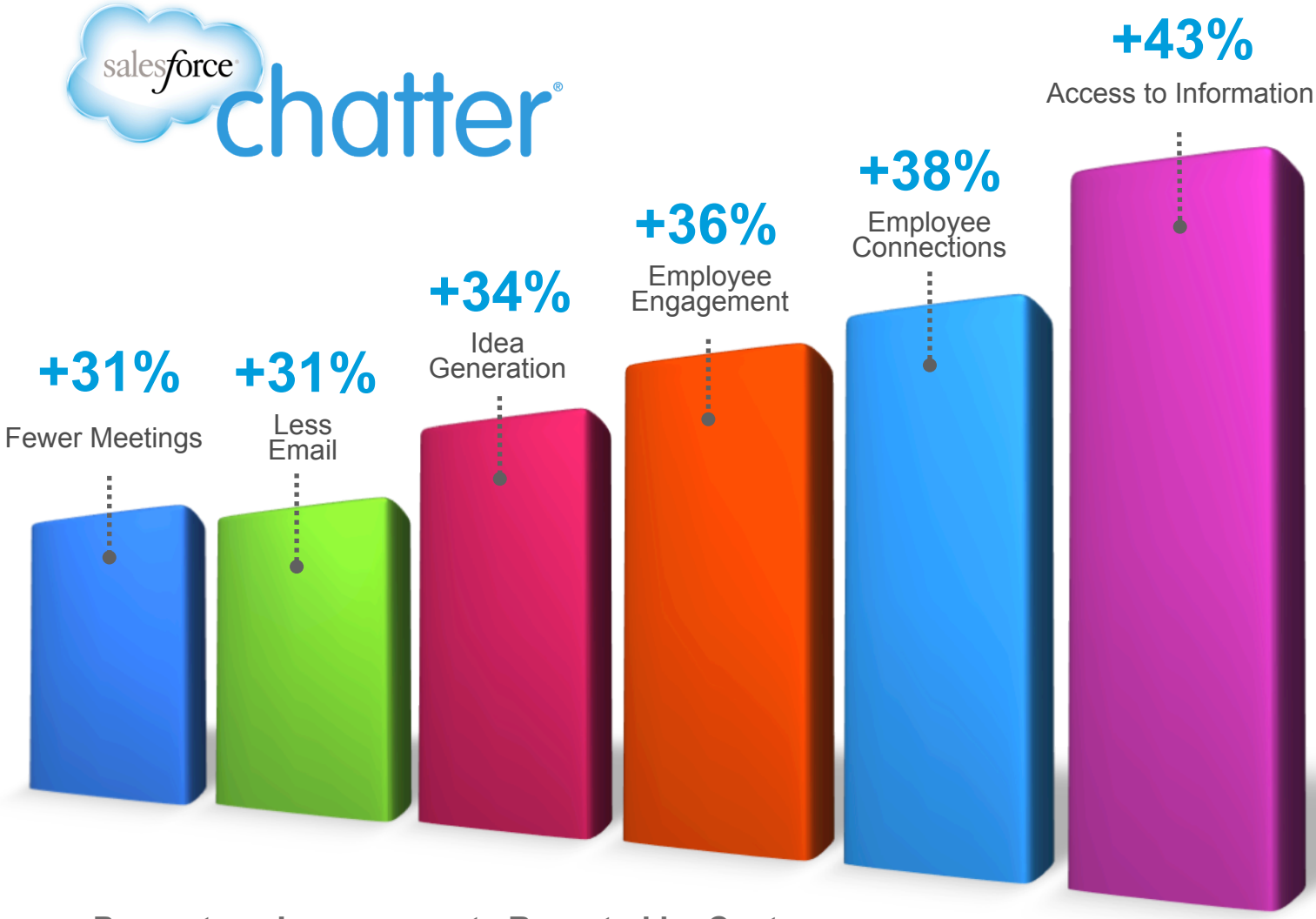
/chatter
@chatter
in/chatter

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.

Why:
Why use Chatter
What:
The basics of Chatter
How:
How to be successful
Where:
where to post

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, Confirmit Inc., on 5,200+ customers randomly selected. Response sizes per question vary.

But What's In It For You?

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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

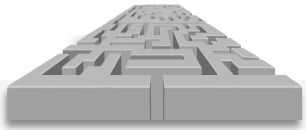
Content is Difficult to Find and Access

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

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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!

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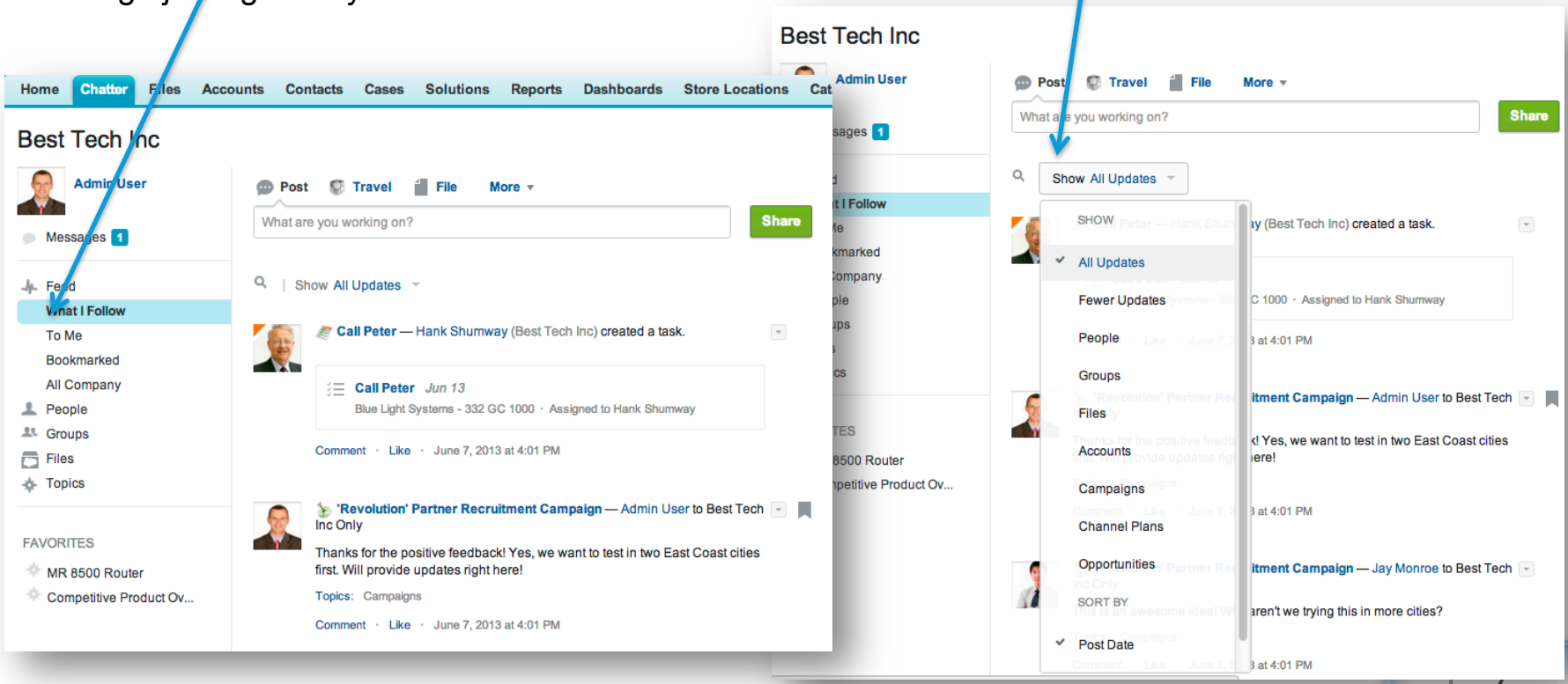
The Basics: The Feed

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

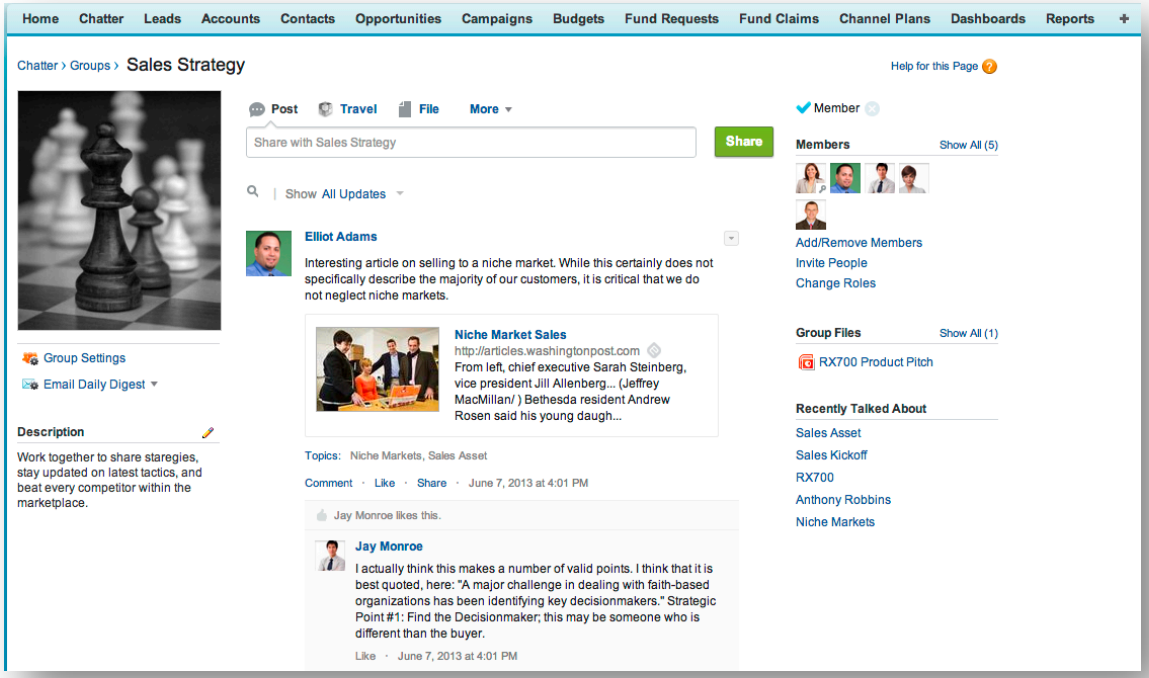
Your feed is made up of posts made by people and objects you follow, and groups you are a member of. You have ***full control*** of what goes into it by following / joining what you need.

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.



