

Transforming Sales Productivity with Social Collaboration

This powerful new way of conducting business is improving productivity as it provides visibility into valuable customer and market insights.

Executive Overview

To better adapt to changing market conditions, accelerate implementation of effective sales strategies, and provide more solutions for Intel customers, Intel IT and Sales and Marketing formed a team to improve collaboration capabilities and provide individual productivity gains. This team created a scalable social collaboration framework that integrates business systems and provides flexibility for the evolving way employees work. This powerful new way of conducting business is improving productivity as it provides visibility into valuable customer and market insights.

Building on Intel's Advanced Collaboration Environment (ACE) strategy, an existing initiative to transform sales processes, Intel IT implemented a social collaboration platform that enables sales teams to discover content and people, and participate in focused, relevant discussions—speeding decision making. This platform has opened up the collective intelligence of the sales organization.

Technology was only part of the solution. We needed to transform business processes and change employee behavior to fully realize the potential of social collaboration. That kind of transformation required a strong partnership between Intel Sales and Marketing and IT leadership.

The team's approach involved the following efforts:

- Developed a sales collaboration model to understand the obstacles to and opportunities for sharing, as well as discover how to deliver personal value to employees
- Evaluated and selected a social collaboration platform to integrate with core business systems

- Built a scalable framework that promoted asynchronous collaboration and coalesced disconnected content such as emails, documents, and meeting notes into interrelated conversations in a central, logical location
- Engaged employees through proofs of concept and early adopter programs, and provided them with personal productivity gains
- Employed transition change management, which involved executive leadership, a community manager strategy, well-planned communication, training, advocates, and incentives

Social collaboration has transformed the way employees work. By changing the way employees engage with each other—removing obstacles to communication and discovering silos faster—Sales and Marketing can advance opportunities more quickly, make decisions more rapidly, and better understand customer needs.

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BUSINESS CHALLENGE

Intel Sales and Marketing has a number of worldwide teams calling on direct customers, channel partners, and end customers. These teams often need to collaborate on accounts and sales opportunities. In the past, business information was frequently scattered throughout a variety of tools and documents, making it difficult to consolidate and succinctly communicate. A collaboration strategy was needed, and Intel IT and Sales and Marketing formed a project team to develop one.

Such a strategy would provide connections within and across sales teams—both upstream and downstream in the sales process. These new connections would enable sales teams to reach new customers and optimize existing customer potential. The new connections would also improve collaboration between Intel's sales force and product divisions, yielding valuable customer and market insights.

Consolidating existing information onto a single collaboration platform with social interactivity had the potential to solve these challenges. But an effective solution also required executive leadership and a strong partnership between Sales and Marketing and Intel IT.

Business Objectives

The project team focused on four key business objectives. These objectives identified the desired collaboration, goals, and metrics for success.

- **Reach new customers.** With rich customer information available throughout the sales pipeline in the context of customer needs, we can improve awareness of sales opportunities and increase revenue.
- **Increase sales potential.** By connecting people across the organization, we can share knowledge about customers and their needs—improving cross-selling opportunities that result in additional revenue.

- **Improve customer and market insights.** Moving from limited email sharing to focused conversation in collaborative communities takes advantage of the knowledge of thousands of salespeople in the field who understand market trends, competitive threats, and customer information—all of which can improve products, gain access to new technology and markets, and decrease time to market (TTM).
- **Improve productivity.** Giving sales staff easy access to product information, decisions, and meeting notes, as well as customer account information, keeps them focused on high-value activities instead of searching for information.

Technical Objectives

Building on Sales and Marketing's existing Advanced Collaboration Environment (ACE) strategy, we defined the following technical objectives:

- **Integrate with existing tools.** Content in existing systems, such as Customer Relationship Management (CRM), email, and office productivity tools, must be connected to deliver relevant information to employees working on the same accounts in different areas throughout the organization.
- **Ensure security.** The social collaboration platform must support the higher level of content classification that the business functions demand, which includes encryption of data in transit and at rest. The platform must integrate with our existing Enterprise Rights Management (ERM) system and user entitlement to established communities in CRM to allow employees easy sharing with access to information without concern for security.
- **Provide an intuitive user experience.** The platform must foster collaboration in a manner that employees are familiar with—as easy to use as the social media tools employees already engage with in daily life.

