Enterprise Social Network Adoption in 5 Steps

A Practical Guide to Combining Systems of Record with Systems of Engagement

Written by Alan Hamilton
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Alan Hamilton

Thanks for attending Social Connections VII in Stockholm and for your feedback!

Here's a little gift from us to help you on your way with getting the most from IBM Connections.

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Dedication

For Diane.

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Foreword

Introducing social collaboration to an organization can bring enormous benefits to staff morale, productivity, profit and quality. Many organizations are concerned, however, that the focus of success with "social" in their companies relies not on traditional IT skills, but on change management, people management and a clear vision for the future.

Recognizing these challenges is one of the first steps towards success. Another major factor in being successful and reaping the rewards is on the level of commitment from the senior management of the organization. Without a clear and demonstrable commitment the staff will lack engagement and might consider it to be another passing IT fad. If this happens your organization will surely have lost a key initiative to raise it above its competition and be a better place to work.

At IBM I have assisted countless customers all over the world with understanding how social business, and IBM Connections in particular, can positively affect their businesses. I have seen enormous success by companies in all industry sectors, both public and private, all around the world, when they follow the principles of vision, people and culture. As I said in my own book, "Get Bold", "Culture eats Strategy for Lunch" - this is never more true when planning the adoption of social business tools.

That's why I feel the approach in this book would be of particular interest to anyone looking to improve their business using social collaboration tools. We all recognize the need to bridge the traditional worlds of "Systems of Record" with the new world of "Systems of Engagement", like Facebook, LinkedIn, and the likes.

Alan has set out here how many of the principles these consumer oriented solutions can be harnessed to the benefit of your organization. He has brought his extensive experience with customers all over the world together with a deep understanding of some of the psychological and sociological issues into an easy-to-digest, clear and practical approach to implementing a social business solution, in particular IBM Connections. Given that Alan is an expert in this area from his years working with clients in social business scenarios, the book has in it very practical advice that is actionable. The examples, steps and approach help companies to succeed in this new world, that will become a mandatory part of every company.

I encourage you to explore the concepts and practical steps he outlines in this book and consider how to implement these as part of your social collaboration project.

I believe that Social is a must for every business. It will become that employee empowering platform that we make employees want to work with you, create value with your clients, and ensure the transparency and authenticity required for success in the new world!

Sandy Carter, IBM General Manager and Social Business Evangelist.

Chapter 1. Introduction

The late Steven R. Covey [https://www.stephencovey.com/] famously said in his book “The Seven Habits of Highly Effective People” that you should “Start with the end in mind”[1]. Without a clear vision about what the future will look like you will surely fail. Like going on a journey, if you don’t have a destination in mind then how will you know when you get there?

A vision is typically an emergent property which might describe a nascent desire of the management or the employees of the organisation which has yet to find a definition. It might also be one which is revealed in an epiphany to a member of your organisation’s management. Either way, you as the visionary in your organisation need to consult and understand where these people are in their thought process.

One of the biggest barriers to delivering on a vision is cultural change. We all might have a vision of being super-fit, thin, healthy and successful at life and work. If our culture doesn’t adapt to embrace this vision, such as living a healthy lifestyle then the vision can’t become a reality. Again quoting Dr Covey, the “Law of the Farm” applies to culture change. We can’t sow our seeds in the field late in the summer and still expect a harvest in the fall. Culture change is something that takes time, patience and persistence.

Many organisations think they can embrace social technologies in their organisation simply by installing some software or my sending their staff on a training course. Some others think that it's solely about having a presence on Facebook [www.facebook.com] or LinkedIn [www.linkedin.com] . Instead it comes from embracing the technologies underpinning these consumer social environments as part of a broader culture change in your organisation.

Recognising that becoming "Social" is a new way of working is one of the biggest "a-ha" moments your organisation can take. Staff recognising that their value in the company is no longer linked to what they know, but instead to what they share is another of those moments.

The organisation needs to drive a culture of openness (at all levels), trust and shared vision. Although a grass-roots drive to better effectiveness is often a successful way of introducing a better team spirit in isolated parts of an organisation, true culture change needs to come from the top. When people recognise that the senior management are invested in this change, they will do the work of living that change.

One common area of difficulty with becoming a social business, an in particular being able to "sell" it to the right people is being able to tangibly demonstrate areas where it will benefit everyone. Often we get tied up in the whizzy features in communities or the ability to co-edit documents across the globe. Senior management are generally not too impressed by such things - and rightly so. They are more impressed by the return on the investment they are going to make. They want to be convinced that by investing, in all senses of the word, there will be a profit, again, in all senses of the word.

Using a structured approach to the adoption of social collaboration is one way to give the culture change and transformation the best chances of success. You can find guidance in the plethora of change management books, or IT project management texts already published. These, however, seem to be mutually exclusive when it comes to addressing the people issues of collaborating using a software solution. As IT people we are often more interested in the technical challenge of implementing and sustaining a technical solution. As business consultants we are often not too concerned with "what" we're implementing, we're just focused on the "how" to implement it. In this book I aim to merge the worlds of business consulting and IT sufficiently to give you a framework to help drive improved collaboration, communication and quality of work in your organisation.

To achieve this lofty goal I have prepared five steps which, if taken in order, should allow you to get your social collaboration transformation on a good footing for the future. This approach is not a panacea for all ills, and I am sure, and in fact encourage, you to adapt and structure my suggestions for your own benefit

[1]http://en.wikipedia.org/wiki/The_Seven_Habits_of_Highly_Effective_People *Habit 2: Begin with the end in mind*

and to suit your circumstances. What I expect you will find, though, is that the order of the steps and the broad direction of those steps will work for you.

So, my five steps for social business adoption are:

Figure 1.1. 5 Steps to Social Business Adoption

- Establish a vision
- Get leadership commitment
- Plan, plan, plan
- Engage your employees
- Adopt iteratively

Why would your organisation want to be social?

This is a good question, and one that I am asked frequently by skeptical customers who believe that social collaboration is just the latest in a series of passing fads the IT industry tries to impose on business to justify its existence. In fact I believe social collaboration is the thing that can give your organisation the advantage it might need over its competitors. Your organisation has probably been through every round of cost-cutting that it can to drive profitability. It has probably rationalised the workforce to the stage that everyone has too much to do. Your organisation probably can't raise its prices by much because it would make it more expensive than the competition, so what else can you do to remain profitable? Most organisations haven't looked at reducing the operational friction in the business - i.e. oiling the moving parts to make it work better, rather than just faster.

Social collaboration drives better information sharing. It allows employees to easily share their knowledge simply by doing their work. Currently many organisations rely on exchanging emails or writing documents as ways of passing on expertise to their colleagues. By "working out loud" social collaboration allows osmosis of information to occur, it records transactions publicly which would otherwise not surface and as a result captures the intelligence, experience and knowledge which otherwise walks out the door every night at 5pm.

Using a social collaboration solution allows your organisation to improve its decision-making processes. It does this by allowing employees to be better informed - they can see what's going on across the organisation rather than just locally in their team; it allows colleagues in geographically disperse parts of the organisation to remain in contact and makes it easier for them to share and co-operate on work. It also lets organisations exploit the "wisdom of the crowd" by pooling knowledge.

Internal social networking allows companies to get things done faster. It provides easier access to expertise and information, provides better processes for managing group tasks and allows the capture of ad-hoc knowledge which falls outside of processes.

Chapter 2. Establish a Vision

Introduction

Figure 2.1. 5 Steps to Social Business Adoption

I believe that there are five key aspects to defining a vision for your social collaborative environment, or in fact almost any system for that matter:

1. What - what will the end result look like
2. Why - why are we doing this, what benefit will we gain?
3. How - how are we going to do this?
4. Who - which parts of the organization are going to use this?
5. When - what will the timescale for success be?

As you can see, each of these parts are questions. It's unlikely you alone will be able to answer these all and I would encourage you not to, frankly. You need as broad a consensus about the vision for the future as is logistically possible. Without a large number of followers for your vision, you will quickly come across people who are not convinced, disagree or otherwise detract from the vision.

It's at this point you need to consider how the whole topic of implementing a social collaboration solution has come up. Has it come from some management epiphany as a result of someone senior reading an article in Forbes magazine, or speaking to another senior executive somewhere else? Or has it come from a grass-roots initiative taken by a small group of people in an isolated part of the organisation who have sought to be self-starters when it comes to improving how the business functions? Your approach to developing a vision will be different depending on which direction you are coming.

In either case there are a sequence of steps I would encourage you to go through when creating a vision, these being:

Figure 2.2. Steps to create a vision

Gain Agreement on the Vision

This might seem an obvious first step, but gaining agreement on a vision is possibly one of the hardest aspects of getting going. It involves someone, possibly you, writing down or drawing in a form which is easily accessible to many people, what the problem initially is, and what a solution would look like.

To get started you should identify the market leaders in collaboration solutions and investigate their offerings. You don't need to go into huge depth at this stage with each vendor but should seek to establish a relationship with the ones who seem to lead the marketplace. They will have case studies and client references to demonstrate how their solution has helped. Organisations such as Gartner [www.gartner.com] , Forrester [www.forrester.com] and McKinsey [www.mckinsey.com] all publish research in these areas.

Perhaps one of the most common, or famous, research pieces comes from Gartner. Their "Magic Quadrant" analyses in many different areas of enterprise software are some of the most detailed and well-researched in the industry. I have no connection with Gartner, but would encourage you to register with their site to access some of the free research they offer.

One of the starting points for this would be to review some of the many case studies of where organisations such as yours have benefitted from the deployment of social collaboration. It's often difficult, however, to get down in to the facts of what was delivered, what processes were improved and what benefits were actually delivered. You should use your contacts with the software vendor to establish just who they have worked with and what the benefits were of their solutions. Ideally a call or meeting with one of their customers would help you to understand how social collaboration might help your organisation.

Before you can start to paint a picture of the vision, however, you need to understand what problem you are trying to solve. Some organisations do this by gut feel, others use staff surveys. You might have been landed with this initiative by your boss or you might know of people who have solved a problem elsewhere in the organisation that you think you can repeat.

Recognising where you are starting from is key to developing a vision. In my experience there are generally two places organisations start from:

- Management imperatives
- Grassroots initiatives

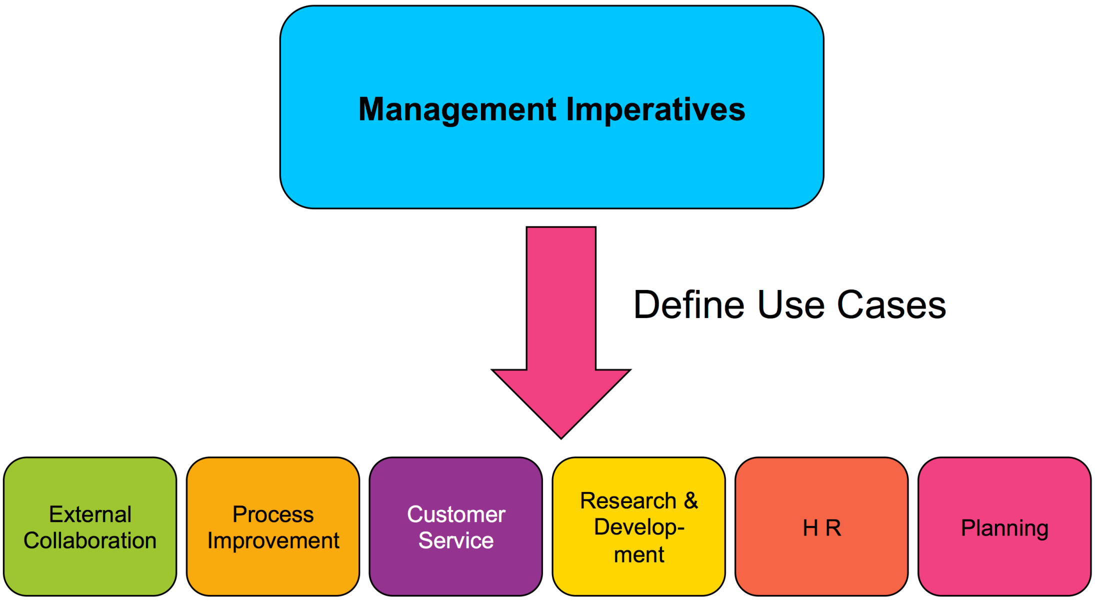
Mixing Management Imperatives and Grassroots Initiatives is an excellent way to build a rounded business case for your vision. Taking Grassroots Initiatives and scaling them up, however, is probably easier to get started with to demonstrate the value of social in your organisation. For example, if you can show that the Research team are now saving fifteen minutes each per day because they consult their wiki to check what their colleagues have contributed on a specific topic (rather than emailing everyone and waiting for a response) then a return on investment can be shown. Management Imperatives generally need to be based on industry averages, analyst research and customer references.

We started this section by talking about all the questions that a vision aims to answer: the what, why, how, when, who, etc. By analysing the source of the Imperative or Initiative and understanding what is ultimately at the back of it - money or time, then you can have a handle on trying to write down what the solution might be. We do this with a Solution Statement.

Management Imperatives

We've all been in the situation where a management imperative has arrived on our desks for implementation. Often these are based on "a good idea" rather than deeply-researched evidence. Management imperatives are good, however, because they come with an implicit endorsement of the approach or at least leadership interest in the topic. Management Imperatives are categorised as:

Figure 2.3. Management imperatives



- Normally based on a strategic desire to improve or modernise the business;
- Usually need refined into a business case to be taken forward;
- An influential player in the management team sets the strategy for the solution;
- Often cause problems when it comes to delivery because of a lack of research and consultation with the end users;
- Can sometimes not be based in the reality of what people do in the organisation.

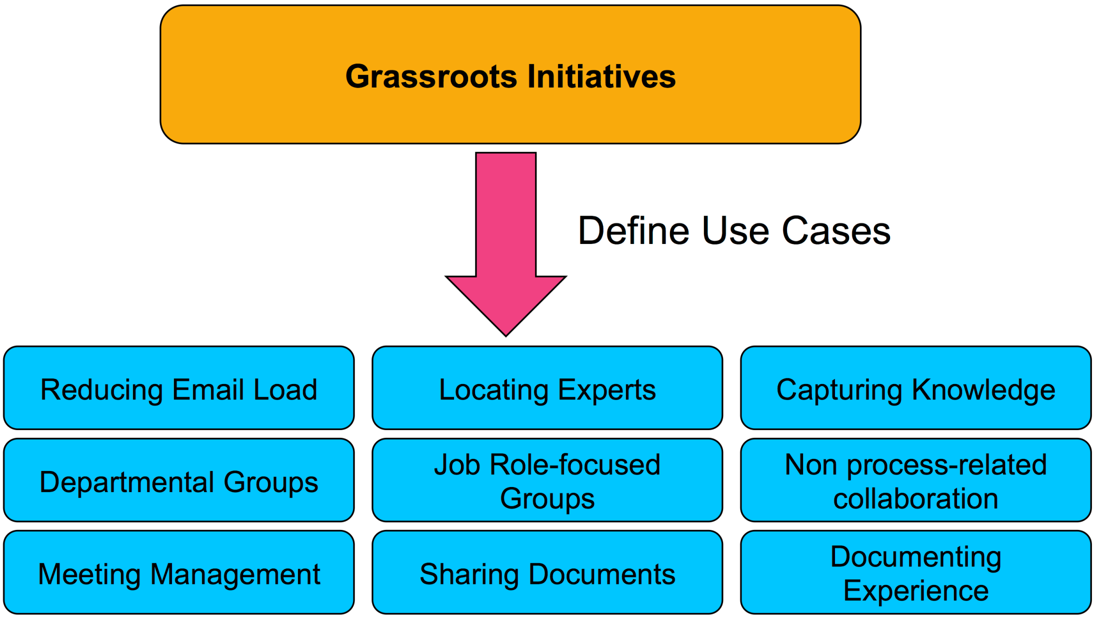
Management Imperatives are commonly focused on large, broad brush areas of the organisation, such as improving customer service through better location of expertise and knowledge; reducing the cost involved in hiring new staff by making them productive sooner; reducing the amount of money paid in compensation to employees when they have an accident by better feedback on safety issues. A Management Imperative usually boils down to money - either gained or saved.

Grassroots Initiatives

A Grassroots Initiative is one where an individual group of users aim to solve their own problems with their own solution. Often such initiatives are the bain of an IT department's life because the technology the users choose is not supported, not stable, not secure not standard, etc., etc. The users are happy because they get their problem solved but often this also breeds as "we know better" attitude amongst people who become disaffected by what the corporation is doing centrally.

Instead of crushing this pioneering approach I recommend embracing their enthusiasm. Look beyond the technological solution, however, and look at how they have solved the problem from a process standpoint. For the most part Grassroots Initiatives will be categorised by:

Figure 2.4. Grassroots initiatives



- Normally a very tactical solution to an immediate problem
- Needs to be refined into a business case
- Needs to be recognised as a point solution that needs to be generalised to form a critical mass.

A Grassroots Initiative is focused on a specific part of the business and usually on a specific thing. For example, the Research department might seek to implement a forum or wiki as a way to capture knowledge. The Project Managers might choose to use Activities (in IBM Connections) to manage their projects better. These are categorised by productivity or efficiency gains, rarely on money gained or saved.

Defining the Use Cases

You hear the term “use case” thrown around a lot in project and change management circles. Outside of the software industry it is something of a foreign term and something I will inevitably throw around here. For the sake of clarity, I will use something of a blend of the definition I found in Wikipedia. For me, and the purposes of our discussion a “use case” is the implementation of a set of actions (such as a business process) which are put together to help meet a specific business goal. To arrive at a Use Case the goal needs to be broken down in to a number of steps and within those the processes which will deliver the steps leading to the goal. It’s at this point we have a Use Case Definition - something tangible which will happen using something the user can interact with. Lastly there is a Use Case Realisation which defines in workflow-style language what the user actually does. Here's an example:

Table 2.1. Example Overall Iteration Plan

Goal	Steps	Use Case Definition	Use Case Realisation
Improve customer service satisfaction	1. Collect customer satisfaction data	Customer Service Representative asks for satisfaction comment and permission to send a survey.	1. At the end of the customer service session the CSR asks the customer if they are satisfied. 2. If YES then ask if there is anything else they can help with today.

Goal	Steps	Use Case Definition	Use Case Realisation
by 25% in 12 months.			a. If No, ask if they would be happy to receive a survey 3. If NO ask how they can fix the situation.
	2. Improve training for customer service staff	User interface of customer service solution provides links to help documents and other information.	1. CSR categorises customer issue according to the fault-finder database. 2. System shows list of recently-asked questions by other CSRs in this area, alongside the trouble-shooting script. 3. If the CSR chooses an existing recently-asked question, accepted answers and other related questions are shown. 4. When CSR completes the trouble-shooting script, use of the Q and A tool requires feedback from the CSR about the applicability of questions and answers to this scenario.
	3. Connect customer service staff with our experts	Customer service member is provided with a list of experts or can search for experts on the topic requiring support.	1. New customer support case is opened; issue categorised. 2. System presents trouble-shooting chart, list of experts and who are online, recent articles, etc. 3. Does troubleshooting chart solve the problem? 4. No? Consult online expert for solution while liaising with the customer. Contribute customer question with expert's answer to the Q and A bank.
	Combine and categorise the information we have to supplement the trouble-shooting charts	Search and locate the correct and up to date information through the product, service and other documentation. Integrate these into the trouble-shooting chart.	1. Use the system's search function and tagging to locate key information not provided in the trouble-shooting chart. 2. Comment and feedback on the accuracy and relevancy of the information found.

A consultant would normally create diagrams to represent the various interactions of the people (the "actors") and the parts of the system with which they work. As you can see from this simple example there is quite a lot of work in producing a truly detailed Use Case Realisation and many organisations implementing a social collaboration solution never reach this end point. Without a more in-depth analysis like this, however, it is unlikely you will be able to completely marry the benefits around social collaborations with the processes and benefits which could be expected.

At this stage you might think that becoming a social business and harnessing the benefits of social collaboration is a bridge too far for your organization. You might have thought that a low-impact introduction of social would be a good starting point to further improve your company's culture and collaboration. Fear not, dear reader, you are quite correct. Almost all organizations have some common Use Cases which with a little effort you can implement to achieve benefit. The remaining parts of this Lesson describe these common Use Cases and how you can benefit from them.

Common Use Cases

In this section we will look as some common use cases organisations initially put their social collaboration environment to. Picking one or more of these and implementing them in your organisation could be a good way to build the skills and confidence you need to tackle bigger issues and processes.

Company Directory with Skills and Experience

When organizations grow from a handful of people to probably more than about twenty five employees it quickly becomes clear that you can't know everything about what everyone is doing. You don't necessarily know their names, the name of their spouse, their kids' names, where they went on vacation last year, the project they're currently working on, or the customer they last spoke to. You also don't know what skills they might have gained in the last six months. The former examples are important, and the latter is vital when optimizing the number of people your organization has in any one area.

I don't use the word "optimise" as a euphemism for "reducing"; I mean it more from the point of view of making sure that the people in different job roles are equipped properly for the work they are doing, that they are not becoming a bottleneck to production through over-work, and that they might be better positioned elsewhere in the organization where their skills can be better used.

The most common way these kind of issues get noticed in organizations is when something goes wrong and then there is a knee-jerk reaction and a crisis which, with a bit of planning and foresight could have been avoided. Normal management processes for mitigating this situation involve yearly or half-yearly reviews with staff. We all know, however, that these can be intimidating, depressing, stressful and demoralizing if not done well, which inevitably are counter-productive. In fact, in Susan M Heathfield points out:

> Performance appraisals are usually connected with the amount of pay rise an employee will receive. Don't ever expect an honest discussion about improving performance if the outcome is the employee's income.
>
> —Susan M Heathfield, 4 Problems with Performance Appraisals

So if you expect your organization to be on top of your employees' abilities through the vehicle of appraisals then you should perhaps look to augment these with a less formal but possibly more accurate solution. One such solution is the implementation of a Company Directory with skills and experience.

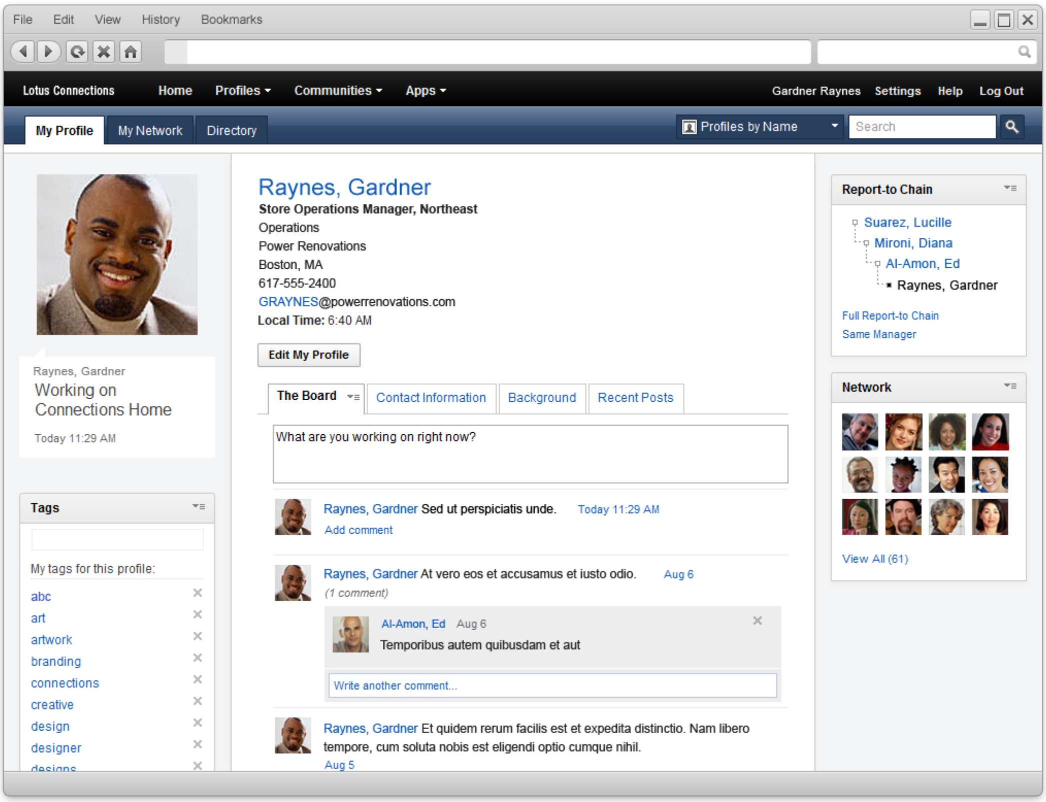
First of all, think of the Company Directory as being a bit like the telephone book, or blue pages - it lists everyone alphabetically and gives their contact details, such as telephone number, email address, and maybe even their job title. This is fine if you know who you are looking for but hopeless if you need to find someone who can perform a particular task. That is, of course, why we have Yellow Pages: a directory of people categorized by the job role or function they provide. If you were looking for a plumber to unblock your kitchen sink and didn't know who to call, you'd look one up in the Yellow Pages, not rely on the telephone book. Does your organization have a Yellow Pages?

So, one relatively simple thing you can do is to compile a live Company Directory. This has the details of everyone in it, their job title, their manager, their role, their contact details, maybe even a photo and some other pertinent information.

No matter which social collaboration solution you are considering, or have purchased, I can guarantee that one of the cornerstones of its capabilities is a User Profile - basically the basic building block used by the Company Directory.

IBM Connections, shown below, uses the Profile as a Yellow Pages, and news feed for the individual in question. In the example shown here you can see that there is photo, report-to chain, a list people in their network, contact details and some recent updates on work they've been doing.

Figure 2.5. IBM Connections Profile



It's quite common for organizations to integrate other sources of information into the profile. For example, the user's vacation information might be synchronized from the absence booking system. Equally, you might connect it with your HR system for additional employee data.

Over on the left and at the bottom of the example shown here are tags. These are extremely useful flags or categories that you can attach to yourself and others can attach to you. Commonly this is used to attribute the person with capabilities or expertise. In the above example we can see that Gardner has been tagged as "branding", "creative", "designer" and "artwork" to name a few. By searching for "designer" in this sys- tem Gardner would appear. I might not know Gardner and therefore would not have been able to find him, however, because he has been tagged with that expertise, I can connect with him and perhaps get a problem solved.

Looking around this example you can also see space for Background information. This is optional and intended to be used as something of a biography which the user can manage. This might be the kind of information they have posted in their LinkedIn profile, or something which describes some recent work they have been involved in. Whatever it contains, it along with everything else is indexed and searchable. Thus, when you are searching for someone with the skills you need to solve a problem or deal with a piece of work your chances are greatly improved by having this kind of social Company Directory.

Meeting Management

One thing we all do in business is attend meetings. Often we are at the sharp end - taking notes, running the agenda and assigning actions. How often do key activities get missed when you are writing up meeting minutes? Isn’t it a chore to format the actions and send them out only to have your colleagues read through, capture their actions and log them into what ever system they are using (if you are lucky). It’s even more of a chore if there are alterations or disputes about the content and the actions as you need to re-work and re-issue to the results sometimes more than once. At the next meeting you go back through those meeting minutes again, get the list of actions and then go round the table to hear what progress, or lack of, has been made. You then start the whole palaver over again with this meeting’s business. There has to be a better way than this.

The example I will give you is based on IBM Connections’ Activity facility. It’s like a multi-threaded task list which includes sections and the ability to add files, documentation and links alongside the tasks. One of the best distinguishing features of Activities is that they can be integrated into IBM Notes or Microsoft Outlook so that they can be used as a convenient store of email along with tasks, but more on that later.

The flow I will reproduce is like this:

As the use case around managing meetings shows, it is actually more complex than you might appreciate. We follow this process often without really stopping to consider how convoluted it can be. Nevertheless the amount of communication involved when handled through a medium such as email can end up in you sinking under a pile of unnecessary data. Take this example:

1. I need to have a meeting with my team of eight programmers. I use my calendaring and scheduling tool to check for a suitable time when we can all meet in the next few days. I send out invitations to the meeting, resulting in eight emails being sent.

2. Two of my team respond with proposed new time for the meeting because they had unbooked commitments. I've now handled ten emails.

3. I reschedule the meeting and send out the updated meeting invitation, resulting in eight more emails going out, adding up to eighteen in total so far.

4. Before the meeting I prepare the standard agenda and send it out to the team for comments. That's eight more emails, each with a file attachment of 320Kb attached. Twenty six emails and 2.5Mb of mail used (ignoring the basic size of the mail itself).

5. For members of the team send me back my agenda with alterations. That us up to thirty email and a further 1.2Mb to add to the 2.5Mb, making 3.7Mb in total.

6. I make the alterations to the agenda as requested and send it out again to the team. Eight more emails make thirty eight and 2.5Mb more of file attachments brings us up to 6.1Mb.

7. Shortly before the meeting I receive papers to accompany reports from three of my team. The total of the emails received is 2Mb each, so 6Mb received. I forward these to the other seven members of the team respectively: twenty one more emails (fifty nine in total now) and 42Mb added to the total (48Mb total size).

8. We have the meeting and I record the meeting minutes. After the meeting I send the minutes out to the team. It comes to 720Kb for the Word document with the minutes, so an additional 4.8Mb is generated (52.8Mb in total now) and a total of sixty eight emails.

9. Two of the team come back with additions or adjustments to the minutes. We're now up to seventy emails.

10. I make the changes to the minutes and send out the final version. Seventy eight emails and 57.4Mb in total.

While this is just a simple process and I am highlighting the number of emails and sizes of attachments flying around, I hope you can see the point - this is just one meeting and a relatively normal flow. Your inbox would be bulging with the firehose of information and different versions of the same file. Too many of those, and you might end up in what my IBM colleagues call "mail jail".

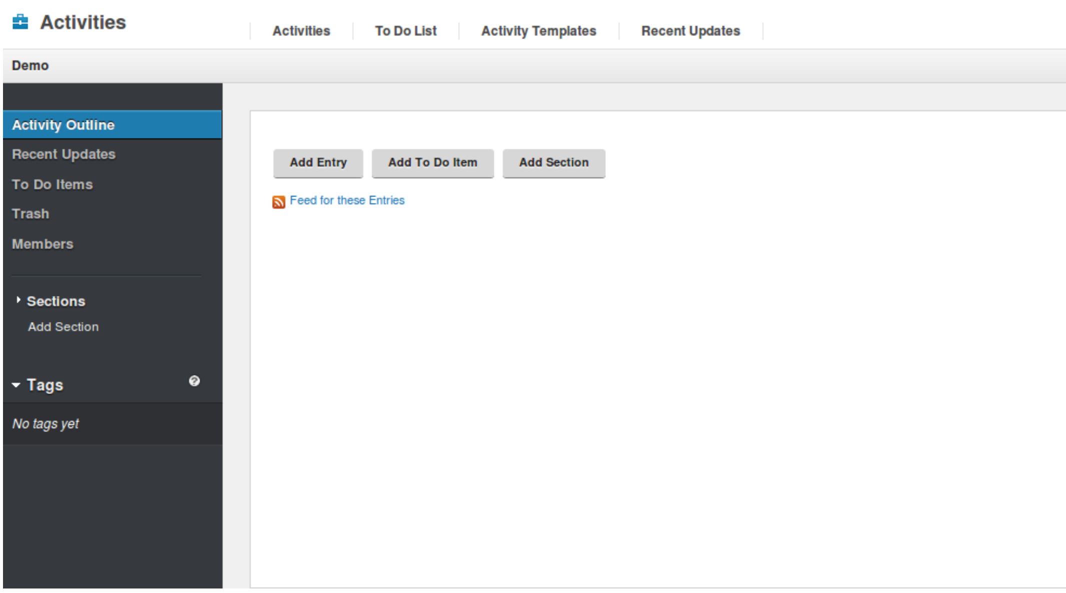
Using IBM Connections, I would create an activity to hold all my meetings:

- I will use one activity to coordinate all of the meetings and use sections to split up the content for the different meetings themselves. I start by giving the activity a name, say "Weekly Management Meetings".

- I enter some tags about this activity which will help me find it later when I might have lots of activities going on.

