How to Overcome Cultural Challenges to Implementing Salesforce Chatter

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Change is a constant in business. However, every organization has a different appetite for change, with some people readily embracing it, and others genuinely uncomfortable with it. Introducing a new technology is no exception. Implementing Chatter successfully is key to achieving a high user adoption rate, and a high user adoption rate will help maximize ROI with your Salesforce investment.

Understanding your organization’s resistance to Chatter can help you plan your launch in a way that minimizes the pain of change while maximizing the benefits – such as higher levels of collaboration, improved communication, and a reduction in email.

**CULTURAL CHALLENGES**

Based on my experience, three of the most common cultural challenges to implementing Chatter are:

**Technology FUD (Fear, Uncertainty, Doubt)**

Chatter is likely a new thing for your users. Some people are very comfortable with social networking tools (Facebook, Twitter, Google +) while others have had no exposure. The thought of using a tool like Chatter might make them uncomfortable, causing FUD. They may not even be comfortable saying this, but their concerns must be addressed. A well thought out communication plan that will familiarize users with social networking tools and chatter will go a long way towards mitigating their concerns.

**Mob Rules**

Many executives become nervous thinking about the fact that they cannot control what people say on Chatter. Sure, they can offer best practices, with “How To” and “How Not To” use Chatter, but ultimately, the crowd controls the conversation. This is a common concern, and a real one. “What if everyone starts bashing a new corporate policy? What if we turn on Chatter and it becomes a flame war? What if a negative conversation snowballs out of control where everyone can see it?”

An important thing to keep in mind is that the conversation is probably already happening. By having it in Chatter, leaders are aware of the conversation earlier; and are better positioned to respond and control messaging. Using Chatter to respond to a hot topic means everybody gets the same answer at the same time. This actually goes a long way towards eliminating miscommunication and “telephone game” type of misinformation.

**Communication Overload**

Another common concern is that it is yet another communication channel demanding attention. Most people don’t leave at the end of their workday with an inbox count of zero. Some people are genuinely overloaded, and the thought of having to respond to Chatter posts on top of email is somewhat overwhelming. However, it is useful to point out that implementing Chatter often reduces email volume through crowd-sourced answers, and sharing of files.
PLANNING FOR CHANGE

A communication plan is key to addressing cultural concerns of your organization. You should think of it as a mini-marketing plan. The goal of the communication plan is to build awareness of Chatter, create excitement, and set expectations. You should plan for several messages sent on communication channels that work best for your users, with each message building on the previous one.

To be effective, your communication plan should do the following:

- Alleviate questions and concerns – Use timed messages that go out regularly leading up to the launch date
- Make a big deal out of it – Chatter has the power to transform
- Have an impact – Messages should come from an Executive sponsor to stress importance
- Educate users – People want to know how they will use Chatter to better accomplish things they do today

Among the topics you should address in your communication plan are:

**Set a Date**

Having a planned date for going live with Chatter will provide a goal, and make the communication plan effective. People want to know when, not just what.

**Define the Users**

Typical groups are Sales, Marketing, Customer Service, Sales Operations, Accounting, Executives, and IT. Each of these may have distinct sub-groups. Once you’ve identified the major user groups, think about how they might use Chatter to develop use cases.

**Define Use Cases**

Thinking about each group, list how they will benefit from using Chatter. There will be universal use cases that apply to all users, and also use cases specific to a particular group.

*Example: For Marketing, a private Chatter group can be used to securely brainstorm a new product marketing strategy. File sharing, and collaborative creativity can be securely shared across geographically diverse team members*

**Define Chatter Groups**

Think about some existing groups in the organization and plan to pre-populate Chatter with these groups at launch. Keep the number of these groups to a minimum – seed Chatter with these key groups and let the users create other groups organically as they need them. The groups they create will be the ones they need.
CREATE QUICK REFERENCE GUIDE (QRG)

There are a lot of components to Chatter. In its simplest form it is a conversation unfolding, which is easy to understand. But setting up a profile, understanding the security around what is visible and what isn’t (think public versus private groups) may not be obvious to most users.

Create a QRG that you can share with the users as part of the communication plan. This allows the users to digest the guide beforehand, which will give them time to ask questions and ultimately be more successful at launch. Consider covering the following topics:

- Global Search
- Following people, and other objects
- Security
- Conduct – Appropriate / Inappropriate usage
- Groups
- Files
- Bookmarking
- @mentions and #hashtagging
- Email settings
- Desktop and mobile Chatter – where/how to get it and install it
- Profile setting
HOST WEBINARS

Host a webinar prior to launch to demonstrate Chatter and take any questions. Use the dialog to modify the QRG if necessary.

On launch day, host two webinars so all users can attend. Demonstrate Chatter, using the Quick Reference Guide as your agenda. Open the session to Q&A. If needed, consider holding the webinar each day for a week.

POST LAUNCH

After launch day, efforts should shift to monitoring usage and promoting adoption.

Monitor

- Salesforce has a great Chatter Dashboard application on the AppExchange. Install and use this to measure usage and trends.
- Have appointed Chatter Champions, who are responsible for evangelizing Chatter and monitoring post content. Instruct them to guide the users on proper usage, and proactively reach out to users that haven't set up their profiles or are using Chatter inappropriately.

Nurture

- Gamifying Chatter usage can increase adoption (Gift card to the first 20 users that complete their Chatter user profile)
- Be sure to work with executives to ensure they have set up their profiles with a profile picture, and have them welcome new employees in a Chatter post. Executive buy in is obvious when they are using Chatter and not just talking about it.

While this might sound like a lot of work to implement something that is as easy as riding a bicycle, it is worth the effort. Before long, you'll have a pile of training wheels in the garage and your users will be exclaiming, “Look Ma, no hands!”
AUTHOR

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Dan is an expert with the Force.com platform, including Sales Cloud, Service Cloud, Chatter and system integrations. He has a strong record of translating complex business processes and requirements into CRM solutions that solve problems and delight clients.

He earned a Bachelor of Business Administration with a minor in Industrial Technology from Baker College.

In his spare time, Dan enjoys playing blues harmonica, mountain biking, gourmet cooking and playing chess.

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