SOLUTION

Our solution has changed not only the way employees communicate but also the business processes themselves. The methods used to engage with customers and employees are different today than in the past, and we recognized the need for a solution that can adapt as technology and objectives change. To meet that challenge, we selected our most valuable business functions and optimized them for social collaboration.

It was imperative that we integrate core functions such as CRM, which contains account information and activities. We needed an infrastructure and architecture that allowed us to overlay the business processes and connect the individual functions or groups. This meant implementing a new collaboration platform on the front-end, where information is accessed, that provisions space for sharing when new accounts or opportunities are entered. This approach allows employees to act on information collaboratively while remaining within the primary business process.

Intel IT develops solutions based on business needs. The social collaboration platform required a strong partnership between IT and Sales and Marketing leadership to drive adoption and ensure overall success. We tackled the project as an integrated team, developing a comprehensive collaboration model that has proven it can transform business processes and user behavior and add significant business value. The project spanned 18 months, beginning early in 2012 and launching early in 2013, followed by postlaunch pilots through late summer.

We approached the development and implementation in the following manner:

- Developed a sales collaboration model with use cases
- Built a collaboration framework
- Evaluated several social collaboration platforms and selected the most appropriate platform for our needs

- Conducted proofs of concept (PoCs)
- Deployed an initial production-level version of the platform, using an Agile development process
- Conducted postproduction pilots
- Launched a transition change management (TCM) strategy

Developing a Sales Collaboration Model with Use Cases

We began by conducting brainstorming sessions with senior and veteran sales managers to fully understand the challenges and opportunities of the organization. We identified activities in which sales staff collaborate outside the core processes, such as when working with division partners and creating sales materials.

We then analyzed the business process and developed interaction models that highlighted obstacles to collaboration.

We also traveled to various locations and observed salespeople and their everyday activities. We concluded by researching what other companies were doing in this same area.

COLLABORATION COMMUNITIES

Based on our analysis, we designed a sales model for high-value collaboration ranging from specific tasks to general interaction. This model comprises three types (see Figure 1):

- **Account and Opportunity communities.** These collaborative communities are generated automatically in our Enterprise Collaboration Platform based on account and opportunity names, hierarchy, and permissions in our CRM system. The primary users are sales staff focused on sales-specific activities. These communities are governed by the CRM function and can also include design partners from within our product teams, as well as other stakeholders.
- **Work communities.** These may be formal groups assembled to work on specific issues or informal groups that need to have discussions, make decisions, or collaborate. Work communities are self-forming based

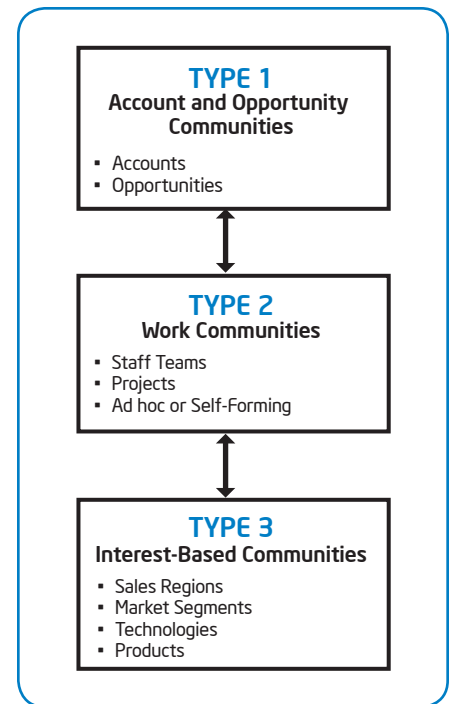


Figure 1. The structure of our collaboration communities encourages high-value, effective bidirectional communication.

on need, with low governance. This type is connected to the other two types for effective bidirectional communication.

