From: www.cio.com

Salesforce.com Chatter Teaches Lessons About Social Networks

– David Taber, CIO

October 04, 2010

Earlier this month, at the CIO Perspectives event in San Francisco, I got an ear-full from attendees about social networking systems. How should they be harnessed? Should they be allowed in the Enterprise? How do you make them more than just a waste of time?

Why Salesforce.com Chatter Matters
Salesforce.com Unveils 'Chatter-Enabled' Apps

Most of the interest was in applying Facebook-like interfaces and lightweight apps built on Adobe (ADBE) AIR. One of the sessions gave a really great example of federated information in the Grapevine app demo.

But that's mainly a DIY world: apps that can sensibly be built on new frameworks and APIs. There's certainly a lot to be learned there. But there's also much to be learned about enterprise social networking from Chatter, the collaboration system that's soon to be defaulted "on" in Salesforce.com.

Given the size of Salesforce.com, Chatter is likely to be dominant in business settings. And at their annual user conference, Salesforce is going to be enabling Chatter for as many as 20,000 attendees, surely the largest social networking session ever congregated in a single location. In doing this, they're likely to break some new ground you can profit from, even if you never buy their product.

Social Lessons

There's still a lot to learn, but it's been clear from the beginning that some new constraints on communication are needed when using social networking in a business environment. The goal of Chatter is to inform in a non-intrusive way, replacing maybe 10 percent of internal e-mails with a kiosk style of information disbursal. For that to work, IT leaders need to provide guidance on the content and style of communications. Users shouldn't be Tweeting on Chatter, and they shouldn't be making Facebook posts either. To keep the signal-to-noise ratio high, users need to post pithy content, not idle messages. Users also need to know *where* to post, particularly in a system with lots of business objects.

On the receiving end of Chatter, users need to be selective about what they subscribe to. Managers can be quickly overwhelmed with inbound messages if they don't trim the number of feeds to the bare essentials. There will be a lot of experimentation with automation around the subscription and filtering of Chatter feeds, and I expect that someone will come up with a set of Chatter profiles that feed the habits (and attention spans) of managers and executives.

At a broader level, the social network needs to be adjusted to the politics and information-sharing habits of the organization it's being deployed into. In Facebook and Twitter, nobody really worries about users who may be politically competing with each other. In an enterprise environment, the Chatter designers couldn't ignore that reality.

Technical / Security Lessons

At the core of social networking is an operational truth: users cannot be given a whole lot of leeway and flexibility if the system is going to really scale. Of course they can be presented with switches and pick lists for features, but there must be hard limits.

In Facebook and Twitter, nearly everything is out in the open by default. Locking things down requires explicit user action. In contrast, Chatter needs a pretty tight security model, as it provides visibility into

all kinds of CRM records. The compromise is that a user's personal profile and wall are open, but all system objects are by default locked down. Even when users gain access to a business object (such as an opportunity or a case), the system's security and sharing model is rigorously followed.

Another big difference between Facebook/Twitter and conventional enterprise applications is the type and duration of user sessions. Social networking usage tends to be intermittent and from mobile devices: the average Facebook user is on the social network about 25 minutes a day. Access tends to be event-driven, to post a message or to look for an update about something the user is interested in.

Contrast that to classic CRM access, which is more modal:

• Power users who are on several hours a day via a browser, motivated by the need to access and update specific records.
• Road warriors who are on sporadically via their mobile device, typically searching for specific data points or status changes.
• Executives who log on infrequently via a browser, looking for dashboards, reports, or global updates.

Because Chatter mixes classic CRM with social networking, we'll all be discovering some new patterns in access, user personas, device preference (watch out for iPads!), and document storage.

Usability Lessons

The Chatter development team talked with the folks at Twitter, Facebook, Google (GOOG), and elsewhere to trade ideas about user interface. It goes without saying that simplicity and intuitiveness are the first steps towards user adoption. But it's not just a nice look and feel.

The UI must offer some new value to users. In the case of CRM, this meant providing new group / workspace metaphors that allowed users to collaborate on a project or solving a problem, rather than just inspecting an abstract record. It meant providing a different way of sharing document drafts and commentary. And it meant providing a publish/subscribe model for status updates that could actually reduce the need for internal e-mails over time.

Taking the historical perspective, it took us years to truly integrate e-mail into the way we communicate and manage information. In the process, users changed e-mail (with attachments, better tools, and more complex policies) as much as e-mail changed user habits (the way we spend our time and organize information). This same process is just starting with social networking in the enterprise, and the evolution on both sides will take a while.

David Taber is the author of the new Prentice Hall book, "Salesforce.com Secrets of Success" and is the CEO of SalesLogistix, a certified Salesforce.com consultancy focused on business process improvement through use of CRM systems. SalesLogistix clients are in North America, Europe, Israel, and India, and David has over 25 years experience in high tech, including 10 years at the VP level or above.

Follow everything from CIO.com on Twitter @CIOonline, and the CIO.com Facebook page

© 2010 CXO Media Inc.