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

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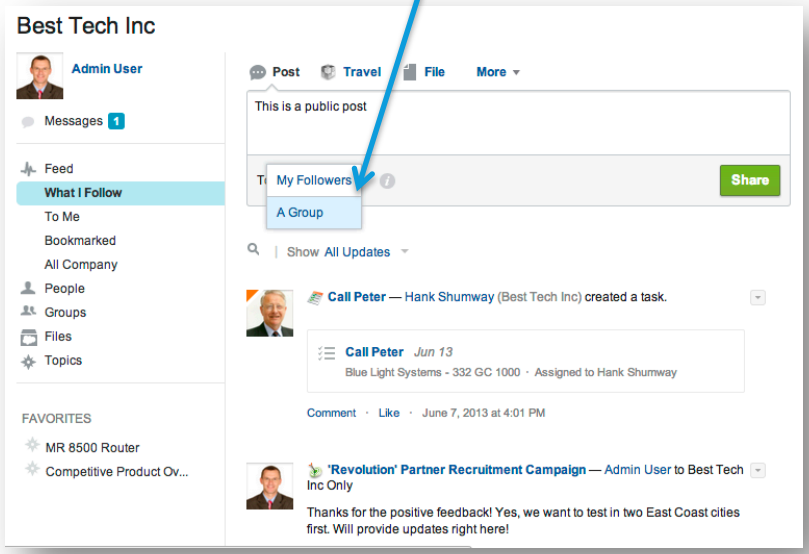
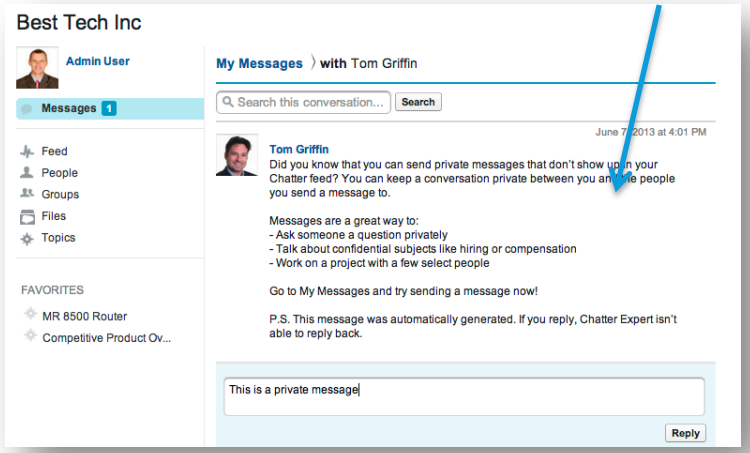
The Basics: A Post

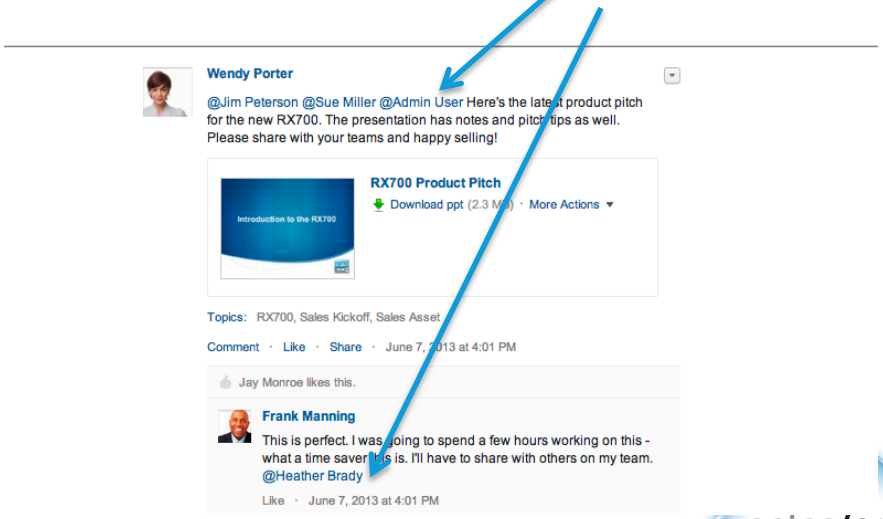
Posts are the building blocks of feeds and groups. You can post anything: a file, a text post, a picture, a URL. Public posts can be made into groups or to people's profiles. Everyone in that group or following that person can see them.



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.



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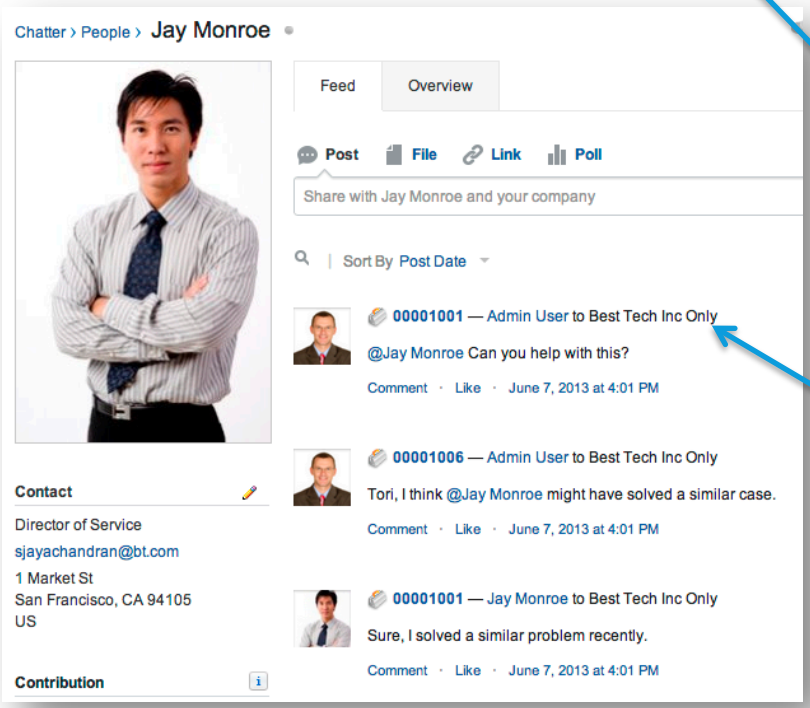
The Basics: People and Profiles

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.

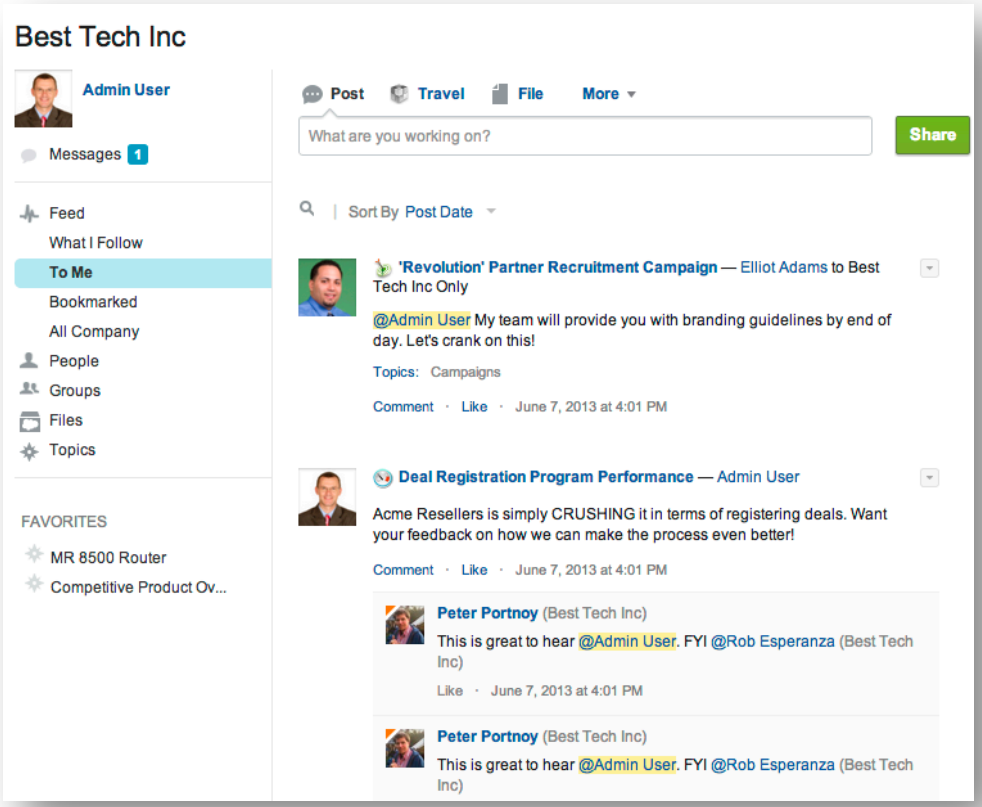
You can read about your colleague to decide if you want to connect with and/or follow. It’s a great way to get connected to people you have never met before – and ones you have!



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.



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.

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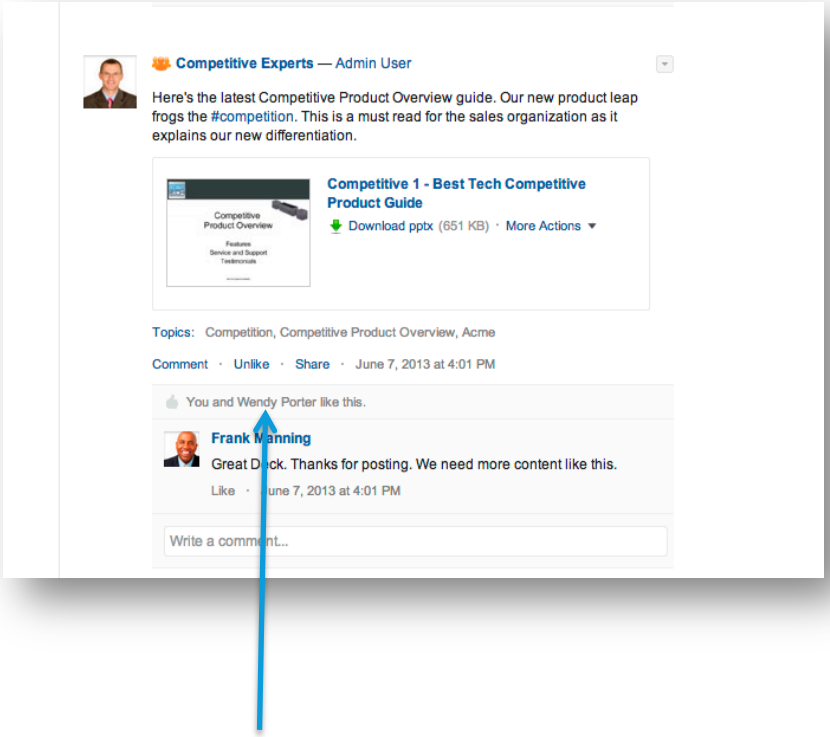
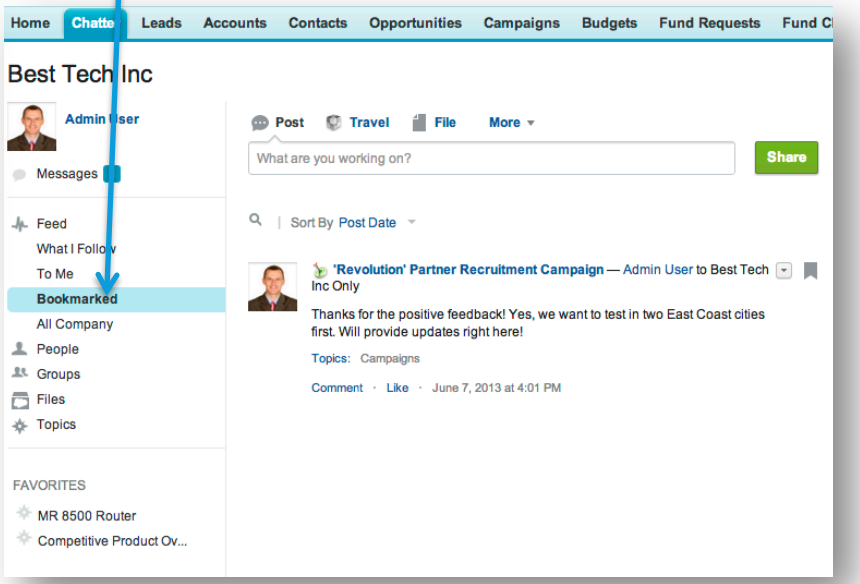
The Basics: Likes And Bookmarks

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.