- **Interest-based communities.** These groups share common interests, such as geographic location, market segments, technologies, products, or peer roles, and can benefit from understanding what is happening in their area of interest worldwide. Because these communities are large and more formal than other community types, they are subject to a high level of governance and communication management.

For this type, sales teams are connected with product divisions, ensuring that they receive the information needed to effectively sell in their locations. An important benefit of Interest-based communities is that the sales teams return key market insights, such as competitive information, directly to the product groups. The relative value proposition is immense; it can improve market share and products, and reduce TTM.

Before, information was received primarily through email and then filtered through different levels of management to sales staff. The use of collaboration communities eliminates the problem of filtering; when information is posted, members of that

community can respond immediately, and all comments and decisions are available immediately. Collaboration communities enable highly effective communication techniques, such as crowdsourcing, serendipitous connections, and scaled sharing.

Building a Collaboration Framework

The strong partnership between IT and Sales and Marketing allowed us to build a framework that helped us discover silos more quickly. The framework also connected the business across groups, functions, and locations. We designed it to integrate content and functionality from the CRM, security tools, and other office productivity applications with a new collaboration platform, which we had yet to select.

The framework consisted of the following components (see Figure 2):

- **CRM collaboration.** Contacts, accounts, opportunities, and issues
- **Enhanced collaboration.** Virtual communities/social rings, resource library, and “My Activity” feed
- **Subscriptions.** Like, follow, and other social-based activities
- **Content.** Product technical information, third-party business information, financials, email, sales-enabling content, and more

- **Security.** ERM, authentication, entitlement, and encryption
- **Search.** Context-aware search that refines results based on location, group affiliation, or other metadata
- **Mobility.** Ability for the sales force to take advantage of “micro moments” when they update or retrieve information while on the move, such as at the airport or in the car

We debated between integration and velocity. One option was to fully integrate CRM with the social collaboration platform, modifying the user interface for consistency. Another option was to integrate the CRM data directly, while leaving the presentation layer as designed. We chose velocity, deciding to launch the collaboration platform with its original user interface to bring the solution to the business more quickly.

While a number of technical pieces had to be connected, our main goal was to enhance collaboration and quickly allow employees to realize productivity gains. If we had selected a completely integrated approach, the project would have taken much longer. To mitigate concerns about the user interface, we included user-experience requirements in our collaboration platform search.

