



Cutting Through the Inbox with Zurmo Social Collaboration Tools

There are very few truths in life. According to Ben Franklin, "In this world nothing can be said to be certain, except death and taxes." But the Jack of all Trades died before email entered the mix. If he were around today, I am certain he would have something to say about it. I'm pretty sure Ben wouldn't like email very much. Does anyone? How often do you hear a coworker say how thrilling it is to sift through a bloated inbox after a week in the Bahamas?

According to a study conducted by CSO Insights, 40% of sales representative's time is spent interacting with customers. That leaves 60% - or 3 out of 5 business days -for dealing with ... what exactly?

Do you think any of this time is consumed by a flooded inbox, bad communication, and running around searching for information? What if we could provide a better system that would make a little dent in the time being wasted by sales reps? What kind of an impact could a better system have on non-sales people who are also customer facing?



- 40 % of sales representatives' time is spent with customers
- The other 60%, which equates to three days per week, is spent **on non-sales related activities.**
- "Organizations that can increase the amount of time sales reps interact directly with customers—even by a few percentage points—should be able to increase the number and size of deals."

These are some of the questions we were asking ourselves when we started to develop Zurmo. How can our application actually save people time? Another related consideration was how we could encourage users to stay within the Zurmo environment as much as possible without bouncing from window to window, application to application.

Internal Social CRM seemed to be the answer to all these questions. But before getting into that, let's differentiate between Internal and External Social CRM.

To us, External Social CRM is about engaging with people outside the organization. This is done by utilizing social aggregators directly within the CRM and associating social communication with specific

leads and contacts. It's a great way for companies to stay on message and keep track of who is saying what.

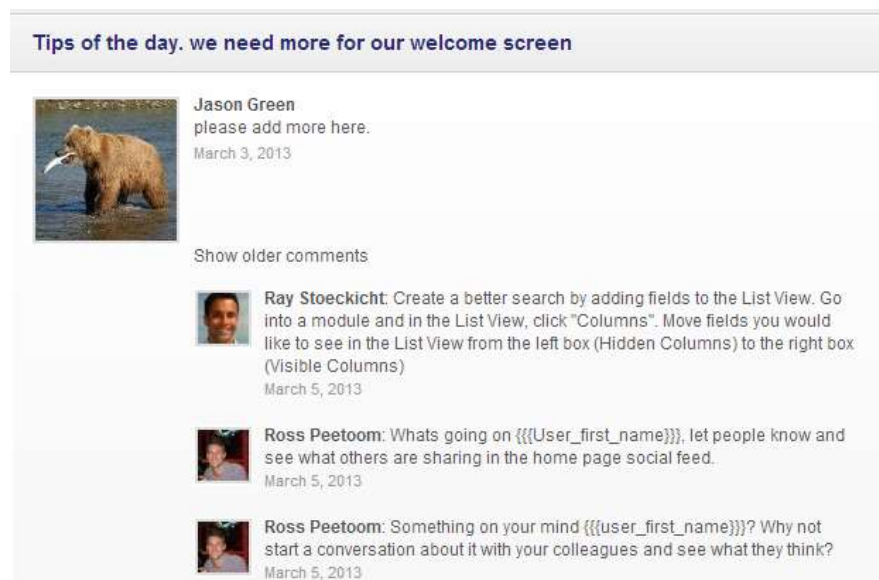
External Social CRM is truly fabulous. But we could only develop Zurmo one step at a time and we had to start somewhere. So where to begin? Internally or Externally? Inside out or outside in? After much consideration, we decided that the bigger issue that should be initially addressed with Zurmo was the need to give back customer-facing employees their lost time. The tweeting believers could wait.

Internal Social CRM is about collaborative communication tools provided within the app among users / employees. In Zurmo, this includes Social Feeds, Messages and elements of Gamification.


By using ourselves as guinea pigs, we took a hard look at the way we communicate internally as an organization.

How much of our inbox clutter could be spared by using Social Conversations within Zurmo? Surprisingly, a lot. So much so that we decided to ban email and use Social Conversations for all internal communication.