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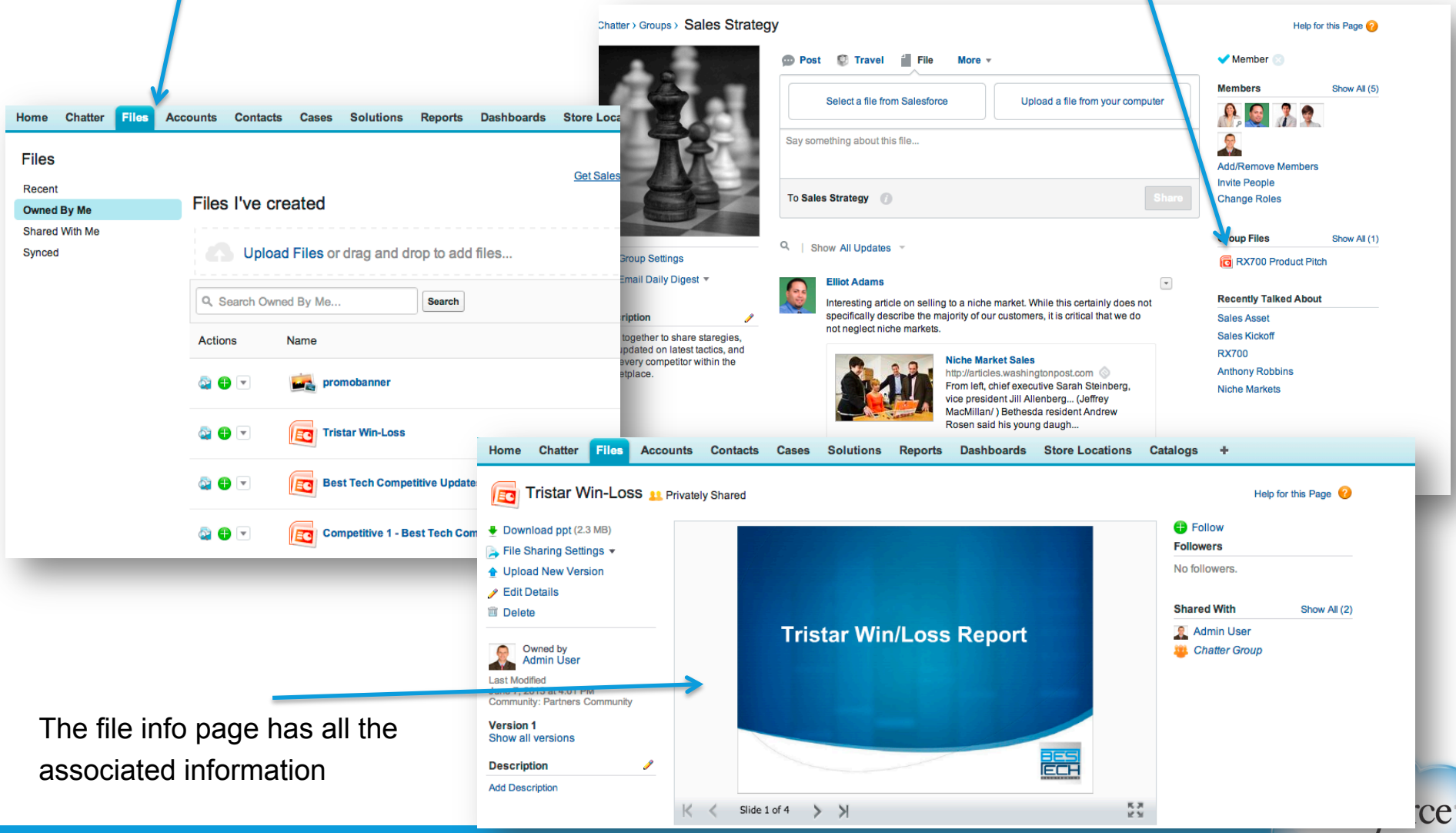
The Basics: Files

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!

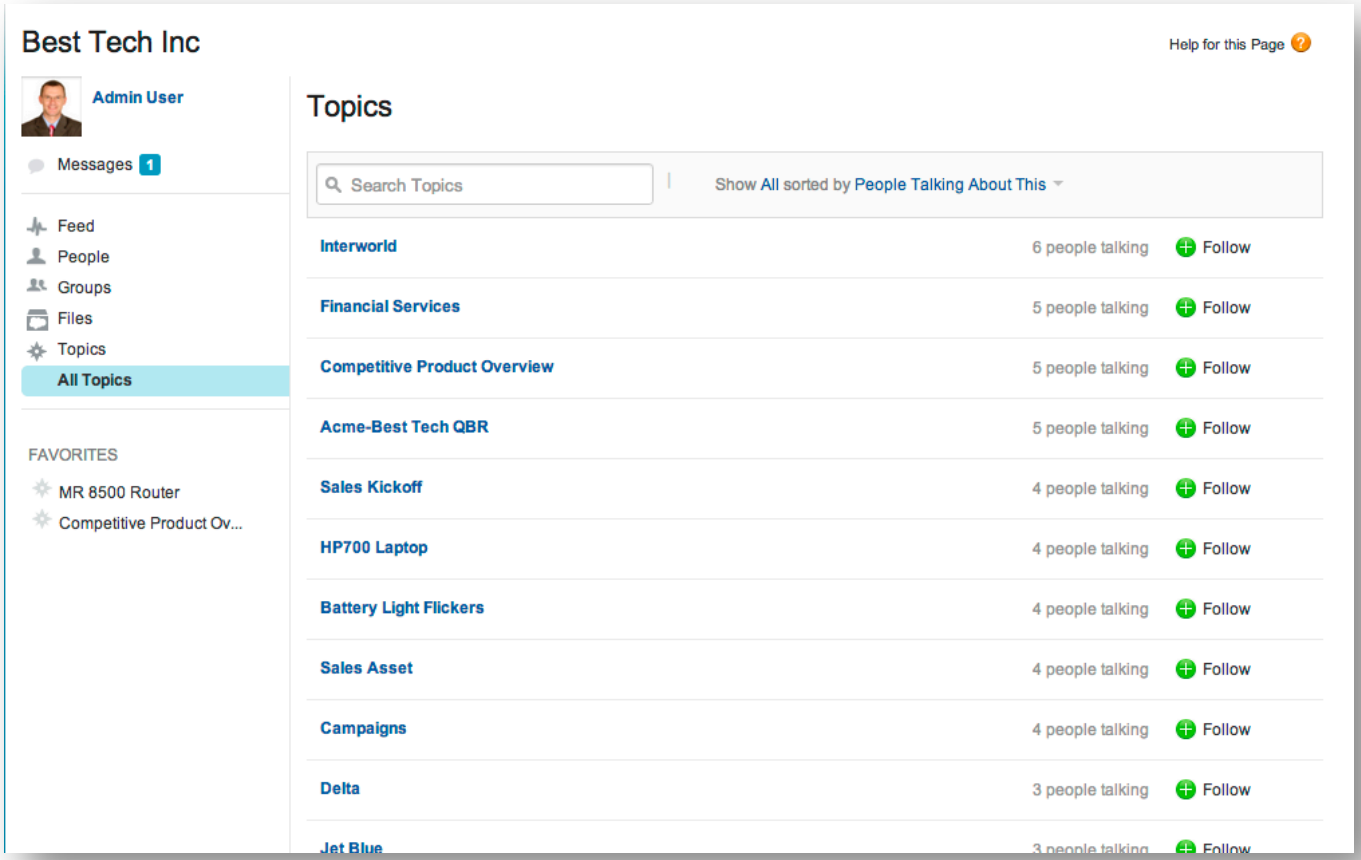
All files associated with a group can also be seen on the right



The 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.



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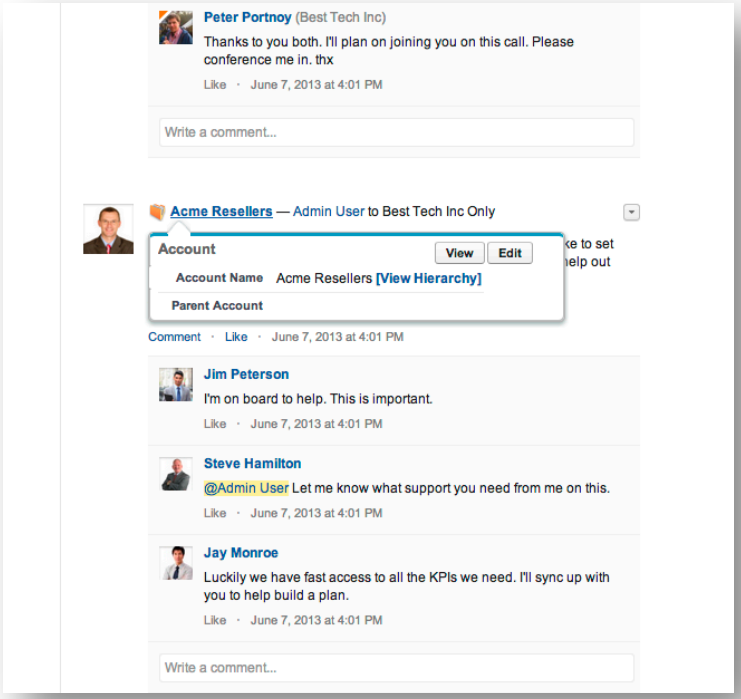
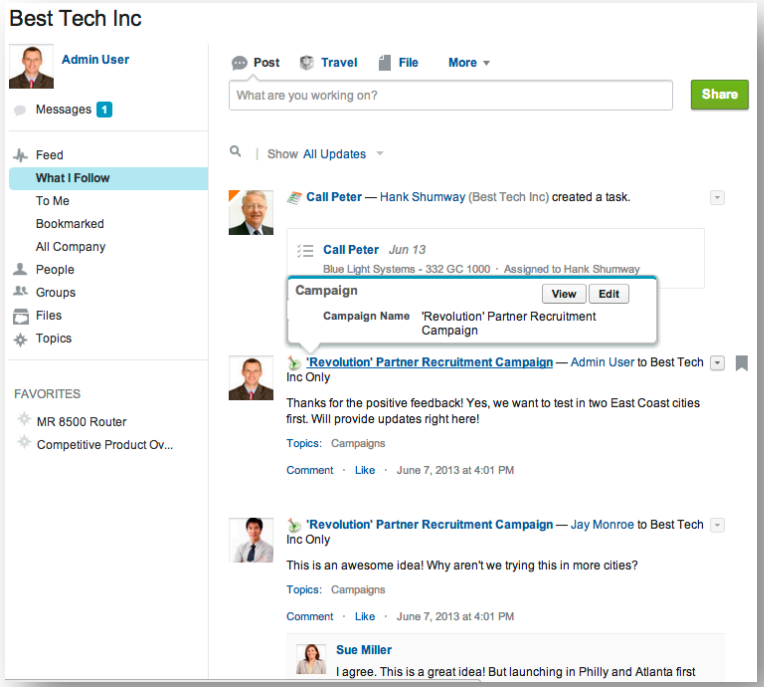
The Basics: Business Objects

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!



