Published on *University of Colorado* (https://www.cu.edu)

Rollout Chatter in Salesforce [1]

September 26, 2021 by Melanie Jones [2]

Salesforce Chatter groups are the least amount of effort while providing the most amount of value. Salesforce Chatter groups can be launched quickly to address urgent notifications like outages or other critical situations. They can be expanded in both breadth and depth, meaning more Chatter groups for different segmentations and content (more frequent posts or enriched content). Some Chatter Group benefits include:

- **Having a real-time user list for anyone to communicate quickly**.
    - Users can be added to relevant Chatter groups during provisioning or batched regularly. Define different groups as desired, this might mirror access to certain tools, varying roles/levels, or an entire implementation.
- Chatter is great for **time-sensitive messages.** Users most likely need to know something immediately and in detail while that same message can be summarized to leadership in the following regular communication. There should be a clear, common thread across communications that can be achieved by reusing content, just presented differently.
- Using Chatter to communicate **helps users become more familiar with Salesforce**.
- The open conversation **educates other Chatter group members who don't even partake** in the conversation. You'll notice a count for how many people saw the post.
- **Rare outages** in Salesforce make it a great tool to communicate unexpected downtime in Marketing Cloud (or other platforms).

Rolling Out Chatter

General Recommendations

- **Set clear boundaries** for what Chatter is for and what it is not.
    - At eComm, Chatter is not used for 'tickets' asking for something to be added to your account or for typical troubleshooting. The system team (Chatter Group Manager) are the main individuals posting to the groups, including timely communications such as outages, notices of urgent message delivery, a reminder for a project deadline, etc. Group Members respond to those posts and are welcome to initiate posts for non-urgent questions to the group to collaborate or brainstorm.
- It will take formal communications and sessions to initiate using Chatter and requires constant nurturing. eComm initially launched Chatter for notifications [3] and later took it to the next level with 'collaborative communities [4]'.
- If you do not want members to be able to create new posts and instead be limited to

responding to posts made by those who manage the Chatter group, configure it to be 'Broadcast Only'. [5]

Content

- **Set a regular, minimum cadence for posts to build engagement.**
  - **Tip & Tricks:** Provide Tips - set regular cadence. Use recent questions/tickets for topic ideas.
  - **Successes:** Promote user/customer successes - let them tell the story and back it with metrics and how-tos for others to adopt.
  - **Analytics:** Find a few easy metrics that pertain to the audience to regularly communicate (even better if it's a Salesforce Report or Dashboard). Highlight those key measures to show progress and call out individuals who rise to the top.
- Seize the **opportunity for users to help fellow users**.
  - This removes the burden on the support team to respond quickly and helps build a transparent community. Reallocate time to monitor the group and only insert yourself if a correction is needed.
- Take the opportunity to **reiterate best practices**. For example:
  - Let's say a user submits a ticket regarding a data issue on a Monday. In addition to responding directly to the user via email saying, *"Good catch, we will fix it on DATE. I'll let others know via the <Chatter Group> (in case you want to change your Chatter Notification frequency). Link to: Data Dictionary"*, put in the Chatter group as well. Post *"Thanks @user for <submitting a ticket> regarding the data issue. We will resolve it on Wednesday and let you all know via a comment on this post"*. Come Wednesday, comment on the initial post that it's complete (in addition to emailing the user directly).
- **.Prioritize rolling out Chatter for true Salesforce users while you grow into more formal communications to those who don't access Salesforce (like leadership).** Users most likely need to know something immediately and in detail while that same message can be summarized to leadership in the following regular communication. There should be a clear, common thread across communications that can be achieved by reusing content, just presented differently.

User Experience

- Users can set notification frequency [3]. Include instructions in the initial email (including 'formal' invitation if sending, group description included in the automatic email notification from Salesforce when added as a member to a Chatter group, and resources for users to access) on how to update.

Admin/Manager Tips

- Add members in mass [6] during the initial rollout.
- Naturally, **super users or influencers** [7] **will start being identified**. Leverage these involved users to lead change - this might involve road mapping future enhancements, providing use cases, testing, sharing success stories, posting in Chatter regularly, etc.
- Review Dashboards to identify 'Super Users' (most engaged in Chatter and likely to influence others).

- Polls & Announcements
  - Trailhead: Create Polls, Posts, and Questions [8] | 15 min.
  - Salesforce Article: Announcements [9]

Related Wikis

- eComm Notifications (Chatter) [3]
- Collaborative Communities [4]

Display Title:
Rollout Chatter in Salesforce
Send email when Published:
No

Source URL:https://www.cu.edu/blog/ecomm-wiki/rollout-chatter-salesforce

Links
[1] https://www.cu.edu/blog/ecomm-wiki/rollout-chatter-salesforce [2] https://www.cu.edu/blog/ecomm-wiki/author/39 [3] https://www.cu.edu/blog/ecomm-wiki/ecomm-notifications
[4] https://www.cu.edu/blog/ecomm-wiki/collaborative-communities
[5] https://help.salesforce.com/s/articleView?id=sf.collab_groups_broadcast_about.htm&type=5
[6] https://help.salesforce.com/s/articleView?id=000384464&type=1
[7] https://cuecomm.lightning.force.com/lightning/r/Dashboard/01Zf4000000foECEAY/view
[8] https://trailhead.salesforce.com/content/learn/modules/chatter_basics_for_users/chatter_basics_for_users_post
[9] https://help.salesforce.com/s/articleView?id=sf.collab_group_announcement.htm&type=5