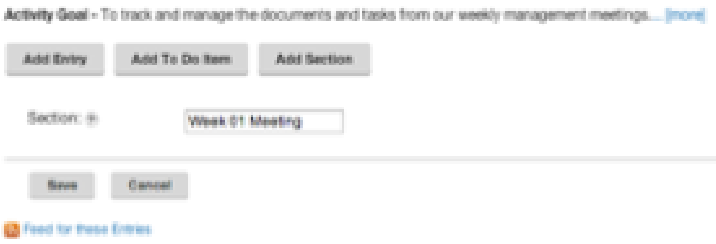
- I've added the members of my team into the authors list (using the Members option) so that they will have the ability to add and edit their own content. Note that I put a short description of the activity in the "Activity Goal" field. There's no due date as it's an ongoing activity. When I hit the "Save" button the new activity will be created:

Figure 2.6. A new Activity



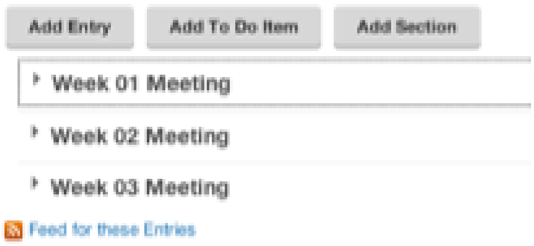
Next I want to set up some structure for my meetings. To do that, I'll use Sections to define an area for each of the weekly meeting. I press the "Add Section" button:

Figure 2.7. Adding a Section to an Activity



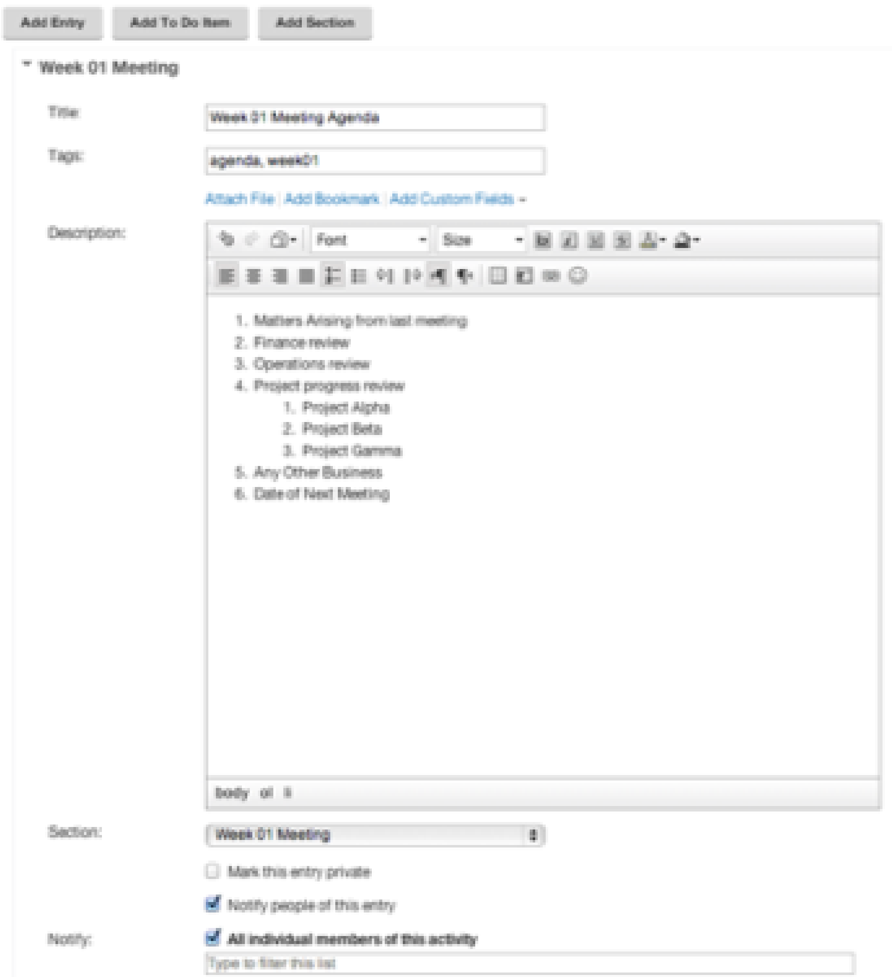
I repeat this a few times so that I have three sections, one for each of the upcoming meetings:

Figure 2.8. Sections for the Meetings



Now I want to start preparing for my first meeting, and here's where we start saving time and effort over our large number of emails and file attachments. My preference is to use IBM Notes to do the scheduling of meetings as it is able to look into the schedules of my team members and locate a suitable time. It's also set up to handle reschedules and other changes. Once the date of the meeting is set, I get to work on my meeting preparations:

Figure 2.9. Meeting Preparations



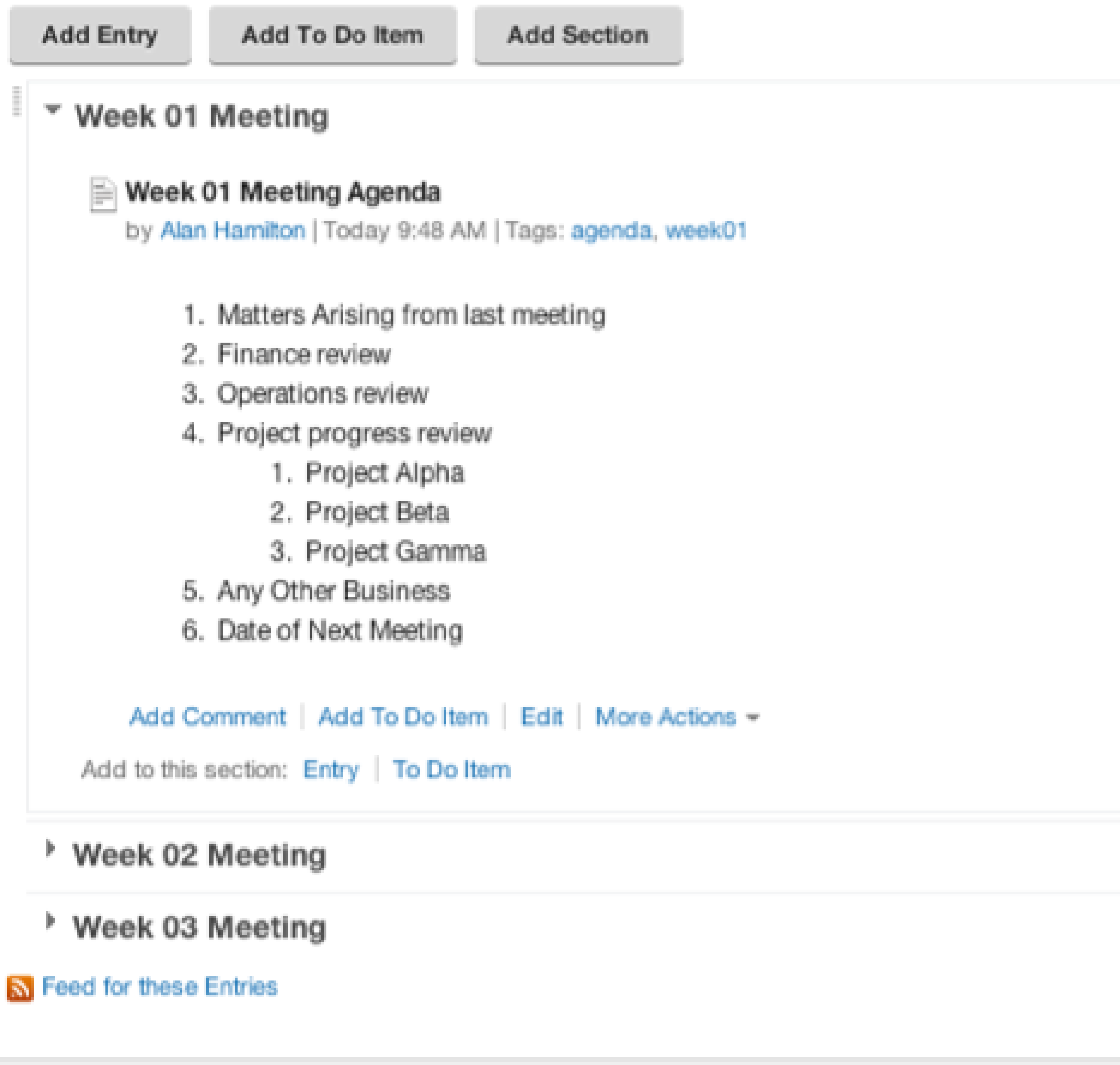
I start by creating an "Entry" by pressing the "Add Entry" button. If the "Week 01 Meeting" section is highlighted, like shown, then the entry will automatically be added to that section. Don't worry, it's easy to move it to another section later if it turns up in the wrong place.

A new form appears. I give the Entry a name, in this case "Week 01 Meeting Agenda", and set some tags for it. I could upload files or perform some other actions at this point, but as my agenda is quite simple I opt to simply type it into the rich text area. I've used the number list and indent buttons to create a multi-level structure as you can see.

Note that this entry will appear in the "Week 01 Meeting" section. If the Section field is blank, simply choose the section you want it to appear in. I don't want this particular entry to be private (I want to share it with my team). I do, however, want to notify them that the agenda exists and to seek their feedback. I check the "Notify people of this entry" checkbox and then "All individual members of this activity". The result when I press the "Save" button (not shown in the screenshot) is that each of the team members will receive an email from IBM Connections notifying them about the agenda.

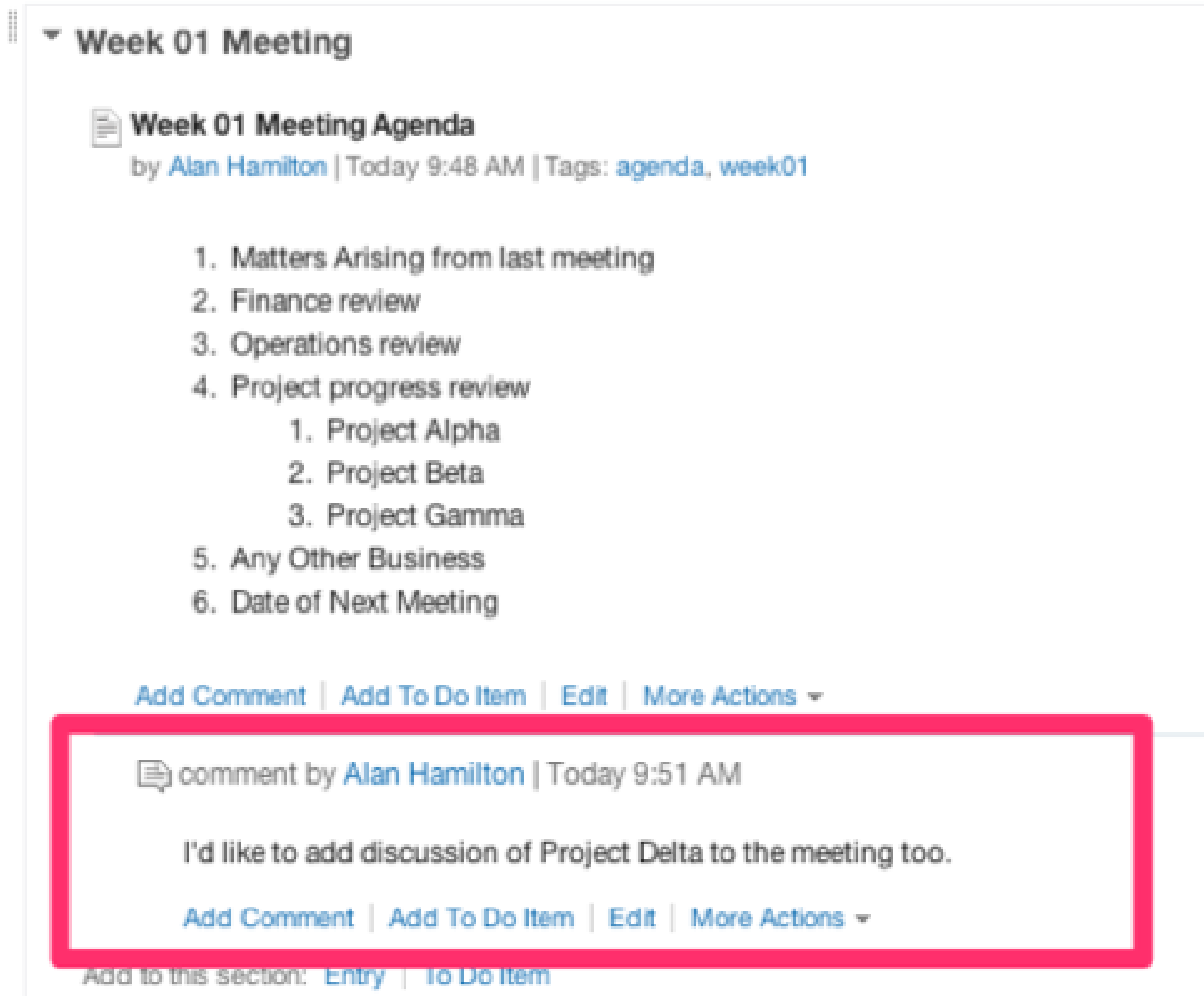
Once I've pressed "Save" I go back to the Activity view and see my agenda in all its glory:

Figure 2.10. Meeting Agenda



Remember that my team will receive a notification that the agenda has been created. Shortly after sending this out I see in my Recent Updates that one of my team has commented on the agenda:

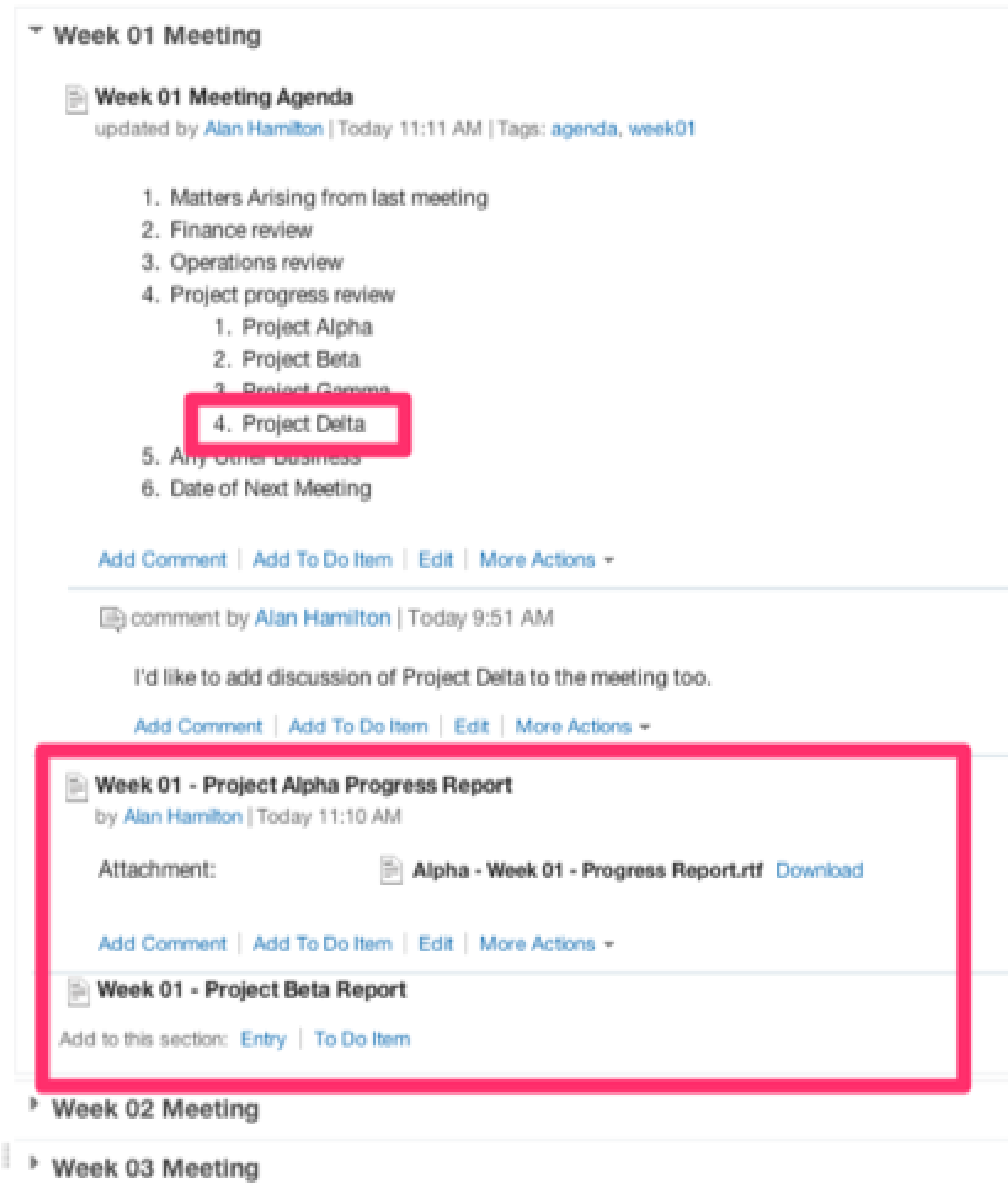
Figure 2.11. Meeting Agenda Comment



Instead of me receiving an email asking me to change it, and perhaps receiving the same request from multiple people, everyone associated with the meeting can see the comment being made and can either choose to add their own comment, such as "Don't forget Project Epsilon", or even a comment against the comment, such as "I agree".

Even at this stage we are collaborating, communicating and being more productive. Fast forward a few hours or days and I come back to check on the status of my agenda and the documents, prior to the meeting:

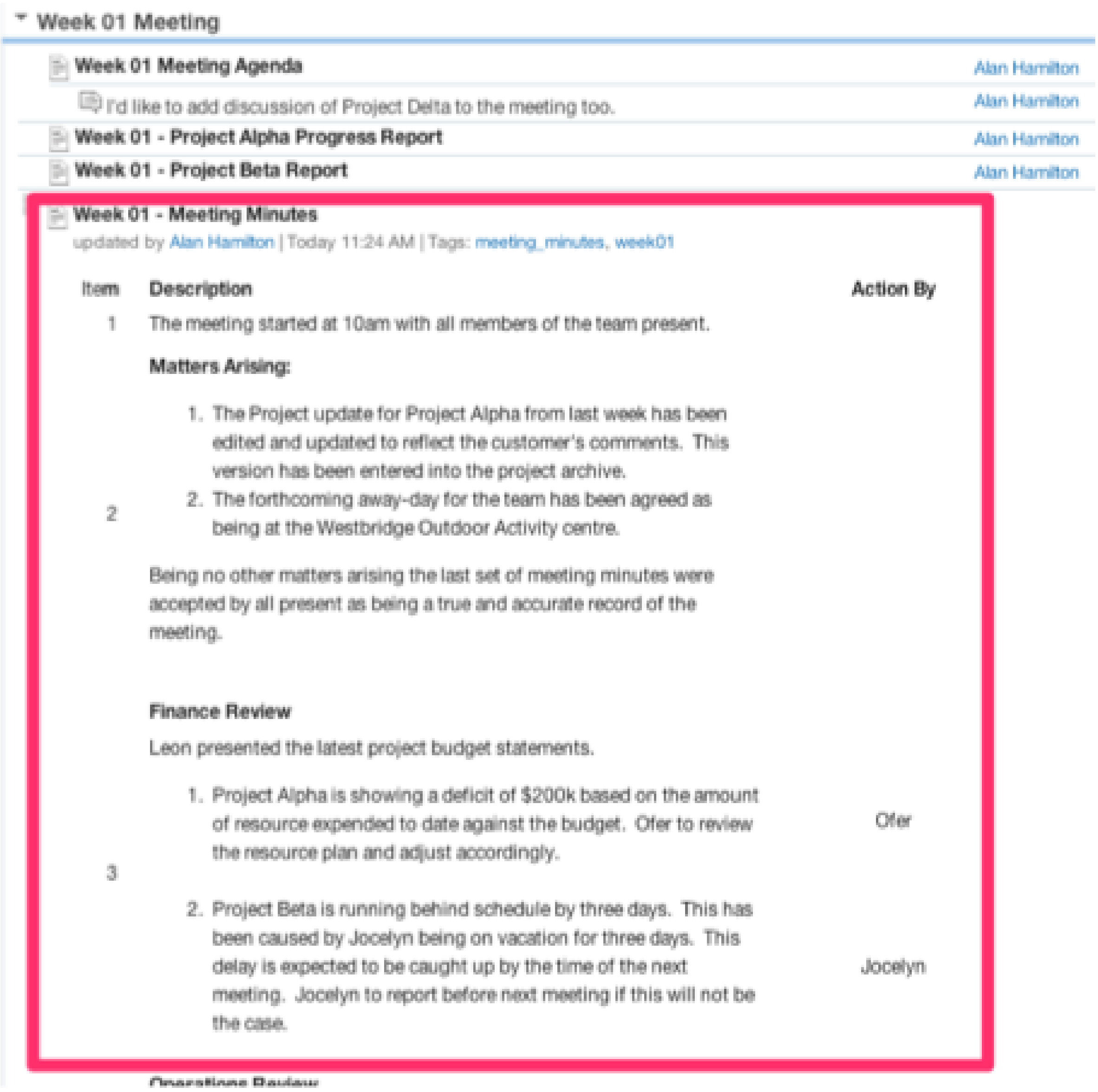
Figure 2.12. Meeting Agenda Comment



We can see that we now have a Project Alpha progress report, which has been uploaded as a file. We've also got a Project Beta report, which has been typed into the rich text editor. These have been uploaded into the Activity as entries as they have the same status as the Agenda. They're the things we need to consider at the meeting. We've used comments to provide feedback on the entries.

At the meeting I create a new Entry, again in the Week 01 section. I can use the rich text editor to record the comments and minutes as I go along, although you might prefer to use a word processor document or spreadsheet - whatever you are comfortable with. I like to have the entry with the agreed agenda expanded (by clicking the "More" button next to the agenda) and type the notes as I go. The end result is a set of minutes completed as the meeting continues which is immediately available for everyone to see at the end of the meeting:

Figure 2.13. Meeting Minutes



I used a table in the rich text editor and set it up with a reasonable number of rows and columns to achieve the result you see in the screenshot. I set the headings "Item", "Description" and "Action By" in bold text. I used the Table Properties to change the border of the table from the default "1" to "0" so that there were no table lines shown. I also changed the "Vertical Alignment" in the third column to be "top" so that I could use the return key on my keyboard enough times to push the person who is to action the point to be next to the action itself. I changed the "Horizontal Alignment" of column three to be "Center".

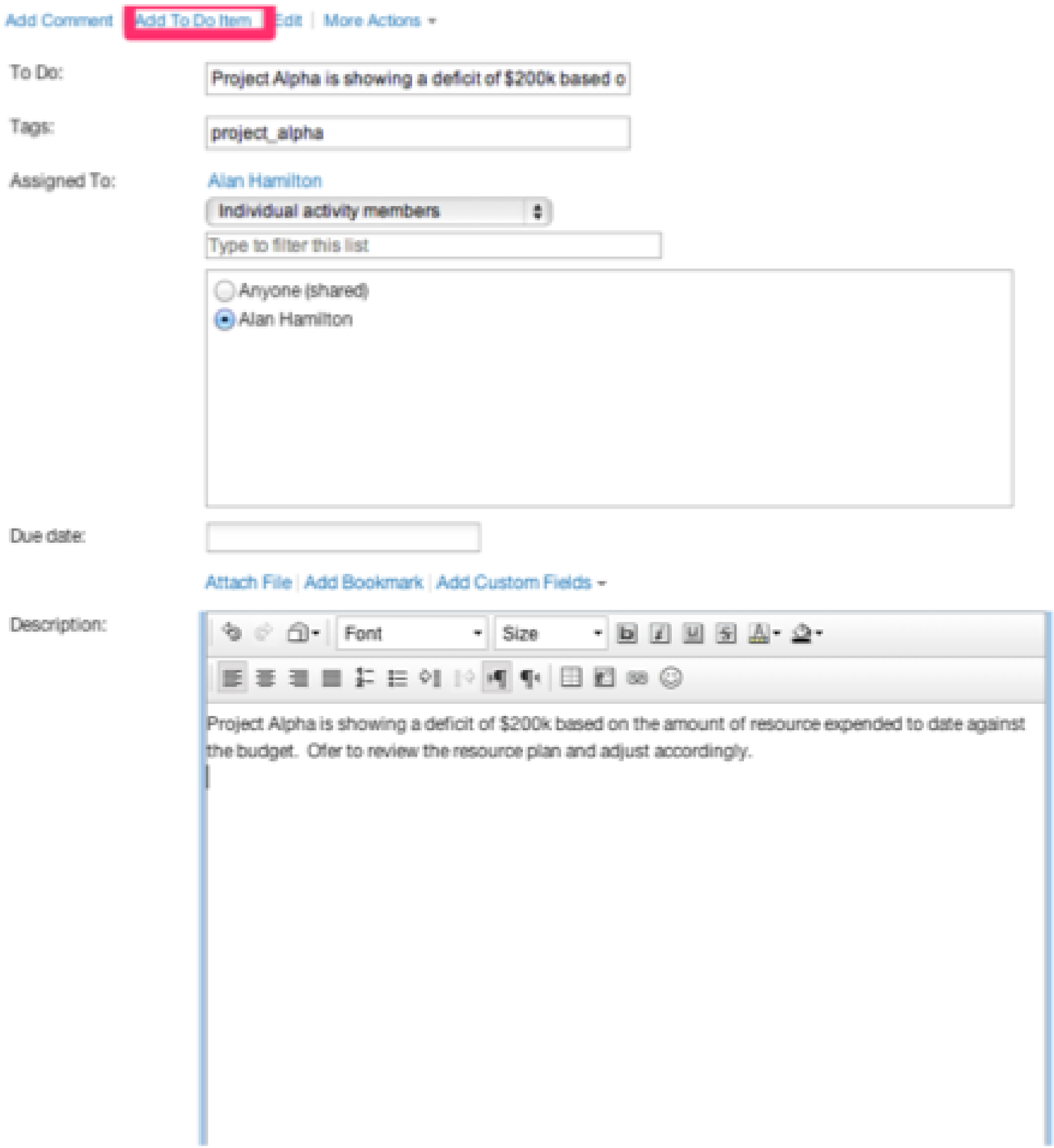
The nice thing about this approach is that the text of the meeting minutes is immediately there for you to see in the context of the meeting agenda and the supplier papers. I want to use the Activity's built-in "To Do" functionality to make it easier for my team to track their actions. It's one thing to formally record the actions in the meeting minutes, but my team tends to do a lot of meetings and keeping track of their actions across all of these would be difficult for them.

Each time an action comes up, therefore, I also create a "To Do":

Figure 2.14. To Do

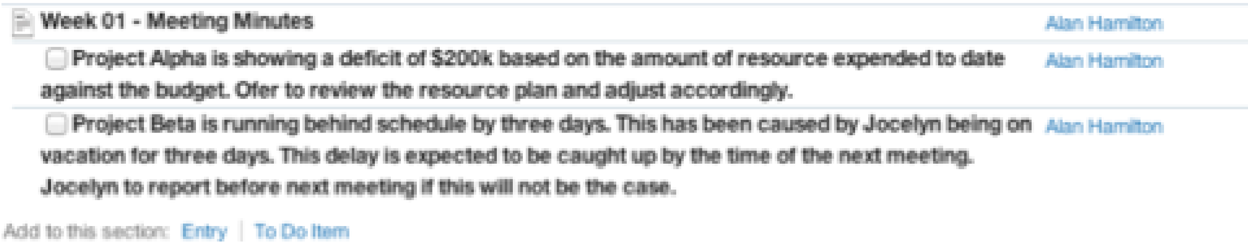
Creating a To Do item opens a new part of the activity:

Figure 2.15. Completing a To Do Form



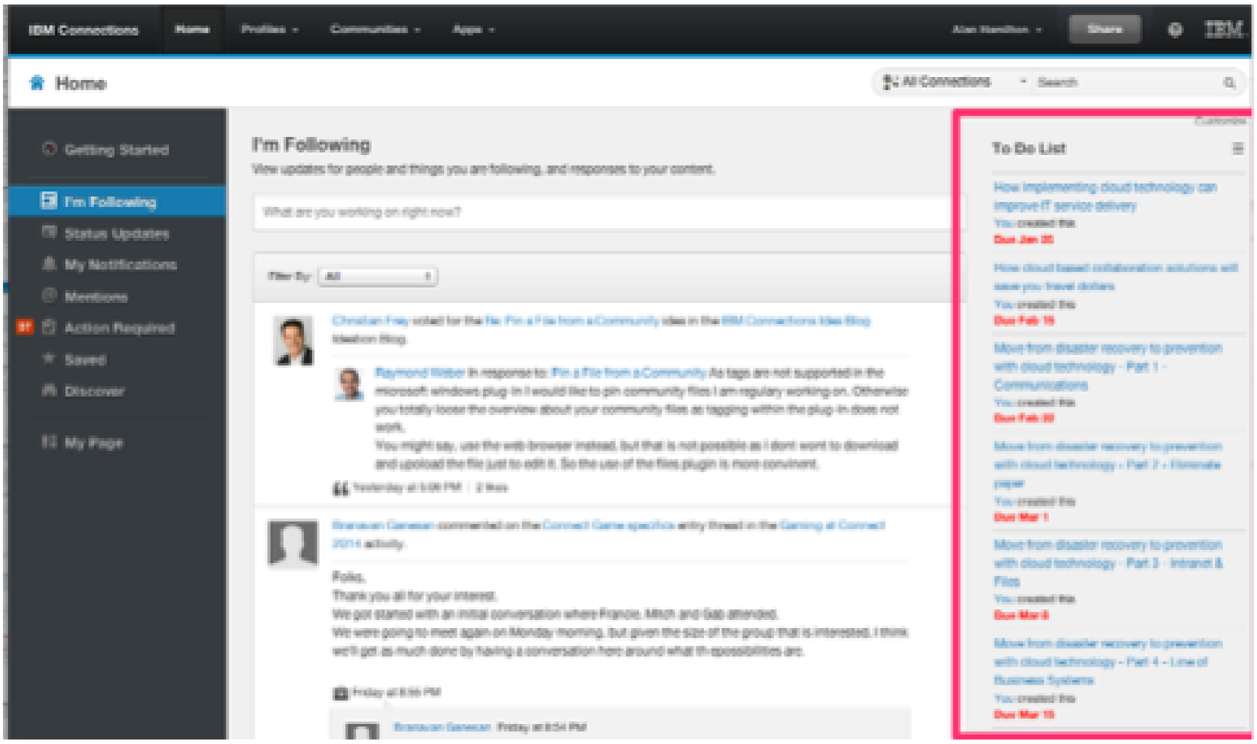
Note that you can select who is assigned to this task, the date it is due to be completed and you can also attach files, bookmarks, etc., as well as adding your own text. The result is that To Do items appear in the context of the Entry they relate to - the Meeting Minutes:

Figure 2.16. To Do's in context



When my team-mates log in to Connections, the default screen (and several other places) shows all of the tasks assigned to them, across all of the meetings and activities they are participants in:

Figure 2.17. All my To Do's in one place



This is one of my favourite features of Activities. This represents the combined list of all the To Do items I have across the whole system. Outside the screenshot but on my (long) list of tasks are the two To Do items I created earlier. Clicking on any of these takes me straight back to the To Do item in the corresponding activity.

When I am running a meeting I like to ask people who have To Do items like this to put a comment next to their To Do item when they mark it complete. Sometimes this is just simply "I've done it", or its attaching the work product, such as a report or other document that the task was about. This is a useful thing to organise your information because it keeps the task and the result in the same place.

You might wonder why I have placed so much emphasis on running a meeting. You might think this is a level of detail that you don't need in a book such as this. I've done this because running meetings is something virtually all of us do. Virtually all of us complain about the effort and time meetings take. When building a business case to establish social collaboration in any organisation, tackling the time-wasting meeting scenario is one which is highly motivational and low-hanging fruit. If YOU can work this way and encourage your fellow workers to do likewise you will be getting immediate return on the investment.

Re-engineering meetings is something each of us can do. It's low risk and produces immediate results. If you change nothing else about the way you work, I encourage you to try this.

Systems of Engagement and Systems of Record

A System of Engagement is a system which helps engage the users in driving or producing a common goal. Such systems are usually collaborative and include things like instant messaging, video conferencing, social networking, email, and so on. The contents of the System of Engagement are not necessarily designed to be used as formal records of transactions.

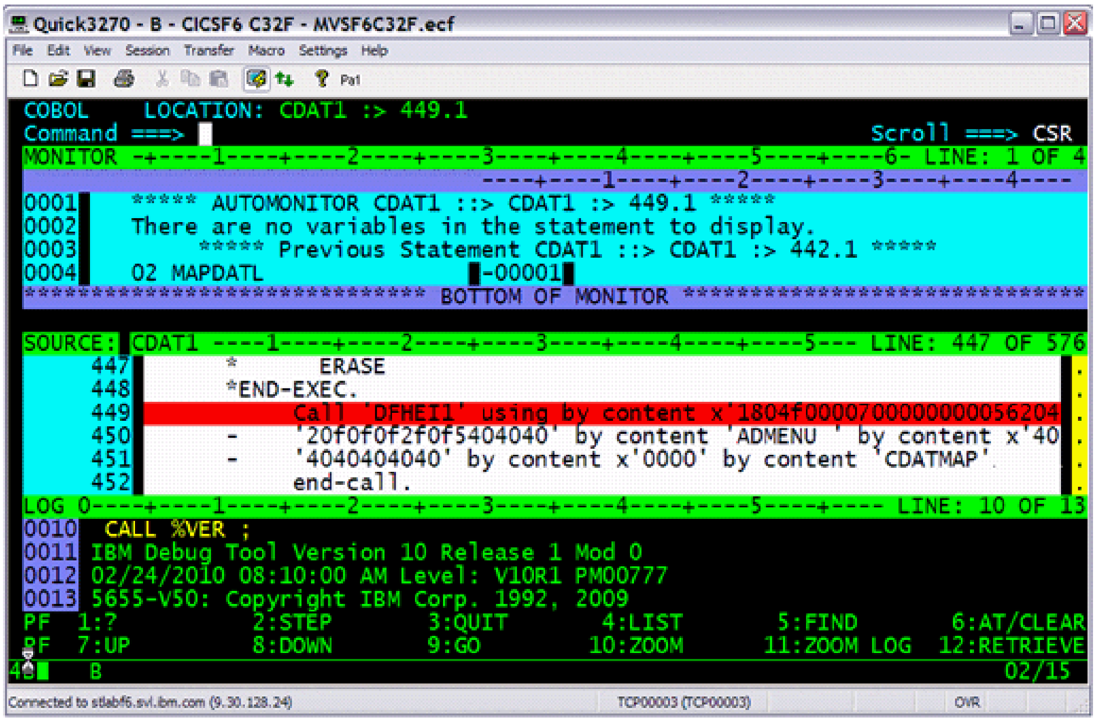
Figure 2.18. A System of Engagement - Facebook

A System of Engagement, as Geoffrey Moore put it:

> Systems of Engagement will begin with a focus on communications. We grew up with letters, phones, telexes, and faxes, and grew in to email, shared text databases like Lotus Notes, portals, websites and mobile phones. Now we are going to incorporate a third generation of communications, based on 1) connecting people in real time; 2) smart and geographically-aware mobile devices; and 3) ubiquitous and cheap bandwidth.
>
> —Geoffrey Moore, A Sea Change in Enterprise IT [http://www.aiim.org/~/media/Files/AIIM%20White%20Papers/Systems-of-Engagement-Future-of-Enterprise-IT.ashx]

A System of Record is quite the reverse. As Moore points out, it is "Enterprise IT 1.0". Its focus is on proof, security, access, audit, long term access and so on. Typical Systems of Record include Document Management, document imaging, customer interaction solutions, like a customer relationship management system.