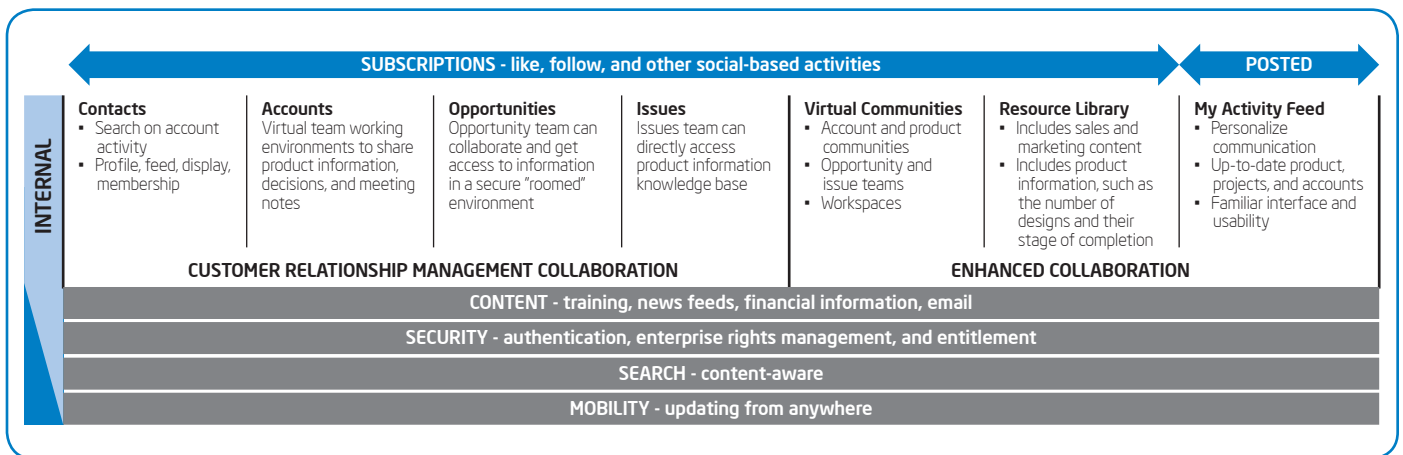


Figure 2. The Intel IT and Sales and Marketing project team integrated information, activities, and business systems into the social collaboration framework for sales.

Evaluating Social Collaboration Platforms

Choosing a platform began with creating a comprehensive requirements list based on our collaboration models and use cases. We conducted a broad market analysis and evaluated multiple suppliers.

We focused on several key areas:

- **Company viability.** Strength and overall health of the supplier and the product roadmap
- **User experience.** Ease of use, clean interface
- **Technology.** Integration capabilities and product features
- **Security.** Encryption, retention, deletion, and purging capabilities

We also talked to third parties.

We narrowed the list of potential suppliers to six based on a ranking system that measured key functionality, such as platform and device support, integration capabilities, worldwide performance, security performance, alignment with common standards, and the ability to define content by security role. We gave each supplier a detailed list of questions tailored to its solution. These questions gave the supplier an opportunity to explain in-depth how its products work while giving us a better understanding of the supplier's strengths and weaknesses.

Based on supplier responses, we invited the top three to present their solutions in person. Before making the final selection, we conducted a PoC with the most likely candidate.

Conducting Proofs of Concept

To ensure that we met the business objectives as well as all technical requirements, we split the PoC into two projects that we conducted in parallel. The first project engaged the sales organization in testing the solution from a business process perspective. The second project tested the solution's technical viability.

BUSINESS PROOF OF CONCEPT

The business PoC determined whether the tool met the use case criteria, engaged users and encouraged participation, and supported critical business processes. In essence, the sales organization used the PoC to emulate and duplicate what the supplier and Intel IT said could be done. The initial evaluation focused on usability and ease of work.

The features tested were extensive and included the following capabilities:

- Searching
- Tagging, liking, and sharing content
- Posting sales notes, documents, questions, and discussion items
- Co-editing and version control of documents
- Maintaining content formatting and layout while editing and adding information

After testing the features and functions, we engaged an account team working on a current project and observed their behavior with attention to the transition from email-based communication to a collaborative environment. The move was self-directed by employees because the collaboration tool provided a logical location for all account documents, plans, revenue, and forecast data. We observed a decrease in email messages as well as a decrease in the time spent searching for information. The account team's ability to co-edit templates and documents allowed them to work together to bring value to the customer more quickly. With a stronger understanding of the engagement points, the team developed plans with extended teams also more quickly.

At the end of the business PoC, we felt confident that the platform could achieve our business objectives, and we looked forward to conducting postproduction pilots in which multiple sales teams would be similarly engaged.

"With social collaboration, we are sharing content as a global team that we couldn't before."

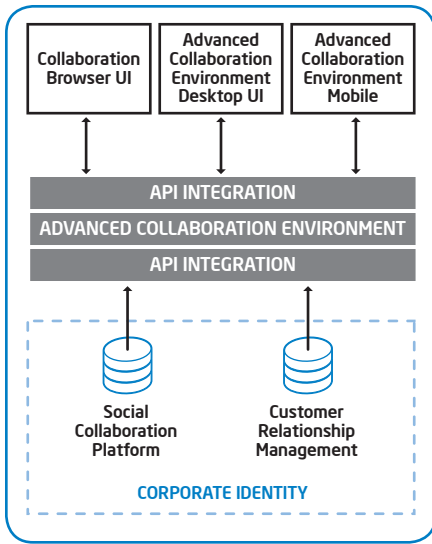


Figure 3. The social collaboration platform is integrated with customer relationship management and user interfaces to produce our Advanced Collaboration Environment.