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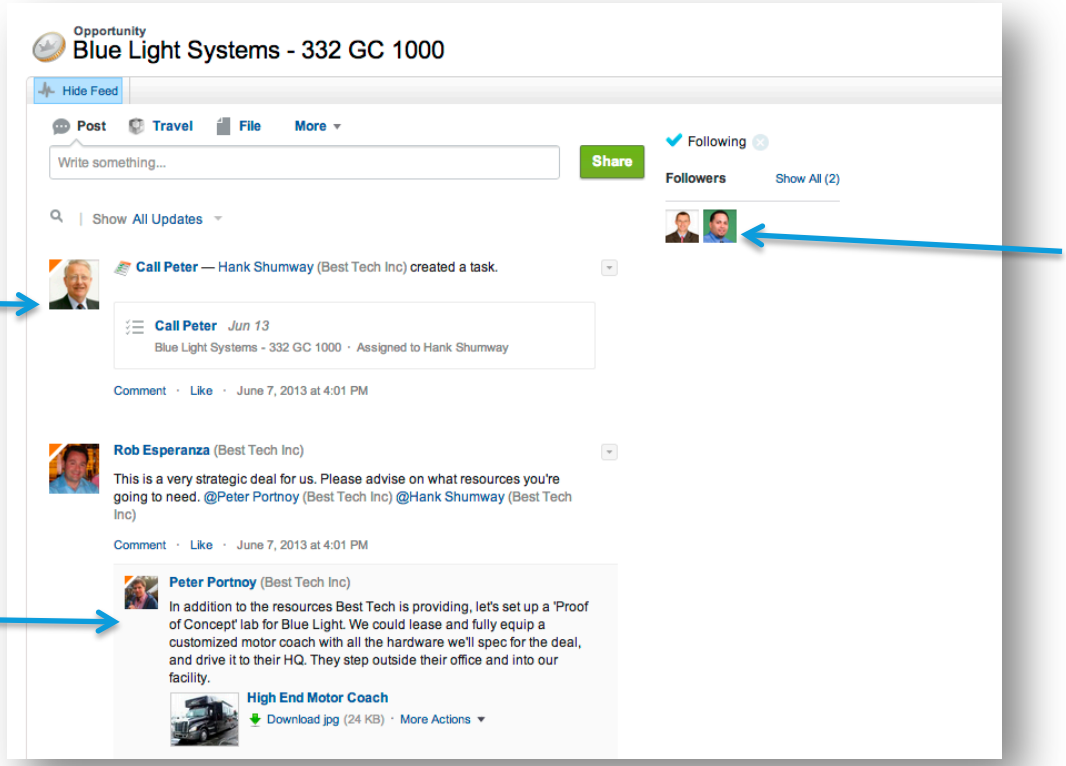
The Basics: Business Objects Have Feeds

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

People following this opportunity

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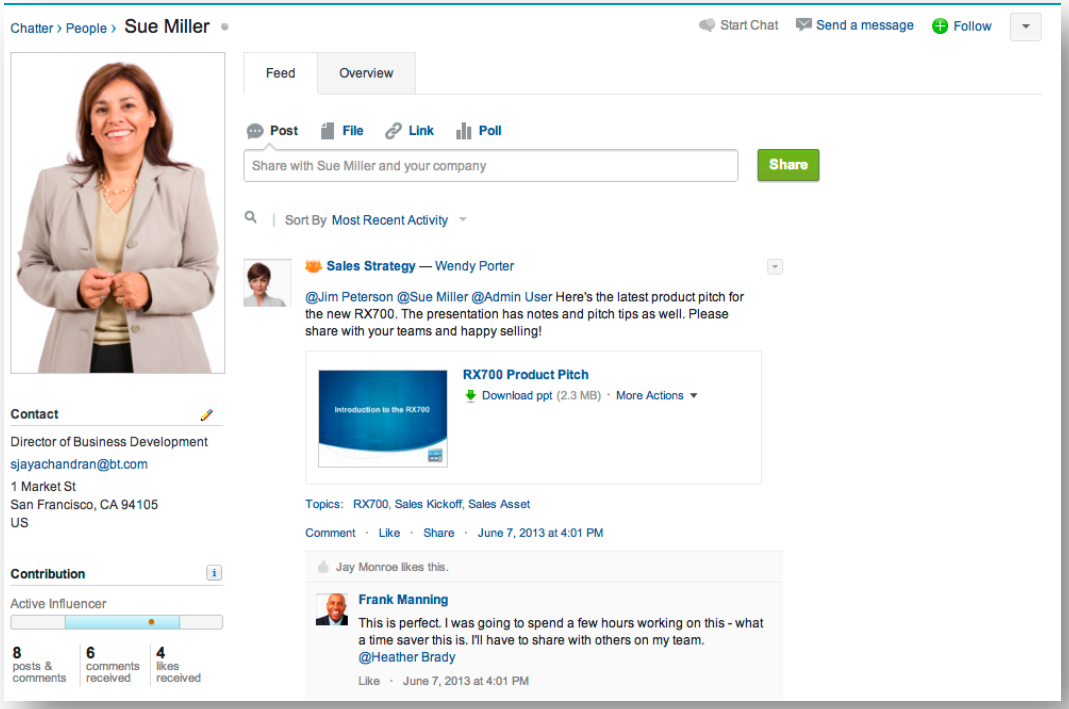
Fill Out Your Profile; Upload a Photo

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.



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.

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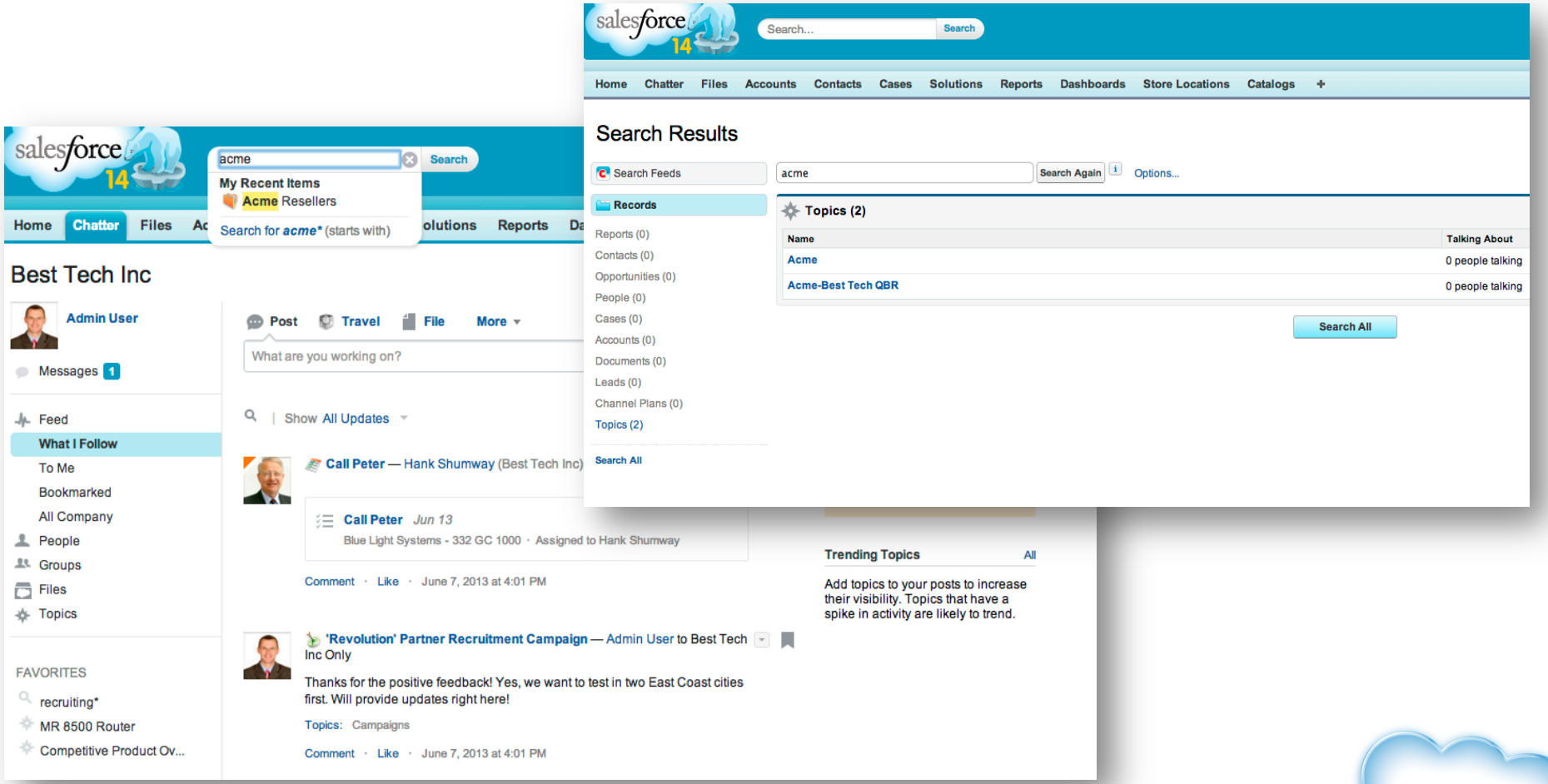
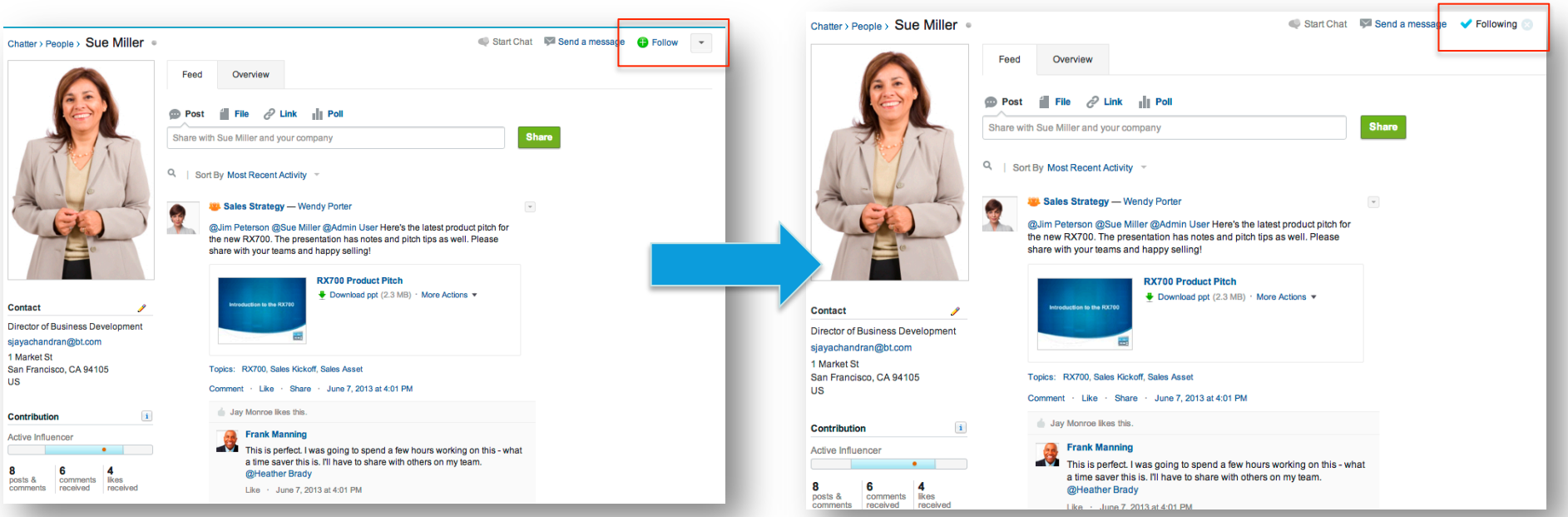
Use Global Search To Navigate Chatter

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.



