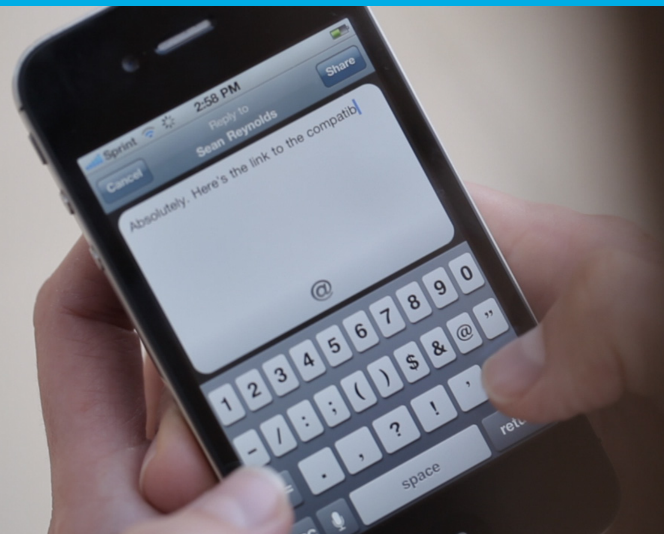
5 WAYS TO BECOME A SOCIAL ENTERPRISE:

SALES EFFECTIVENESS

Sell as a team by leveraging the expertise in your company to close deals faster. Chatter gives you powerful ways to tap into the intelligence of your organization and make the sales process more social, all in the context of your business. Here are the top five ways Chatter can help you take your sales effectiveness to the next level.



1: Get answers fast

CREATE GROUPS FOR EACH MAJOR PRODUCT OR SERVICE
Experts should share product information—whether it's technical, strategic, or sales-focused— n one group. Use naming conventions so groups are easy to find (i.e. Product: Widget A, Product: Widget B).

SHARE SALES CONTENT
Post documents like pitch decks, customer success stories, objection handling presentations, and other relevant materials in product groups. Link to essential files and info in the left sidebar for quick reference, and let the social intelligence engine recommend files for reps to follow.

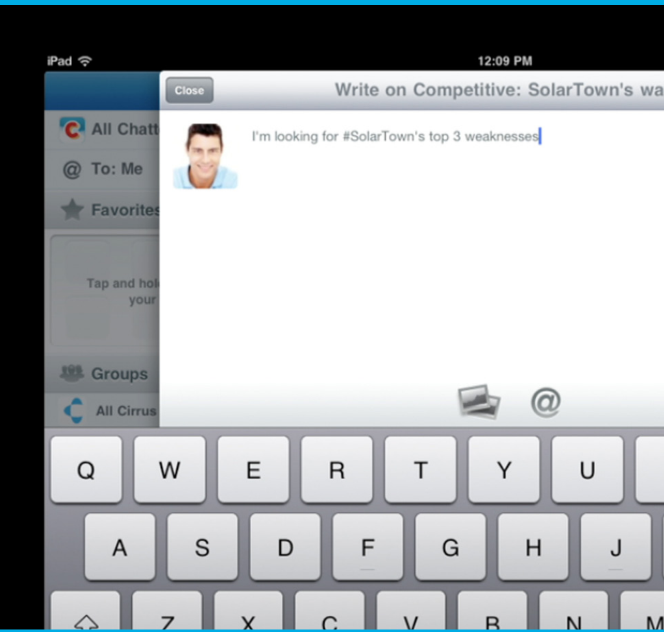
CROWDSOURCE FOR ANSWERS AND LOOP IN EXPERTS WITH @MENTIONS
Post questions to the broadest relevant group, @mention the people who can point you in the right direction, and get answers faster.

2: Gather competitive intelligence

USE #HASHTAGS TO FLAG IMPORTANT INFORMATION
Create #hashtags for competitor information and make it searchable. When sharing competitor stories, just add "#CompetitorX" to the comment. Trending #hashtags let reps see what matters now.

GATHER, SHARE, AND DIGEST COMPETITOR INTELLIGENCE, ALL IN ONE GROUP
Use naming conventions for competitive groups (i.e. Competitive: Competitor X, Competitive: Competitor Y). Employees can find the right group simply by searching the term "Competitive."

DESIGNATE AN OWNER OF THE COMPETITIVE GROUP
Competitive experts should manage community knowledge. They curate all relevant insights across the company in a single place, adding additional thoughts or research where needed.



3: Sell as a team

CREATE DEAL ROOMS

Set up private Chatter groups to function as virtual deal rooms. Team members can collaborate, share files, create meeting agendas, and strategize to win the account.