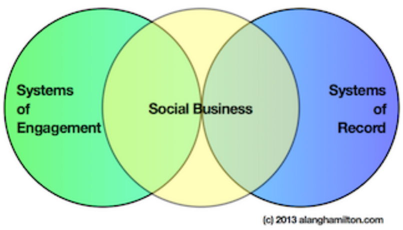
Figure 2.19. A System of Record - IBM CICS [http://www.ibm.com]



The two Systems are designed for different purposes and are approached from different angles. Typically a System of Record is deployed by the IT department of an organisation in response to some underlying procedural requirement, like providing somewhere to reliably put documents. A System of Engagement is primarily something which the line of business identifies (such as a workgroup, department or subsidiary) as being required to give an improvement to how it works.

I see the definition of "Social Business" as being one which intersects both of these Systems:

Figure 2.20. Social Business is the intersection of Engagement and Records

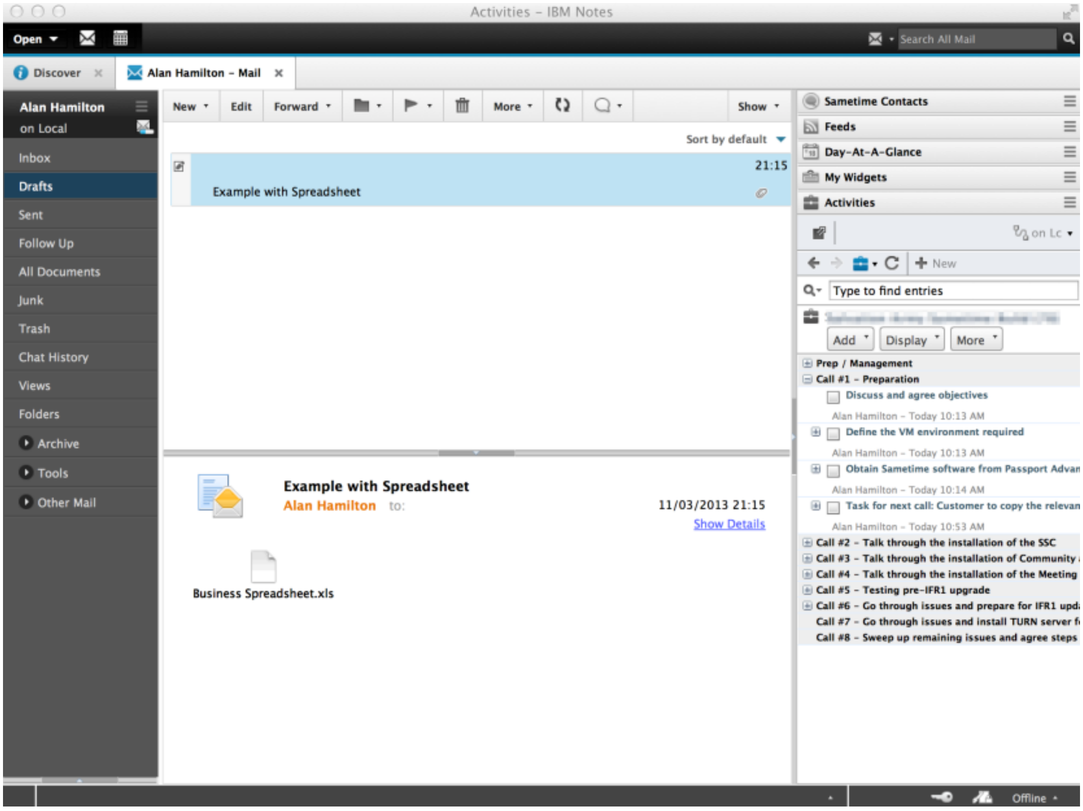


The best of both worlds is to be found in Social Business solutions. You use the Systems of Record to ensure that your business records are safe, secure, auditable and accurate. You use Systems of Engagement to help build up the information and expertise which goes into the the information in a System of Record.

One area where the two worlds merge and Social Business can drive real business benefit is in the area of project management. There is a need for a high degree of engagement between participants in the project whilst at the same time there is a critical need to ensure that there are accurate records of progress, time-spent, and so on. That's why we're going to look at how social collaboration can help with project management as a) it's in the ideal intersection of the two worlds and b) it's because I am sure many of you reading this are involved in delivering or managing projects.

It's easy to integrate a common System of Record you use with a System of Engagement. I use IBM Notes on a daily basis as part of my work and part of that excellent application is the Activities sidebar.

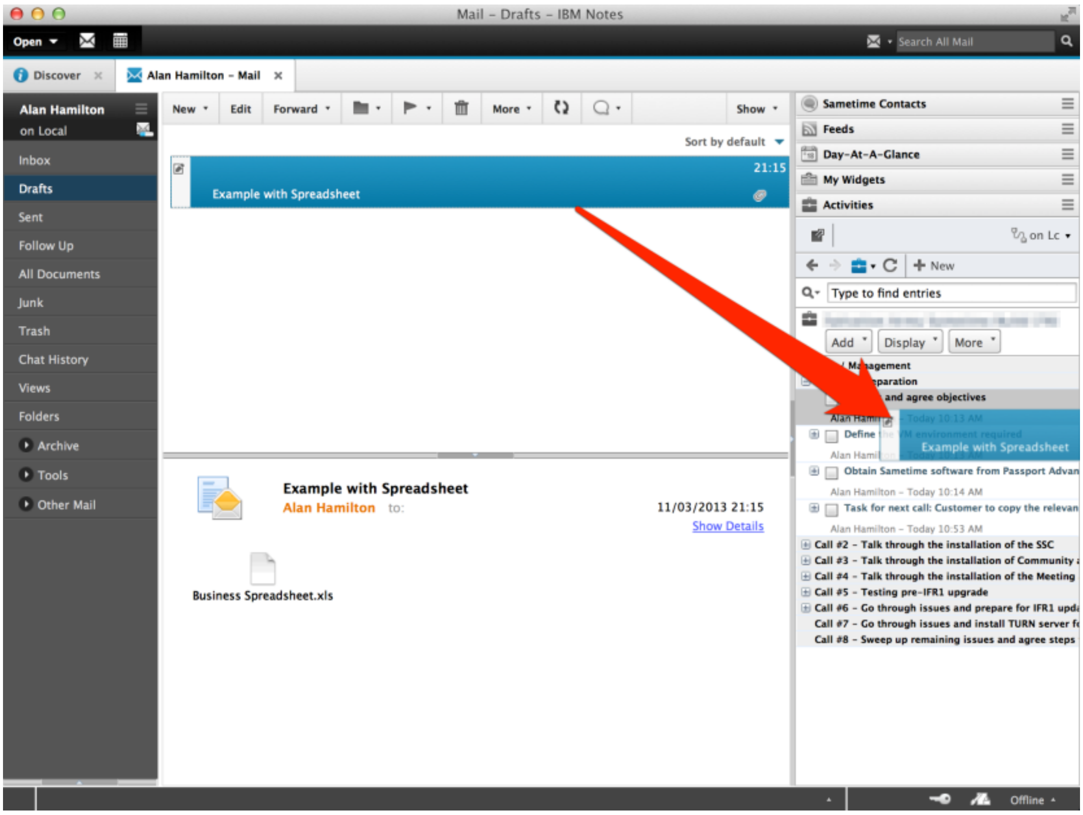
Figure 2.21. Activities Sidebar in IBM Notes 9 Social Edition



The Activities sidebar shows me all my activities in IBM Connections and allows me to explore their structure.

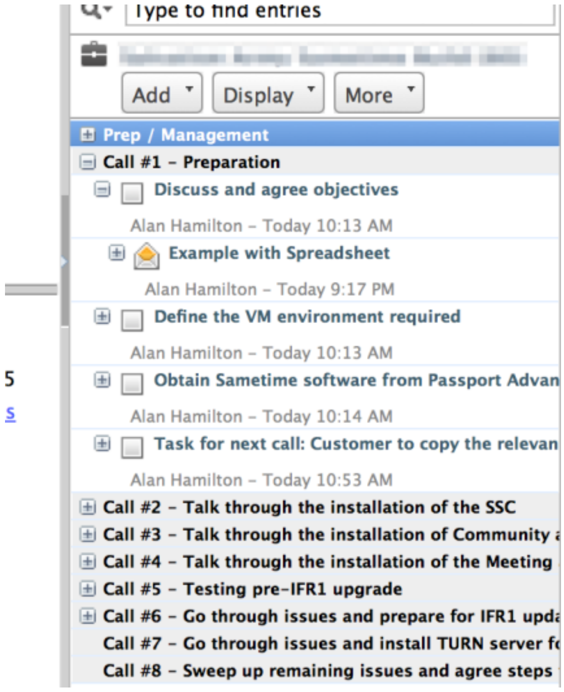
However, the Activities sidebar also accepts drag and drop action from my Notes inbox. This means as part of the engagement of collaborating with my colleagues on a particular project I can now submit email as a Record of work done:

Figure 2.22. Drag and drop an email to the sidebar



The result is that the email and any attachments in the message are added as Entries into the hierarchy of the Activity wherever I dropped it. Once it's there, of course, I can move it around as appropriate:

Figure 2.23. Sidebar closeup with email



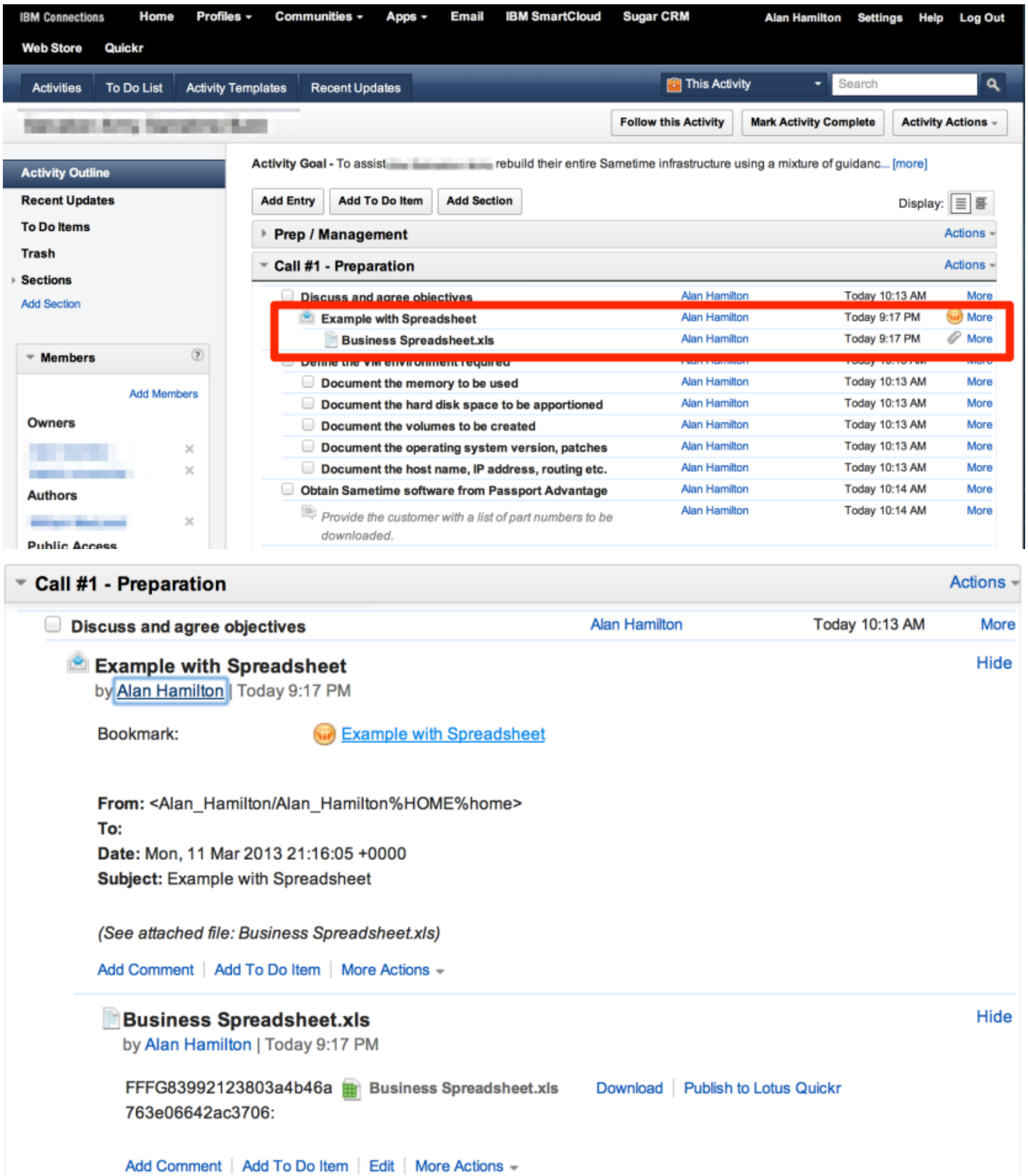
If I take a close look at what the result looks like back in the web page view of IBM Connections I see a number of interesting things:

1. The action has added the entire body of the message into the rich text area of the Entry.

2. It has created child Entries for each of the file attachments from the email.

3. It has provided a Notes doclink back to the original email in my mail file.

Figure 2.24. How an email looks in IBM Connections



This last point is a significant one. As well as providing me with a new place to store information in the context of the actions being taken, it also affords me the possibility of audit and checking with the bookmark back to the original store.

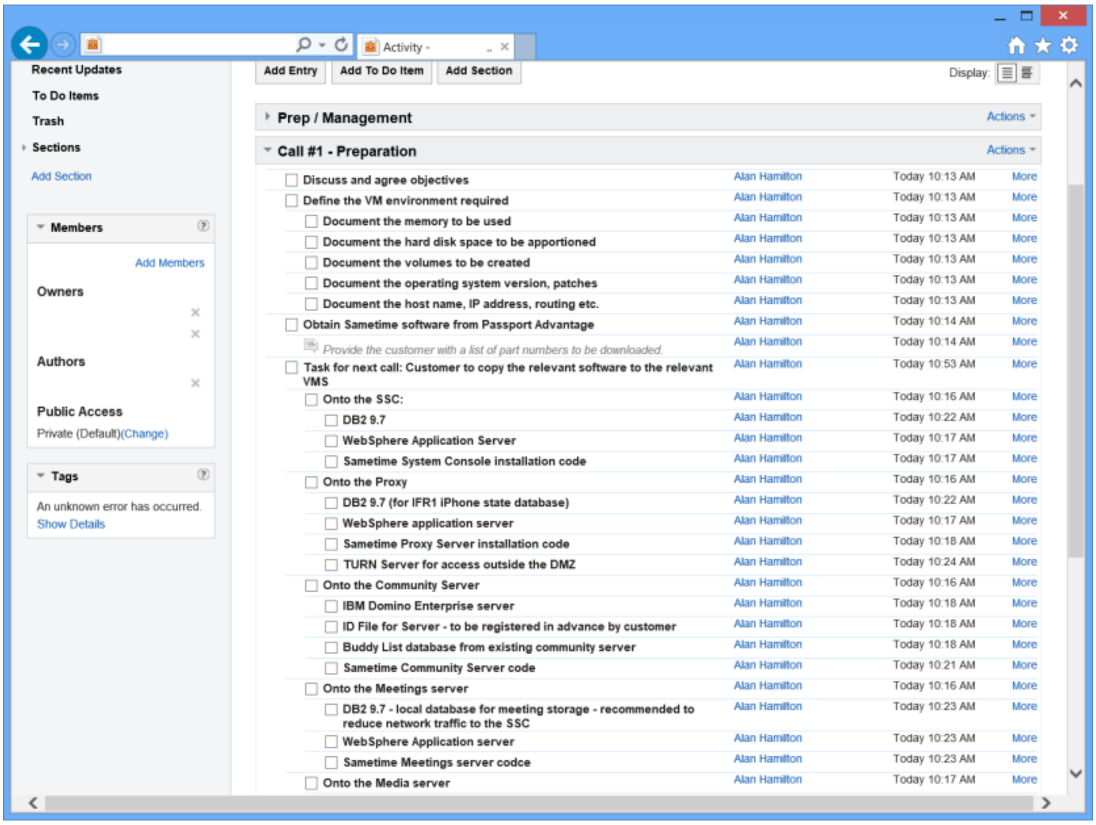
I recommend that you check out the section later in this chapter on "Supplements to Other Systems" if this is an area of particular interest to you. Organisations of all sizes now have many computer systems, many of which rely on the employee to be the point of integration. Bringing social collaboration into the equation might seem like just another system to be kept up to date and therefore makes more work rather than less. Let's take a closer look at that later.

Managing Small Projects

A small project is something which is reasonably linear and concerned with a single outcome. For this purpose I would use an Activity, but on a bigger scale from how we worked with meetings.

The Activity structure allows you to create a sophisticated hierarchy of tasks, sub-tasks, and so on. Interspersed with these can be Entries and Comments which help to define the context and contain the results or commentary from the people involved.

Figure 2.25. A structured project in an Activity



If your project has obvious phasings or major groupings to it then use Sections as a way of mapping them out. Next, create each major task as a To Do at the level immediately below the Section. For each major To Do, create sub To Do's to describe the tasks involved in the main task. You can repeat this structure, refining each of the tasks successively.

Remember, of course, that each and every task can be assigned to an individual in the project and can have a due date, etc. Each To Do item can also have Entries and Comments associated with it so that a very detailed documentation environment awaits you if you choose to run your project in an Activity.

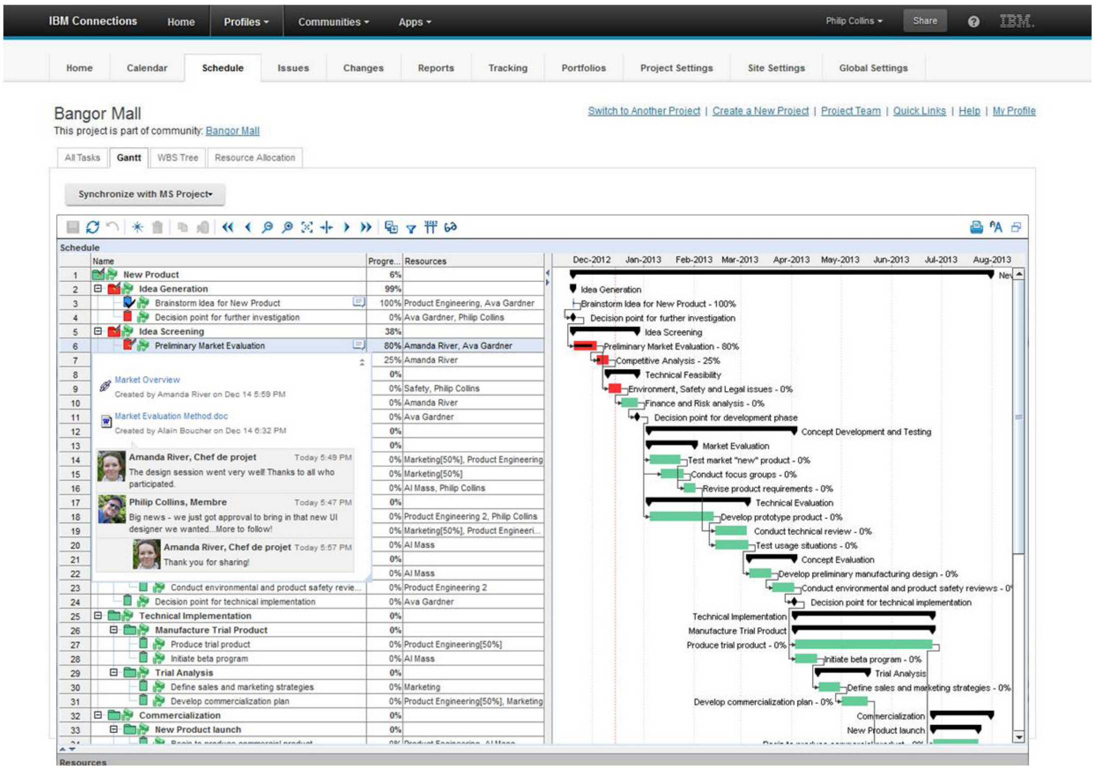
When you combined this with the ability to attach documents, drag emails in and generally use the Activity as the hub for your project, I hope you can see why using a social collaboration environment like IBM Connections can:

- Reduce the amount of email required to perform simple tasks;
- Provide a single place for the most up to date information to reside;

- Avoids the need for multiple versions of project plans to be moved around so that it's difficult to know who has the latest version;
- Encourages the sharing of information such as email by getting it out of the individual's email inboxes and into a central place.

If you are looking for a more conventional view of project planning, such as the traditional Gantt chart and resource planning, you might want to consider Trilog Group [http://www.triloggroup.com/portal/web-site/home.xsp] 's ProjExec for Connections. This integrates with Connections and provides a comprehensive project planning solution for any Community.

Figure 2.26. Trilog Group's ProjExec for Connections



Managing Large Projects

I hope you can now see how an Activity can be used as an excellent tool for managing a project. In fact it is now the de-facto way of running projects within the part of IBM I work for. It ticks all the boxes of centralisation, collaboration and communication without all the hassles of managing files and separating communications from project progress. What, though, do you do if you have a large project to manage, or several projects all at once?

In my view the Community feature of IBM Connections is the best vehicle for you. It acts like a container into which you can put all your files, Activities, Comments, Events - basically everything that your project would need in order to provide a central location for coordinating your activities. Communities also let you manage their security, right down to making it invisible except for those who have been given access. Communities also support sub-communities which are a useful way of performing Program Management, i.e. the management of several related projects at the same time.

You can find a full exploration of the capabilities of Communities in Appendix 2. For the meantime, however, let me demonstrate how you might handle a large project using the example of a Construction project.

A construction project – building a new home, office block, shopping mall, or whatever, is all about people. In most cases the people work in many different organisations and are appointed either by the client (the organisation who has commissioned the building) or the contractor (the organisation charged with physically building it).

As well as the client and contractor there will likely be the following other companies to a greater or lesser extent: architect; quantity surveyor; mechanical engineer; electrical engineer; planning supervisor; to name but a few.

The contractor, whose job it is to build the thing will appoint sub-contractors who are specialists in their areas: electricians; a/c engineers; structural steelwork; plumbing; groundworks; etc.

What I want you to understand from this is that there are lots of different companies involved. Each company of course has multiple people involved and hence you immediately have a social network formed where people need to meet, understand their position and hear about what they're doing.

The construction industry is typically quite conservative when it comes to working practices. This is partly because it is very litigious (often a company's only route to making a profit on a project is through litigation). Times have changed, however, and nowadays project extranets are virtually mandated on projects of any size.

Construction is all about instructions. Everyone covers themselves with an instruction to do this, or that, and failure to do so, or to act in time is often the basis of litigation. Therefore in the bad old days, a construction project would produce literally tons of paper. As time moved on this moved to fax and then email. Many hundreds of gigabytes of emails, drawings, documents and other information are produced on a construction project of any size.

Thus the project extranet was born. Instead of bombarding everyone with all this data and giving each company the same headache about receipt and retention of information organisations such as 4Projects, BIW and others have sprung up to provide a customised centralised location for information to be stored and notifications sent.

Although these systems achieve their aim by cutting down the IT hurdle involved in managing a construction project, they don't offer the benefits an in-house project team deploying a social intranet experience.

So why would a construction project want to be run in a social manner? A project need the following:

- A place to store and manage controlled documents like drawings, specifications and reports;
- A way of updating others on changes to files and other important information;
- A project directory so that everyone knows each other's responsibilities;
- A management and workflow engine to provide a standard approach to managing changes and which provides industry-standard templates to achieve these changes;
- A way of managing revisions to documents and being able to back-track through previous revisions;
- Security and auditability of all changes in the system;

Using a social business approach to these requirements allows:

- A great reduction in irrelevant information flooding into users mailboxes (remember that many construction professionals work on several projects at a time and hence can receive several hundred notification emails a day);
- The necessary management and control structures to deliver industry standard processes which as subject to audit;
- Cross-system tagging and discovery of information which previously was not possible through traditional systems;
- The opportunity to simplify the reporting structure and information update paradigm so that although the same rigour of reporting is put in place, it is done so less formally (I will explain in a minute).
- The basic utility functions of file sharing and information dissemination are covered through Files and Wikis.
- Knowing who to contact is addressed through Profiles.
- Fine-grained control of project activities, completion and progressing is delivered using Activities.
- Standard Operating Procedures, Policies and other standard documentation is covered and controlled using Wikis.
- Micro-blogging by each participant can be used as a way of updating others on the status of their part of the project, such as “Drawing 193783 – Second Floor Revision A drawing posted to the General Arrangements Folder”.

Blogging

Blogging might be scoffed at as simply a way for the idle to promote themselves (ahem!). In a construction context, blogging can be a system of record where each organisation reports formally on the work they have done, advises others of issues arising and generally uses it to communicate.

I advocate that blogging would allow the individual organisations to make the formal reports they need, provides the security to prevent later tampering with the reports and also provides the longevity of data storage which is needed to aid referencing in the future.

Micro Blogging

Instead of endlessly producing memos of updates on the status of work, construction projects can use micro-blogging (similar to Twitter) to publish what’s going on. Those involved can subscribe to the feeds from different players in the system.

File Management

Centrally storing files and providing a mechanism for revision is a given in any viable project extranet. Any social business solution worth its salt provides this functionality. By tagging the files (with the same bank of tags which are used throughout the system) not only can the hierarchy of files and folders which the industry is used to be maintained, but cross-functional meta data can also be provided.

For example, any project would likely structure its files according to the building, the structure, then perhaps the package of work the drawings represent. This would still be the same. However, by using tags to further describe the content of the drawing it becomes possible to locate the information you need in future alongside other explicit knowledge in other areas of the system. For example, on an electrical drawing you might tag the file air conditioning, data outlets, electrical sockets. Later, blog entries, wikis, status updates and other content similarly tagged can then be grouped with what might otherwise seem to be an irrelevant file.

The ability for not only the owner of the file but in fact any user to tag the file means that the tacit knowledge the users of the system have can be applied. Let's say I open the drawing and find that it also includes information on the lighting. I tag the file with lighting and have contributed to the body of knowledge without affecting the original data.

Process Management

Most project extranets provide inflexible approaches to managing processes. Some construction projects can be complex and require many different pieces of information to be recorded as well as actions to be taken.

Using a social system which has something like IBM Connections' Activities framework (where rich templates of process can be defined and reused over and over) provides a mechanism to define, refine and run change management, information review and general management processes for the project.

Communities

Where information needs to be gathered into logical groups, communities can be formed. These allow files, wikis, blogs, activities and all sorts of other information to be brought together under one logical group.

This allows the like-minded to gather and discuss, share and contribute in ways which is not currently possible using traditional extranets.

Tuning Out

The amount of information a construction project generates is immense. Using Communities and Activity Streams to group and connect with the relevant people involved in the project allows everyone to stay in control of the stuff that is important to their job.

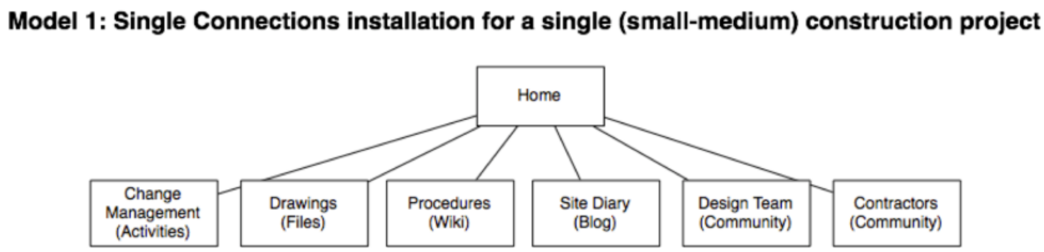
A Social Construction Project provides these social features with the same rigorous controls for auditing and security which are needed to cover everyone's backs but with the flexibility of encouraging collaboration and sharing.

Different Models

Although this example is about construction, you could easily apply many of the principles described to any complex and/or large project. To give you a handle on how I would structure different types of construction project (which you might wish to apply to your own, I am going to look at a number of different models of projects used in construction.

Single Connections environment for a single (small) construction project

Figure 2.27. Model 1 - Small project

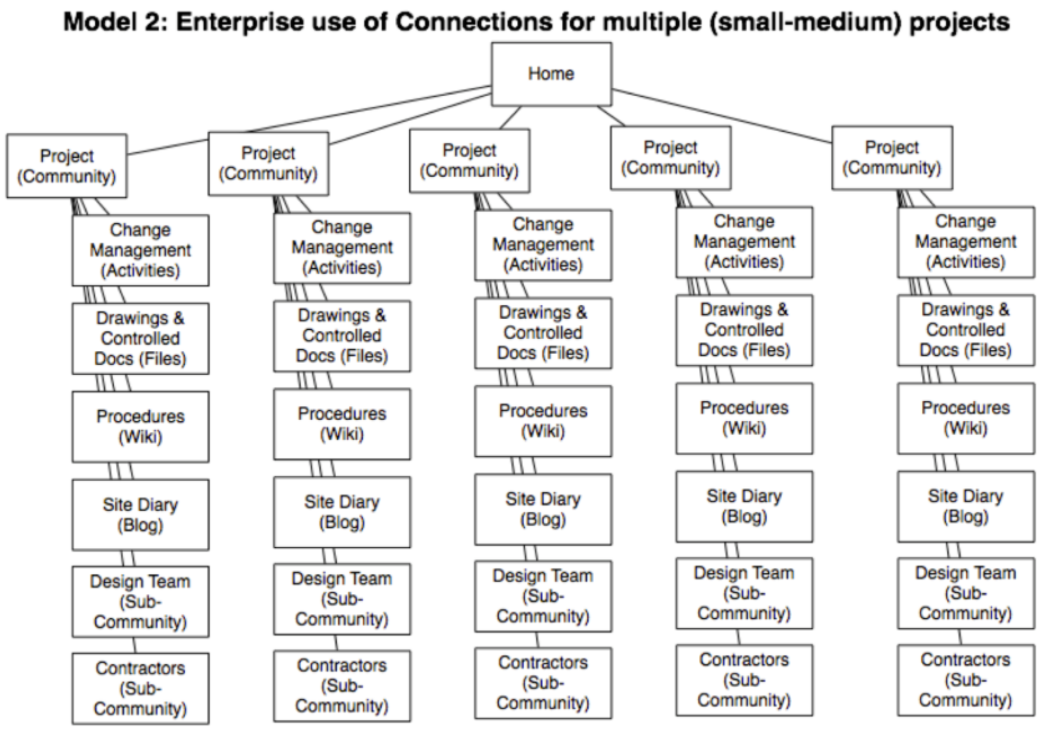


In the Model 1 diagram above I show that the main areas concerning a construction project can quite easily be implemented in Connections:

- Change Management is probably one of the most complex but can easily be standardised into the main workflows the project needs based on common definitions agreed by the industry itself.
- Drawings fits easily into the Files area. Uploads, downloads and all that good stuff are handled easily by Files.
- Standard work procedures in place in the project, such as health-and-safety details, contractor inductions, etc would be placed in the Wiki.
- The Site Diary, a record of what has happened on the site can easily be implemented using a Blog.
- The two distinct groups I discussed in my earlier post, the design team and the contractors would be managed through communities. As the main contractor you'd be a member of both communities. Anyone else, often including the client, would only be a member of one of the communities as well as all the "public" information.

For a much larger project, such as one with multiple sites or very complex requirements like multiple buildings, a bigger model is needed. Importantly, however, many organisations who would really benefit from a social business project management tool do lots of small jobs. Implementing Model 1 would quickly become unmanageable for their requirements, so I propose for these situations, Model 2:

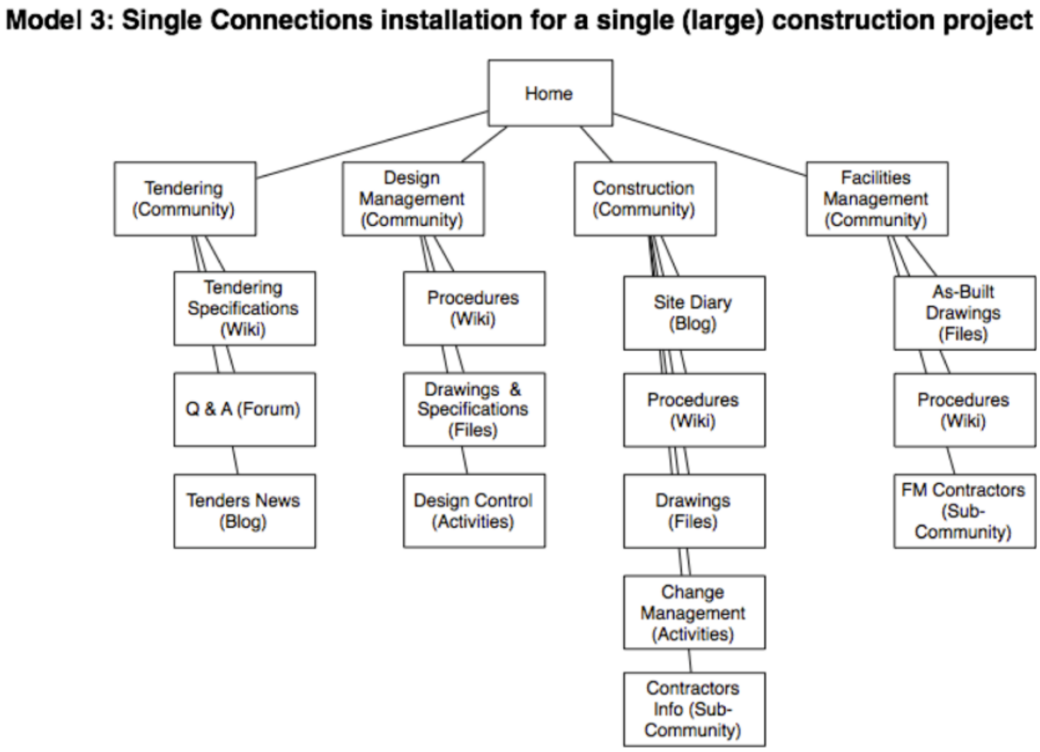
Figure 2.28. Model 2 - Multiple (small/medium) projects



Key to deployment of this kind of structure is the ability to template a community so that it appears each time with the same structure, of course!

