IM Best Practices – or How to Love IM

The days of phone tag and lost emails are gone – Instant Messaging (IM) is quickly becoming the de facto way to communicate, both in our personal lives and at work. Most of us have used some type of instant messaging service to communicate with our children, friends, or colleagues, whether using AOL, Yahoo, or Microsoft Messenger. These public IM services are available at no cost and let us communicate quickly and conveniently. While great for teenagers to decide what time to meet for a movie, these public IM services don’t provide the security, privacy, and reliability that businesses require. Over the past few years, business-grade IM systems have been introduced, offering large and small organizations the speed and convenience of IM, but with the security and reliability that businesses require.

Engaging with others quickly and easily, IM lets users conveniently get the information needed, without going through time-consuming chitchat or having to draft an email message. IM helps workers be more productive by reducing the amount of time it takes to conduct real-time interactions that have traditionally taken place over the phone, with the added benefit of being able to maintain a log or archive of the interaction.

When used appropriately, instant messaging systems can benefit both workers and businesses. However, without appropriate guidelines, the use of IM can have unintended consequences that can harm a business. Why has IM become so popular within business organizations, and what are some best practices that users and IT managers have learned? We spoke with a range of business professionals who shared their insights and experiences about using and benefiting from IM.

Goodbye Email, Hello IM – A Better Tool for Collaboration

The workplace has changed, and most workers are mobile and difficult to track down. The virtual office is now a reality, with work being something you do, rather than a place to which you go. The 8-5 work day is now just a memory for most people, especially when working with colleagues in other geographies and time zones. The ability to interact in the most efficient and easy way possible has necessitated the use of tools like IM, which automatically tell you who is and isn’t available at any time of the day.

In many organizations, email is now considered passé, with IM as the primary means of communication. Without the annoying traits of email, including the often over-used and misused “reply all,” function, IM is often a more efficient tool for collaboration. An INT Media Research report notes that companies using IM found that email traffic was reduced by up to 40 percent and overall voice mail was down 10 percent. IM provides an immediacy that is difficult for email to duplicate. With IM, you can send a message and receive a reply within a matter of seconds, while emails often sit in the recipient’s inbox without being opened or read for hours.
Colleen Jakes, director of information services for TopLine Federal Credit Union, also prefers IM to email, noting, “IM pops up on the desktop and isn’t buried in someone’s Outlook. It’s not a drag on productivity like email. IMs can be sent to multiple people at once to ask a question or get information.”

Another UC user noted, “I know that if I send an IM, it will get a faster response than email. If I need assistance with a problem or question, IM is the fastest way to reach out to someone.”

When integrated with an organization’s unified communications solution, the ability to escalate from an IM session to a voice call or to a document sharing collaboration session is just a couple clicks away. With less time wasted on communication roadblocks, employees can get more work accomplished, more efficiently.

**It’s About Speed – And More**

What drives people to use IM? It’s all about the speed of interaction and the ability to ask a question and get a quick response. Companies and workers use IM in a myriad of ways to enhance communication with colleagues and coworkers across offices or locations. Whether one-to-one or with multiple parties, IM is primarily used for quick questions and inquiries, and to quickly find the right expertise and resources needed to solve problems.

IM is quickly replacing email as the communication channel of choice. According to Troy Kuskie, IT manager at RMH Group, a consulting engineering firm, “Our consultants deal with a lot of CAD files and have to collaborate with architects, other engineering firms, and IM helps them to keep the communication and flow, which is the key to what the consultants.” He adds, “Internally there are teams and team members that, instead of sending emails or walking to someone’s cubicle and try to locate the project manager, can use IM to get the information they need. It’s all about the speed of communication within the in-house teams. People may open up their email a few times a day, but their IM is always on.”

Beyond speed is ease of use. Kuskie notes, “IM is an easier way to distribute links or attachments and is much faster than composing an email and launching an email client for a quick question. If you’re looking for a quick answer, it’s less intrusive, doesn’t take up much resources – it’s just one click and you’re done.” Using IM as an integrated part of a UC solution means that IM sessions can be elevated to a multiparty call if discussions need to be taken to the next level.

IM can be used as a “back channel,” where users communicate among themselves behind the scenes during conference calls with customers, for example, or even during in-person meetings (if done discretely). While presenting over the Web or during conference calls, co-workers can have private IM interactions to help give instructions (slow down, speed up), ask and answer questions, etc., without other participants knowing that this is going on.