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.



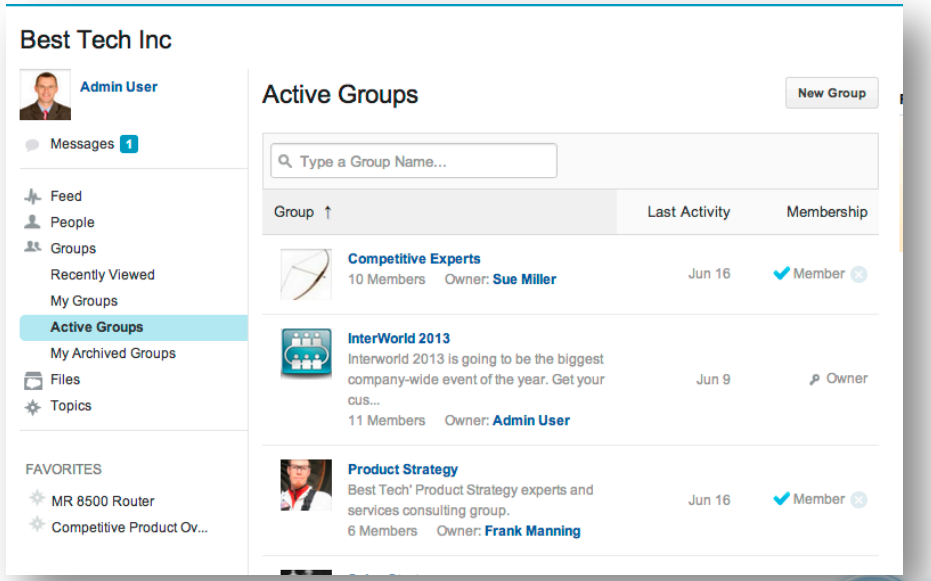
…. And By Joining Groups

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



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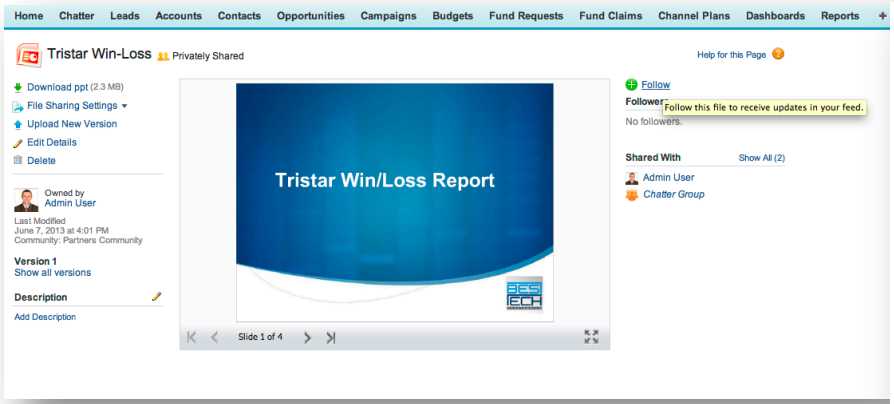
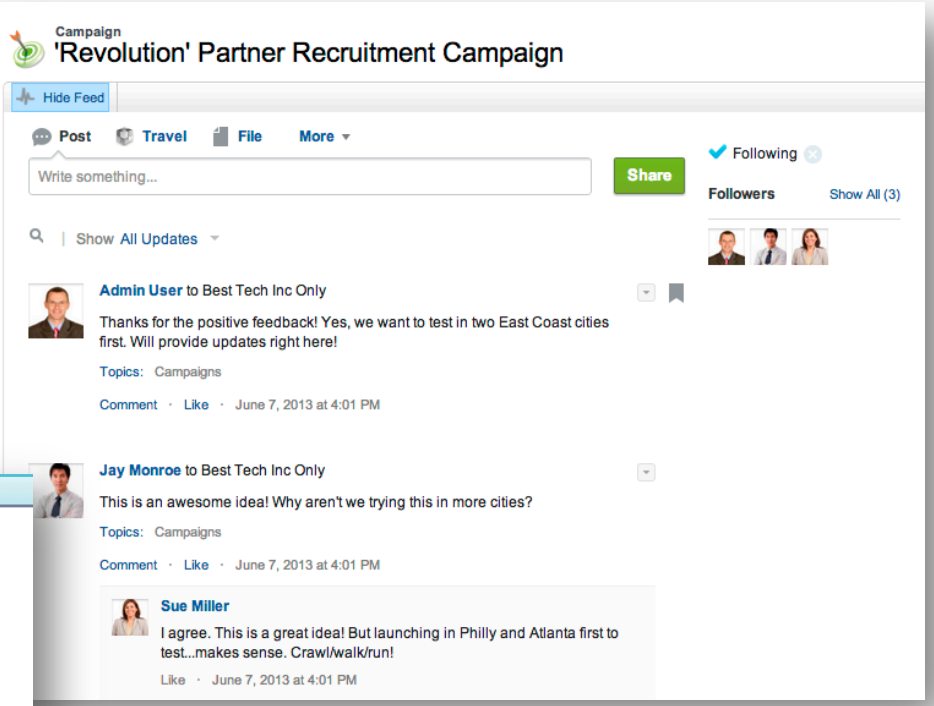
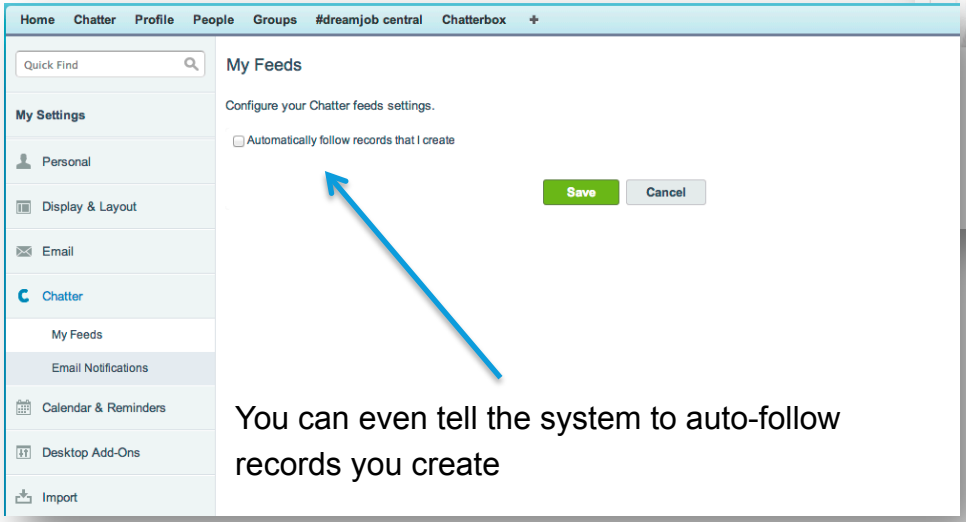
Follow Files, Opportunities and Objects

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







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

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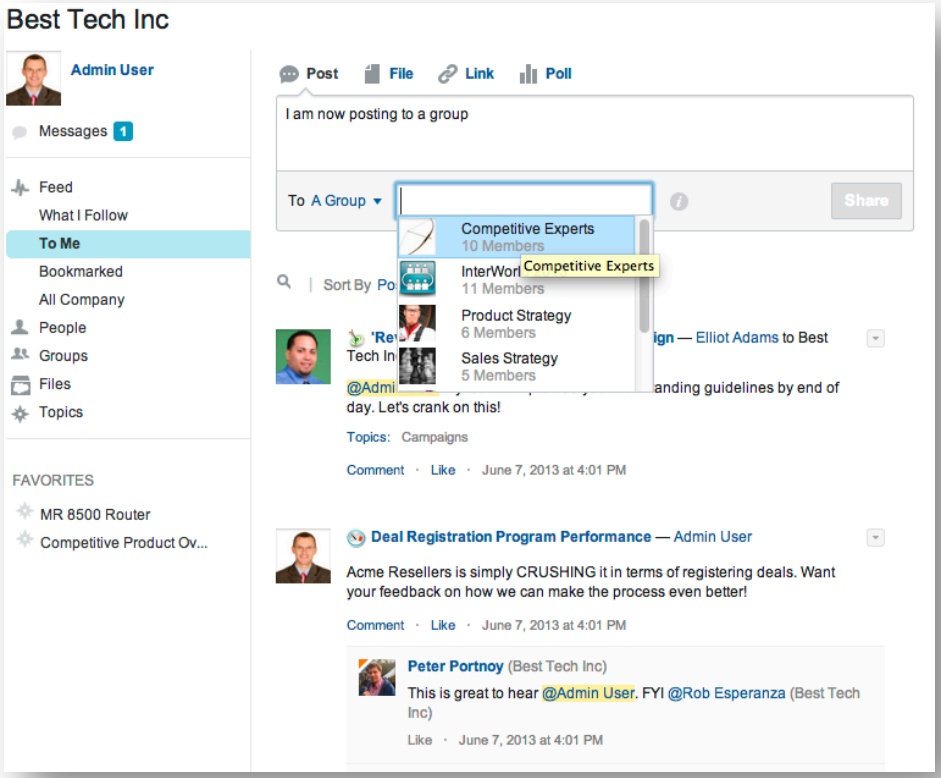
Post To A Group

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

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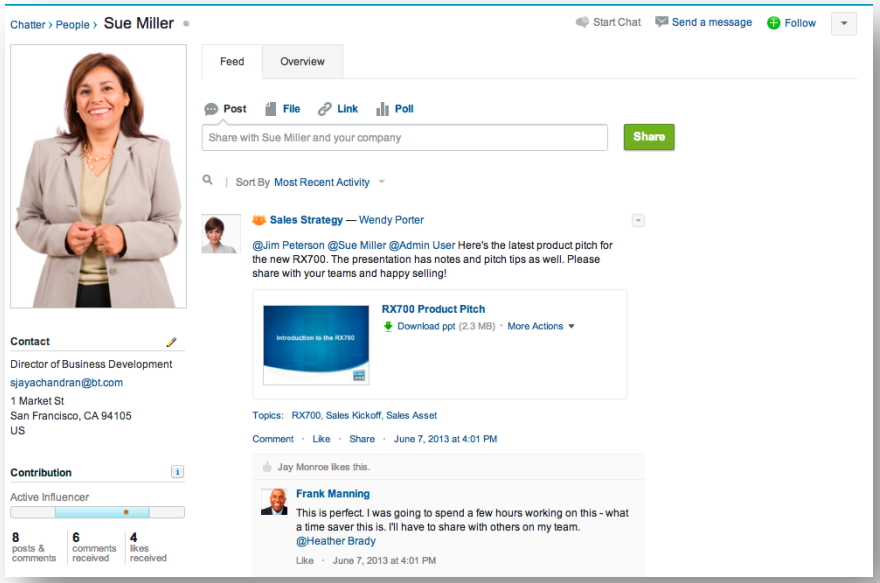
Posts Without A Group Post To Profiles

