



Implementation Innovation: Leveraging Social Media to Drive Adoption and Collaboration

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Social media is pervasive in our lives and is often a blend of both our business and personal worlds.

Social media is about interaction: we tweet, share, like, and comment. These interactions are not only providing a new standard of communication and replacing vehicles like email or phone calls, they're also creating a new way to connect, reaching a much larger audience with an instantaneous feedback mechanism. The following is a case study journey where we harnessed the power of social media to create a real-time community for training and support by providing the following benefits:

- **Reduced implementation time** — from the industry standard 10 months to less than six weeks
- **Speed of adoption** — 94 percent in the first week and maintained in the mid-90s since release
- **Cost savings** — eliminated the need for a \$35,000 training budget
- **Improved confidence and professional development** through greater collaboration across markets and sales channels

HERE'S THE STORY ...

To adapt to environmental changes, a cloud and communications services company was launching a redesigned sales model for their largest outside sales channel. However, the existing sales automation tool, built on a legacy on-premise CRM, was not designed to support the new process and would require significant effort and prioritization over other

in-progress projects to make the needed changes. In the absence of an automated system, an Excel-based spreadsheet was proposed to manually track the sales activities and support the redesigned model.

The company was already under way with a Salesforce.com (SFDC) implementation across all sales channels, but the outside sales channel launch was still in the planning phases with an estimated launch date several months out. The SFDC Project Lead ascertained the need to move quickly and be nimble to leverage SFDC to support the launch of the new sales model, and had committed to implementing phase one of the CRM tool in just four weeks. This fast decision making is an example of being reactive without losing focus. Launching the two initiatives together made sense because Salesforce.com was the best tool to support this new business process. In addition, we could capitalize on the excitement and momentum to improve adoption of both the new sales model and the new technology.

Shortening our timetable was risky and required innovative thinking and creative solutions paired with discipline and planning. We created a “war room” with a cross-functional team comprised of eight staff members from IT development, application support, sales operations, and training, who manned the feed during working hours across four time zones so that responses could be real-time. Being in close proximity enabled our team to look up from what we were doing and ask a question, share an idea, or validate information without delay.



Dos and don'ts when implementing social media as a change accelerator:

Do ...

... create a specific group for the launch help, so launch questions are not mixed in with general discussion and collaboration. This also provides a forum to freely ask questions without feeling embarrassed or exposed to other users of the platform.

... respond promptly so it feels like a conversation instead of a virtual black hole.

... have monitoring teams sitting together to ensure consistency of responses and eliminate duplicate efforts when chasing down answers.

... reference existing training materials when responding to questions and remind teams to search historical posts so users know the resources available to them once real-time support ends.



Our primary concern was minimizing risk and driving adoption without compromising the tight deadline to support the new sales process launch. Doing so meant we had to rethink our training plan because of the reduced time available to develop training materials. This drove the team to find a creative solution to successfully transfer knowledge to the new users. In lieu of robust training, the team decided to provide the real-time virtual “war room” environment via Chatter — Salesforce.com’s native social media platform — to provide instruction, coaching, and immediate responses to questions from the field.

This was an exciting and new way to use Chatter and a creative way to introduce the sales force to a complex tool using methods that were familiar to the channel’s social-savvy demographic. We set up a Chatter group specifically for help requests and monitored it throughout the day, every day, for the first month. We knew that enabling the field to reach our team easily would help them feel as if they had subject matter experts by their side. The managers were able to ask questions while they were training their reps if they encountered an issue, or didn’t know how to respond to a question from their team. Since Chatter also has a mobile application, the reps could reach us with a question while they were in the field making sales calls. We aimed to boost their confidence by responding and solving problems quickly.

The sales reps were encouraged to engage with Chatter not just as a support tool, but also a great collaboration tool across markets and sales channels. Chatter feeds enabled the reps to reach product and technical resources faster and more efficiently than by phone or email to help them close a deal. In addition, Chatter posts are searchable, so the users were able to see if their issue had been discussed previously by others. Within the first few weeks, we saw examples of team members providing tips to help one another prepare for a sales meeting, reaching out to get more technical specifications to better serve the customer, and sharing success stories. This low cost/high impact tool enabled us to communicate with and connect people across sales channels and markets in real-time.

Don't ...

... make social media the only outlet for help and support — additional training is needed, especially to capitalize on different learning styles.

... be afraid to pick up the phone — typing back and forth can sometimes add to the confusion.

... always be the first to respond — this is a hard balance to strike, but fostering collaboration across the teams is part of building a lasting communication tool.

The support that the sales people received prior to going live, and in the days following roll-out, jump-started the organization's use of the tool and resulted in significantly faster take-up and use of the new sales process. The acceleration of the launch by using this strategy cannot be overstated. Industry standard for a full CRM implementation is ten months, yet we were able to implement Salesforce.com for the largest sales channel in less than six weeks. Adoption reached 94 percent in the first week and remained in the mid-nineties long after release. The feedback from the field was positive and our launch statistics demonstrated just how effectively Chatter support was used. Within the first 24 hours of launch, a rep was able to use the collaborative nature of Chatter to get feedback across markets, channels, and even pull resources from product and marketing into a discussion to help him close a deal. On the first day, the Launch Help Chatter Group received 109 comments on 49 unique threads, which represented almost 40 percent of all Chatter posts logged that month. This tool became a focal source of information and a great point of connection and communication.

Our use of Chatter social media as a method to deliver training and support is truly an example of the old adage, "*Necessity is the mother of invention.*"

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