CREATE REGIONAL AND SEGMENT SALES TEAM GROUPS

Align your regions (West, Midwest, East) and segments (SMB, Mid-Market, Enterprise) to help foster networks and easily share information, best practices and files. When reps look at a file, they can see similar files being followed by peers.

LOOP IN PRODUCT EXPERTS AND MANAGERS WITH @MENTIONS

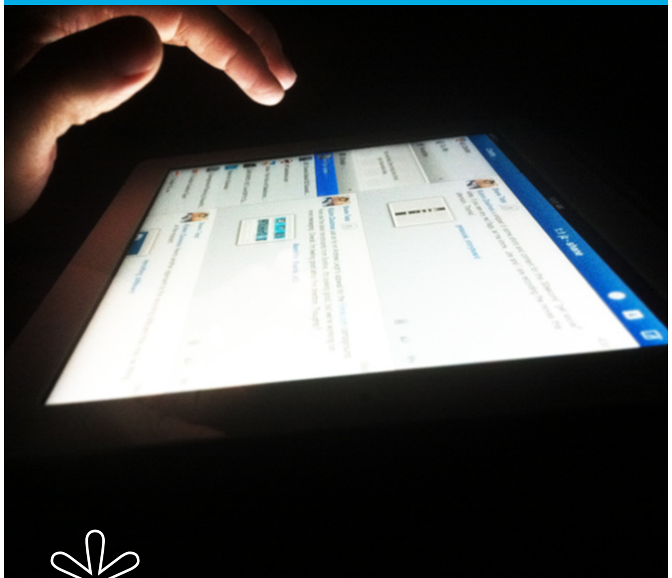
@mentions are a great way to get someone's attention. Quickly loop in product experts to answer questions, ensure that team members and executives are on the same page, and alert colleagues when you post an important new file.

ANNOUNCE DEAL WINS AND SHARE BEST PRACTICES WITH #HASHTAGS

Create deal win conventions (#DealWin) that help teammates share and find winning strategies.

SHARE SALES REPORTS AND DASHBOARD COMPONENTS

Post dashboard components to profiles or feeds so employees can have conversations around the data. Schedule dashboard updates so you can be sure to stay notified.



Additional best practices:

ENHANCE PRODUCT AND PRICING COMMUNICATIONS

- Create a "Pricing" group with links to the important pricing documents.
- Post new product communications in an "All Sales" group.

ACCELERATE ON-BOARDING

- Create new hire groups where reps can ask "newbie" questions in a safe environment.
- Place the latest training materials in new hire groups so they're easy for new employees to find.
- Distribute "who/what to follow" lists to guide new hires to the right groups, people, and assets. Then let the recommendation engine do the rest.

SALES MEETINGS AND TRAININGS

- Create public groups for offsite meetings such as sales kickoffs and trainings.
- Encourage real-time feedback during training sessions to shape the event and address questions.

4: Get real-time deal updates

FOLLOW HIGH VALUE OPPORTUNITIES

No matter where you are, updates are pushed to you in real time, across all devices. Reps should follow every one of their accounts and opportunities. Managers may want to run a report on high-value opportunities and follow only their highest priorities.

COLLABORATE IN THE CONTEXT OF YOUR OPPORTUNITY AND ACCOUNT RECORDS

The Chatter feed on account and opportunity records helps the teams (sales, support, service, etc.) collaborate. Stay updated on account activities, like open support tickets or quote changes.

SUBMIT APPROVALS

You can take action on any approval process from within your Chatter feed. Sales discounts, hiring decisions, and vacation requests can be approved within Chatter for greater context.

GET AUTOMATIC NOTIFICATIONS

Whether a big deal is won and closed, or a new opportunity uncovered, you can automatically get notified using workflows. For example, congratulate your reps as soon as they land deals.

5: Collaborate directly with your customers

CREATE A PRIVATE, INTERNAL GROUP TO ADDRESS CUSTOMER NEEDS

Create a strategy within your organization that helps you determine your plan for customer engagement.

INVITE CUSTOMERS, PARTNERS AND PROSPECTS INTO YOUR PRIVATE GROUP

Engage quickly with individuals outside of your company in a customized environment.

SHARE FILES IN A SECURE ENVIRONMENT

Guest users you invite can only see the conversations, files, and people inside the private groups you invited them to.

“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.COM

FIND THE INFORMATION
YOU NEED 52% FASTER.

salesforce + You = Like

SALESFORCE.COM/CHATTER/SALES