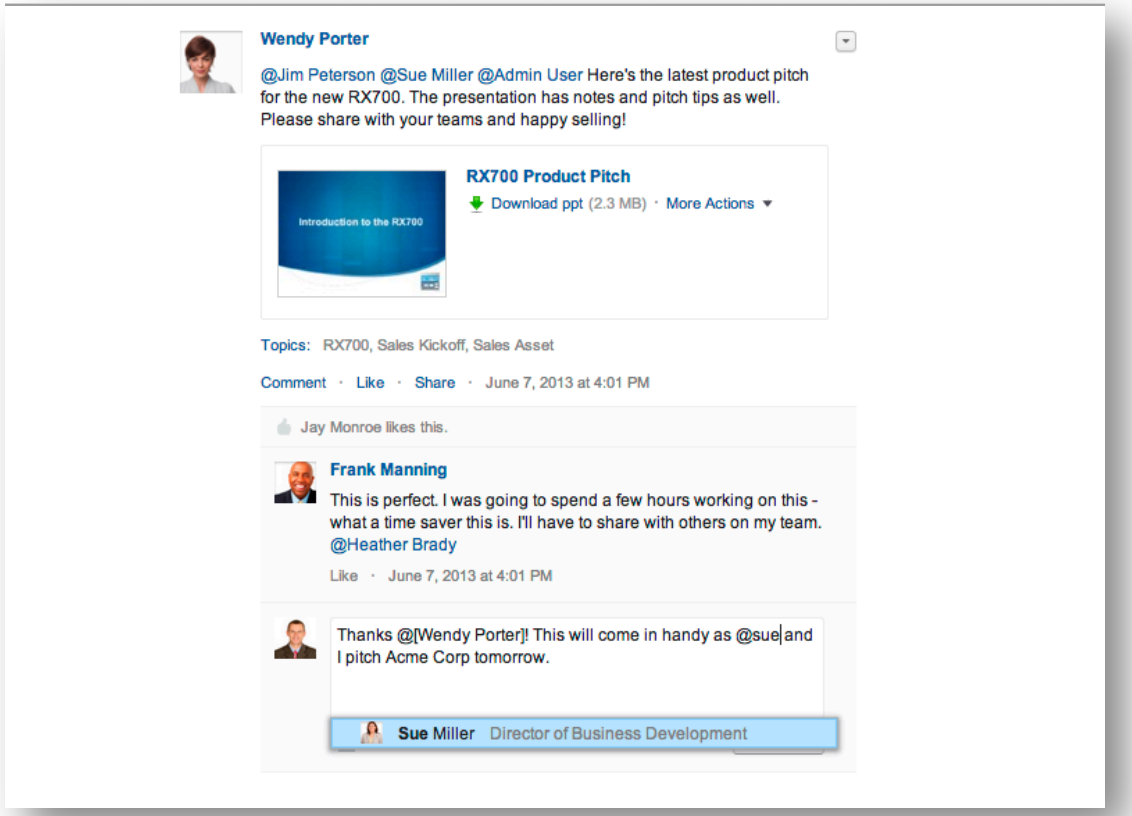
When you don’t have a particular group to post to, you can post to your followers. Anyone following you will see it in their feed. If you post to someone else’s profile, people following that person will get it in their feeds.



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

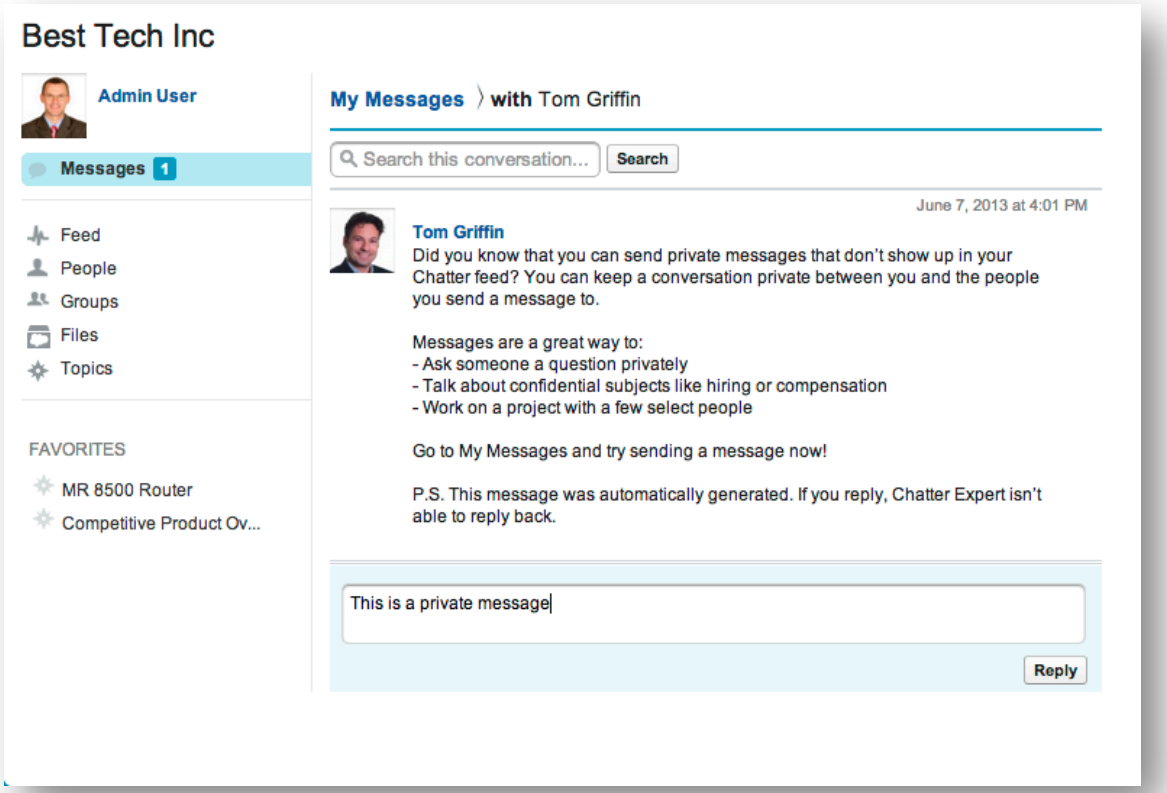
@ Mention The Right People In Public Posts

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



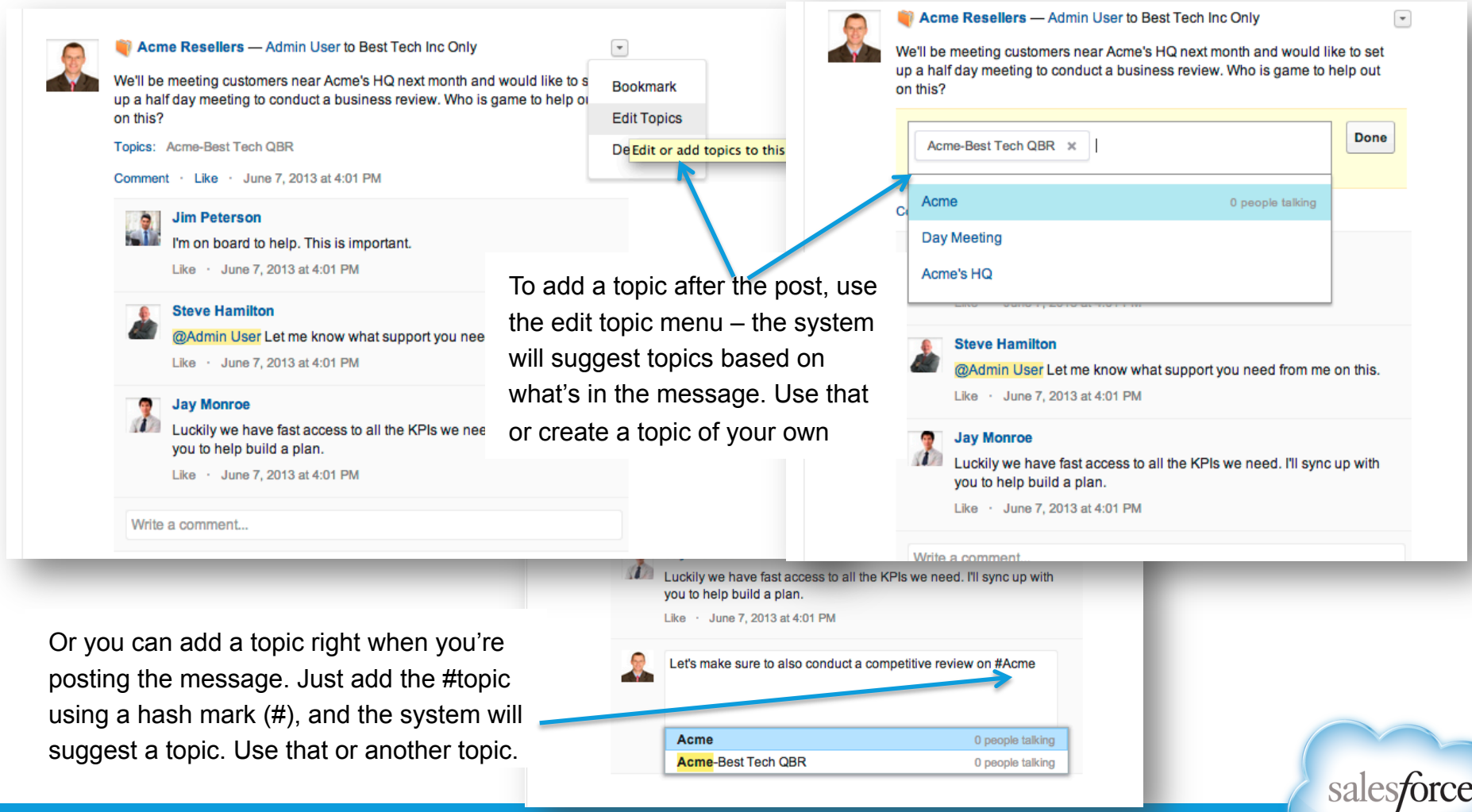
… Or Post Privately

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.



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.