Multitasking has become a way of life for most people. Corey Fling, director of network services...
& telecommunications and interim CIO at Point Loma Nazarene University, found that university staff, “love it when they’re on a call and can communicate via a text message when a second call comes in. We get a pop-up notification on the screen and can click to send an IM and instantly inform the caller that ‘I’m on the phone, is there something I can help you with’ and solve the problem through IM while on the phone with someone else.”

University staff members in financial services and business services are always in meetings and don’t have information at their fingertips and use IM to get the information they need quickly. “A staff member can send a quick IM to someone saying ‘I have a student here and I need information on their record, can you bring me the file,’” which saves a good deal of time.

Most chief financial officers are more interested in cost savings, and business IM helps companies save money in several ways. By using IM instead of making a phone call, companies experience reduced long distance and international usage and costs. IM is quickly replacing email as the primary means of communication within organizations, reducing the number of email servers and storage needed. Similarly, by reducing voice traffic and the need for voice mail (why leave a voice mail message if you can see that a colleague is available via IM), companies can cut down on the number of voice mail servers or storage needed.

Working smarter means working faster, which translates to reduced costs. Point Loma Nazarene University’s IT Help Desk support costs were reduced when Level 1 support teams, which are generally students, began using IM to get quick answers from experts or other support team members while the user was on the phone. The result: cost savings based on reducing the number of calls escalated to a higher-level team, thus reducing the need to increase staffing.

Use Cases and Benefits – The Business Value of IM

In addition to technical support, the uses of IM in business are as varied as the types of businesses deploying it. Here is a small sample based on interviews and conversations UCStrategies has had with various UC customers:

Sales: Close sales more quickly, and have more time to make more sales.

- “Instead of exchanging three or four emails, I can use IM and get information in a few minutes without waiting eight hours or more for a response to my email. This can make the difference between winning or losing a sale."

- “During the sales cycle there are questions about functions, features, pricing, etc. With the use of IM and presence and seeing colleagues’ availability, I don’t have to wait until the next business day (for international sales) for a quote or information about a feature or functionality.”

Colleen Jakes, TopLine Federal Credit Union

It’s a part of our culture and how we communicate with each other.

IM Best Practices – or How to Love IM UCStrategies
“Customers who can see our presence status and do IM with us feel comfortable with us and can ask questions and get responses right away – they feel that they can get in touch with me when they need to, which gives us a huge edge.”

“If I’m about to receive an order and the customer needs to change the terms, I can see if the finance manager is available and we can communicate via IM.”

“If you’re trying to negotiate a contract, you can IM back and forth and can have confidential conversations amongst your employees via IM without having to tell the client that you have to get back to them.”

**Management:** Make decisions and solve problems more quickly.

“There’s drama every day that gets resolved much quicker – there are at least 10 instances a day where an IM or chat allows us to get issues and questions addressed and resolved that we weren’t able to do before.”

“If I’m giving a marketing pitch but need more detailed product information, I can IM someone on the spot and get the info, making us all look better.”

**Consulting:** Better collaboration with team members.

“Projects are very dynamic and we may be working on several at a time with different people in each group. We can create project group that are specific to the project we’re working on and quickly see who’s available in the group and send them a group message.”

**Customer Service:** First contact resolution and increased customer satisfaction.

“If a customer calls in because they have a question about their loan status, the call center agent can reach out to a subject matter expert using IM to get the information they need, with the agent having to call the customer back at a later time.”

Used in all verticals, use cases for IM reach across the front office and back office:

- Banking: “We have a greeter in the branch to assist members as they come in to the branch. IM is a quick way of notifying people something as simple as “Your 1 o’clock appointment is here,” without having to make a call.

- Education: University student financial services staff use IM to get information from coworkers while in one-on-one meetings with students to “make it as quick and helpful a process with the student as possible,” which lets them help more students in less time.
How to Get the Most Out of business IM - Best Practices and Recommendations

Now that you’re sold on the value of business IM, it’s important to understand how best to use IM in order to engage workers and to reap the maximum benefit. The following are some best practices based on discussions with organizations that have deployed business IM within their organizations.

1. As with most text-based communications, don’t IM something you wouldn’t say aloud. Remember that IM’s can be recorded and archived.

2. Respect people’s availability and IM status settings. If someone’s IM status is “busy” or "away," don’t try contacting or disturbing them. When initiating an IM, it’s generally considered polite to ask the other person if they have time to “talk” with you.