Finally for an extremely large construction project, like the stadium in London for an upcoming sports event, we might consider using an entire instance of IBM Connections to host the system:

Figure 2.29. Model 3 - Single Large Project

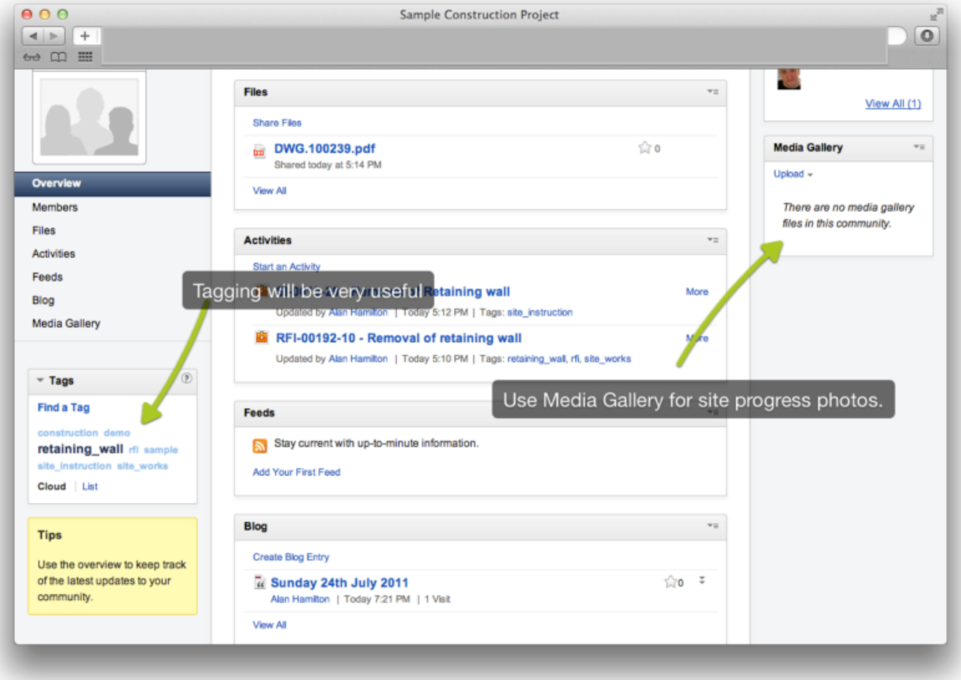


Without turning this into a shameless sales drive for IBM Connections, its worth considering Model 3 for a moment and the implications for the IT infrastructure you would deploy.

Running a project like the Olympic Stadium generates enormous amounts of data. Leaving out the drawings, can you imagine the amount of documentation which would be associated with such a project? Getting some proper advice from who is going to run a social solution like this is vital to ensure that it operates trouble-free throughout the life of the project. IBM Connections runs on IBM WebSphere and as such can be scaled horizontally and vertically – in some situations where individual applications (such as Activities) are hosted and clustered on individual servers. In this way the IBM big-iron approach allows you to be confident your system won't let you down. My point here, to quote Steven Covey, is "Start with the end in mind". Connections lets you scale up so, think about it!

So what would this look like in Connections? Well first off the community might look a bit like this:

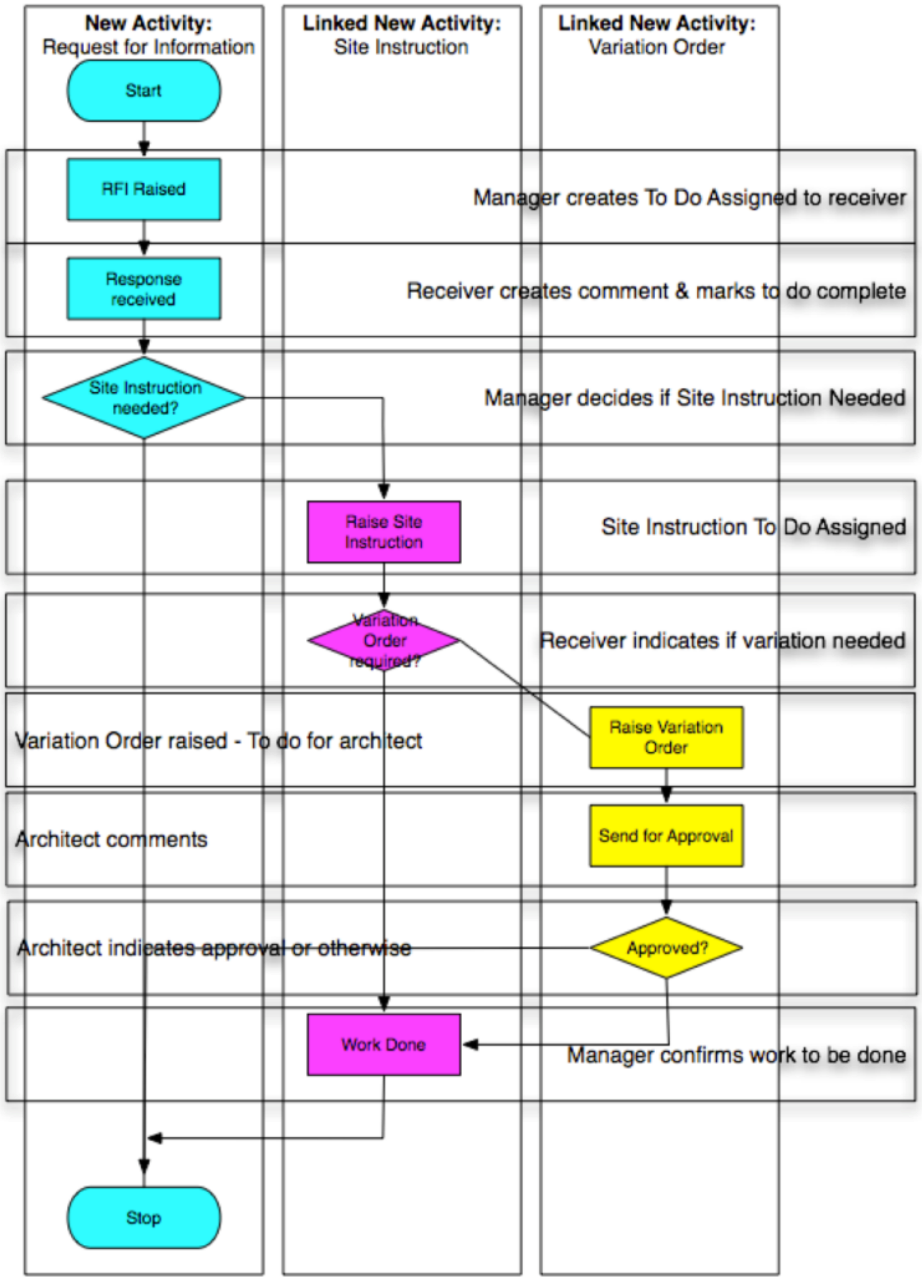
Figure 2.30. Connections Construction Community



Change Management, the management of changes on the job, is one of the most tricky parts for any computer system to handle. It’s easy enough to prepare a system which provides workflow, but to put the ability to tweak that workflow into the hands of the end users whilst maintaining oversight and control is more difficult, especially for systems which set out to be glorified web based file systems. Thankfully, as you’re probably expecting by now, we have an excellent platform in the shape of Connections’ Activities.

Here's an example of how you might run a Change Management process using an Activity:

Figure 2.31. Change Management Process in an Activity



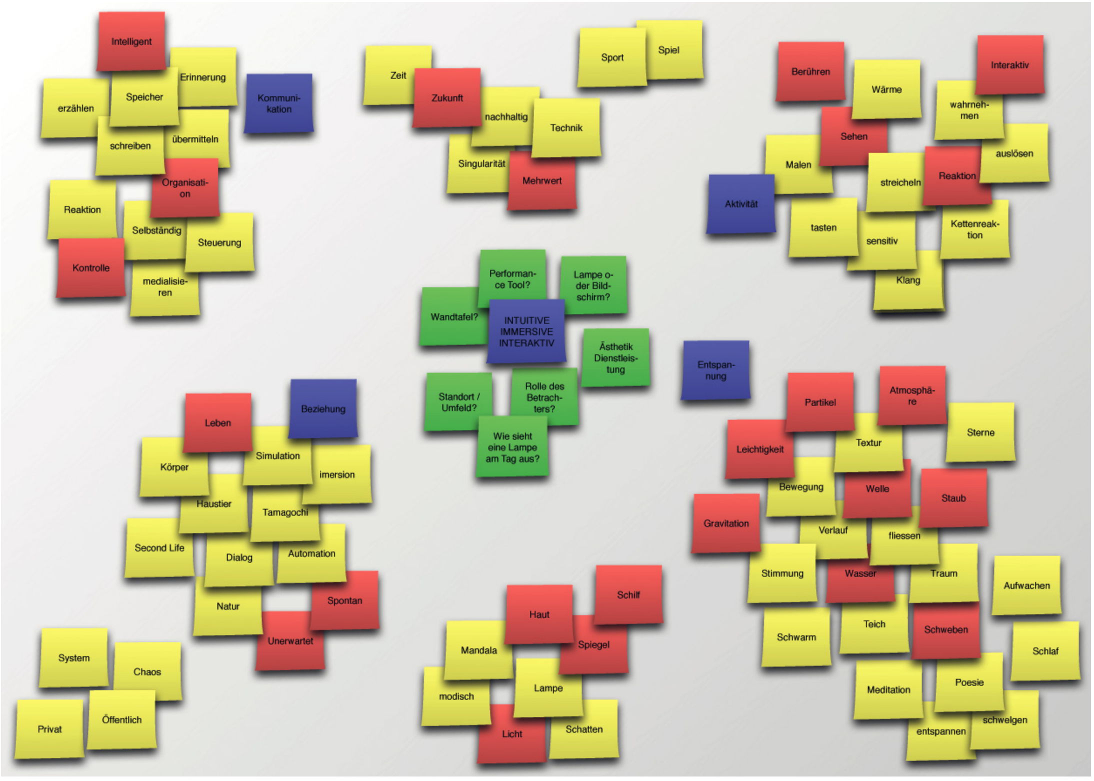
Through the use of Activity Templates Site Instructions, Requests for Information and all the other types of change processes can easily be handled.

One other quick point to make – criticism of online systems for construction often centre around the need to be able to record who received drawings. In the old paper world a Transmittal Sheet would be used as a kind of manifest for the drawings being sent to the recipient.

This can easily be achieved using Activities again, providing a template for the transmittal and attaching to the activity bookmarks to the drawing files which the recipient is to get. IBM Connections keeps track of who downloaded the files so you also have a record to prove someone has the information they are supposed to have.

Innovation

Figure 2.32. Sticky Notes are a trademark of a brainstorming session



In some organisations, innovation is driven by brainstorming. Brainstorming can be a dangerous pursuit. It is also something which lots of organisations engage in to come up with bright ideas for new products, to solve a problem and find ways forward. Normally brainstorming occurs in a meeting or a workshop where the great and the good are drawn together and there is an intensive exchange of ideas, with people linking their thoughts with the core problem.

The problem with brainstorming is that it can cause Groupthink, .i.e where through a nature desire for conformity brainstorming is guided down a particular path to try to reach a consensus. Truly outlying ideas are often dismissed by the person who considers them before offering them to the group because they will be out of conformity with the rest of the group.

Organisations indulge in brainstorming as a way of getting ideas out on the table. "The Hive" mentality exists so often these sessions don't produce the hoped-for results. One alternative to this is the process of Idea Generation, or Ideation [http://en.wikipedia.org/wiki/Ideation_%28idea_generation%29] In "Ideation: The Birth and Death of Ideas", Graham and Bachmann postulate that there are nine methods of innovation:

- Problem Solution
- Derivative Idea
- Symbiotic Idea
- Revolutionary Idea

- Serendipitous Discovery
- Targeted Innovation
- Artistic Innovation
- Philosophical Idea
- Computer-aided Discovery

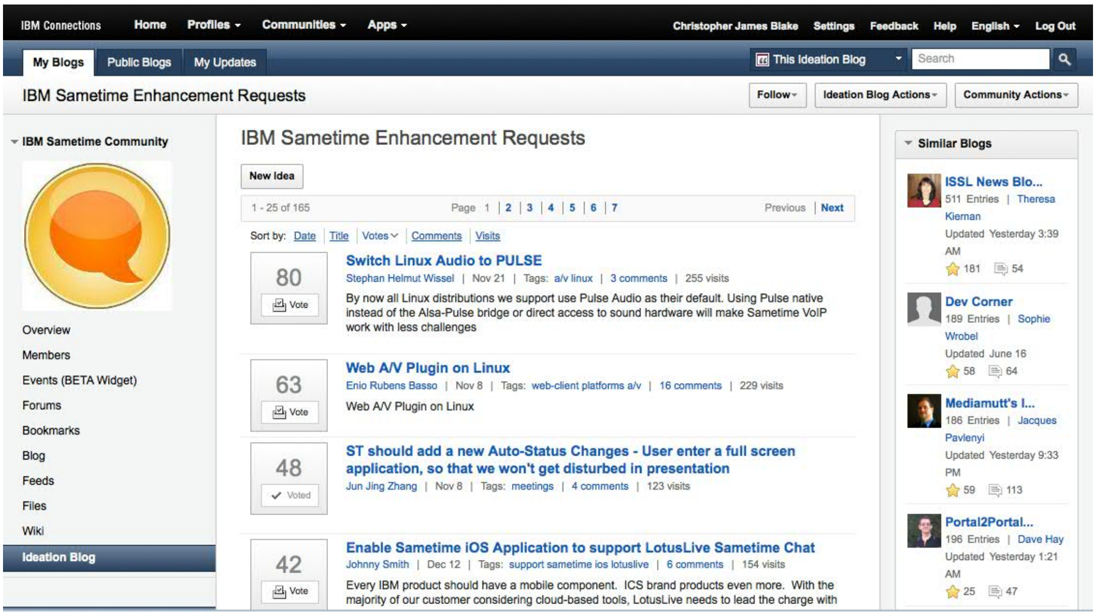
For me, this extensive list of situations how good ideas emerge is as good a reason as any to abandon the concept of brainstorming. Some ideas, like a problem solution, derivative idea and targeted innovation can occur in brainstorming sessions because such a session includes a high degree of interaction between the participants and that kind of engagement can spark other solutions. However, some of the other routes to innovation, such as serendipitous discovery, philosophical ideas and symbiotic, to name a few require reflection, time, research and true "knowledge accidents" in order to emerge. They can't easily (or at all) be forced out in a brainstorming session.

It's for this reason, for me at least, that the use of a social tool to perform Idea Generation instead of brainstorming is one of the finest purposes enterprise social collaboration can be put to. In Ideation, everyone can contribute ideas and get a chance to expand on each of them. They are permanent entities in the "Ideation Blog" which others can see and, more importantly, comment on and revise. Participants can also vote on the idea to encourage good ideas to the top of the list. This latter point helps avoid the Groupthink problem. It helps to deliver a more democratic consensus which gets the time to be reflected upon.

Current desktop productivity solutions and intranets don't provide a solution for innovation like this. So, as I've said already if innovation is something that is important in your organisation, building an enterprise social network to deliver on ideation might be a big deal.

As an example of ideation in action, here's a screenshot from IBM Connections:

Figure 2.33. Ideation in action in IBM Connections



I hope you can see from this example a number of key features which distinguishes ideation from brainstorming:

1. The most popular idea has the most votes and appears at the top of the list.

2. Each idea can be commented on

3. Each idea has metrics on how often it has been viewed

4. Each user gets one vote for each idea.

This example highlights an interesting aspect of ideation and something which I have seen a lot in its use: comments. I have found that users make use of the comments to refine ideas from their initial posting. i.e. the team gets together and uses a comment structure to discuss and refine ideas before they vote on them. The end result is that many of the rough edges which a raw idea might have (and would otherwise be held back or dismissed in brainstorming) are rubbed off through debate. Good ideas get the chance to live and evolve.

Check out Ideation Blogs in IBM Connections if innovation is something you work on in your organisation.

File Sharing

Many organizations store files on a server. This is a very common way of storing files centrally, but one of the key difficulties any organization faces with shared folders is that you need to know where something is in order to be able to find it. Moving your folders of files into your social collaboration system can take two approaches:

- You create a community for an entire workgroup or department's files and move the files into there.

- You upload each individual user's files into their personal file storage.

Both of these approaches can be used as I am reasonably sure that you will have both personal and shared files on that file server. Using something like the Windows Explorer extension for IBM Connections (described in the Appendices) gives you the possibility of dragging and dropping the files from their current locations into Connections. Beware, however, that because you are essentially going through the Connections API to store documents in Connections, it will be slower than simply copying files to another shared volume. The payback for this, however, is that the files now reside in a central location, are searchable, tag gable and shareable like never before. Also, if you are allowing mobile access to your social system, your mobile users with their smartphones or tablets can now gain access to files which previously they would need to have been in the office to access (or have them sent to them by email).

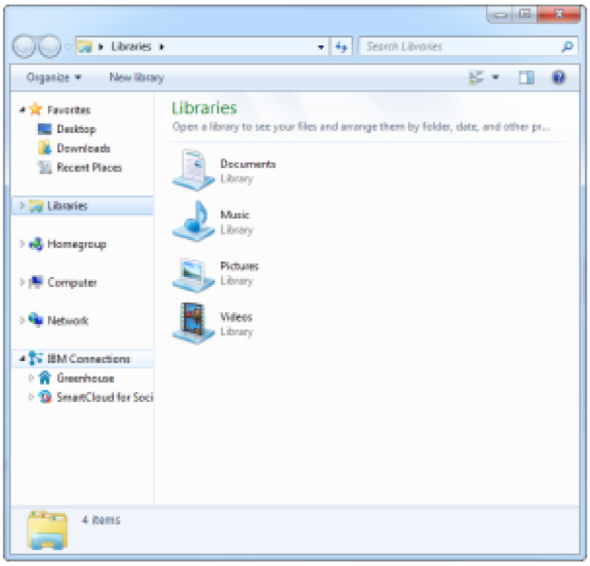
An often overlooked aspect of IBM Connections is its ability to integrate itself with many different parts of the working environment. If you're an IBM Notes user you may be aware that there is a Files sidebar (similar to the Activities sidebar) which makes it easy to send people files without...you know...sending them the files.

Even if you're not a Notes user, you still have options for making file sharing social. One of the best of these is the Windows Desktop plugin, available from IBM's Greenhouse [https://greenhouse.lotus.com/plugins/plugincatalog.nsf] website (free).

It works on most flavours of Microsoft Windows and provides a file server, tree-based view of the files you have acces to across all the IBM Connections environment you use, including SmartCloud.

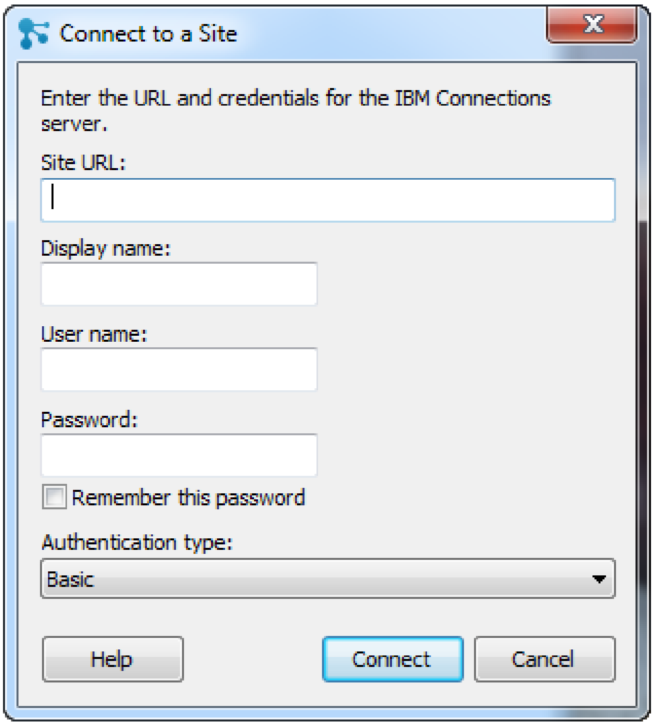
After you have installed it, you will see a Connections icon on your Windows desktop.

Figure 2.34. Desktop plugin integrated with Windows Explorer



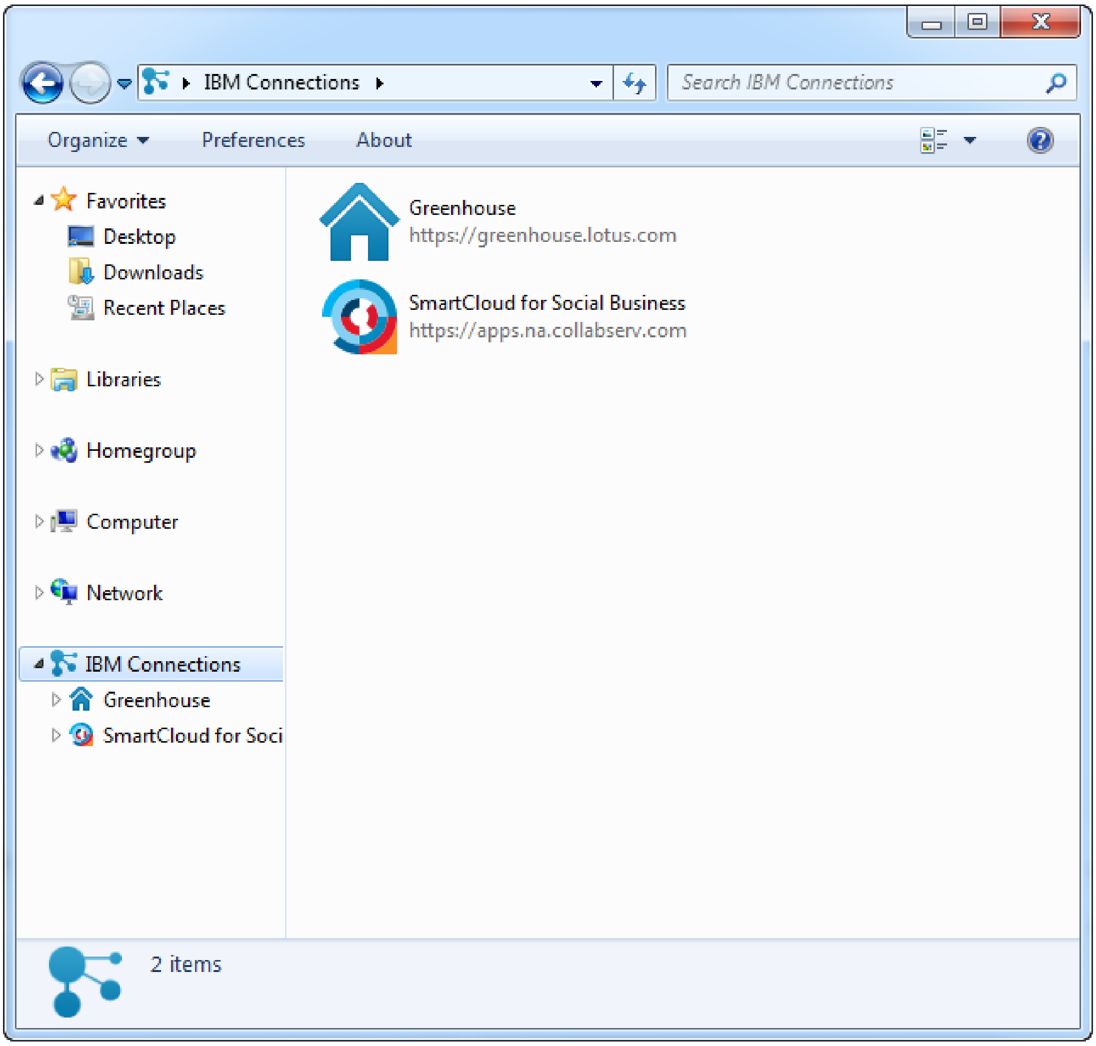
Right click on the IBM Connections name on the left hand side to start the process of adding a new connection to your system.

Figure 2.35. Setting up a new connection



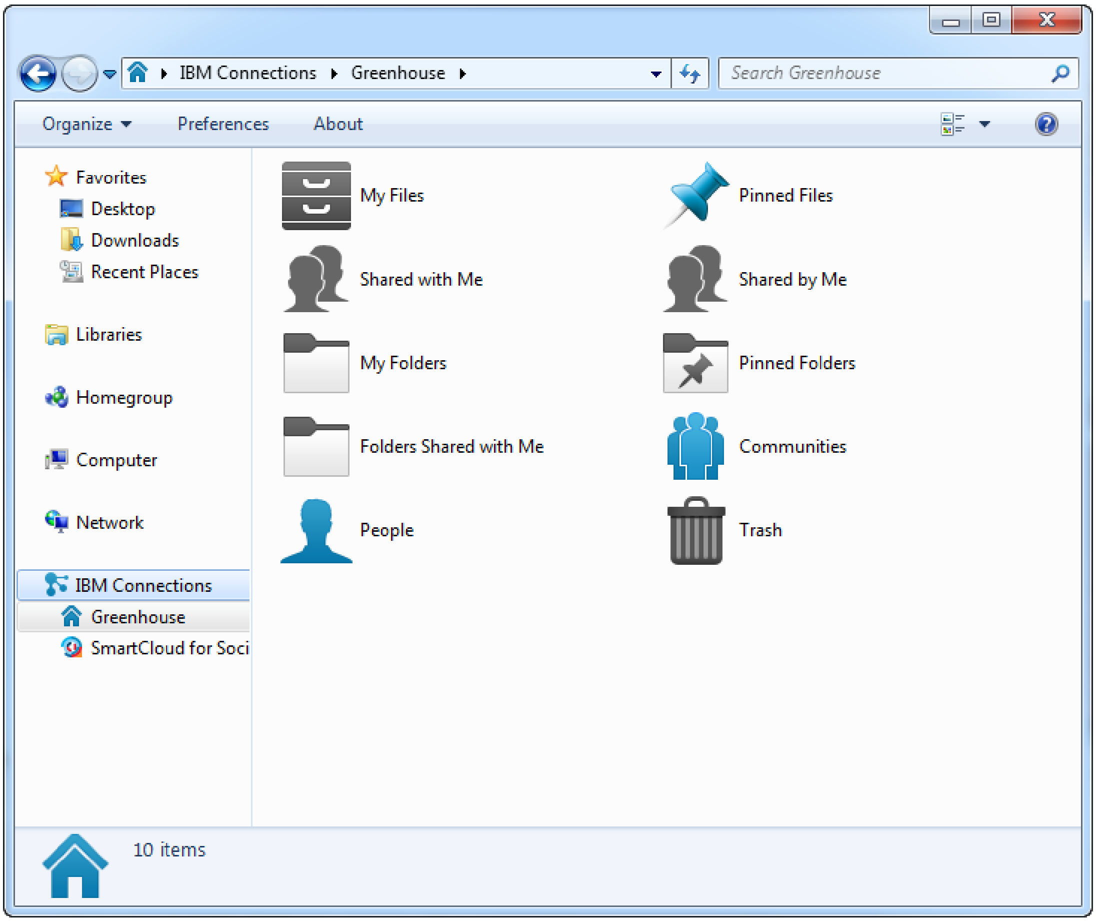
Enter your user name and password for the service you are configuring. If all goes well you'll see a large icon for the system you've set up appear:

Figure 2.36. Greenhouse and SmartCloud connections



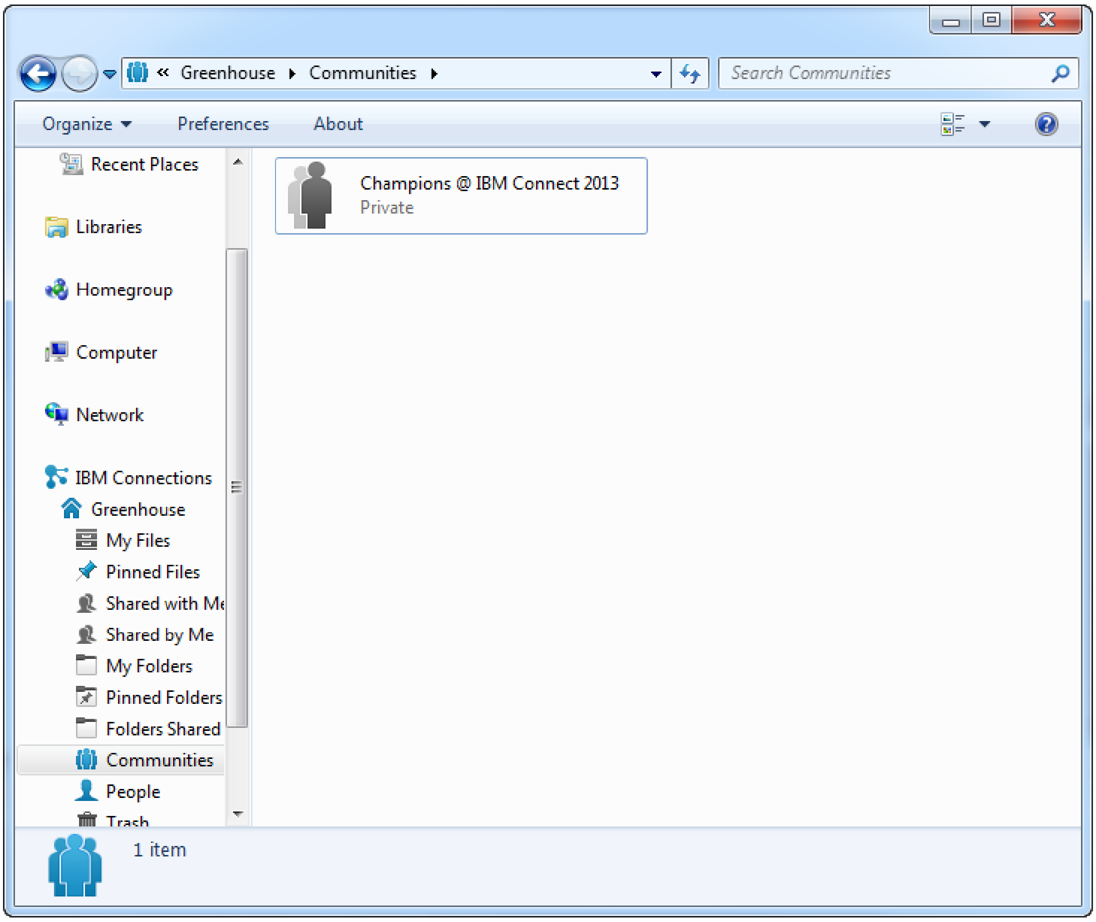
The Plugin recognizes SmartCloud and gives it a different logo. Click on the Connections system you want to access, in this case Greenhouse. You'll see something like:

Figure 2.37. The places your files can live



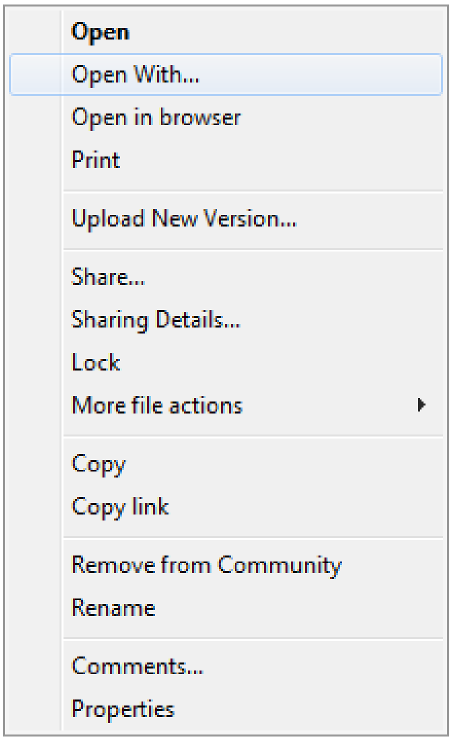
These icons should be self-explanatory and give you access to your files wherever they may be throughout the Connections system you're working with. Particularly useful is the fact that the files contained within Communities can be accessed by drilling into the Communities themselves.