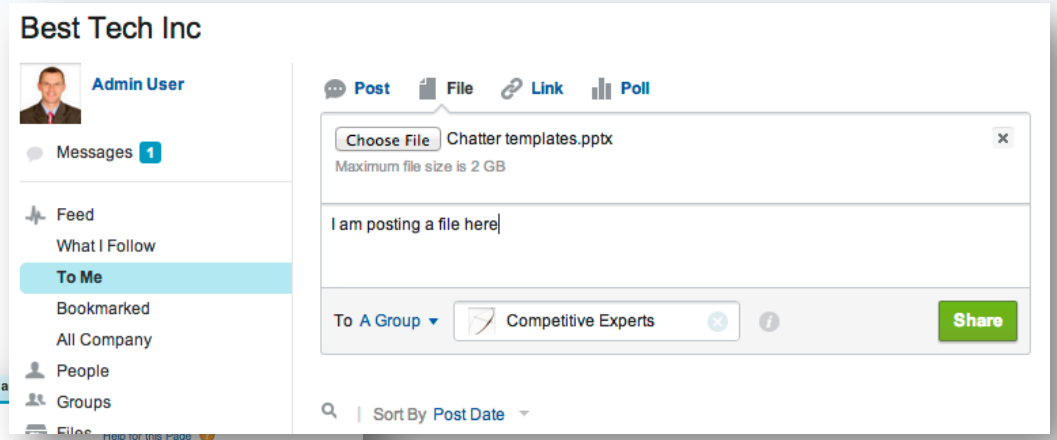


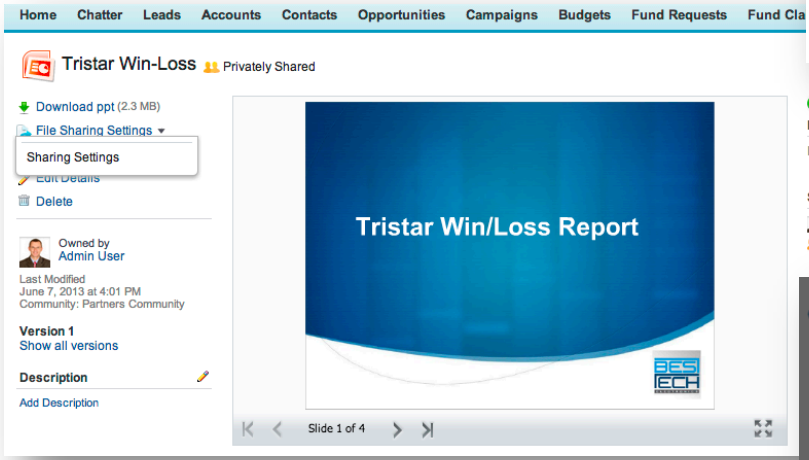
To add a topic after the post, use the edit topic menu – the system will suggest topics based on what's in the message. Use that or create a topic of your own

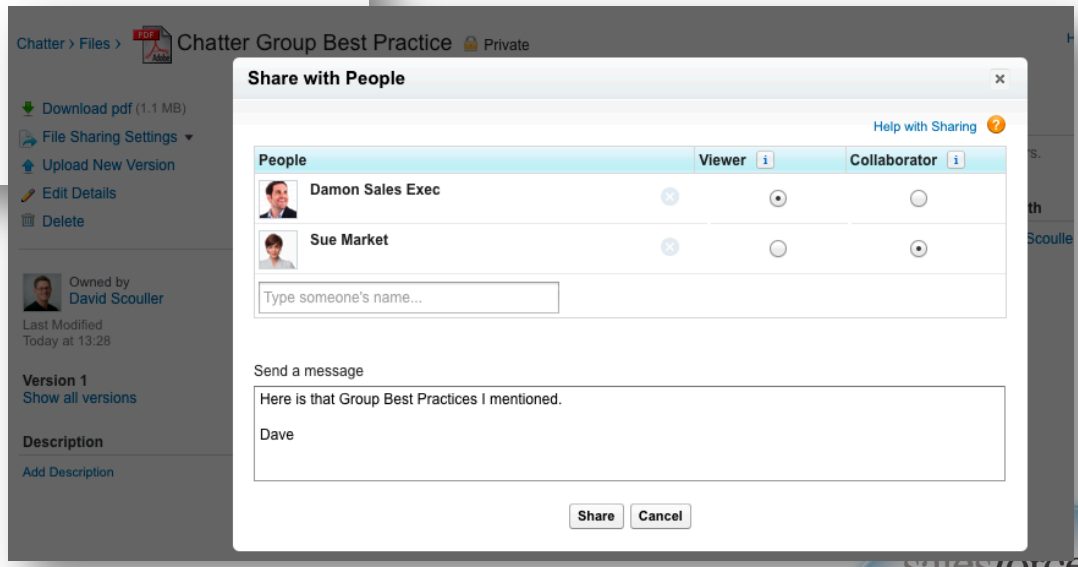
Or you can add a topic right when you're posting the message. Just add the #topic using a hash mark (#), and the system will suggest a topic. Use that or another topic.

Upload Files

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

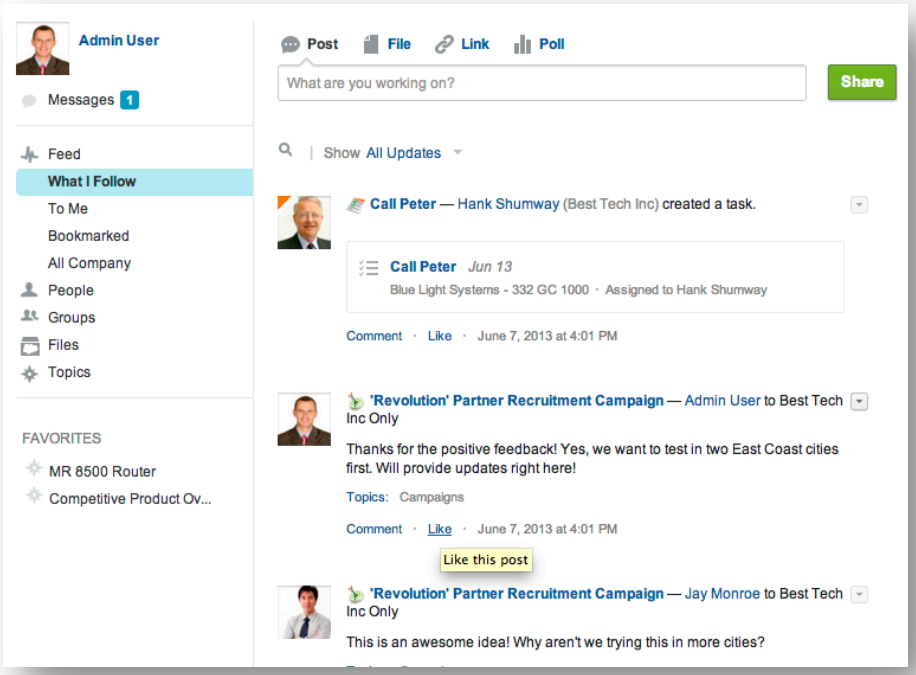






You can decide which groups and people can access or edit the file.

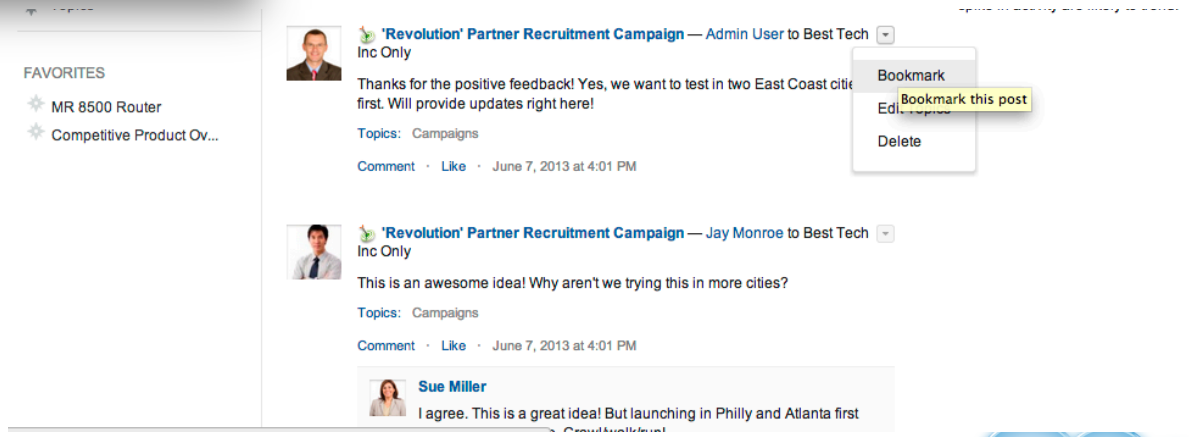
Like and Bookmark Posts



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.



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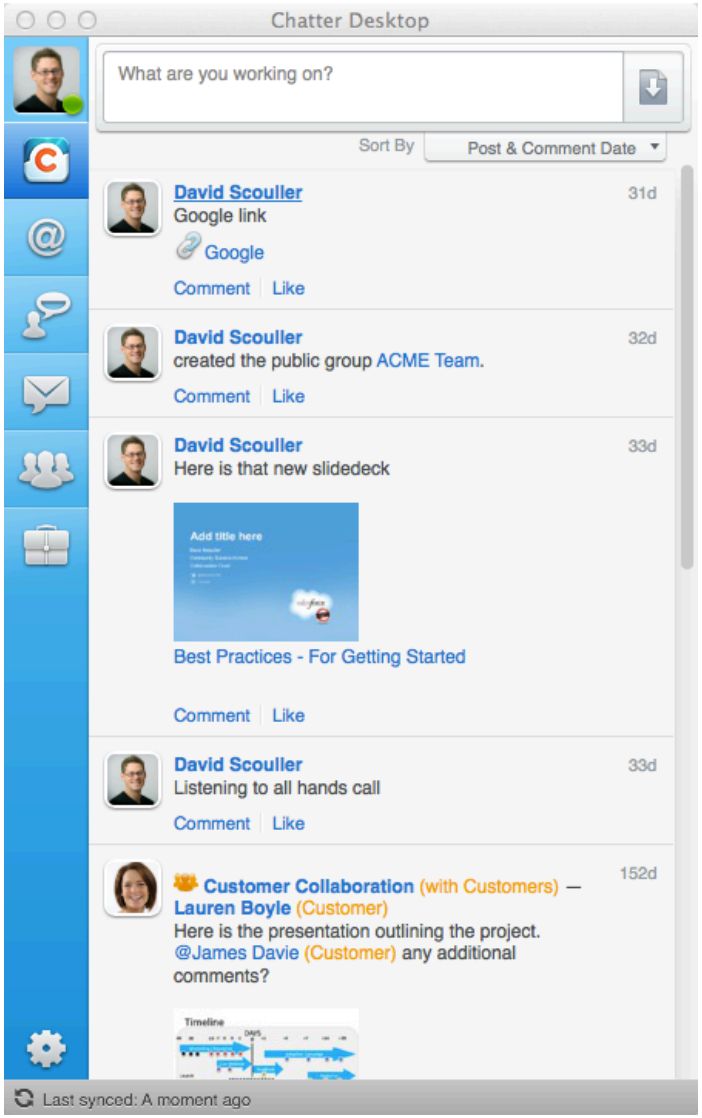
Be Productive Wherever You Are