Let's look at an example. A suggestion that the Zurmo welcome screen should be beefed up resulted in a conversation with relevant participants. As opposed to what would traditionally result in a over a half dozen scattered emails, this conversation is condensed into one single item that our lead developer can quickly scan.





Tips of the day. we need more for our welcome screen

 **Jason Green**
please add more here.
March 3, 2013

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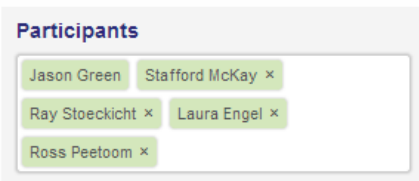
 **Ray Stoeckicht:** Create a better search by adding fields to the List View. Go into a module and in the List View, click "Columns". Move fields you would like to see in the List View from the left box (Hidden Columns) to the right box (Visible Columns)
March 5, 2013

 **Ross Peetoom:** Whats going on {{{User_first_name}}}, let people know and see what others are sharing in the home page social feed.
March 5, 2013

 **Ross Peetoom:** Something on your mind {{{user_first_name}}}? Why not start a conversation about it with your colleagues and see what they think?
March 5, 2013

In our next phase, we'll include a voting mechanism that will allow participants to indicate which idea/comment they like the most. Then highest voted ideas will show first, adding an element that is

even more relevant than timing. This is a method already employed by external social platforms like Disqus. We use it on our project blog and we believe that it is a useful feature.



The nature of Social Conversations is that they are privileged – by invitation only. Like a powwow happening in the tree house and you can only attend if you have the secret password? Well, not quite, but pretty much. Users can be invited at any time when their input is needed. They can opt out when the conversation veers off into a direction outside of their interests. Or they can be booted out by the organizer if their presence is no longer appreciated.

Okay so the advantages of Social Conversations in terms of sensitive collaboration are quite clear. But it can get pretty stuffy up there in that private tree house. And let's be honest – not too social. So how can people communicate in a method that is open to all? Where can we find a ladder to the free-speech soapbox dish in Zurmo and what does it do? The Social Feed is where ideas are born and every CRM user can sing like a canary.



Social Feeds in Zurmo allow users to sing about anything they'd like. Generally, people should use the Feed when they have an announcement to make that could be relevant to everyone, but may not merit an email or a conversation.

Leaving for the airport? Shout it out to everyone. Maybe someone at the office is heading there too and can share a cab. Not likely a piece of information that would be appreciated by 150 recipients, but no one is going to mind it making a brief appearance in the Feed.

Additionally, the Social Feed can – and should – be utilized in reference to specific records. In the example shown here, a sales rep wants everyone to know that he is approaching a contract renewal with an important account. A link to the account record appears directly in his status update. People

with whom he may not normally engage have the option to chime in to offer their two cents. If the plot thickens, a deeper conversation can be migrated over to the Conversations Module.

Lastly, let's touch on how Gamification in Zurmo helps users collaborate. It's important to preface this however by pointing out that Gamification is a much larger topic, bigger than anything we can mention in this article. So we'll focus just on one tiny aspect, using Missions as a collaboration tool.

Missions provide a way for employees to challenge one another in completing a task.



In this example, we see a sales rep is challenging his coworkers to come up with a plan for getting the client (used in the previous example) what they want in order to renew their contract. As this is a support related issue, someone

from the support team will likely take it. It is a great opportunity for employees to take on an initiative, get recognized, and awarded. The beauty of Missions is that they can be open to anyone. Perhaps in this example, the aspiring intern working in customer support will accept the mission. In future iterations, we plan to add functionality that allows multiple people in a group/team to collaborate together in completing a Mission.

The bottom line: **Our goal with Zurmo is to provide a platform where co-workers can exchange information in a timely and intuitive manner that frees up bandwidth that can be allocated towards engagement with customers.** We encourage Zurmo users to do as much as possible within the application beyond the typical CRM use case. Ultimately this results in more effective ways to generate revenue, keep customers happy, and show real value to users who can surely find use of their newfound time. Zurmo is an agile work in progress that is constantly improving through each release. Expect to see us continue with our goal of finessing effective collaboration.