Figure 2.38. The Communities you have access to



Adding and removing files is as simple as dragging and dropping them from wherever they are on your computer into wherever you want them to go in whatever Connections environment you have set up. It's also really easy to use the right-click action in Explorer wherever you are to add files to Connections:If you already have a file in Connections which you want to access or work with, simply drill-down to it in the Plugin and then right-click. The context sensitive menu pops up:

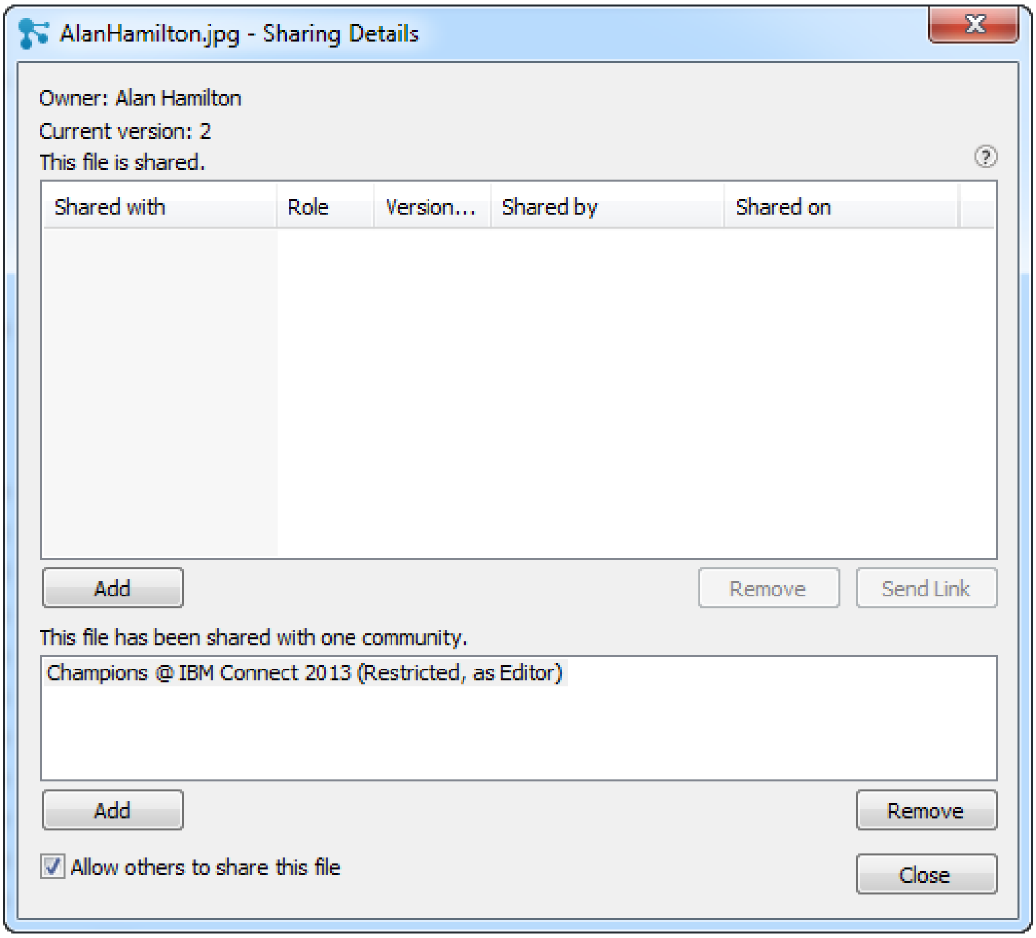
Figure 2.39. Right Click for the Context-sensitive Window



This lets you perform a wide array of functions, such as:

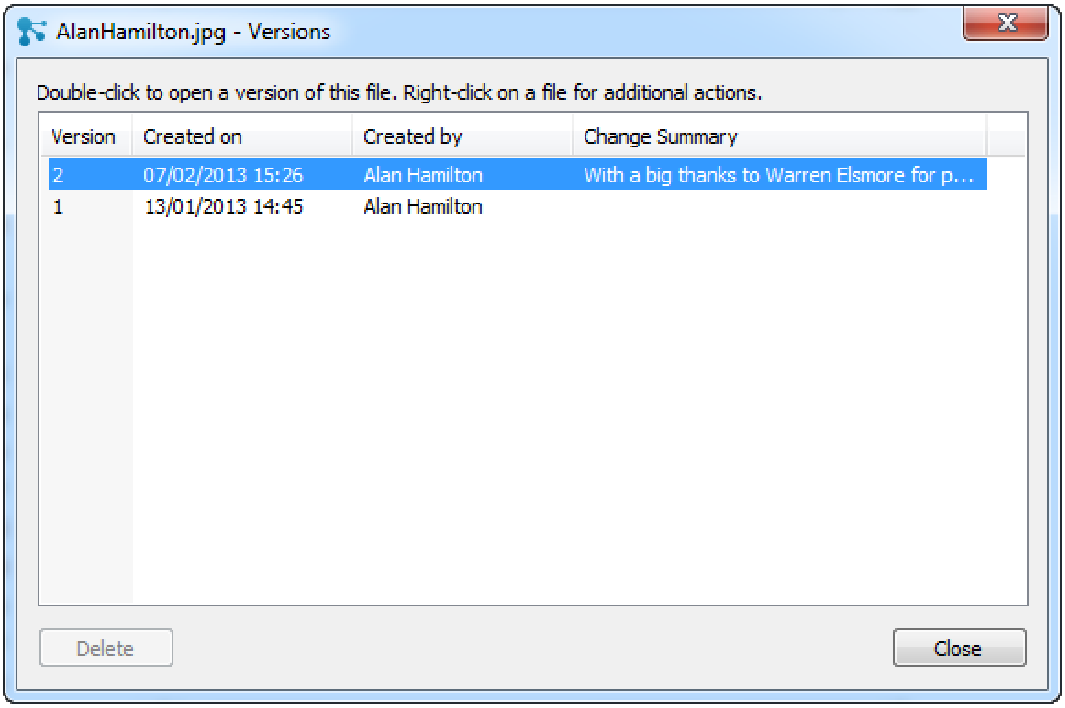
1. Opening the file with an application on your computer
2. Opening the file in a browser
3. Uploading a new version of the same file
4. Sharing the file
5. Seeing what the sharing settings of the file are:

Figure 2.40. Sharing options



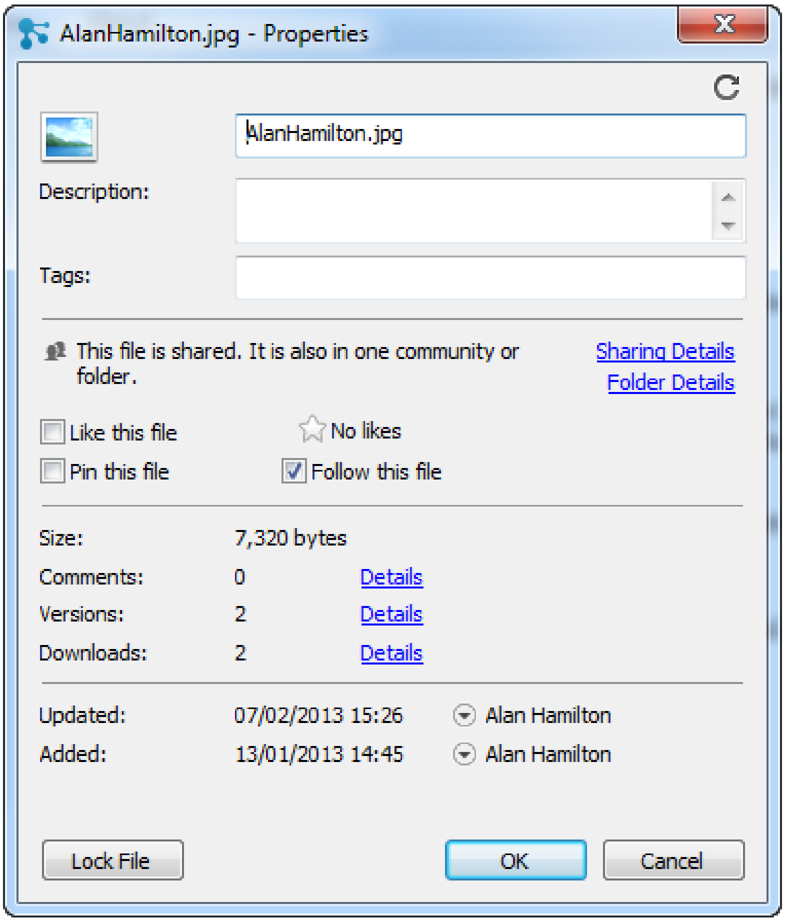
6. Locking the file to prevent edits
7. Looking at the version history of the file:

Figure 2.41. Right Click for the Context-sensitive Window



Clicking on Properties shows the file properties dialog box which gives you enormous control of the file right from your Windows desktop:

Figure 2.42. Right Click for the Context-sensitive Window



This brief look at the Connections Desktop Plugin hopefully gives you a taste for the kind of control you can have over the files that your Connections, Greenhouse or SmartCloud for Social Business system gives you. While it might not provide the most heavy-duty document management facilities you might find in the likes of Filenet, I have found that much of this is enough to provide a level of collaboration and control which lots of organizations have previously struggled with.

Standardising Documentation

Standardising documentation is something which you might think is purely the preserve of a document management solution. It's also wrapped up in templates, terminology, approval cycles and other workflow-related approaches to the control of information in your organisation.

I am not going to advocate that you abandon your document management regime and instead adopt some sort of social approach which breaks years of process and management. Instead I'd like to introduce you to the concept of working with documents in new ways and in so doing prompt you to consider how the problems you encounter standardising the work people do might be positively affected.

Virtually every organisation uses office productivity software to produce the basic staple nuggets of information - documents, presentations and spreadsheets. Some have gone further and linked many of these documents together (particularly with spreadsheets). and built into them business logic through macros. These are fine for what they do as they achieve a set business result. What they don't do is encourage the propagation of knowledge. They don't engage people with meaningful interaction which others can access. When you are presented with folder full of files on a file server, SharePoint library or similar, it's difficult to get context and meaning from the documents. Often people rely on a README or something similar to provide some documentation about the documentation itself.

The other consideration about these documents is that they are static until reviewed or edited by someone. If you have a document management system you may need to check the document out and then send it round on an approval cycle for sign-off before it can be considered live. You might be changing just a small part of the document but the whole thing needs to go round because the document is the atomic level, i.e. the smallest entity in the universe of information in your organisation.

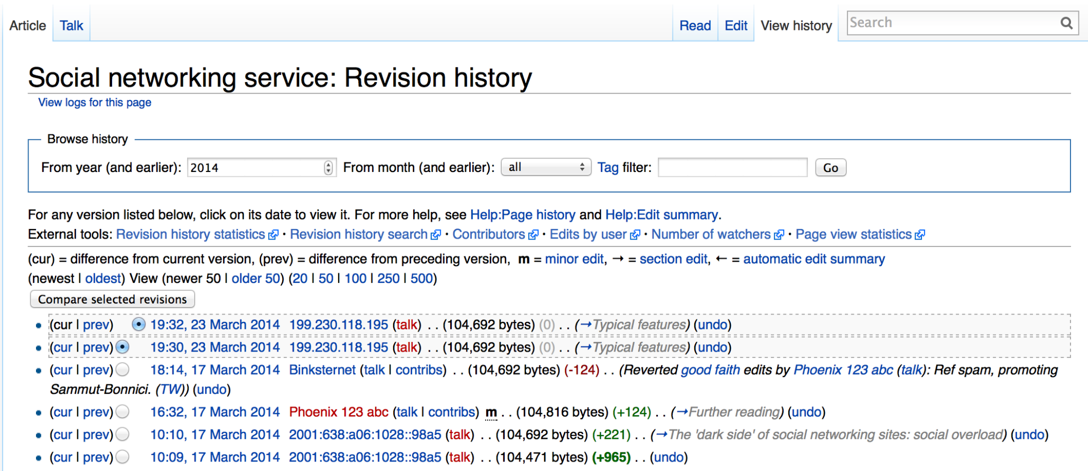
How many document libraries do you interact with on the internet? The public internet that is? I am thinking of ebay, Facebook, Amazon, webmd.com, LinkedIn? None. That's because the knowledge they present is displayed as web pages. The information does not require a specialist application, like Microsoft Word, to open it. In some situations the defacto solution for sharing information has become the PDF file as - almost by accident - the PDF format has found its way onto virtually every device. PDF will be with us forever most likely because of the number of systems which support it. However, the huge, overwhelming majority of everything else exists as HTML text - something your browser, phone, tablet or whatever can easily exchange and access.

We are in the situation where we are document-file focused because of the route we've taken in the evolution of computing. Workgroup computing was all about personal productivity. Wordprocessors are late 20th century typewriters. The .doc file is the equivalent of the file copy we'd keep in countless filing cabinets. Isn't it time to unlock much of that information, make it easily reference-able and adaptable? Isn't it time we found easier ways of standardising our approach to creating documents which didn't rely on a single document atom moving around? That time is here already, and social collaboration brings it to you.

One of the largest repositories of information on the internet is Wikipedia. For most people this is a useful website where you can find out about all sorts of stuff. Most people don't know how that content appeared there though. It's done entirely by individual people like you and I giving freely of their time to contribute their knowledge. That knowledge is then able to be edited by other people who also know about that topic and consequently the content itself becomes self-policing. There is of course an element of caution that should be applied to Wikipedia content: what you are reading might have been written by someone who thinks they know the topic and if it hasn't been reviewed, may be completely wrong. But the maxim of something being worth what you pay for it applies. Don't make health decisions based on what Wikipedia says - get professional advice too.

My point is that Wikipedia demonstrates how documentation, in this case an encyclopedia, can be built in a standardised way in a social manner. This information is easily consumed by anyone on the planet using virtually any device capable of connecting to the internet. If you look closely at a Wikipedia page (the tabs at the top) you'll find a bunch of interesting stuff about the "document" and its history:

Figure 2.43. Page History of the Social Networking page in Wikipedia

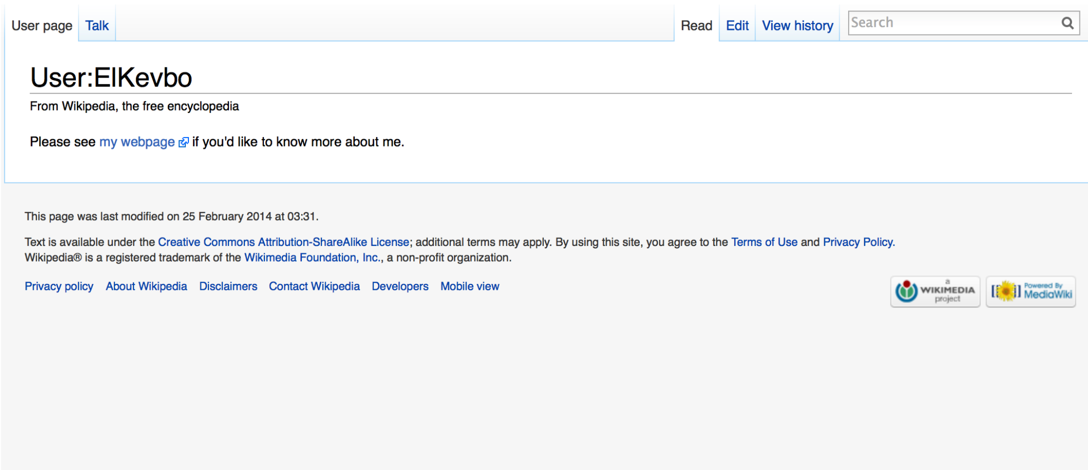


If you are familiar with document management solutions, the above picture indicates something you are familiar with - a document revision history. It shows when the document was last changed, who changed it, etc. What Wikipedia also shows, however, is an easy-to-see "what's changed" view:

Figure 2.44. What's changed in the document

Remember I haven't got any special software installed on my computer to do this. It's using the wiki engine to do this. Lastly, I can find out a bit more about the person who made the changes:

Figure 2.45. Who changed the document



I hope you can see, therefore, that this approach, the use of a wiki instead of an office productivity suite document, is one solution for putting the content and the people in focus instead of the management of the document. It doesn't replace formal document management review policies and doesn't support more formal revision numbering, but for situations where you simply want to publish information and manage the review and changes of that content, then a wiki may be a useful tool for you. It's especially the case where you have users on a wide range of devices, both desktop, laptop and mobile, who need access to the information as each device is able to consume the content and present it easily. There are also broader options for translation of content through automatic browser extensions which detect the language and convert them into the local or chosen language.

IBM Connections has its own wiki system, loosely based around the wikipedia examples I've shown. To put the foregoing explanation in a bit of context, I thought it might be useful to present an example of the preparation of a document many of us have probably worked on in the past - a sales proposal:

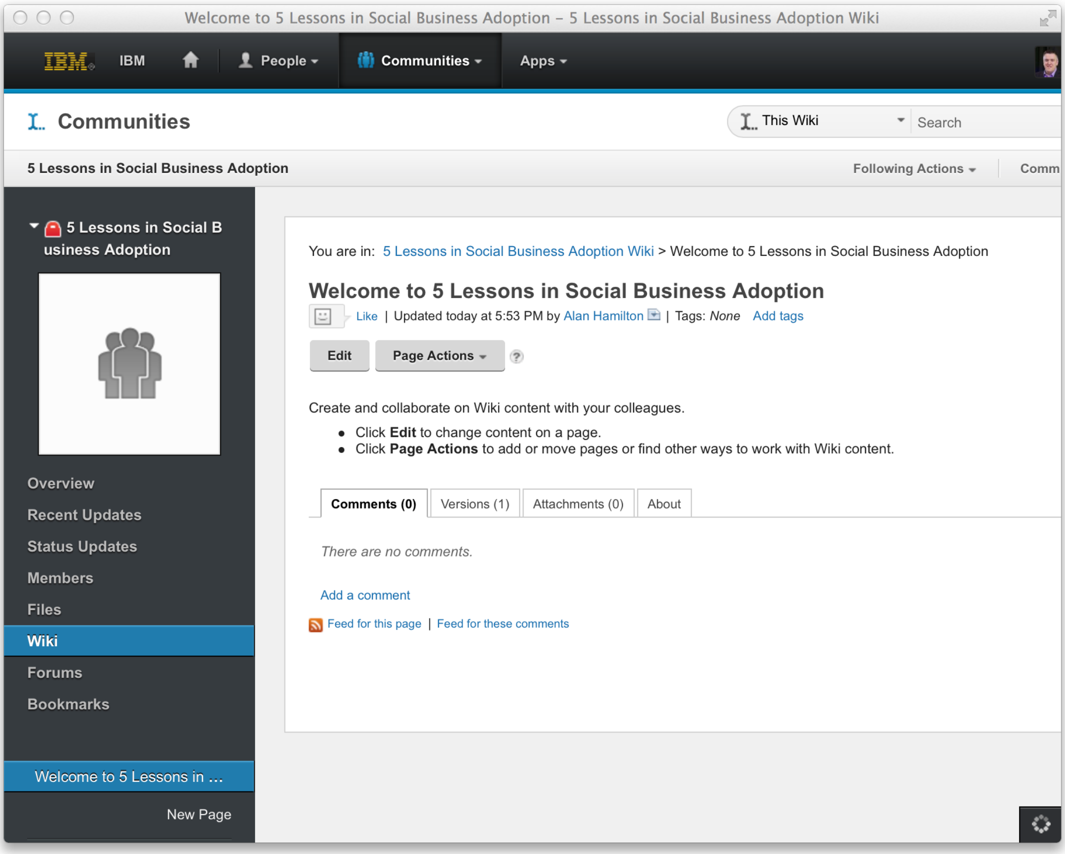
Writing a Sales Proposal with a Wiki

Let's say you have received a Request For Proposal (RFP) from a major client. The timescales are short and the amount of work involved in putting in a good response is high. There are lots of sections; some relating to the health of your organisation; some relating to the technical aspects of the solution you can propose; some about customer references and of course one on the price of the solution you can present.

It's common for these RFPs to be split between several authors, each of which is focused on producing a particular section of the response in the format the customer has asked for. In many organisations I've seen working on such documents, there is an initial planning meeting and then people get on with the work. Typically there are many revisions of the response document. There are lots of authors and therefore many versions of the document floating around. The chances for someone to work with the wrong version are high and the volume of email (both in number and in size) is huge.

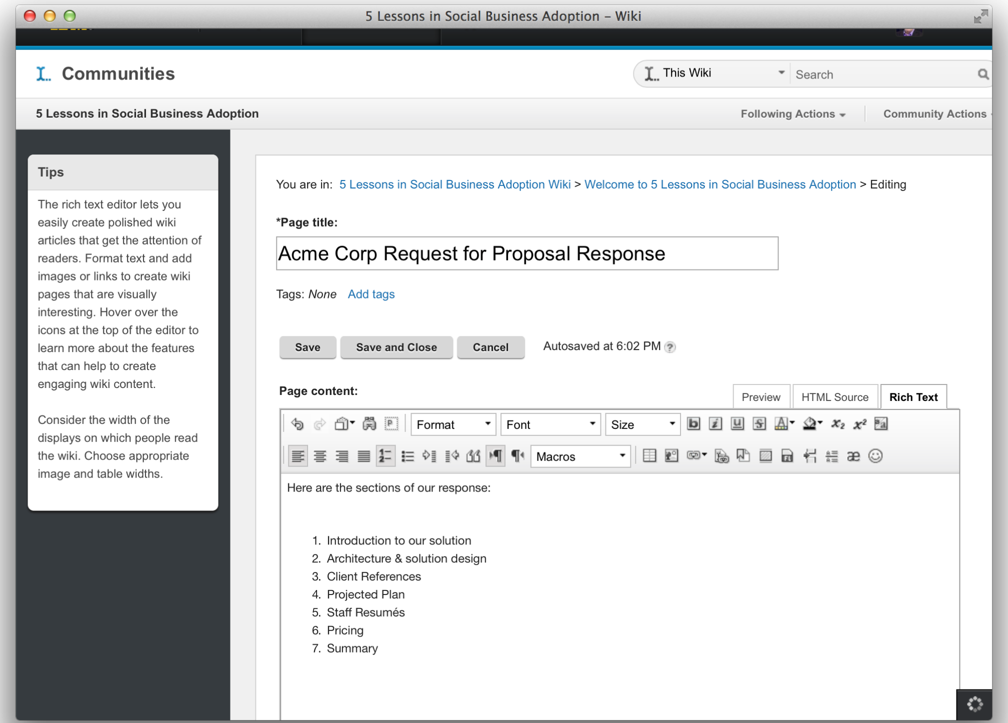
Consider, therefore, using a wiki as an alternative approach to standardising your Proposal preparation. In IBM Connections I would start by creating a new wiki, giving it an appropriate name:

Figure 2.46. Creating my wiki



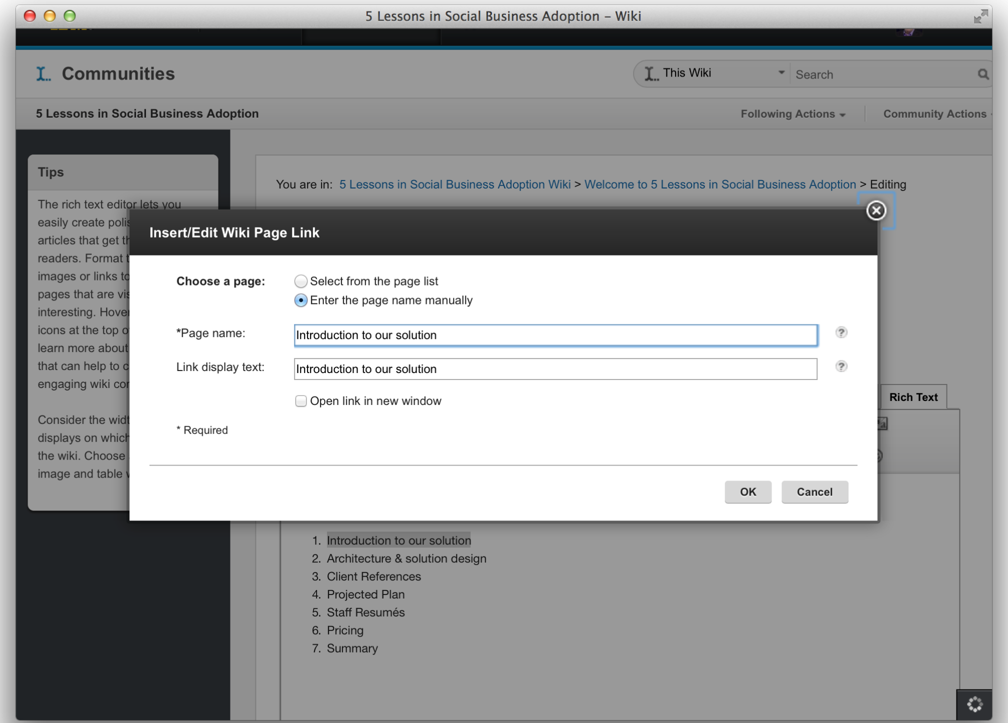
Next I set out a table of contents for the various sections of our response. I am just using the rich text editor and a numbered list:

Figure 2.47. Setting up a Table of Contents



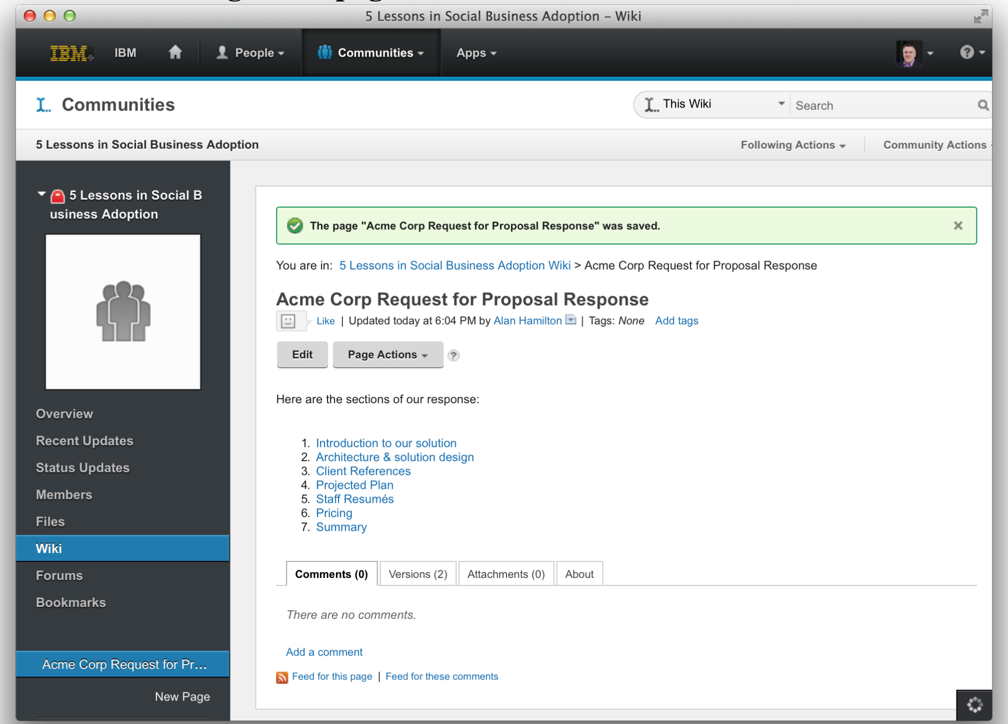
Next I select each of the entries in my Table of Contents and create a wiki page link:

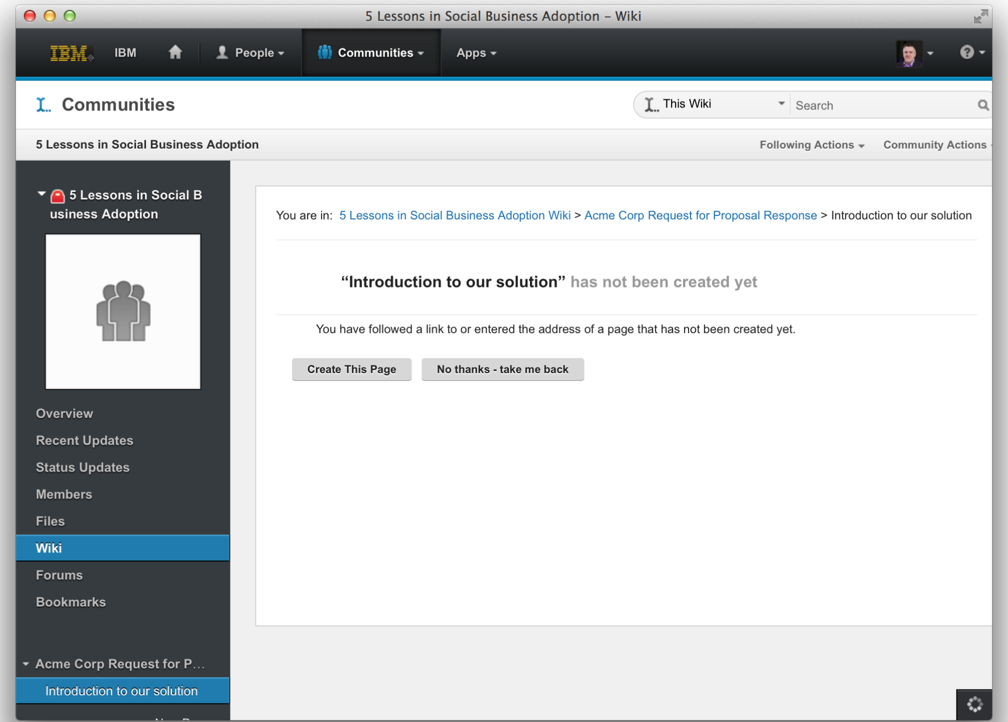
Figure 2.48. Creating wiki links for the Table of Contents



I repeat the process for each of the sections in my Table of Contents. Note that all I have done is to create links to non-existent pages at this stage. Now when I click on each of the links, the wiki responds with:

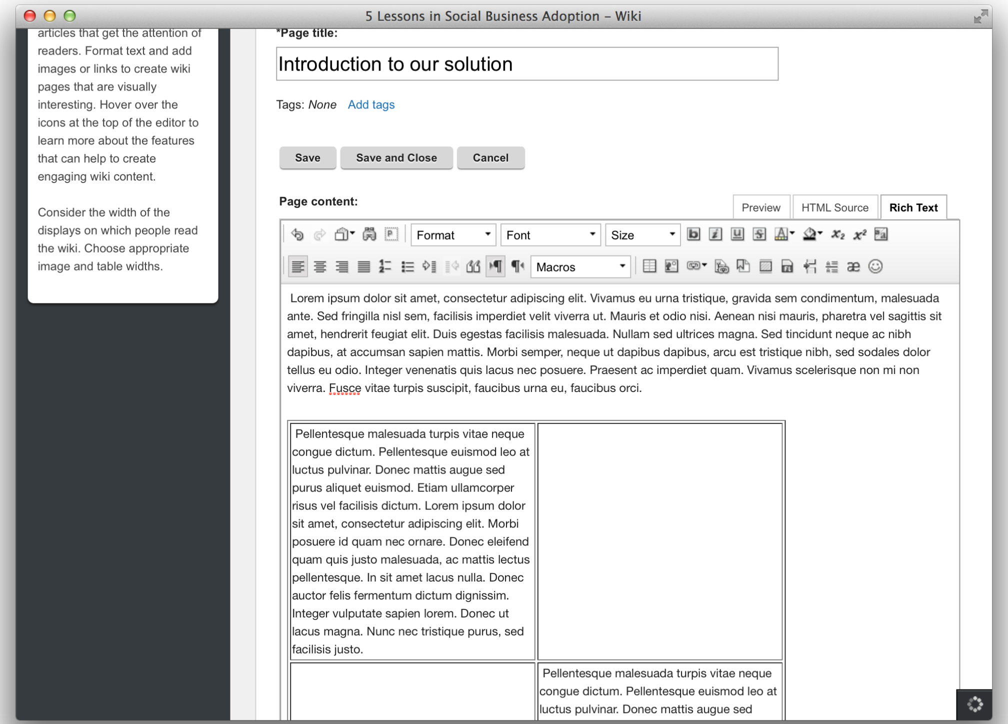
Figure 2.49. Creating a new page





So I go ahead and create the page. I start typing and working on the relevant section of the RFP response. I could copy and paste text from elsewhere or work with the rich text editor (as I have done here) to build up my content:

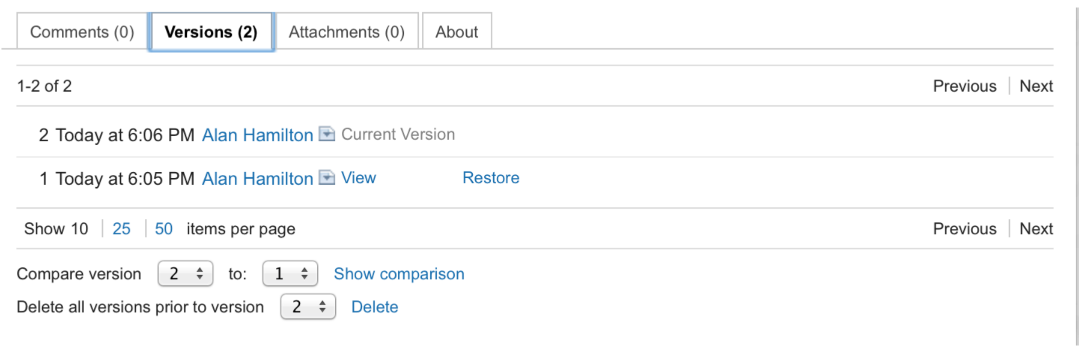
Figure 2.50. Creating the content



As I work on my document, the wiki automatically saves my work so that if I lose my connection I can get back to a draft copy. Each time I press "Save and Close", though, my changes are committed to the wiki and a new version of my page is created. I can share a link to my wiki page with my colleagues and if necessary they can add their own edits/comments etc as we work together.