TECHNICAL PROOF OF CONCEPT

The technical PoC tested integration, security, and performance. Intel IT needed to confirm that the social collaboration platform met the requirements of integrating with the Account and Opportunity processes critical to the sales organization’s core functions.

We focused on these key areas:

- **CRM integration.** Prove that the CRM and social collaboration platform integration supported the business use cases. This involved mapping CRM Account and Opportunity data to the collaboration communities (type 1 of the collaboration model) and verifying that the tool exposed the necessary APIs to achieve success.
- **Security and identity service integration.** Validate that the platform integrated with our existing ERM tool to preserve data protection, role-based security, and single sign-on capabilities, and met our encryption performance needs.
- **Performance.** Prove that the platform functioned within acceptable usability and reliability limits. We measured the average time to load a page, peak load for concurrent users, network bandwidth (saturation and latency), profile loading using our entire directory of 100,000 users, and performance feedback from global users.

The PoCs confirmed that the functions, features, and technical aspects of the collaboration platform met our needs and validated our plan to integrate business systems. Figure 3 illustrates the business systems and technology necessary for integrating content on the social collaboration platform.

Moving to Production

After the PoCs, we moved to production on a limited scale, using an Agile development methodology. We expected to gain insights during deployment that might lead to changes, so we planned a series of post-

production pilot projects that included TCM and activities to engage employees.

The first production deployment was tied to the Account and Opportunity use case for integrated note taking for CRM users. Notes taken in the CRM tool were now stored in the social collaboration platform, opening them up for immediate collaborative opportunities. This allowed us to offer a simple and effective introduction to employees while completing the complex back-end integration of provisioning collaboration space from within the business process.

Conducting Postproduction Pilot Projects

During the first half of 2013 we conducted pilot projects focused on Account and Opportunity communities, Work communities, and Interest-based communities and observed new efficiency opportunities, identified additional use cases, improved training, and documented results. The purpose of each pilot varied but included increasing the velocity and quality of wins (the term we use when an active prospect turns into a sale), improving communication on multisite accounts, improving virtual team collaboration, and providing better support of market-specific practices.

Three account teams participated in the advanced use case study pilot. Two engaged in increasing velocity and quality of wins and had similar goals of moving customer emails into collaborative discussions, sharing marketing and account plans, engaging in pricing discussions, staying informed of performance and forecasts, and co-editing templates and documents. The third focused on tightening their interactions across geographic locations, connecting members in dispersed geographies, understanding the new organization of one of its own customers, coordinating sales opportunities, and keeping members informed about performance and forecast issues.

Eight teams participated in Interest-based community pilots. For each team, we identified the business functions, such as project management, document management, and meetings, as well as what denotes success in the collaboration platform, such as fewer and more productive meetings and centralized communication on geographically dispersed accounts.

During the pilots we witnessed a reduction in the use of email and an increase in the teams' ability to find information quickly. In the past, information was filtered through multiple people using email and was difficult to locate when needed. The global content sharing and co-editing capabilities significantly improved communication.

Transition Change Management

Our approach to TCM was instrumental in our success as a socially engaged business. It included visible participation from executive sponsors through sharing, recognizing (or liking) content, and activity on the collaboration platform. We understood that asking employees to change their behaviors and work attitudes would not be enough; employees needed to see greater personal value in their daily work. We structured our activities to create the following value for the employees:

- **Relevancy.** Collaboration communities are directly applicable to employees' work.
- **Faster outcomes.** Information and decisions are available in real time, and the content is higher quality.
- **Stay informed.** Employees are connected to the people and information that impact their work.
- **Focus on what is important.** Employees stay focused and are able to filter out the noise because there are fewer meetings and email, and less time spent searching for information.
- **Career growth.** Employees' networks are broadened, and their skills, knowledge, and influence are apparent.

