

Rethinking Instant Messaging

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This former diversion is enjoying newfound respectability

By Marcia Jedd



Instant messaging is no longer a superfluous tech tool. Though outlawed by many corporate IT departments, IM is on the rise, according to tech analysts such as Forrester Research and Gartner.

Sales and marketing professionals use IM to make swifter decisions, close the deal and generally talk among themselves in strategic back-channel conversations during conference calls and sales presentations. "The beauty of IM is you can be in strategic conversations on the back side and you don't all have to be in the same location," says Mark Dillon. The vice president of channel sales at Omniture, a Web analytics firm in Orem, Utah, Dillon relies on IM to coordinate with a far-flung sales team.

"IM is actually like live e-mail," Dillon says. He instant messages from his mobile device, laptop and PC at the office. "Our business is all about providing our marketing execs with data about their customers. Now we're doing that in real time. We can let them know in minutes of a campaign being launched if its driving the right message, and the right ROI." He says IM is more effective than e-mail for critical-action items like getting approval on a press release.

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Sean Whiteley, director of marketing applications at Salesforce.com, a San Francisco-based CRM provider, is a veteran IM user (since the mid-1990s). "Life without IM would be more challenging," he says, noting it's often a critical tool in back-channel conversations and for staying in touch with road warriors and other dispersed sales teams. IM also pushes out to the customer at Web sites with live-support chats, increasing customer response.

Both Whiteley and Dillon view IM as a complement to e-mail, not a replacement. Evan Rosen, author of the *The Culture of Collaboration* (Red Ape Publishing, 2007), agrees. "Using IM, a salesperson can resolve customer issues more efficiently by getting on-the-fly input from colleagues in marketing and other functions, like engineering and finance." Marketing teams benefit by getting real-time input from sales professionals in the field. Ultimately, Rosen says, IM's real-time collaboration results in reduced sales cycle time, increased customer retention and enhanced value creation.

Do's and Don'ts of IM

Back-channel conversations among sales teams aren't meant to be shared. Shut off your instant messenger program as appropriate. Dillon recommends taking extra precautions when you are doing a live sales demonstration with the customer who looks onto your laptop. "Do not share your desktop when you are doing a demo on WebEx or Breeze [collaborative desktop sharing tools]," he warns, "because your IM dialog box is open to everyone."

Some companies prohibit the downloading of instant messaging software, blocking the services from their firewalls. Chatting from a Web page without having to install any software is an option with services like Meebo and KooIIM. Whiteley has had positive experiences with Meebo, which integrates with various IM services like MSN Messenger and Yahoo! Messenger. He also likes GoogleTalk.

Many of these IM platforms allow users to capture and save IM chat logs for future reference. In Whiteley's case, Salesforce.com chat records are often saved directly into the prospect or client CRM software record.

Gartner predicts by the end of 2011, IM will be the preferred method for voice, video and text chat. And the tech consultancy says by 2013, 95% of workers in leading global organizations will use IM as their primary interface for real-time communications.

SOURCE: global survey by Nokia, The Economist intelligence unit and cio forum.

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