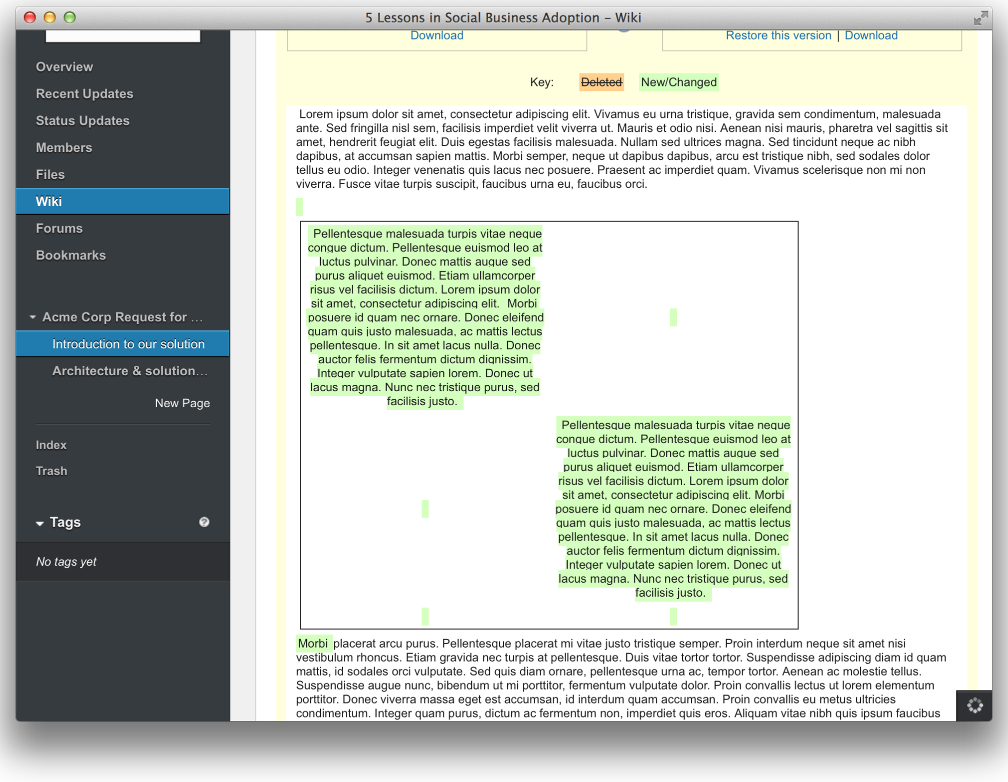
Like in the Wikipedia example it's easy for me to see which versions this particular page has gone through, when it was edited and who edited it. If necessary I can also restore an earlier version:

Figure 2.51. Who changed the document



It's also really easy for me to compare one version of the document to a previous one. As Wikipedia does it, so does IBM Connections' wiki:

Figure 2.52. Who changed the document



The green text is the content which was added in the later version of the document.

This section is all about standardising documentation. The purpose of this example is to highlight that documentation in a social collaboration environment need not necessarily all be about office productivity files. Significant distribution of effort, simultaneous editing of different parts of the same response document can be achieved with out-of-the-box technology which works in your browser.

Next time you have a document to write which involves multiple authors and many revisions, take a look at the wiki.

Community News

Using social collaboration as a way of sharing community news is a great way of getting engagement and participation from a group of users. News, for a community of like-minded people, is vital if the energy and creativity of the group is to be sustained. I'd encourage you to have one of the following (or perhaps both) tools embedded in your communities and in your social collaboration solution in general:

- Status Updates
- Blogs

Community News is also a way of encouraging your users to "Work out loud": [1] , i.e. to provide small but regular updates of what's happening to each of the employees. This is especially useful where you work in a team which is physically separate.

"Working out loud" is a great way of sharing and enabling others to know what you are doing. It's a really good way of asking questions to the general user population in the hope that someone with the knowledge you need has the answer. By "working out loud" I mean posting status updates about events happening to you, such as "Great meeting with Customer X today", or "We won our largest order with Customer X today". This "passive absorption" of information is something we now all do all the time. Have you ever been at home with the TV on in the background and heard something that caught your attention? You were passively aware of what the TV was saying, and tuned in when you heard some key word or phrase you were interested in.

The same is true when others work out loud: most of it will flow over you, but the absorption process in your subconscious is going on all the time. Isn't it great to be able to say to someone when they are vexed with a problem "I saw something about that the other day". If that happens to you and you find something out of the ordinary in your social collaboration system, remember to post a status update and let people know how useful you have found it on this occasion. I have found when people have these "a-ha" moments they suddenly respect the system and its implementation in a whole new way. These moments come along when people choose to altruistically share what they are doing.

IBM Connections also offers some extra ways where you can bring particular status updates to the notice of others. A common way of drawing someone's attention to your status update is to mention them in the update itself, example:
`We won our largest order with Customer X today, cc: @Doe, John`

The "@Doe, John"" syntax is just like a Twitter handle. If someone tweeted something and they wanted me to pay particular attention they would add my Twitter handle to the tweet, e.g.
`Hello, @alanghamilton`

A second way, and possibly even more useful technique in the long run is the use of a hashtag in a status update. A hashtag in Twitter is a way of categorising a tweet. Categories can be made simply by using a # character and then using a word or phrase without spaces. If you and a group of other people agree to use the same hashtag in your tweets on a particular topic then it becomes easy to search for any tweets with that hashtag, e.g. in Twitter I might encourage people to come to the IBM Connect conference in Orlando:
`Please join me and my colleagues at #ibmconnect in Orlando this year! #socbiz`

#socbiz is a common Twitter tag used by people interested in Social Business. I, and thousands of others use Twitter applications like TweetDeck, TweetBot and a multitude of other apps to tune into the #socbiz "channel". By doing this my tweet can reach a wider audience than simply the people who follow my tweets.

The same technique can be employed in IBM Connections. Adding a hashtag to your status updates lets the users search on common terms and get updates from people outside of their network. In other words, they discover information which they would not otherwise have received. When I create a status update in IBM Connections, if it includes information about a customer I usually put the customer's name in as a hash tag:
`We won our largest order with Customer X today, cc: @Doe, John #customerx`

This is a repeat of my example above, but with the addition of the hashtag. The compound effect of this is to:

- Notify my network that we won a large order

[1] http://johnstepper.com/2012/05/26/working-out-loud-your-personal-content-strategy/

- Notify John Doe that we won the order
- Notify anyone who subscribes to the #customerx hashtag

Notice that with one line and a few characters I have reduced the amount of email I would have sent by potentially a huge amount. It might be that there were fifty people in a "Customer X" mailing group. If I had wanted to achieve the same effect as my status update, the whole group, plus my manager John Doe would get an email, whether they wanted it or not. In this case, people who are interested in following developments with this customer can "tune in" to hear it, otherwise it's off their radar screen.

Social Groups at Work

How do people learn how to use eBay, Amazon, Facebook or LinkedIn? Did they attend a training course? Did their employer set aside time out of their day to train them on being "social"? No, people use these systems because they hold some inherent value to them. People will use things if there is something in it for them. Fundamentally we are interested in things that interest us - that might sound like an oxymoron but the truth is that many of the training issues with any kind of system vanish when people find something of value to them. I'd bet we'd all find it much more difficult, and need much more training, if we were told we had to learn to drive. If we choose to learn, we make it happen.

It's for this reason, therefore, that I encourage you to include in your vision setting and planning space for people to use the social collaboration environment for things which personally interest them. These social groups probably already exist in your organisation: it's the jogging club, the mum's club, the wine club, the photography group, even the restaurant or canteen. Each of these associations have something of personal interest to your users (even if it's just what today's soup is). Indeed reaching out to a pre-existing group, like the photography group or the wine club and using them as a pilot group could well be a good place to start your first iterations. They will be a committed bunch of people with a common interest and a desire to work together, so why not use it?

I have seen some customers say that their management teams are not too happy about the thought of their expensive new system being used for "just" this kind of thing. The truth is, however, that if you can get early successes and have people enabling themselves they will become some of your strongest advocates for the solution.

Socialising Other Systems

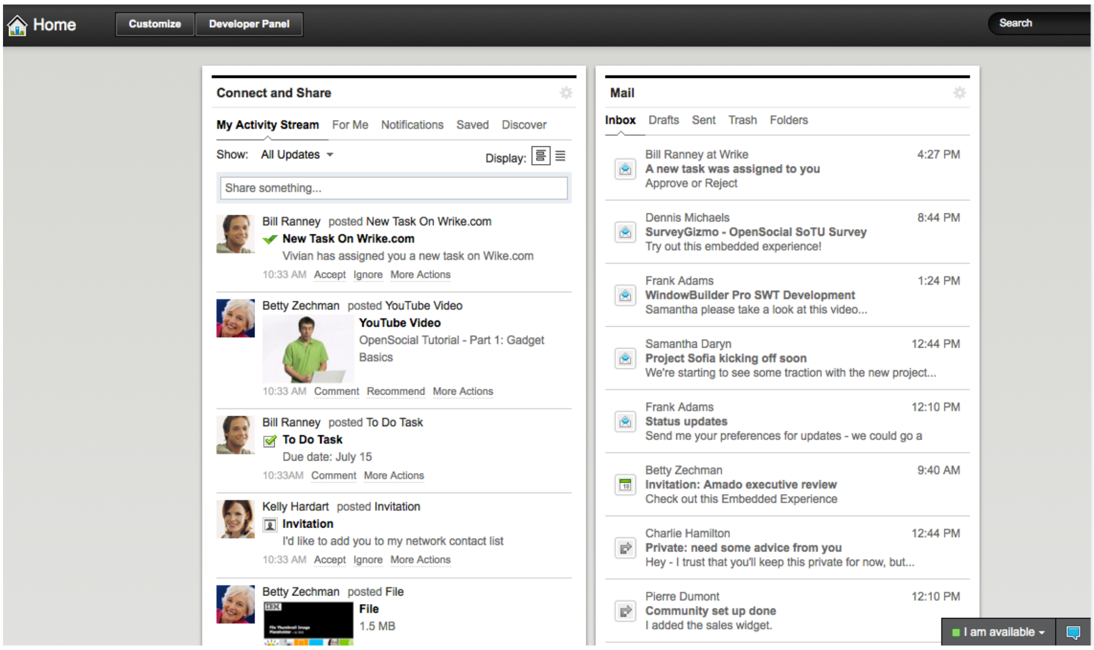
Building social collaboration into other systems comes in two parts - bringing the non-social system into your social network, and exposing social functions to non-social systems. Unless integrating social with non-social is a fundamental part of your vision I would encourage you to get the basics of social adoption and grab some of the lower-hanging fruit. That said, integrating and socialising are well-defined and relatively easy to implement.

As this is not a technical manual on integration, I won't be going into the depth of coding examples. Suffice to say that the main technologies in this area are OpenSocial and ActivityStrea.ms.

OpenSocial

OpenSocial is the most common way of integrating systems. It is published as a non-profit Application Programming Interface and has been taken up by many organisations, including IBM and SugarCRM. Provided that the server you want to integrate with supports OpenSocial, the two systems are integrated by developing small OpenSocial Gadgets. These are XML files which are installed on (normally) the IBM Connections or similar system. The result is the ability to surface content from, say, a CRM solution inside the user experience of a social environment, such as a community:

Figure 2.53. OpenSocial Example [http://opensocial.org/wp-content/uploads/2010/09/CollabApp.png]



ActivityStrea.ms

The ActivityStrea.ms specification has been drawn up to essentially allow social applications to exchange and share activity information with each other. Don't confuse "activity" with "Activity". In the latter case an Activity is something specific to IBM Connections. In the former its a closely-defined group of information about something, such as a check-in at a restaurant that the user has made, a posting to a Facebook wall, or a tweet. By following the published specification it becomes possible for a programmer to integrate activity streams from many different sources. In a business context you could integrate a company's twitter feed with the activity stream of a marketing community:

Figure 2.54. Activity Streams allow you to connect to many systems

Draft a Solution Statement

A solution statement is the basis of your vision. It should be a well-structured paragraph of text which defines the problem and how it will be solved. It is normally broken down into the following components:

1. Set up your thesis statement - define the problem
2. Identify potential solutions
3. Define who, what, why, when and how
4. Describe the solution
5. Conclude the statement

Here is an (unrelated) example:

> The Simpsons seems to be the story of a fractured, chaotic, sometimes violent family. However, this interpretation fails to explain why the Simpson family does so many things together: vacations, family dinners, and church. If we continue to see The Simpsons merely as a dysfunctional family, we'll never understand the show's real meaning and appeal. In fact, The Simpsons represents a very traditional approach to family values.
>
> —University of Virginia [2]

[2] *http://faculty.virginia.edu/schoolhouse/WP/sampleprobstat.html [http://faculty.virginia.edu/schoolhouse/WP/sampleprobstat.html]*

You can see from this example that the reader is taken on a journey through the problem and out to the solution. Here's another, more realistic example:

Example 2.1. Example Solution Statement

Our customer service satisfaction scores are 5% below the industry average. Customer Support Operators attribute this to not being able to locate the right information or person at the time when a customer requires it. By capturing product and service knowledge in central locations, readily accessible to the CSOs, McKinsey and other research organisations have shown that a 25% increase in productivity can be achieved. By increasing our customer service productivity we can improve our customer service satisfaction scores to above industry average in six months.

Define High-Level Expectations and Requirements

Defining high-level expectations and requirements are important steps to take to provide a scope and boundary to the problem your vision document will address. Your high-level expectations might come from the Management Imperative or from the Grassroots Initiative or be based around your organisation's standards for such a solution, such as the choice of technology, environmental considerations etc.

A high-level expectation for a social collaboration solution might be something like "Employees will be able to locate the right person to help them more easily", or "Staff should have access to the system from anywhere - inside the office, from home or mobile"

You need to gather expectations and requirements from the people your vision will touch. If this is a Management Imperative, your sponsor, or at least the person who landed it on your desk, should give you some sort of boundary inside which you should collect these. If you're working on a Grassroots Initiative the people who created the initiative in the first place should be able to describe to you what their expectations and requirements were of their solution and should also be able to offer some "nice to have's" or "if we started it again, here's what we'd want"-type feedback.

Collect the expectations and requirements in a document, often a spreadsheet as you'll need to refer back to this in the next section. For simplicity-sake, here's a template that might work for you:

Table 2.2. Example list of expectations and requirements.

Type	Initiative
Expectation	Reduce new-staff onboarding time from 45 days to 30 days.
Requirement	See a list of new staff onboarded each month.
Expectation	Access the system on an iPad
Requirement	Use the Windows-login details as the method of logging into the system

Expectations and Requirements are not too dissimilar from each other except that Requirements tend to be a bit more specific than expectations.

Link Requirements to Stakeholders

With a high level list of expectations and requirements assembled you can be sure of the following:

- In no way does this represent anything like a complete list of requirements;
- You can't consider this list to be particularly accurate;
- You should expect this list to change.

I am scathing about this initial list because you are asking people who presumably have at most a superficial understanding of the question you are asking. They don't have the benefit of experience and are reacting to your question by giving you something of a wishlist which is probably not too well thought out.

To get your project off the ground, however, you need sponsors who will line up to the problems you've uncovered. I'd recommend seeking their approval to link the high level expectations and requirements to a stakeholder so that you can demonstrate that the need exists clearly. I would also recommend that you do a bit of analysis about the issues to identify which are the real priorities.

To establish the true priorities I take the following approach. I list each of the Expectations and Requirements in a table and then ask either my sponsor, the stakeholder or take a guess myself at the following questions:

- What number of people are affected by this issue? In terms of the organisation, is it a Low number, a Medium number or a High number?
- What is the risk to the organisation of nothing being done about this? Low, Medium or High?
- What is the potential cost of doing nothing about this? Low, Medium or High?
- Is this a Management Imperative or a Grassroots Initiative?
- Who would own this particular problem in the organisation?

The result often looks something like the following table. On the left I have listed each of my Expectations or Requirements.

Table 2.3. Requirements to Stakeholders

Requirement/Expectation	# People affected	Risk size	Cost size	Mgmt or Grss-rts?	Stakeholder
No central place to store files	High	High	High	G	IT Manager
No document management regime	High	High	High	M	Compliance Manager
Top-down communication is poor	High	Med	Low	G	Board
Little standardisation of information	Med	Med	Med	G	Production
No incentive to improve	High	Low	Med	M	HR
Email culture dominates	High	Med	Med	G	IT Manager
Unclear job roles	High	Low	Low	M	HR
Aloof management	High	Low	Low	M	Board
Don't know who to ask for help	High	High	Med	G	Production
Poor customer satisfaction	Med	High	Med	M	Customer Service

I then convert these weightings into a series of numerical scores. High scores 3 points; Medium scores 2; Low scores 1:

Table 2.4. Requirements to Stakeholders with scores

Requirement/Expectation	# People affected	Risk size	Cost size	Score
No central place to store files	3	3	3	3+3+3=9
No document management regime	3	3	3	3+3+3=9
Top-down communication is poor	3	2	1	3+2+1=6
Little standardisation of information	2	2	2	2+2+2=6
No incentive to improve	3	1	2	3+1+2=6
Email culture dominates	3	2	2	3+2+2=7
Unclear job roles	3	1	1	3+1+1=5
Aloof management	3	1	1	3+1+1=5
Don't know who to ask for help	3	3	2	3+3+2=8
Poor customer satisfaction	2	3	2	2+3+2=7

Rearranging the items into their score order, highest first...

Table 2.5. Requirements to Stakeholders in priority order

Requirement/Expectation	# People affected	Risk size	Cost size	Score
No central place to store files	3	3	3	9
No document management regime	3	3	3	9
Don't know who to ask for help	3	3	2	8
Email culture dominates	3	2	2	7
Poor customer satisfaction	2	3	2	7
Top-down communication is poor	3	2	1	6
Little standardisation of information	2	2	2	6
No incentive to improve	3	1	2	6
Unclear job roles	3	1	1	5
Aloof management	3	1	1	5

Let's recap what we've done here so far:

1. We've identified High Level Expectations and Requirements for social collaboration.
2. We linked these with stakeholders.
3. We've scored these according to perceived importance and identified the top priorities for the vision.

Notice that the top issue comes from a Grassroots Initiative, the second is a Management Imperative and the third issue is again a Grassroots Initiative. This tells us something about this (mythical) organisation: two of the top three imperatives are coming from the Grassroots. To me this suggests that the upper management doesn't have a strong grasp of many of the issues in the organisation. From that I might surmise that staff morale is probably fairly low and that there might be a higher than normal staff turnover. How do I arrive at these conclusions? Grassroots Initiatives rarely come about because the workforce is particularly motivated or because they particularly want to improve the business. Generally a crisis becomes the mother of invention and as a result a perceived crisis amongst the Grassroots has resulted in a solution being invented. Its continued existence suggests that the management doesn't know about it as otherwise it would have been quashed in favour of an alternative solution or embraced and rolled out to other affected groups.

Create a Baseline

Creating a baseline involves a bit of time-and-motion study. I would not advocate the use of such a technique as an absolute driver for business change as these days the processes many knowledge workers are involved with are not suited to the more "mechanical" processes a Time and Motion study is good for. Nevertheless, establishing a baseline of the time and effort involved and can be fed into the Vision Document.

Mikell Groover [3] , according to Wikipedia [http://en.wikipedia.org/wiki/Time_and_motion_study] proposed the following approach:

1. Define and document the standard method
2. Divide the task into work elements
3. Time the work elements to obtain the observed time for the task
4. Evaluate the worker's pace relative to standard performance, to determine the normal time
5. Apply an allowance to the normal time to compute the standard time

The key here is to define and document the standard method - i.e. what do we do at present. In our example we have highlighted that we don't have a central place to store files. Document what people do. You will probably find that different people do things in different ways. Some might store their files on their harddisk, all in one big folder. Others might share a network drive and have a more regimented folder structure. Estimate the amount of time it takes to store and share documents. Observe difficulties one person has locating a file that another person has saved. This is the key to the productivity gain to come. Record the frustrations and attitude towards the current situation - this will be important later to benchmark how attitudes might have changed when the new solution is implemented.

Review the Vision

With our prioritised list of issues and stakeholders assigned, we should review our vision and plug in Solution Statements for each. Remember our model for Problem Statements is:

1. Set up your thesis statement - define the problem
2. Identify potential solutions
3. Define who, what, why, when and how
4. Describe the solution
5. Conclude the statement

Our top three priorities for our project are:

1. No central place to store files
2. No document management regime

[3] *Groover, Mikell P. (2007). Work Systems and Methods, Measurement, and Management of Work, Pearson Education International*

3. Don't know who to ask for help

Here is our top priority transformed into a Solution Statement:

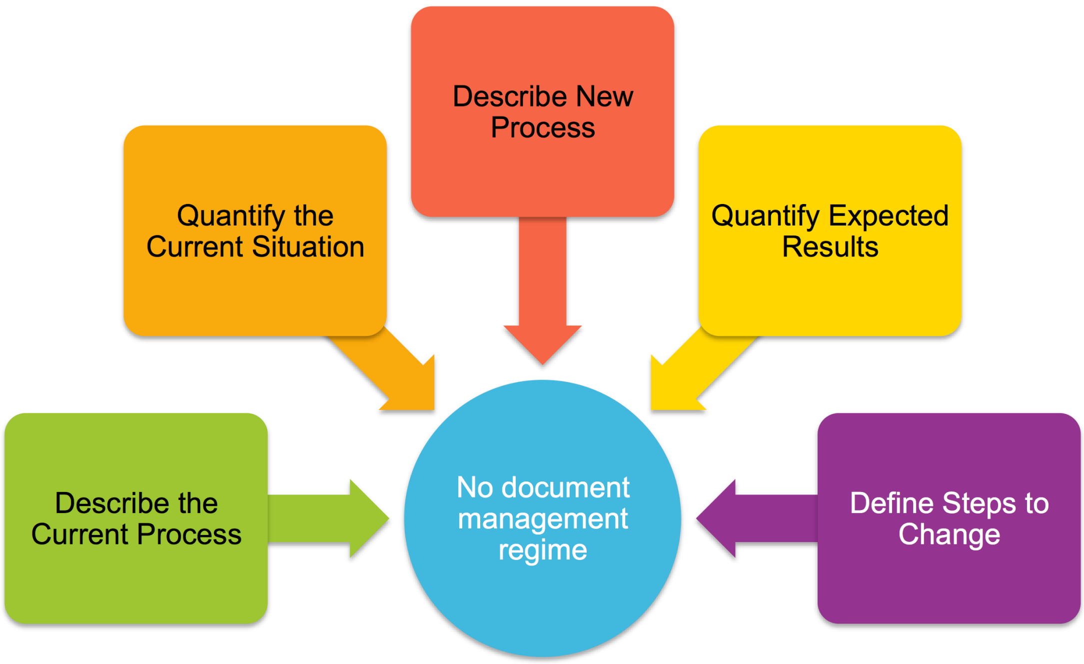
Example 2.2. Example Solution Statement 1

In a recent survey of our staff it was found that there was no central place to store files. Feedback has indicated that this causes significant duplication in the number of files we have and causes problems when staff need to find the right file. Implementing a centralised document sharing solution would alleviate this problem and would 1) reduce the overall volume of files stored; 2) ensure that everyone is working with the same version of the document. We propose to form a group to map the volume and location of the files and identify a strategy to migrate these into a central storage location. According to McKinsey's recent research (2013) this can help drive a 25% increase in productivity. The project would be expected to last around six months and would result in a centralised document storage solution available for all staff.

I would use the Solution Statement as the Executive Summary for your Vision Document. In one paragraph it covers the entire scope of the project and gives timescales, benefits etc. You still, of course, have some work to do to build a complete vision document. So what would you put in one?

- Who is affected
- Current methods of work around the problem
- Estimation of the cost of the problem
- Describe the current problem
- Describe the proposed solution
- Quantify the expected results
- Define the steps to make the change

Figure 2.55. Steps to create a vision



I'd encourage you to use diagrams, real facts, numbers and before-and-after diagrams to show how the transformation will take place. Once you've got the document ready, ask your sponsor to endorse it. Get it circulated amongst the key people in your organisation would can support your initiative and give it the backing you need. The key part here is to *gain consensus that the vision is accurate and appropriate* for your organisation.

Chapter 3. Leadership Commitment

Leadership support, measurement capability, content, and appropriate processes are must-haves for social business success.
—Social Business: #Shifting Out of First Gear, David Kiron, et al., MIT Sloan Research Report 2013

Figure 3.1. 5 Steps to Social Business Adoption

Introduction

Figure 3.2. Key Requirements for Leadership Commitment

Although they may be reluctant to admit it, the leadership in your organisation are the celebrities which employees watch. The demeanour, presence, interest and general overall behaviour of the leadership plays a huge role in the behaviour of the employees. Their style of management, approach and stance in different situations set the tone for the culture of the organisation. A large organisation may have many sub cultures related to prominent managers or executives in those business units but the overall tone comes from the top.

Without the commitment of the leadership of your organisation your project will face an uphill battle to be truly successful. You are essentially staging an organisational coup d'etat in the organisation. You are shaking up the current way of working to move to a new way of working which will drive better business outcomes, both for the bottom line and for the people who work there. However, like in any takeover, unless you have the people at the top with you, you'll only get so far.

Thus, you need the sponsorship of senior people in your organisation to help make this change. It needn't necessarily be the person right at the top, but should be someone influential and senior enough that when it's a raging success the other people at the top will take notice and want to take part. You need to do a reasoned sales job on this individual. You need to present the business case, the vision, the outcomes from your workshops etc. I wouldn't arrive with all of this prepared and land the idea on them, however. I would ask for their support to develop the vision, ask for their feedback with your draft vision and then finally ask them to take your proposition forward for further consideration.

As well as having a senior sponsor you also need commitment that they will take part in the solution. Your colleagues will not see the social collaboration solution as worthy of their time and effort unless they can see that a) it's not going to go away; b) their managers are watching and appraising their input; c) the management are committed to it and d) it actually helps them in their day to day job. Without the latter all you will get is frustration. Without all of the former you'll get lip service paid to your plan and eventual disuse.

What does leadership commitment look like though? Here are some examples:

1. The senior management mention the existence and their enthusiasm for the project in their communications;

2. Some initiative is created where communications from the senior executive are moved into the collaboration platform. This can usually be combined with a commitment to use the collaboration platform as a "listening vehicle" with the prospect of the leadership commenting openly on other comments raised;

3. Senior management post news of some sort, like a status update, or a blog post or something similar, in a timely manner every so often so that there is some value for the employees to follow that senior manager in the system. Exhibiting this "working out loud" to the employees will encourage them to do the same;

4. The senior leadership commenting on the posts and input of others to the system. The odd comment, recommending someone, calling out someone's contribution to the system, whatever. Something which shows that the management is watching what's in the system and are showing their opinion and feedback on the matter.

I work for an organisation with nearly half a million employees. Using a social collaboration system effectively puts me in direct touch with the senior management in the company I work for. It flattens the entire organisation tree to two or three levels instantly. This is extremely empowering for employees and for management alike.

Leadership Skills Gap

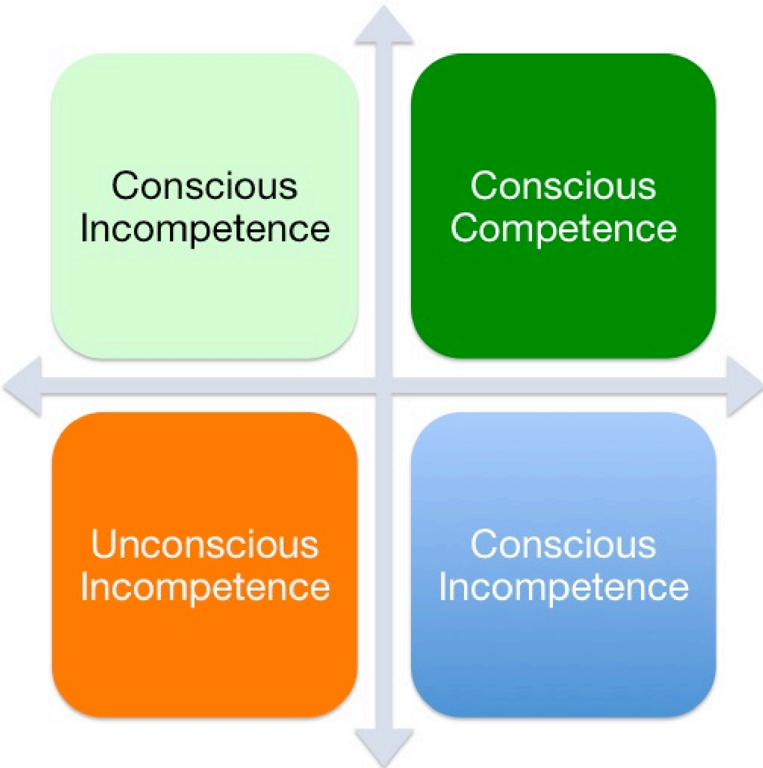
The leadership skills gap is something you need to be aware of. The people who hold the keys to success are some of the least-well-skilled individuals at this. They might be great presenters, keen financial minds, great strategists; but I bet they are not great on the fine detail, the button pressing or the mouse clicks. Frankly they have bigger fish to fry than this.

Recognizing that they have a skills gap and doing something about it are of course two different things. One of the primary gaps you will face is a perception gap. Their perception about what "social" is and what it can do for them are probably two initial areas you need to focus on.

I find I often need to make it very clear that there is a fundamental difference between social media and social business. This often leads them to jump to the conclusion that "social media" is the voice of the customer and "social business" is the voice of the employee. While this definition is not in itself wrong, I believe you also need to highlight that "social business" is bigger than that. It's about using the social techniques we see in some areas of social media and using them as tools to broaden engagement and insight with employees, customers and the organization's supply chain (partners, suppliers, etc).

When they understand the distinction often their interest rises and their enthusiasm for the subject starts to take off. Recognize that in the early stages your leadership will be "unconscious incompetent":

Figure 3.3. The Competence Cycle



The Competence Cycle describes the process people go through as they gather new skills. Your leadership team will usually start in box 1 or 2 of this cycle:

1. Unconscious Incompetence - your leader doesn't know what he doesn't know. They have no grasp of the subject, what it entails or where it might take them.

2. Conscious Incompetence - your leader knows that they don't know about a particular subject. This is good place to be as a) they will generally stop themselves from a dangerous action and b) will normally be receptive to help.

3. Conscious Competence - the person knows what they are doing and can apply it when they think about it. Most non-professional computer users are consciously competence with the use of a computer, for example.

4. Unconscious Competence - this is the stage a true expert reaches. They are able to participate naturally and without a great deal of thought. Once we have passed our driving test and have been driving a car for a while we quite often become unconsciously competent at driving - we don't need to think about gears, brakes, etc, we just do it.

Understanding where your leader is and where they need to get to is important to ensure that you can cross the skills gap. You should be prepared to address the gap with a range of measures, many of which we discuss in later sections of this chapter.

Communications

Commitment to Culture Change

You will find it difficult to be successful with a deployment of Social Collaboration without a commitment to culture change from your leadership. In my experience it becomes quite obvious early on in a project, especially in the vision-setting stages whether or not that commitment is there. Where the leadership recognises that continued success, increased competitive advantage, cost reduction, modernisation and the many other benefits to be gained by being more collaborative, then you can develop that commitment. Where it doesn't see it this way, then you have an uphill problem.

Aligning your project with a major culture change initiative is an excellent way to be part of the larger movement and be the tool people use to drive that change. This is more than, however, "Business Process Re-Engineering". Social Collaboration is not so much about re-inventing processes, but rather about adding people back into the processes.

One customer I spoke to recently has implemented social collaboration in a heavily process-focused part of the organisation. They have supplemented the existing process and improved it by using better tools than the email and conference calls they had been using previously. The result was an eighty percent cut in overtime and a reduction in the process time from twenty days to six days. Such dramatic "process improvement" is surely testament to the need to be committed to the culture change argument. In this example the company wanted to embrace a culture of transparency. They didn't issue an edict that everyone had to be a blogger or that everyone had to "work out loud" by posting status updates all day. They just committed to using collaboration tools to improve their existing approach.

The leadership's commitment to culture change must be both Vocal and Visible: We've probably all seen these reality TV shows where the boss goes undercover and works on the shop floor to find out what's really going on; well, this is a bit like this. As a junior member of staff, being able to hear from and interact with a senior member of the company is an empowering and motivating experience.

Encouraging Others

Some organisations implement "Gamification" solutions from organisations like ISW [www.isw.com.au] whose Kudos Badges approach motivates and recognises individuals and their contributions. Others, and I would encourage you to start with this, simply make a habit of calling out good work and encouraging people. A simple "Well done on that sale", or "This is a great example of what I hope to see in our social network" is all it takes from a senior member of staff to encourage that person, and those around them to participate in a positive way.

There is absolutely no substitute for authenticity, caring and well-timed feedback. A good leader knows this already. Giving public praise goes a long way towards motivating and reinforcing positive behaviour.