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

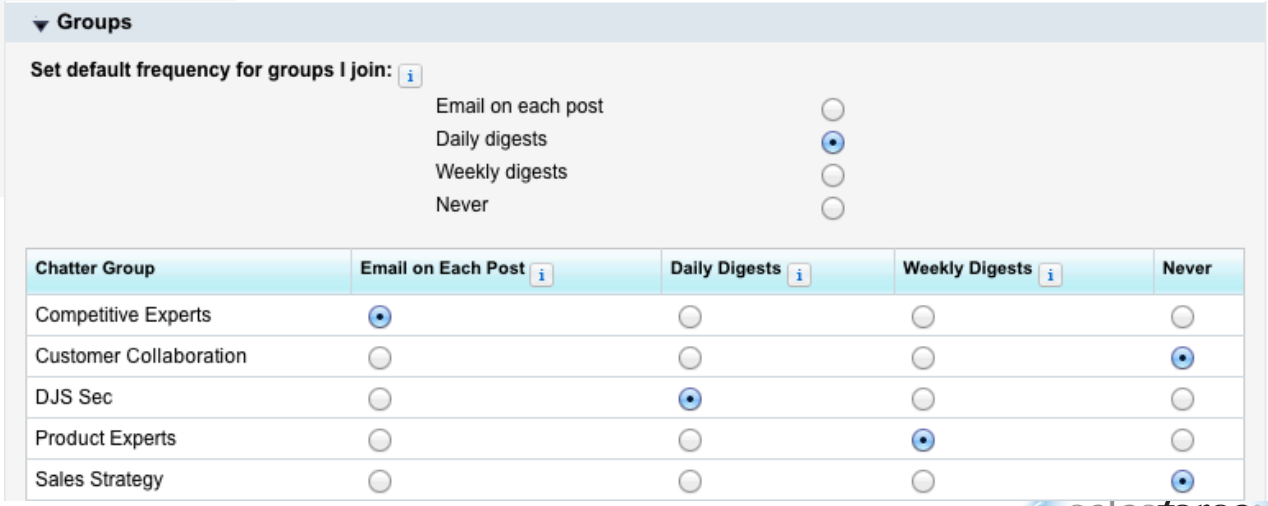
Set Your Email Settings

Navigate to Setup > My Chatter Settings > Chatter Email Settings

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

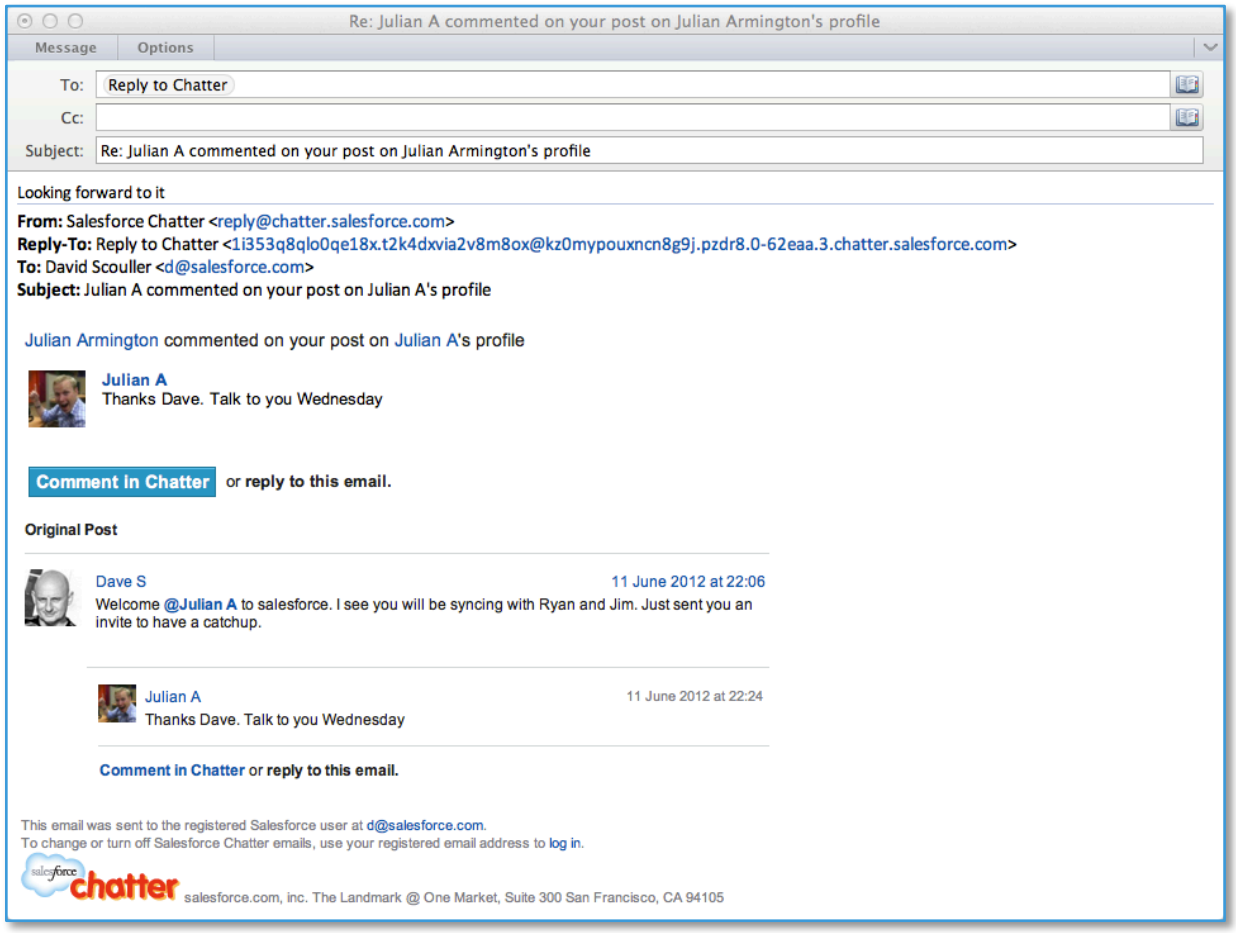
Manage settings per group

- 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



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.



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Anatomy Of An Engaging Post

There's no such thing as a perfect Chatter post. What's 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 receptible 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.

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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

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Why:
Why use Chatter
What:
The basics of Chatter
How:
How to be successful
Where:
Where to post

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

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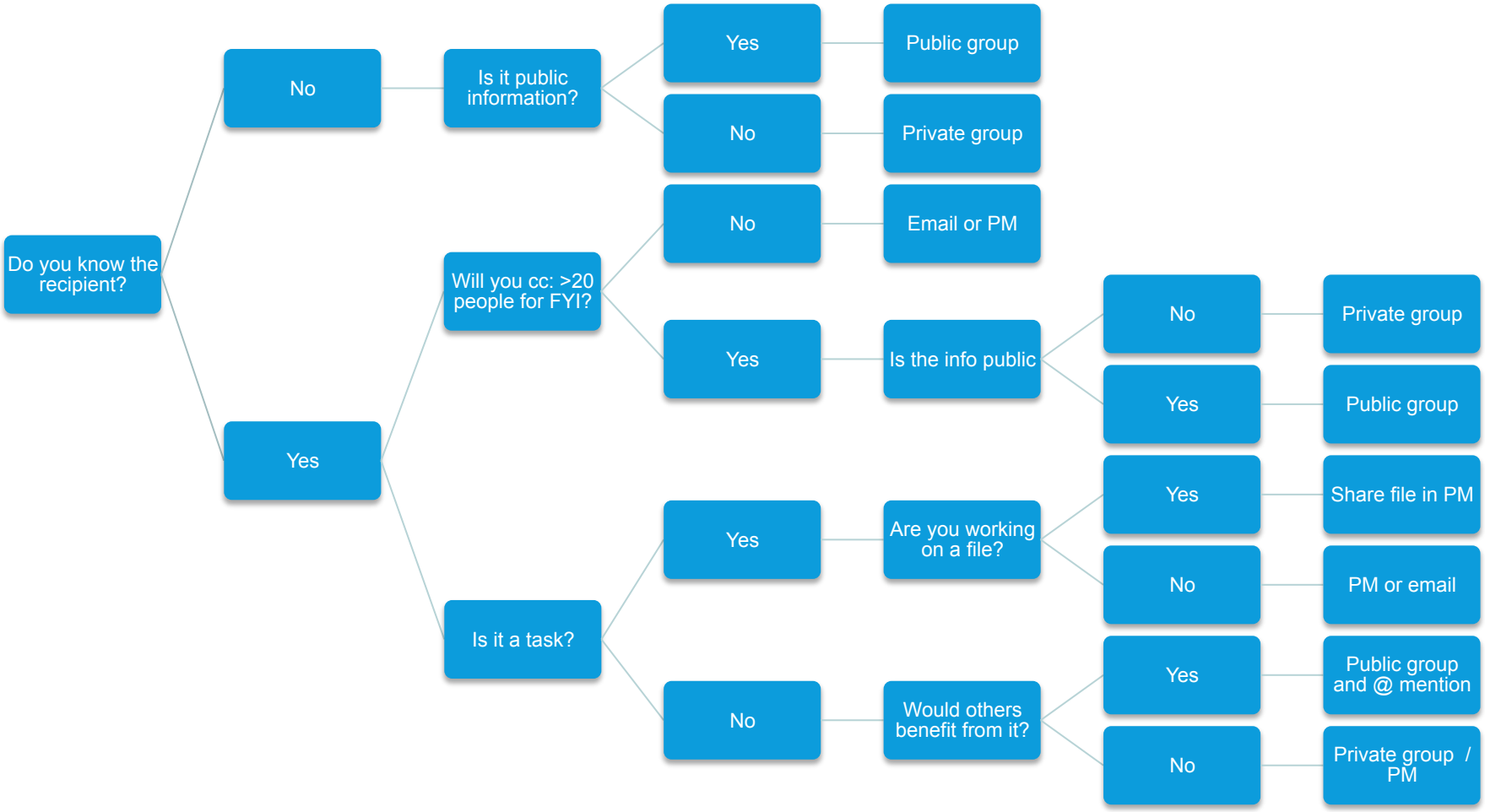
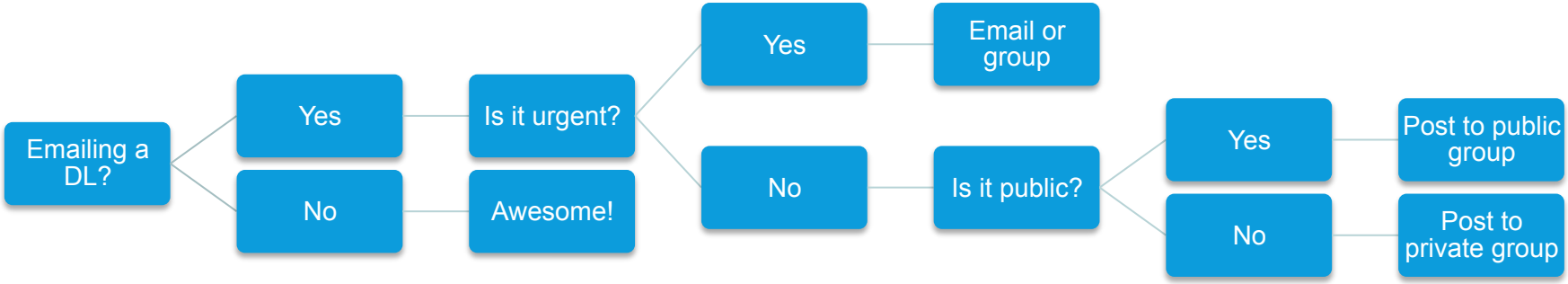
Chatter vs. Email



Chatter vs. Distribution lists



What's Next?

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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

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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

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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

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Thank You