To achieve employee-focused value, we identified four areas of activity:

- **Remove roadblocks.** We identified barriers to adoption and removed them to promote collaboration, such as adopting an "open information" policy to give Interest-based communities more freedom in sharing while relying on the Intel IT security model to maintain confidential and role-based information.
- **Lead by example.** Sales and Marketing executives, senior managers, and general managers in different locations were active users and advocates. They communicated success stories, promoted the value to the business, and challenged their employees to register, contribute, and appreciate information.
- **Provide incentives.** Contributors were rewarded through many different compensation programs. These programs encouraged participation, recognized knowledgeable people who shared, and offered rewards for collaborative input leading directly to added value.
- **Identify advocates.** We recruited candidates in each location as early adopters to assist others with the transition. These advocates provided detailed training and guidance in the following activities: developing profiles, answering questions, posting discussions and feedback, and sharing documents, templates, and best practices.

Leading by Example

Transforming our business processes required sponsorship from the Intel Sales and Marketing as well as executive leadership by example during the implementation. Executives modeled desired behaviors and then asked employees to follow, such as their first request of three simple actions:

- Complete your profile.
- Communicate something to your geographic Interest-based community.
- Appreciate something someone else communicated with a "Like."

Executive leaders stayed involved in the adoption through a series of communications illustrating their commitment to the initiative. In a bold message underscoring the central function of the new social collaboration platform, they announced that all future updates to the organization—newsletters, announcements, and documents—would now come through the social collaboration platform.

BUSINESS VALUE

We have seen clear value for the business during and since the pilots. The cross-geography collaboration has connected employees who would have otherwise been unaware of each other's work and professional interests, allowing us to improve productivity, expand our market knowledge, and improve our products.

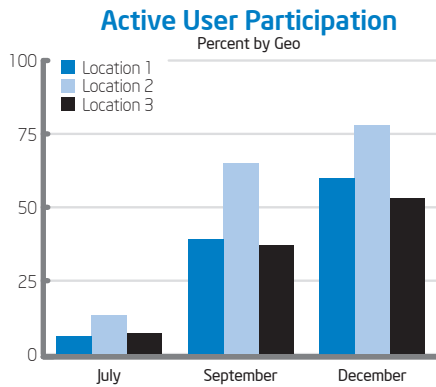


Figure 4. Since launching the social collaboration platform, we have seen a steady increase in active users in each geographic region.

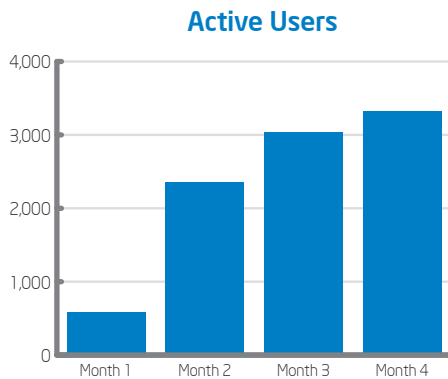


Figure 5. Sales and Marketing has seen a steady, month-over-month usage increase.

We continue to see steady adoption since launch, and we are hearing about successes with value gains, especially in connecting teams across dispersed geographies. The Account and Opportunity communities, focused on increasing velocity and quality of wins, as well as connecting dispersed team members, are well prepared to see value in the form of these productivity improvements with the new social collaboration platform:

- Consolidating emails and account documents from a variety of sources in centralized community-based locations
- Finding information about products and technology faster and understanding it more thoroughly, resulting in higher quality and quicker wins
- Reaching agreements on pricing more quickly
- Learning about teammates across geographies by asking questions, sharing interests, and developing relationships
- Completing their understanding of customers and the engagement points
- Rallying around forecast and revenue issues, and soliciting ideas from the group

The number of Interest-based communities is steadily increasing as employees seek out information directly related to their geographic location (see Figure 4), product focus, role, and other areas of interest. These communities embody the principles of crowdsourcing and serendipitous connections, sharing knowledge and arriving at solutions more quickly as the discussions expand across the organization. The social collaboration platform has provided significant business value as a result of Interest-based communities, including the following:

- Housing best-known methods in a single location based on interest (or discipline), making it easier to standardize practices across the organization

- Broader sharing of market knowledge and ideas, such as competitive information and customer and partner comments
- Increased worldwide coordination, efficiency, and decision making, resulting in being able to eliminate meetings
- More productive meetings with time spent on strategic discussions and decisions—more work is getting done in the same amount of meeting time, and decisions are being made in near real time instead of being postponed until the next meeting
- Managing and coordinating customer visits by co-editing agendas, arrival and departure details, and meetings with customer executives
- Connecting the ACE support teams

One of the teams that participated in the pilot was recently surveyed, and 86 percent of the participants agreed that social collaboration enables future business growth, and 78 percent are already seeing efficiency and productivity improvements. More than 58 percent of the Sales and Marketing organization are using the platform, and several thousand people outside Sales and Marketing have been invited to collaborate. There are currently more than 7,100 communities and over 30,000 pieces of content.

Across Sales and Marketing the month-over-month usage is steadily increasing (see Figure 5). One group has created ACE social collaboration communities around their key demand-generation activities, enabling stakeholders and task-force members to coordinate in real-time and improve productivity.

Among our key learnings is how important mobile engagement and out-of-office connectivity is to Intel's sales force. We also found that as more sales staff and product groups collaborate, they recognize isolated content and actively move to share it with the relevant collaboration community.

The community and crowd identify and break down silos as they are discovered. The Work communities formed around projects are leading to more efficient and effective communications between team and community members.

The social collaboration model has positively influenced the way information is shared and collected. Before, information was received primarily through email and then filtered down through different levels of management to salespeople. Interest-based communities eliminate the problem of filtering. As soon as information is posted, employees can respond immediately, and all comments and decisions are available instantly.

MOVING SOCIAL COLLABORATION BEYOND SALES

The social collaboration platform and its integration with ACE is a first step toward providing a collaborative environment across the enterprise. While the solution was designed specifically for sales, the framework is scalable and connects company-wide content through integration with existing business systems.

The success we have seen with the Sales and Marketing group has been so encouraging that we plan to continue to refine our TCM approach as participation grows. Our immediate next steps are to connect sales to the product divisions. Using the social collaboration platform, we can build new communities within the organization focused on optimizing market potential.

CONCLUSION

By transforming the way employees work rather than simply implementing new technology, the social collaboration platform and its integration with ACE has tapped into the collective intelligence of the sales organization. This powerful new way of conducting business is already proving its value through improved employee productivity and increased visibility into valuable customer and market insights.

Building on existing business systems and taking an integrated approach, we have created a scalable framework that sets the foundation for the changing business and technology needs of the future while maintaining the communication flow necessary for a world-class sales organization serving diverse global partners and customers.

We have learned the value of transition change management and understanding the roadblocks to change. By providing employees with productivity gains they can see and appreciate, we have gained their interest and participation. And the example our executive leadership set engaging with the platform proved a powerful approach to effecting change within the organization.

By approaching the project as a team, Sales and Marketing and Intel IT transformed business processes and employee behavior. We have shifted into a collaborative environment in which individuals are valued for the knowledge they share and are recognized for their skills and expertise. This new way of working has reduced or eliminated many obstacles created by geographic location, function, and product area.

We want to extend the benefits we have already achieved with social collaboration.

To do this, we have a three-phase vision:

1. Connect the sales organization.
2. Connect the sales organization to the divisions.
3. Connect customers and partners.

We plan to take what we learn from phase 1 to enable phases 2 and 3, and in doing so we will change the way our employees, customers, and partners collaborate for a stronger compute ecosystem. This process will accelerate Intel's vision to connect and enrich the life of every person on earth.

RELATED INFORMATION

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- "Developing an Enterprise Social Computing Strategy"
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ACRONYMS

ACE	Advanced Collaboration Environment
CRM	customer relationship management
ERM	enterprise rights management
PoC	proof of concept
TCM	transition change management
TTM	time to market

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