Short Blog Articles

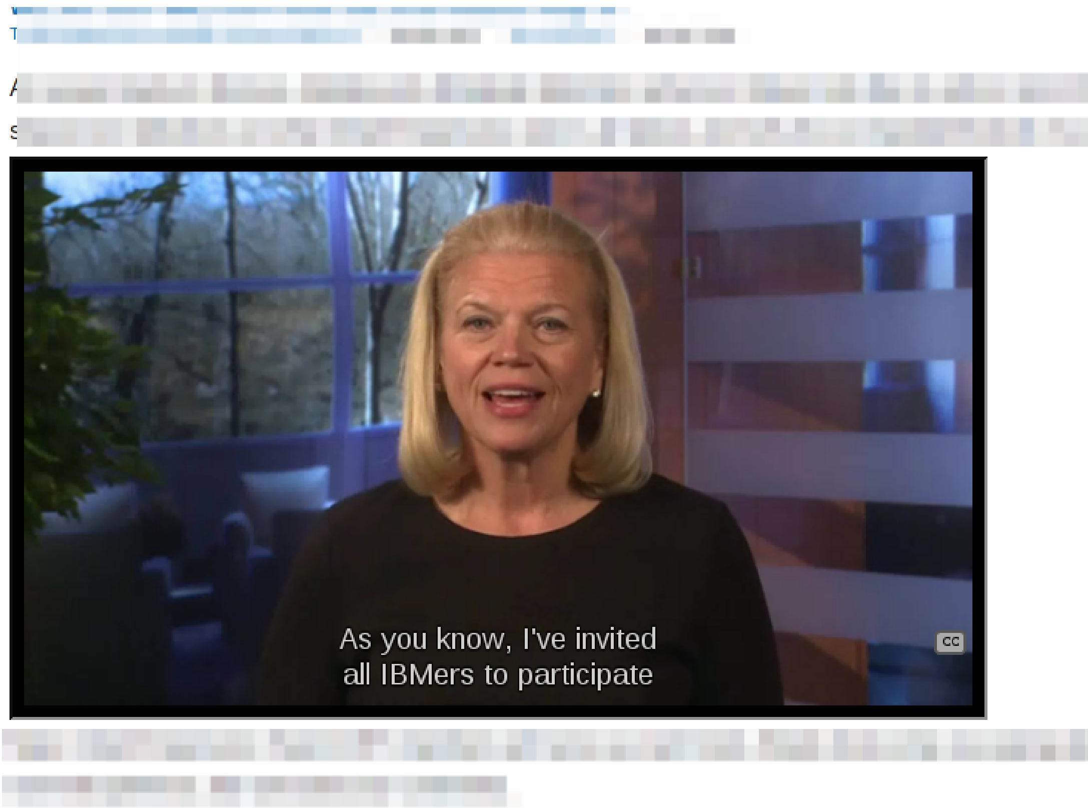
Getting leadership commitment is like panning for gold. You know the nuggets are there, its a case a of teasing them out. So too is free-flowing communication from executives where there is a genuine exchange of thoughts and opinions. I commonly see "corporate" communications writing apparently "personal" blog statements from executives. Such articles stick out a mile and result in the perception of the executive as being distant, aloof and not in touch. Instead, work work with your exec to write a one-paragraph, three-sentence blog post about what they were doing last week. Such news is very valuable to those who have otherwise no concept of what their senior management is doing. Of course there will be sensitivities about what can be posted, and you should use your judgement as to what's appropriate. The tone that the executive sets in their blog will be the drumbeat the company works to. If you're executive says "We're doing well, but we need to catch our competitors", they have both reassured the worry-some workforce and set a challenge. Conversely stating "We're doing well" alone might well breed complacency. Stating "We need to catch our competitors to remain a healthy business" could have people running to the doors.

So executives need to be careful about what they say, but like the gold nuggets in the riverbed; such postings are highly valued by those who read them.

Video Blogging

A really good way of getting your message over with passion, sincerity and the least possible chance of being misunderstood is to use a video blog. IBM's CEO Ginni Rometty is one of the best at this I have ever seen. Most often she looks directly into the camera and appears to be talking to you directly. She's not reading a script and talks fluently, passionately and from the heart. The impact of this is huge engagement by the IBM employees to every blog post.

Figure 3.4. Ginni Rometty video blog



All you need these days is a reasonable-quality flip-cam or recent mobile phone for basic video, but if you want to do something a bit better quality, an inexpensive HD camcorder with a microphone-in plug (so that you can use an external microphone) is a good bet. IBM Connections makes it easy to upload your videos into a Media Gallery in a community and thereby make it easy for people to watch the videos. Connections also keeps count of the number of page views in your blog entries, so you can gauge uptake and impressions for the material.

Chapter 4. Planning

Figure 4.1. 5 Steps to Social Business Adoption

The Basics

For the most part, implementing a social business project is no different from any other project. To be successful you need to:

- A budget to work to (both of time and money)
- A clear understanding of what the end looks like
- A plan to get there
- An understanding of the resources and skills you'll need to deliver the result.

In this section I'll provide advice I have found to work when planning and executing a project for rolling out Social Collaboration. I am not going to be prescriptive about exactly how you should plan the project, but suffice to say that the concept of iterations, described later, is one which I would strongly recommend. I would also not set off on any plan without an agreed and clear vision amongst the major stakeholders.

Planning Advice

The first step in any project is of course to plan what you are going to do. In my experience, a plan needs to be produced at the beginning so that everyone has a chance to think through the whole project. One of the biggest mistakes any project makes, however, is that the plan then gets forgotten about and everyone goes off and gets on with it. The result is that timescales get forgotten, next steps are ignored and before long chaos ensues. This doesn't mean that you need to have a full time project manager carefully tracking every step along the way, but there are two key things I'd recommend you do for ANY project:

- Build in slack to absorb over-runs.
- Meet regularly with the whole team to review the plan and adjust accordingly.

Remember that I am advocating that you follow a process of iterative adoption. Without the second of these key steps you won't iterate your project plan and will be bound to make the same mistakes again.

I am commonly asked, however, how much time does it take. Without a clear definition of it, it is of course difficult to say. However, I have found that the following chart summarises the broad proportions of time I spend on different aspects of a social business implementation based on iterative adoption.

Low Hanging Fruit or Big Issues?

The next issue to come up is whether or not you plan to go after the Low Hanging Fruit (easy and quick to solve issues), or to tackle the Big Issues that your organisation needs addressed? It's a difficult one to decide upon for an entire organisation because it depends on a number of factors, including:

- The culture of the organisation - is it ready to embrace being social everywhere?
- Are the big issues the reason why you have the go-ahead for this project?
- Are there perfectly adequate solutions for the easy-to-solve Low Hanging Fruit?

Ultimately the decision about whether to go one way or another need not be cast in stone. You can tackle the Low Hang- ing Fruit issues for one area of the organization and then change to tackle a Big Issue of another area. Using Iterative Adoption, the meat of which we will get into shortly, you can plug the Use Cases in that you are going to tackle for the next iteration, so you can change your scope and approach as you see fit.

In my experience, a "big bang" approach to implementing social ways of working is not a success in organizations larger than about one hundred people. It's too much to implement all at once. There are two many questions that come up, there are too many loose threads from completely unexpected corners which will appear. I strongly recommend you focus on manageable iterations of use cases which make sense to the business unit you're focused on.

If, for example, you have a chief executive who is really keen on being social and is looking forward to engaging with the staff through the social collaboration solution, then you should proceed with this and consider more closely your Communications component in your iteration plan. He or she will want to make sure that people are reading and participating in what they have to say - so you need to come up with ways of getting the vast majority of users to at least log in to see what's going on. You might, for example, use the chief executive's request as the cue to encourage the formation of the more non- work social aspects which you could roll out easily to people who would have a strong desire to use it. I'm thinking here of the jogging club, camera club, wine club, book club, whatever your organisation has that staff congregate around which doesn't directly relate to work. It might even be a community for the staff restaurant. By introducing non-work areas of interest along side something work-related, you can gain engagement and participation without having to drag the metaphorical horse to the metaphorical water.

Equally I have found expecting the system to be adopted virally is ultimately doomed to failure too. Sure it will take off amongst those who are pre-disposed towards social networking but it will soon fall in to the Chasm of Disillusionment.

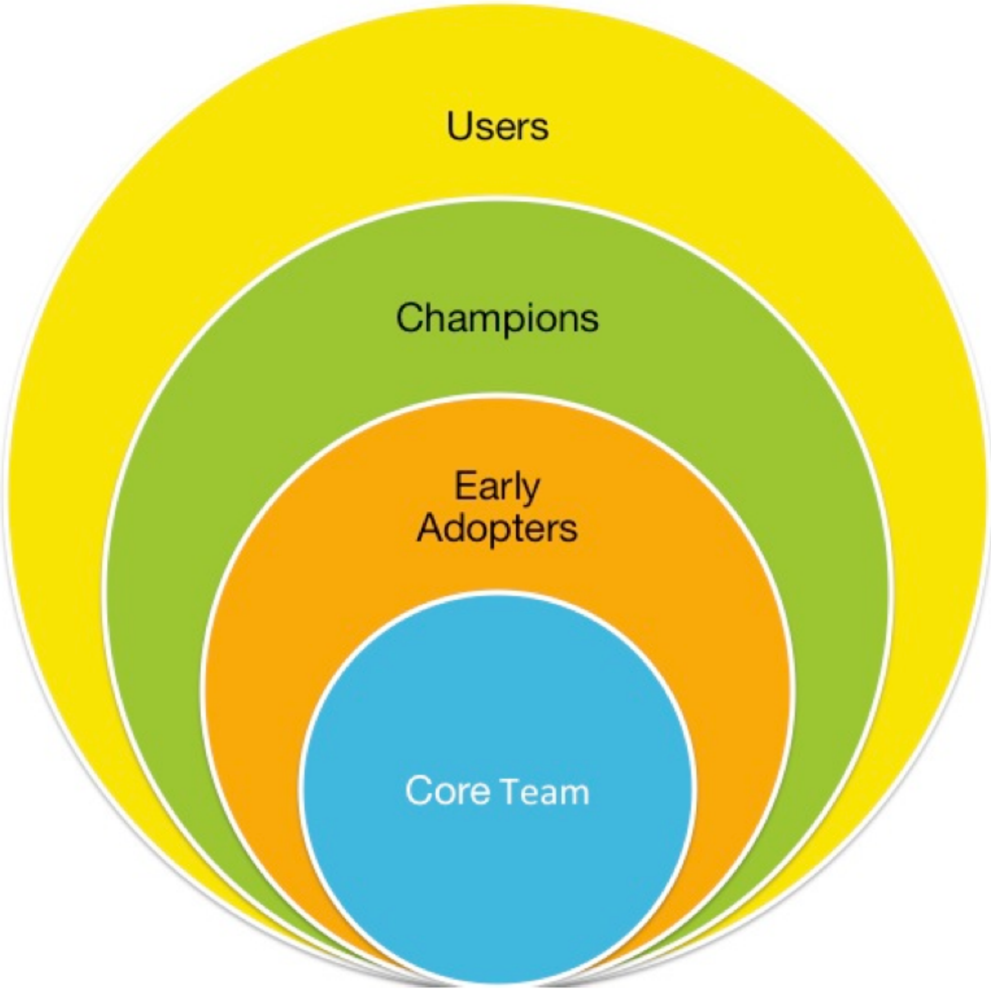
Use the System Yourself

Your own adoption of the social collaboration system will be an important thing to show your prospective users. If you are seen to practice what you preach then you will at least come across as authentic in your desire to help. You can honestly evangelise on the benefits, the practices and the new insights using the system has brought you and your team. So run your project in the system. Consider using some of the methodologies in this chapter around Meeting Management, Project Management and Brainstorming. If you can show others that you are doing it, you will encourage them to do it too. You will also be teaching your own team at the same time.

Refer to the sections on running a project, or handling meetings if you need advice on how to do this. You need to be able to wield the metaphorical project sword to be able to win the battle. If you don't use it yourself, you will not be authentic when trying to convince others to do so.

People

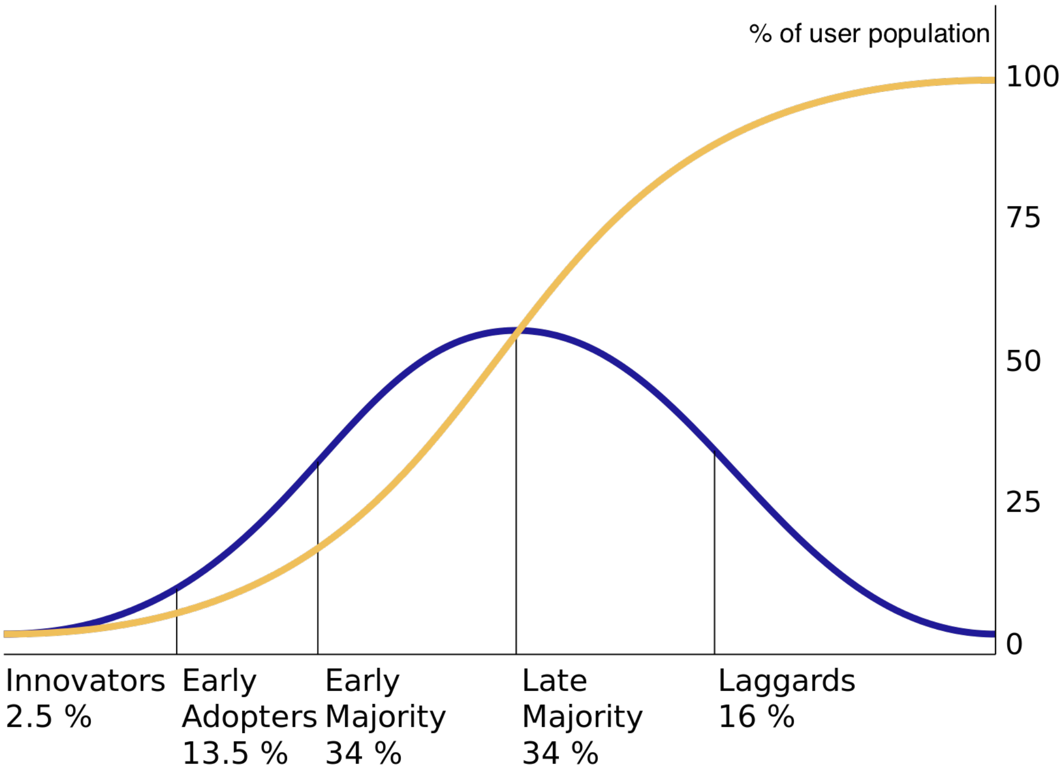
Figure 4.2. Teams in your Project



Getting the right people around you is critical to the success of your project. I would suggest that you think about who will be in the following groups:

1. Your core team
2. Early Adopters
3. Champions
4. Senior stakeholders
5. Community Managers

Figure 4.3. Diffusion of ideas



The above diagram, taken from the Diffusion of innovations [http://en.wikipedia.org/wiki/Diffusion_of_innovations] highlights the need for innovators (your core team) and Early Adopters to get the adoption of your social network going. As the diagram also shows, the early majority take you to the top of the adoption curve, ensuring a critical mass [http://en.wikipedia.org/wiki/Diffusion_of_innovations#Rate_of_adoption]:

> Within the rate of adoption, there is a point at which an innovation reaches critical mass. This is a point in time within the adoption curve that the number of individual adopters ensures that continued adoption of the innovation is self-sustaining. Illustrating how an innovation reaches critical mass, Rogers outlines several strategies in order to help an innovation reach this stage. Strategies to propel diffusion include: when an innovation adopted by a highly respected individual within a social network, creating an instinctive desire for a specific innovation. Also, injecting an innovation into a group of individuals who would readily use said technology, and provide positive reactions and benefits for early adopters of an innovation.
>
> —Wikipedia [http://en.wikipedia.org/wiki/Diffusion_of_innovations#Rate_of_adoption]

Your Core Team

At the beginning of the project you will need to focus most on your core team. To achieve scaling (discussed in the next section) you need to build out the early adopters, champions and community managers. I would propose that it is your job, yours personally, to work with the senior stakeholders in the organisation. Their input and support is so critical that there is a danger that if you hand the job of supporting them to someone else that the message will be diluted and the project weakened. You may, of course, not be the best person to provide that support so I would encourage you to look at your own skills and abilities and those of your core team. If there is some who REALLY gets all of this and is a good communicator, then perhaps you should ask for their help with the senior stakeholders. Consider this carefully, though.

Your core team should contain the following roles. Note that I say "roles" and not "people". In large projects you may have the luxury of dividing the work between many people. On smaller or pilot projects this luxury may not be there so you and your team may need to take on multiple roles.

Example 4.1. Core Team Structure - Example

Table 4.1. Core Team Structure

Role	Description
Project Manager	The Project Manager is the role which has the overall responsibility for managing the resources, timing, communications and reporting of the project's progress. They are not, necessarily, involved in the production of deliverables, provision of training, etc. The Project Manager's job is primarily clerical in the project - making sure you are on target and that the project's communications are in order.
Evangelist / Advocate	The Evangelist is the true expert in social collaboration. They "get it" and are able to apply the tools to the problems that are to be addressed. Such a role may not easily fit with someone in your team and may need to be brought in from a vendor or business partner. The role is one of being the lead authority on the "wielding of the sword".
Communications	It is vital that the project is able to communicate its plan and translate that communication into terms which the end users will understand and accept. Having someone think about the advance promotion, communications, emails, approach, graphics, theming, etc., is a really important part of the project. Indeed it is often the role of the Communications person which "crosses the adoption chasm" (Geoffrey Moore), and turns this from being an ordinary project which might only meet 50% of its objectives into something which provides true business value and improvement to the organisation. The Communications role is doubly-difficult. It needs to understand what we are trying to achieve and then needs to be able to translate that into something the employees will grasp. Typically this can only be someone within the organisation. They are best placed to understand the tempo, language, approach, format etc of the communications the project will make in the context of what has gone before and what else is going on in the organisation. I am not suggesting that the Communications role is solely left to get on with it, however, a good vendor or business partner will guide you through an example communications plan to reflect the iterations the project will go through. It should be possible to set out a project plan (with the assistance of the project manager) and develop a Communications Plan alongside it. We look more closely at a communications plan in the next chapter.
Technical Support	The need for technical support does not disappear when you implement a cloud solution over, say, an on-premises implementation of an enterprise social network. To get the most from these tools, regardless of their implementation model, there will be a need to look at extension products, like mobile use, desktop integration, email client integration, browser compat-

Role	Description
	ibility, external access, etc. All these IT issues need to be handled and a clear route to getting these solved is necessary. Your own IT department may be able to help with this, or if you don't have one, or they are not involved I would strongly recommend ensuring that your vendor provides some level of support. It never ceases to amaze me the difficulties organisations have making small changes to user's computer setups to get the most from a new solution. Simply installing a new piece of software or trying to access a new website with the standard browser gives unpredictable results on many computers. The problem magnifies when you introduce different platforms, like Mac OS X, Linux and, of course, the myriad of mobile platforms out there. Some organisations use virtual desktop environments, like Citrix, to manage the desktop interface users access. Others use the standard browser with the operating system and expect everything to work. ActiveX controls, java applets, large amounts of javascript and all sorts of other complications can make this a tricky proposition. Therefore, you need someone who is skilled in the resolution of these issues and someone who understands what end you are driving to. It may well be someone co-opted from your IT department or vendor, but they do need to have a very close understanding of the technical environment your organisation runs.

Early Adopters

Once you have your own team set up and working using the enterprise social network, you need to start planning two things:

1. The recruitment of early adopters who can use the system and get up to speed with the tools at their disposal.

2. The iteration plan for the rollout of the solution to the employees

I specifically mention them in this order as it is important to have a constituency of people who can help you roll out the solution to the constituencies of users with the functionality defined in each of the iterations. You should recognise that your Core Team cannot possibly expect to deploy the whole solution itself, nor expect to get the respect or attention of the different parts of the organisation you will touch without the input of early adopters.

But what does an early adopter look like? Typically they will be people who self-select for the project. They will be people who are comfortable using computer tools and who recognise that the current way of doing things could be improved. Ideally they will be people who have some exposure to other social networking solutions, like Facebook or LinkedIn. Ideally they should be people to whom many of the concepts you will present will not be completely foreign. Importantly, however, you need to get their commitment to make a change in how they work. To back this up, you should present the evidence of your executive sponsorship, other customer case studies, references, etc.

Ideally you should also attempt to recruit early adopters from as broad a cross-section of the organisation as possible. Limiting your early adopter population to, say, IT or HR, will limit their perceived ability to recognise and adapt to the problems of the wider organisation.

OK, so you've identified people who could be early adopters in your organisation. They are a mix of young, middle-aged and older members of staff (to help provide balance as to what can and cannot be implemented in the company), and they are enthusiastic about getting involved, but where do you start with getting them enabled?

Early Adopter Training

When I have been delivering Early Adopter training, I have taken the approach of congratulating the people involved in being part of a revolution in the way their organisation is going to perform. The first thing I have done is to set up an Early Adopter's community. Pay some attention to the look, feel and design of the community to make it as inviting as possible to these people. They are the ones who will carry your message into the deepest reaches of the organisation, so your support is essential.

I'd recommend setting up your Early Adopter Community with the minimum of features / functions:

- Forum - for handling questions and answers from your Early Adopters.
- Blog - for keeping the early adopters up to date on what's happening on the project.
- Files - for sharing presentations, graphics, and other resources the EA's can use as part of their advocacy.
- Status Updates - for you, your core team and the Early Adopters to share news, experiences and snippets of information.

With a community in place, you need to provide what I call "briefings" rather than training. Training assumes that they have no idea about what you are providing. Briefing, on the other hand, respects their knowledge and experience (even if it is from their use of Facebook at home).

The following example is one which I have used repeatedly with IBM Connections customers who have an Early Adopters group. I am not proposing that it is not error-prone, but might act as the starting point for some Early Adopter training of your own:

Example 4.2. Early Adopter Briefings Plan

Table 4.2. Early Adopters Briefings Plan

Session	Contents
Lunchtime session 1	The first meeting is very much about setting the scene for the whole project and the concepts around social business. Agenda: 1. What is all this about? 2. What is Social Business? 3. Social Business vs. Facebook 4. Communication and Collaboration 5. Doing work without email? 6. Aligning the culture of your workgroups 7. Forming a social users group 8. Presentation and discussion of the enterprise social network 9. The Man Who Should Have Used IBM Connections {video from YouTube}

Session	Contents
	10.Demonstration of how the Core Team uses the enterprise social network 11.Case Studies and Successes I find that it's best if the Early Adopters don't escape the initial session without some homework: • Find a blog about something you are interested in. • Find a Twitter account you like, login to Twitter and create your own account. • Join Facebook or LinkedIn and populate your profile. You should use this meeting as an ice-breaker for the Early Adopters. Ideally you should keep it light-hearted and encourage discussion amongst the group to foster an air of openness and communication. All members of the group should be encouraged to complete their "homework" for the next meeting.
Lunchtime session 2	The second session for the Early Adopters should concentrate on using the tool itself, for example: 1. The Man Who Should Have Used IBM Connections, part two 2. Profiles, Tagging, and Knowledge Capture 3. Status Updates 4. Communities, including Blogs, Ideation Blogs, Wikis and Files 5. Bookmarks and Activities I usually set homework from this second session, as follows: • Log in to the enterprise social network • Join the Early Adopters Community • Find five other members of the Early Adopters community, or other staff and add them to your network. • Write one status update per day. • Create a community on something they are working on and involve other members of their group to participate The purpose of this session, apart from introducing the concept of the tools themselves, is to identify natural Community Managers for later on.
Session 3: Examining pain points (identifying use cases)	Now that the early adopters are more up to speed on the system and what it's capable of, I start with an ideation session, using an ideation blog to capture the issues the early adopters have with communication, collaboration and locating of information in their jobs. I focus this specifically on THEIR problems, and not necessarily on those which the organisation has highlighted as being in the project vision. I want their buy-in to use the

Session	Contents
	solution as quickly as possible. I want them to see what's in it for them right away, so focus on their issues. The format of this is often just using a flipchart or whiteboard to go round the room, writing up each issue. I then hand out some pens to each of the Early Adopters and give them ten minutes or so to place a tick, or a cross or a stroke, or some other mark against the issues they can identify with. This lets me rank the issues according to "popularity". I re-write the list, taking the top three issues and ask people if they agree with my analysis. Assuming they do, I then seek a volunteer, usually the person who first flagged the issue as the owner of that little project. I divide the Early Adopter group into three sub-groups by either asking for volunteers or simply picking at random. Next I ask each group to create a sub-community of the Early Adopters community and get them to ideate through how they would address their issue. I facilitate this on an informal basis and at the end of the session usually ask them to meet again once between this and the next session to come up with one wiki page on the problem they are going to solve and how they plan to go about it. I make all of the sub-communities open so that each group can see what the other is doing and gently prod those who are not participating to jump in and offer their thoughts.
Session 4: Putting it together	The final session of the Early Adopter training is a review of what the different groups have done to document and plan how they would address their chosen issue. I ask each of the groups where they would apply their solution in their daily work and use what they commit to here as the place I will follow up in later weeks to help them if they are experiencing problems. Try to get a handle on the time the current issues require of those who perform the work. Can you measure the cost of doing work at present - time, paper, phone-calls, emails, searching, etc. It will be important to show an improvement in hard facts rather than just gut instinct to ensure continued success for your project, so do what you can to quantify the "as-is" situation. I reinforce the use of the forums in the Early Adopters community to address issues with their chosen issue and then we collectively work through how the Early Adopters will start to involve their colleagues in the solution. It's at this point that the Early Adopters start to get nervous, usually. They now realise that they are moving into the front line of adoption and that they will need to try to encourage and motivate those around them to change their working practices to improve collaboration and communication. You should recognise that in order for them to be able to deliver on this they will need your support. I try to arrange regular one-to-one sessions with each Early Adopter in the few days and weeks immediately after this point. By giving them the

Session	Contents
	support they need they will feel confident to experiment and work with their groups to change how they operate.
After the Training	As discussed above, you should schedule time with each of the Early Adopters on a personal basis as well as being attentive to the developments in the Early Adopters community. Your energy, motivation and attention will develop the confidence of the Early Adopters to act on your behalf. Like learning to drive a car, once you've passed your test and you're driving yourself for the first time, you start to really get the experience of the real world. The same is true here, be there and be supportive for your Early Adopters.

Champions

The Champions of your adoption are people who emerge from the extended groups formed by the Early Adopters. These are people who are able to extend the use of the system, are doing new and innovative things with the tools and are actively advocating on the system's behalf. Typically these people should be treated like superstars in your enterprise social network. You, and your senior stakeholders, should be calling out their hard work and innovation to everyone in the system. Their work should be highlighted as an example to everyone as what can be done.

Because the Champions are self-selecting and self-starting they generally don't require the kind of bootstrap training or familiarisation we did with the Early Adopters. Instead you should seek to establish a Champions community, accessible to the Champions, the Early Adopters and the senior stakeholders where you and your team share the power tips you use which they can get access to.

What do I mean by power tips, though? I'm talking about advanced topics like wiki page formatting, videos of client reference testimonials, scholarly articles on the use of social media technology to drive engagement, anything that will allow you to give the people who truly believe in your change as much power as possible to help sustain you through the early majority phase up to critical mass.

In previous projects I have scheduled a once-a-month call or meeting with the Champions and Senior Stakeholders. This is a deliberate exercise to expose the champions to their senior management - to highlight their efforts to their executives and also to learn from each other.

Often this kind of networking session acts as the basis of the reverse mentoring approach I have described and helps do pair-matching between champions and execs.

Senior Stakeholders

The senior stakeholders, as we described in the earlier section on Leadership Commitment, represent the reason why many people will take up the use of the system. Despite the efforts of your Early Adopters and Champions, without the vocal and visible support of the senior stakeholders the late majority, which can represent as much as 34% of your user population.

In my experience, going to the senior stakeholders and providing one-to-one support, advice and encouragement is by far the most beneficial and effective way of securing their engagement. Reverse mentoring, 15-minute workshops at the end of already-scheduled meetings and briefing their personal assistants are also good approaches.

You should not expect to turn your senior stakeholders in to power users. Instead they should be able to do status updates, perhaps blog entries, comment on things they see, like, recommend and generally participate. Where the senior stakeholder wants to make more use of the tool and they have an assistant or secretary, then you should focus your efforts on ensuring that the assistant is in your champions or early adopters programmes.

Community Managers

Good community managers will likely be obvious. When you are deploying your social business project you may have a group of early adopters. Amongst them you will find particularly enthusiastic, switched-on individuals. I'd recommend approaching them to act as your early community managers.

There might be a collective gulp amongst people who realise they might be called upon to participate in this way. So, to help explore the work involved Joyce Davis, who managed many of the IBM Communities, was interviewed to get her insights.

Joyce was the Community Manager for the very successful IBM Collaboration Solutions Community which is the place to go to interact with the wider community of IBM Social Business Subject Matter Experts, customers and IBM'ers alike. Joyce has first-hand experience of managing a large, diverse community and engaging with that community to get debate, interaction and above all a sense of community going amongst people who may never have met each other, but share a common interest.

Table 4.3. Interview with Joyce Davis, Community Manager

Question	Joyce's response
When starting a new community on behalf of a group of users, what tips could you share about getting the users to start to work together?	When working with online communities, I recommend making it easy for people to get started. Post a "Get to know your fellow community members!" topic in a forum to generate some engagement. Come up with a list of 4 to 6 questions that are easy (and dare I say FUN!) to answer, and that encourage people to share a little about themselves. Here are some ideas: 1) What is your name and title? 2) What do you love about your job? 3) Where do you live? 4) What is the last book you read? 5) Share a favorite hobby. Then include a question or two that brings attention to a topic relevant to the community. For example, if you have a community focused on mobile technology, consider a question like "What mobile device could you not live without and why?" The responses you'll receive are great, but what is really exciting is the discussion that is generated BETWEEN the community members through comments and replies. The conversations are a great way to build connections between community members.
When you have community members who are obviously more enthusiastic or knowledgeable than others in the community, is there anything special you do to harness that energy?	It's great to give "shining stars" in the community a way to spread their enthusiasm and expertise to help grow and nurture the community. Putting them in leadership and mentoring roles is one way to do that — having them lead sub-communities in a particular area of interest, or partnering them with new community members to help get them engaged. Encouraging these community advocates to share ideas with each other can be valuable too. I recently spoke to a team of community advocates who work for one IBM's enterprise customers. They meet bi-weekly to discuss ways they can drive community participation and share best practices. These meetings allow them to sharpen their leadership skills, as well as share ideas on how to address community challenges. Finally, outstanding community members need to be recognized and rewarded. The IBM Champion program is an example of how IBM recognizes customers and partners who excel in community participation and leadership. Raising the visibility of these outstanding members helps them reach more people and supports their evangelization efforts.
Are there any metrics or ratios you look at when the community is established to get a handle on its health? Any warning	The three key metrics for measuring community health are people, participation, and content. But numbers can be tricky and you want to make sure you align your measurements with your community goals. Be careful not to equate community health to exponential growth in membership. Just

Question	Joyce's response
signs that suggest you might intervene?	because a community is growing in numbers doesn't mean it's providing value to its members. What is even more important is engagement. Are members contributing content? Are entries being read and responded to? Are people downloading files? Are conversations taking place? It's not uncommon for community participation to be dominated by a small percentage of active users, with the rest of the community "lurking" or just consuming the content. But you may want to keep an eye on the number of unique contributors in order to ensure that as your membership grows, so does community engagement.
What do you do at the formation of a community to set the ground rules for people to follow? Do you have a standard way of setting up a community?	Defining a community charter is one of the most important things you can do when setting up a community. Not only does it help you clarify the vision and purpose, but also it provides an opportunity to define roles, responsibilities, and resources required to successfully launch the community. Although every community is different, my preference for setting ground rules is to highlight what type of participation and content is encouraged vs. listing what members should not do. A good way to do this is to have an introduction or landing page that describes the scope and purpose of the community, and provides examples of how community members can participate. You may choose to have a statement or two about etiquette (e.g. prohibiting offensive language, etc.).
If there was one piece of advice you would give to current or prospective Community Managers reading this, what would it be?	Always put the needs of community members first. Be sure to interact and listen to members to make sure that the community is providing value to them, and adjust the community charter and plans as necessary. And be patient. Building a healthy community takes time. Even with the most committed leaders, communities can take from 12-18 months mature enough to the point of regular contributions and interaction, without the community manager having to bribe members to participate.

In summary, my key characteristics for a Community Manager are:

1. Take the right tone - friendly, curious, to-the-point, informal, but professional.

2. Remember everything is a conversation - be interactive, find ways to involve those who you think would be interested, ask questions, seek feedback.

3. Mind your character count - Try to keep it short and concise, use commonly accepted shortcuts, user abbreviations and acronyms, but define them first.

4. Make it your own - don't repeat what others have said all the time. Add your own commentary, explain your thinking and why something is important to you.

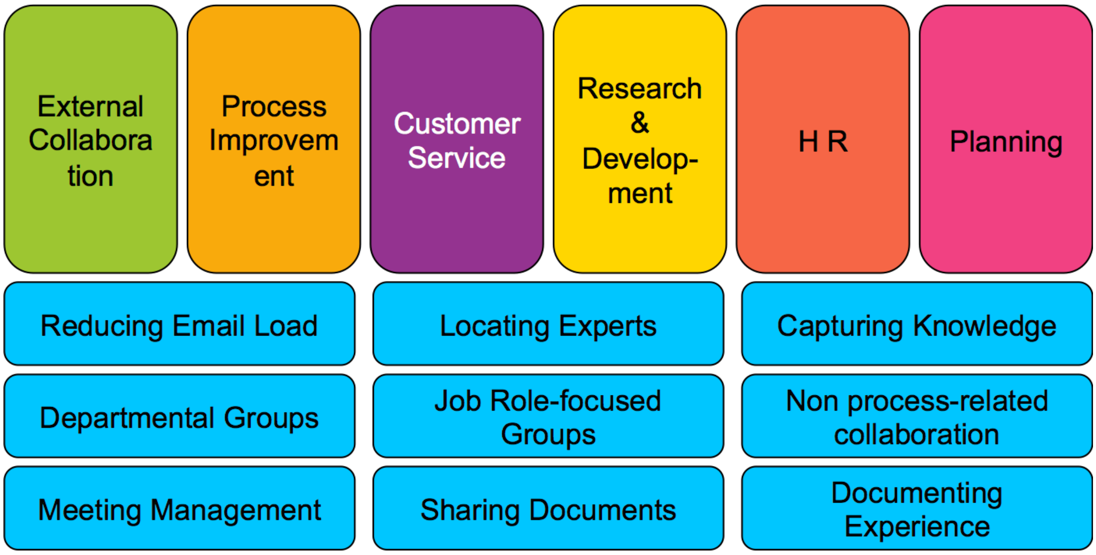
Overall Iteration Planning

We will examine the detail of the iteration cycle for social business adoption in a later chapter, but before doing so you need to know how many iterations you are going to deliver and to prepare an overall project plan for the delivery. This should be simple enough to prepare but will inevitably spark debate about who is getting what and when. The format of an overall iteration plan is like this:

Earlier, in our Vision Setting chapter, we discussed the difference between Management Imperatives and Grassroots Initiatives. We discussed prioritising these and went into some depth over the common use cases which many organisations focus their efforts on when building an enterprise social network.

If you recall, we discussed Management Imperatives as being horizontal use cases which are intended to drive improvement in areas such as HR or customer service. Grassroots Initiatives are point solutions focused on a particular area of work.