3. Use your settings appropriately. Some business users don’t use IM because they don’t want people knowing their availability status or because they don’t want to be interrupted, and they keep their status set to “unavailable.” This defeats the purpose of having a tool like IM, and reduces its value not only for those individuals, but for people in their workgroups and organization as well. If you’re busy or don’t want to be disturbed, be sure to set your IM status to indicate that you’re not available.

4. Generally, the more specific you can be with your status setting, the better. If I know you’re on an airplane, for example, I won’t bother sending you an IM, but I know that you’re in a meeting, I’ll assume you can have an IM chat.

5. Engage as many workers as possible – the more people that use IM, the more value it provides to the workers and the organization. If only a few people in an organization use the IM tools, they can only chat amongst themselves. The more IM users in the company, the greater the return on the investment.

6. Limit simultaneous IM sessions. If you have teenagers, you know that they can have many multiple chat windows open at one time. While this might be acceptable among friends, it is not appropriate for business usage. Limit IM sessions to no more than two or three at a time in order to avoid confusion or lag time between messages.

7. Be professional. While acronyms and abbreviations are usually fine, don’t be lulled into being too casual during IM interactions with customers and partners. The medium is more relaxed than a phone call, but professionalism must be maintained, especially with people with whom you do not have close personal relationships.

8. Be brief and precise. IM is not appropriate for long, involved interactions, and it’s important to get to the point and precise about what you’re looking for.

9. Don’t invite someone to join a conference in progress without first asking the others in the conference if it’s OK to do so.

10. Don’t use all capital letters to type your message. It’s the IM equivalent of SHOUTING at someone.
The IT Managers’ Perspective on Best Practices

Without a doubt, the most important best practices from an IT Manager’s perspective focus on security and confidentiality. Many companies avoid security issue by allowing IM to only be used inside the company. Depending on your industry, compliance may be an issue and you may need to implement monitoring solutions and security policies. Topline’s Jakes recommends logging and monitoring all IMs just like emails.

Most companies don’t have electronic media policies, but having clear written policies can help people understand what is and isn’t appropriate in a business environment. RMH Group’s Kuskie notes, “IM can be recorded, saved, and archived, so be thoughtful and mindful of what you’re typing since the recipient or initiator can be recording the conversation. If you’re venting about something, you have to be careful since the chat can be recorded.” Kuskie’s advice: “Don't write it if you don't want it out in the public.”

Because IM is so simple to use and intuitive, most companies don’t train users on how to use their IM systems, which is a big disservice to users who may not be aware of some of the IM system’s capabilities. RMH Group’s Kuskie notes, “Let the end users know the tool is available and train them on how it functions and works. Walk them through the simple basics, plus capabilities such as how to transfer from an IM to a phone conversation and how to use the Alerting feature, which lets you see if someone is trying to get in touch with you. Also, help them to understand that IM is a far better choice than email for things like ‘where’s the spec sheet?’ and other simple requests.”

ShoreTel 13

With ShoreTel 13, Instant Messaging becomes a standard feature for all users on the ShoreTel system by way of the ShoreTel Communicator desktop UC client. IM is currently supported on ShoreTel Communicator for Windows. All users will have access to the Contact Viewer within ShoreTel Communicator. The Contact Viewer allows adding your favorite IM contact but also your favorite phone numbers. To utilize IM, you will need to deploy an IM server on the back-end (either ShoreTel Instant Messaging Service or Microsoft Lync).

Conclusion – IM as a Business Tool

Originally a consumer service to let teens and 20-somethings keep in touch with each other, instant messaging has become mainstream and is used in businesses of every size and in every vertical. From a simple “U there?” message to sharing files and documents, IM is quickly replacing both email and telephone calls. Knowing when to use IM, and how best to use it is important for companies implementing these new solutions, and by following some of the best practices described in this paper, organizations can have more successful IM and UC deployments.
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Blair Pleasant is Co-Founder of UCStrategies, and President & Principal Analyst of COMMfusion LLC. She provides consulting and market research analysis on Unified Communications (UC) and voice/data convergence markets and technologies, aimed at helping end-user and vendor clients both strategically and tactically. As co-founder of UCStrategies, a website portal providing information and analysis on the growing Unified Communications market, Blair publishes articles and blogs, and participates in executive interview podcasts with leading UC players. She is also a regular contributor to NoJitter.com and has been featured in numerous webinars and podcasts, presenting insights, analysis and research on UC and related industries.