Figure 4.4. Use Cases - both Management and Grassroots



Now is the time to prioritise these and build a plan for the implementation of them as social processes or initiatives.

Table 4.4. Example Overall Iteration Plan

Iteration	Description	Audience	Use Cases	Start	End
1	Core Team Project Management	Core Team Exec Sponsor	Project Management Meeting Management Project News	1st February	1st March
2	Executive Enablement	Executive Team	Meeting Management Budget Tracking Working Out Loud	1st March	25th March
3	PM Team	Project Managers (Building A)	Meeting Management Project Management Knowledge Creation Expertise Location	1st April	2nd June
4	Customer Service	CSRs	Finding Expertise Knowledge Location Improved CRM	2nd June	8th August

Each iteration focuses on one or more the section called "Defining the Use Cases". These are definitions of the thing that someone will do or the process that will be affected by the implementation of your system.

In the early stages of your planning it's important to get the first few iterations mapped out in detail. This will help you get a better handle on the work involved, the interconnections between people and a feel for how long the project will take:

Example 4.3. Detailed iteration plan, based on 6 steps iterative adoption

Figure 4.5. Iteration Plan, in Detail

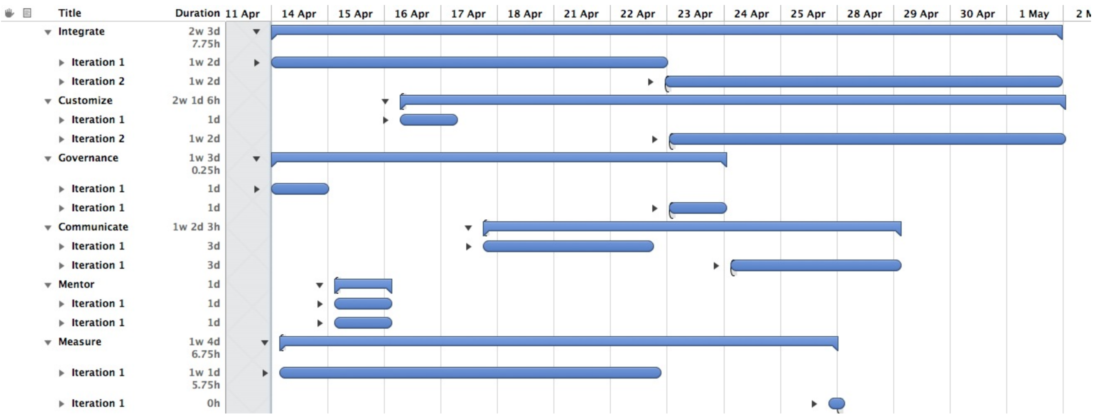
1	Leader	Start	Est. Duration	Steps
Integrate	Jane Doe	1st Feb	7d	1. Community Management 2. Project Management 3. Knowledge Collection 4. Team Liaison 5. Public Communication
Customize		8th Feb	1d	Implement header graphic for communities Document Project Management process
Governance		9th Feb	1d	1. Establish tagging taxonomy 2. Define moderation process for blogs
Communicate		10th Feb	3d	1. Announce iteration start via status messages. 2. Document the plan in the Core Team Blog
Mentor		14th Feb	2d	1. Provide 1-1 training for Jane Doe 2. Lunch and learn for Jane's team
Measure		16th Feb	1d	1. Project Management start-up time 2. Volume of files shared 3. Reducing in file attachments in email

I have set out the example plan above how we will implement this particular iteration, and have based it on going round the six step iterative adoption cycle we'll discuss later.

What I hope you can see here, from the plan above and a greatly-simplified Gantt-style chart below, is that once the iterations are planned, executing the plan is very much like running any other project. One inherent advantage of taking an iterative approach, however, and following the six-step methodology I describe in this document, is that it becomes straightforward to derive the necessary sub-plans that your organisation might need.

Example 4.4. Example multi-iteration Gantt chart

Figure 4.6. Gantt-chart representation, divided into the iterative adoption steps



Many organisations need technical implementation plans, communications plans, training plans, etc. It can be very difficult to synchronise the different plans with your project plan. However, structuring your overall project this way makes it easy, for example, to derive the communications plan for the whole project by simply focusing on the Communicate area of the adoption methodology step shown. You can then task corporate communications, HR, or whomever to work up the necessary engagement materials in parallel with your process change and business implementation.

There is of course a level of detail I have not gone into here which describes the individual communications and the templates that might be used to communicate what's happening, or to specify the technical implementation required, or provide agendas for training, but with a little more project planning you can easily subdivide this into further and further steps. I would, of course, recommend, managing your planning with an Activity (in IBM Connections).

Iterating

"Iteration" is a word which is not commonly heard outside of software development circles. It does, however, encapsulate a key approach around which we are all familiar: Improving what you do based on feedback so that each cycle gets better and better. To quote Wikipedia:

> Iterations in a project context may refer to the technique of developing and delivering incremental components of business functionality, product development or process design...A single iteration results in one or more bite-sized but complete packages of project work that can perform some tangible business function. Multiple iterations recurse to create a fully integrated product.
>
> —Wikipedia [http://en.wikipedia.org/wiki/Iteration]

If I was to paraphrase this definition to more closely suit our purposes:

> Iterations may refer to the technique of developing and delivering incremental social collaboration facilities. A single iteration results in one or more areas of the organisation becoming fully operational and using the social collaboration tools. Multiple iterations recurse to apply these tools throughout the entire organisation.

Chapter 5. Employee Engagement

Figure 5.1. 5 Steps to Social Business Adoption

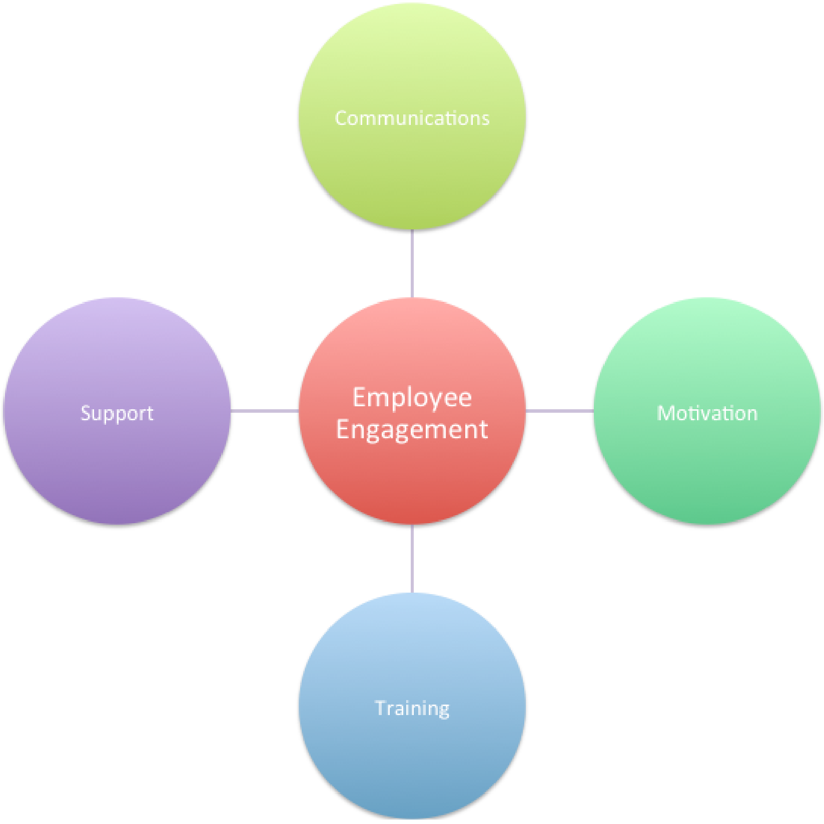
Developing a comprehensive employee engagement program is essential to drive awareness, confidence and energy about the enterprise social network. Many organisations have some sort of communications function, whether it is marketing, human resources, or a specialised corporate communications department. In any of these cases, what lifts your project from being an interesting point project into something which will genuinely help people is communication. You might well be transforming how a small part of your organisation works by implementing social collaboration but without employee engagement, either on a small or large scale, your success will be limited.

Furthermore, without a plan to engage the employees, there is a chance that they will not take it seriously. As we have said elsewhere in this book, establishing leadership commitment and a common vision is essential. You need to be able to broadcast that commitment and vision and you do this through an employee engagement campaign.

Traditionally projects such as this have been the preserve of the IT department. This has naturally limited their uptake and appeal. Most projects such as this, because they are driven by IT, do not place a great deal of credence on the need for treating the engagement of its users as a campaign. If the project was a company, its customers would be its users. We all know that engaging customers is essential to secure sales, so why would it be otherwise for an enterprise social network?

The diagram below summarises the four aspects I will address in employee engagement: communications; motivation; training and support.

Figure 5.2. Four aspects of Employee Engagement

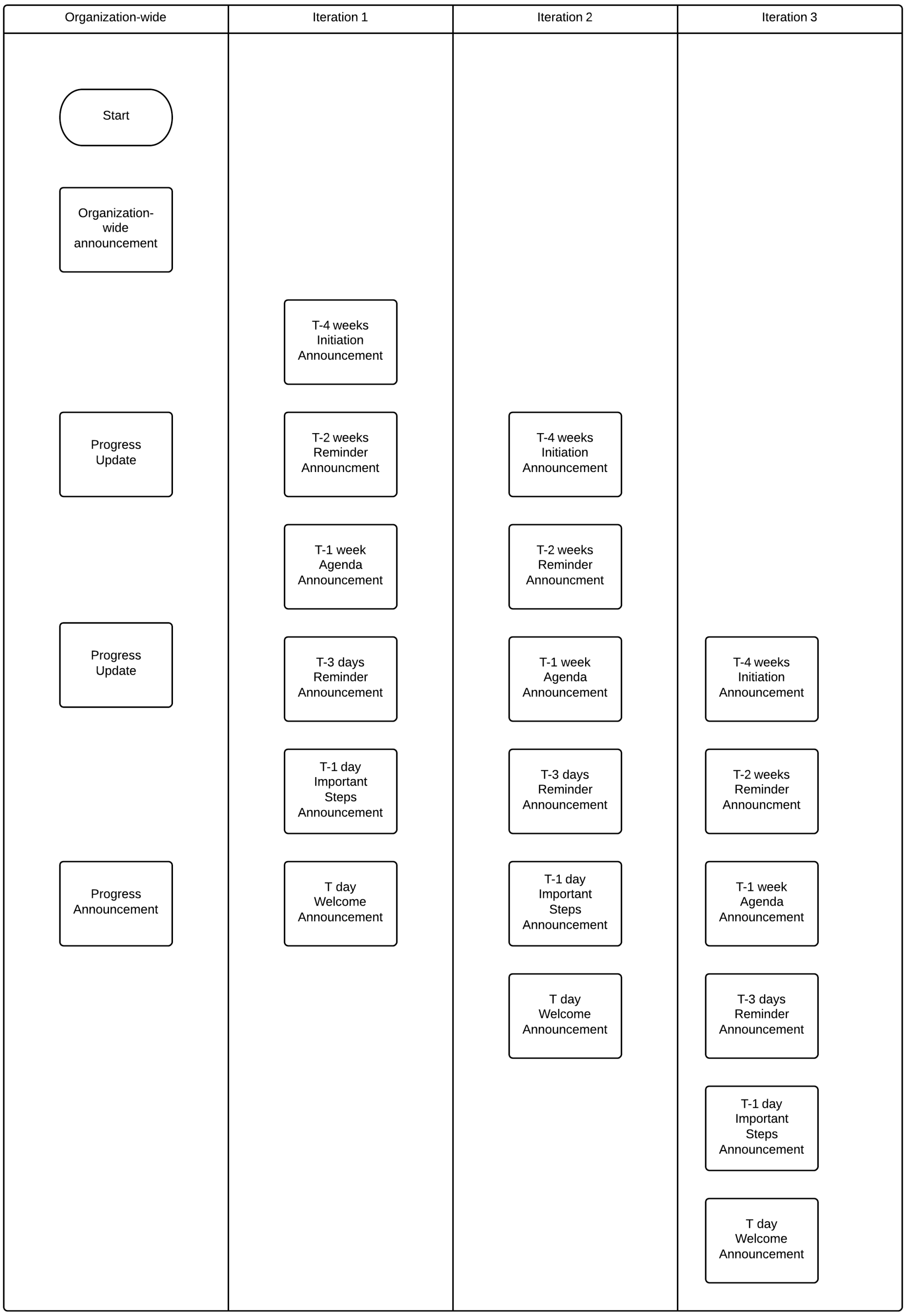


As we'll see in the next section, employee engagement is a complementary and inter-locked part of your adoption strategy. Once designed it runs alongside your adoption efforts.

Communications Planning

Planning your communications with users is vital. Consistency and clarity are essential elements to be considered when designing the messaging and communication which the whole organisation will use when rolling out the enterprise social network. In the diagram below I show a fictional communications plan to highlight the need for a campaign which runs in concert with the iterative adoption efforts going on.

Figure 5.3. Example Communications Plan diagram



What, though, are the elements of such a communications plan?

1. Determine the Goal
2. Identify and profile the audience
3. Develop your messages
4. Select the communications channels you will use
5. Choose the activities you will undertake and the materials you will use
6. Implement the engagement plan
7. Evaluate the plan and make corrections from feedback

Determine the Goal

To initiate successful and effective employee engagement you should review the initial vision and objectives for the enterprise social network. Examine also what your organisation stands for, including its mission, values, goals and beliefs. Look closely at the overall purpose for the organisation and put the enterprise social network in the context of that purpose.

Looking back at the evaluation of the issues we did when we were setting the vision, if you ranked and prioritised the issues, then the following should be easy to consider, otherwise look at:

- What issues are most important to the organisation right now?
- Who is affected by these issues?
- Who makes the decisions about addressing these issues?
- What would a measurable outcome and benefit be by addressing these issues?

Identify and Profile the Audience

When preparing an engagement plan you should consider the iterations the project will go through. Your engagement plan should be staged and synchronised with the iteration plan so that it is targeting the right audience and their expectations, situation, and so on. It's also important, however, to have an overall engagement plan (which covers all of those who will be affected, regardless of where they appear in your plan). This should be the first salvo in your engagement - set the scene, set out the expectations and broad plan. You then hone the engagement to the specific audiences based in the iterations.

Consider who the primary audience for each iteration in the engagement plan will be - the directly-affected users. Define them, describe them, and if possible list them. Consider also, however, the secondary audience for the engagement. If your primary audience will be changing the way in which they work, what effect will that have on the secondary audience? What changes will they observe? What can they expect?

Look to produce an "Audience Segmentation Profile" which examines the following:

1. Describe what you know about this audience's knowledge, attitudes, and behaviours as they would relate to this project.
2. What are the barriers to this audience fully supporting or participating in using and benefitting from the enterprise social network? What are the benefits if they embrace it?
3. What are the characteristics of this audience? How do they spend their time? What gender mix are they? How are they educated? Are there language considerations? What or who are they influenced by? What makes new information credible for them? What or who could motivate change or action?

Develop Your Messages

Your messages are closely tied to your goal and objectives. They deliver the important feedback about what and why the project is in existence and compels the audience to think and act as necessary. Your messages should:

1. Show the importance, urgency, or magnitude of the issue.
2. Explain who is sending this communication - is it from the CEO or the project manager? This will have a significant effect on the credence the audience will give the message.
3. Be tied to specific audience values, beliefs, or interests.
4. Uses language appropriate to that audience - don't be condescending but equally lofty rhetoric is not appreciated by many.
5. Reflect an understanding of what would motivate the audience to think, feel or act.
6. Be culturally relevant and sensitive.
7. Be memorable.
8. Be of an appropriate length to the audience - if your audience will mainly read your messages on a mobile device, use short sentences and paragraphs and reduce the length to avoid scrolling. If they will view it on a computer screen then consider more graphics and a sophisticated layout. If the message is for a poster for the kitchen wall, make it highly visually-appealing.

The messages you develop by using the following key points can be used in many ways. Firstly, they are a set of statements that you and your team agree upon as conveying the key information for the project. They will not include all the detail and supporting information and data that you may use in later communications. Consider developing talking-points that you might use in presentations, posters, fact-sheets, articles for the company magazine, etc.

Both the channel and the purpose of developing communications for an engagement plan affect the message design. Information may be designed to convey new facts, alter attitudes, change behaviour, or encourage participation in the social network. Some of these purposes overlap and often they are progressive (one builds on the next). For engagement to work the users must:

- Receive the information in a form they can assimilate
- Understand the message
- Believe what is contained in the message
- Agree with the engagement message
- Act upon the engagement along the lines you request.

You must develop your engagement communications with these steps in mind. Consider also:

- Clarity - engagement messages must clearly convent the information to ensure that the end users understand what is being said and to minimise the opportunity for misunderstanding or inappropriate action. Clear messages contain as few technical terms as possible. They eliminate information that the user does not need at that point in order to go through the process described above.
- Consistency - seek to be consistent about the ordering of terms, the capitalisation of words (such as product names), referring to processes or people in the same way and avoid acronyms unless you have already defined them or they are already well known in the organisation.

- Summarise and highlight - In electronic communications, such as emails or blog posts, clearly state at the beginning whether the reader is required to take action or not. Where there is more than, I would say, four or five paragraphs of information to be conveyed, then summarise these paragraphs right at the beginning in bullet-point form. People will not read everything you send them in depth. If they can scan down a list of no more than seven items then your chances of getting your message across are higher. Don't bury important actions in the detail.
- Tone and appeal - the engagement communications should be reassuring, alarming, challenging or straightforward, depending on the desired impact and the target audience. Try not to mix these tones in the same communication.
- Credibility - make it clear who is making the communication and their authority to do so.

When preparing your communications, consider these points for each one:

- What are the barriers and benefits to your audience thinking, feeling or acting on the message you are conveying?
- What change in attitude do you want to motivate in your audience as a result of this communication?
- What change in behaviour do you want to achieve?
- Based on what you know about your audience and what it needs to hear or read in order to think, feel or act the way you want, what are the three most compelling messages you need to use to motivate the audience?

Channels

The channels you use to engage and motivate your users should be broad and extensive. Many organisations don't have the resources or budget to get t-shirts printed and large posters produced. That's fine but simple and straightforward is better. Authenticity of communication always wins over a flashy design or high production.

If you have reception area where your staff walk through, consider using posters or some sort of automated presentation with simple messaging and a few words to warm up your staff to the concept of what you will be delivering.

In gathering areas, such as restrooms, kitchens, staff lounges, etc, consider similar branding and messaging but expand upon the detail a little.

If you manage the desktop interface users work with then consider a custom graphic which could be deployed which you might change in the weeks running up to or during the deployment.

Seed meetings with leaflets on meeting tables which talk about the forthcoming deployment.

Ask managers to add some news to their staff briefings with your key messages.

Consider having open sessions where you can give brief presentations on the plan, the concepts etc.

I have also seen menu cards placed on tables in the staff restaurant and even customised free cupcakes to draw attention to your plans.

Implement the Plan

Use the following steps to determine the time, budget and planning needs for your engagement activities:

1. List all the activities

2. Under each activity outline the steps, in order, that will lead to its completion.

3. Assign a budget of time and money where necessary to each step.

4. Assign staffing needs to each step.

5. Working backwards from the iteration end-date, assign a date for each step.

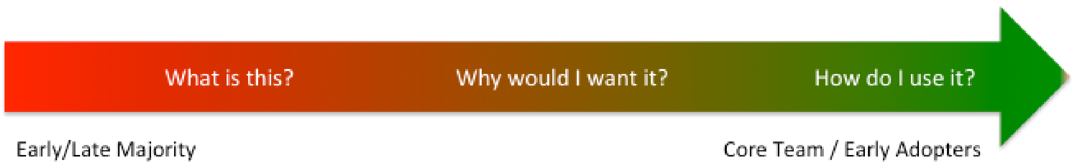
Training

I bet most people who use Facebook, LinkedIn, Amazon, eBay or the myriad of other online systems we all access these days have never received any training on using them. To a greater or lesser degree they just get on and use them. Sure they might not use or even know about every aspect of the functionality (does anyone understand Facebook privacy?) but for the most part these systems are accessible and their core functions are simple and intuitive enough to be able to use without any special skills.

What's different with an enterprise social network is not the complexity of the system but rather the need for the use of the system. With Facebook we have a desire to keep in touch with our friends, family, favourite band, etc. With LinkedIn we might want to establish connections with work colleagues or look for a new job. The "what's in it for me" argument is quite clear and people are motivated to use these systems to get to the prize. In an enterprise context it's still often the case that people need to be coached and motivated to do something other than what they have been doing all along. They might accept that the organisation's own internal systems are not as good as they could be, but the "what's in it for me" argument doesn't really apply as, from many employee's standpoints, there's nothing in it for them other than, perhaps more work. If they get more work done, will they get paid more? Probably not, so, well, they're not interested.

That's why, in a business setting, some training on using an enterprise social network is important. The focus should vary depending on who it is that is being trained. I assume that your Core Team are motivated to want to be successful with the system and consequently the focus is not on "why" but "how". For the early/late majority of users you have to start at the other end of the spectrum, with the "why" before getting into the "how":

Figure 5.4. Training transition spectrum



Like a communications plan, training runs alongside the iterative adoption cycle but is focused more on the users being affected rather than the iteration itself. Like we defined earlier in the engagement planning, focusing your training materials on the audiences you will be working with is the optimum scenario. Do some planning, early on, about the kind of training and messaging you'll deliver for the audiences. Here's an example:

Your Team

Your team is presumably the first group of users who really get what is going on. They understand the mission, the purpose and the approach that needs to be taken to make deploying an enterprise social network a success. If not, you need to start at the beginning and explain the vision and approach. Assuming they are, your approach to training your core team revolves around how to use the tool to get stuff done. Not why, but how.

You should agree amongst yourselves how you will organise yourselves using the tool. If you like, you should perform "Iteration 0" on yourselves, to integrate your work with the system, customise it to suit yourselves, set the rules, and so on. I'd hope and anticipate that your need for engagement, mentoring and so on will be minimal, but there is no harm in going through an initial iteration yourselves, besides it means you'll be more familiar with the iteration process when you first unleash it on your users.

Typically you should get your team together and start the iteration, with you leading a demonstration session on how they will use the tool. Next ask them to do some homework to let them practice. If they are struggling, then help. Remember your confidence will pass on to them. You need them to have the confidence you have so that they can transfer it to your users.

Executives

Training executives is a delicate process. Usually they are very short on time, sure of themselves, uncomfortable being uncomfortable, if you know what I mean, and impatient to get results. You should have a clear agenda and make sure that the purpose of the training session is clear in advance. You should articulate the session to the executive and their PA if they have one. Explain what they will be able to do by the end of the session and what you would hope they would do afterwards.

Thirty minutes is about the maximum I would recommend you scheduling training sessions for with your executives. The reality is that they will probably start late and be interrupted, so plan for about twenty minutes of material. Keep it simple and focused on the tasks you would want them to do, such as catch up on what people are saying, communicating themselves and commenting on other content. There's no point in trying to do a "grand tour" of the product, nor explain the intricacies of many aspects of it out of an interest in the mechanics. Go for the facts, the processes and the techniques they will need and no more.

Almost more important than the executive training is training the executive's secretary or PA. If you can get them up to speed, and in fact a little further on than the executive then you will have a ready-made support partner who can take away the frustration the executive might experience when they come to use the system. Again the PA is very busy and will have limited time, but at least show them what you have shown the executive and back up what you have demonstrated with support and practical suggestions. Keep in touch with the PAs. They will be the way your leadership team can easily remain committed to this.

Early Adopters

The Early Adopter group is usually made up of a collection of people who are prepared to put up with a level of discomfort and reworking in reward for being in the vanguard of the staff who get to use the new tools. That's not to say that you should treat them as guinea pigs for your testing of the system. They are enthusiastic and keen to learn, so lead them with demonstrations, examples and motivation. Set homework and challenges and try to build a team spirit amongst them.

In the past I have set up a schedule of training sessions at lunchtimes where at each session we look at different aspects of the system and apply it to work areas the early adopters are involved in. Combining sessions with food, so called lunch-and-learns, is a good way of building team spirit and minimising the impact on people's days. Often a once-a-week session for eight weeks is adequate to get round the whole system in enough detail to allow the early adopters to have tried and played with the system. Remember you want them to find ways that they can use their new found skills in their everyday work. You want them to gain in confidence to start bringing other members of staff in. You want them to take on the job of explaining how the system works to these new individuals so that you can scale the system out to your whole organisation.

Having a regularly-scheduled session means that they can also bring their questions to a place where they know it can be solved. I encourage the use of an ideation blog and a forum to capture the early adopters' questions and feedback between sessions. Before the next session I make sure to have gone through any new items and answer them. At the face-to-face session we review the answer and ensure that the problem is now solved. By working this way you build up a knowledgebase of experience, both explicit (in the forum) and tacit (in their heads) which can be reused over and over. The early adopters will use that knowledge to help the others they are working with and build the confidence of using the enterprise network.

Training The Early Majority / Late Majority

The rate at which you train the majority of users depends to a large extent on what you plan to do with the actual deployment of the system. Training should be relatively formal for the majority, e.g. a half day session, but should be tailored and focused on the work that people do. By all means have "advanced" sessions where people can learn about areas of the system which are not related to their work, for example, blogging if they would normally work in activities to progress projects, and so on.

Remember we are all about business benefit and value. Expecting users to become socialites in the organisation is not what we're about. We want the tools to support the work people do and to help them uncover new information to help them do their work better.

Your training efforts, therefore, for the majority of users should be done on an iterative basis, just like the adoption work itself. Looking back at the iterative adoption cycle, the main gist of the approach applies:

1. INTEGRATE - make the training focused on the work that this particular work group is focused on.
2. CUSTOMISE - adapt the training materials, whether online or physical, to use the language and approach suitable to that group. Remove material which is superfluous to their needs.
3. GROUND RULES - explain that you will want them to do homework, to participate and to feedback.
4. ENGAGE AND MOTIVATE - encourage people to come. Follow up with those that drop out. Find out why they don't attend.
5. TRAIN AND MENTOR - that's what the training is all about.
6. MEASURE AND REVIEW - use surveys, benchmarking, votes, whatever is appropriate to get a handle on how far the group has travelled in its understanding of using the tool in their work.

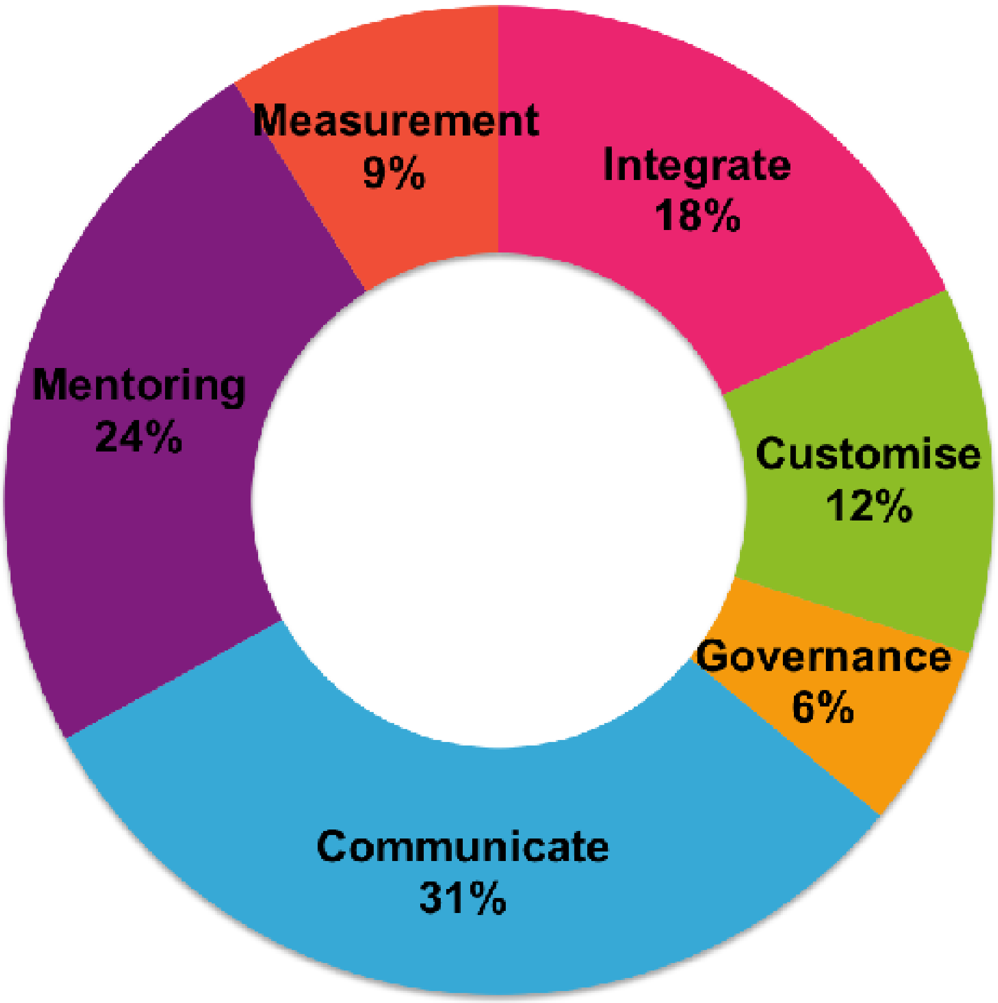
Chapter 6. Adoption

Figure 6.1. 5 Steps to Social Business Adoption

Figure 6.2. Iterative Adoption Cycle

Iterative adoption is a new approach to rolling out a social business project. It comes originally from agile software development techniques where the concept of repeating a complete cycle of scoping, design, implementation and training is repeated and tweaked with each phase of the project. Being strictly correct, iterative adoption encourages progressive refinement of the functionality being implemented in the software project.

Figure 6.3. Initial Proportions of Time Spent



Before we start examining each of these areas in depth, I want to spend a small amount of time on the proportions of time you spend in different areas. Remember, however, that these are

- not prescriptive;
- averages of my projects;
- something you would expect to vary as your project and iterations go on.

With these health warnings in place, lets look at these areas in overview first:

- Integrate - this part is probably the closest to business process re-engineering as a social business project will be. In my experience this phase can get stalled quite quickly because the users themselves can't agree on the definition of the work they will do that social will be integrated into. This of course uncovers some interesting business problems itself. Your should expect that your very first project with the first eight users might well use more than the eighteen percent of the time I've suggested here. Nevertheless, expect to spend some time documenting what they currently do and how its going to work in your social collaboration solution.
- Customise - The terminology, user interface, colour scheme and in fact any aspect of the system which can be customised to better reflect the working life of the users needs to be addressed. By making their new "house" feel like "home" your users will take to doing their work and realising your vision more easily.

  Don't undervalue this part of the project. While it gets less emphasis than other parts of the adoption project it is still worthy of focus as customising the environment significantly lowers the barriers to acceptance your users need to jump over.
- Governance - Setting the ground rules and plans for moderation, quoting other people, speculation, discussing money, offers, invoices, etc., all need to be decided upon and set out in clear language which your users can easily absorb and understand. It's better to get this sorted out early-on than have to deal with it if something happens. This part appears in each iteration because the rules about what can and cannot be said, where things should go and what the escalation procedures are might vary depending on the user audience you are working with at the time.
- Communicate - This is possibly the most important aspect of the social collaboration project. During your communication work you need to mentor, evangelise, publicise, and generally energise the whole project and the people who will use it. Without your enthusiasm, and that of your team and executive sponsors you should not expect to measure tangible benefit.
- Mentoring - Hard on the heels of a successful communications campaign comes mentoring. This needs to be done to keep confidence high in the ability of your solution to deliver the promises you've been making. Your organisation of resources through your project team, executive sponsors, champions and early adopters are very important here.
- Measurement - When you are planning your adoption you need to decide on what success will look like and in the Measurement phase seek to demonstrate how you are doing in the process. For example, you might decide that you want to shorten the length of meetings. Set a metric, like "save fifteen minutes from a sixty minute meeting every day", and describe how you will measure it, e.g. someone records the start and end times and posts it to your message wall. You compile those statistics and present them to your executive sponsor.

Step 1 - Integrate

The first step in our iterative adoption cycle is where we bring the social tools into the process or purpose to which this particular iteration is focused. Enterprise Social Network solutions generally have three functions when integrating into existing systems:

- To help gather information
- To help publish information
- To store information

Gathering information is about the collection of feedback, comments, data, files, anything that would be useful to the process we're integrating with. In IBM Connections we use tools such as wikis, files, blogs, communities, activities, ideation blogs, forums, sub-communities and bookmarks to do this.

Publishing information is where we want to use the social network to inform the users of some change, whether its an announcement, like a blog post or status update, or if it's a revision to an existing document or creation of a new document. It might also, of course, be information about who is using the system.

Lastly, we can integrate with existing solutions by using the social network to store information, such as in files, wikis, blogs, and so on.

It's quite likely that with each iteration in your project you will be implementing a blend of these three functions. My point here is that the tools of the enterprise social network can be put to different purposes and in most cases there is not necessarily one "right way to do it".

As an analogy we could try to fix a nail into a piece of wood using the handle of a saw, but a hammer is a better tool for the job. The saw would get it done, eventually, but I think we could all agree that it is not the best tool for that particular job.

The same is true of course in the enterprise social network. You could choose to issue status updates as your way of broadcasting news to people. If you have lots of news and you know your users might have difficulty keeping up if they are not using the system often, the a better tool might be to use a blog, where longer articles can be created and more easily assimilated.

A blog, on the other hand, while good at representing news in date order, doesn't easily lend itself to providing a structure to the information it presents when you publish many articles. If you are seeking for a means to produce some sort of long-term electronic documentation, then perhaps a wiki might be a better solution. A wiki is like an electronic book with static pages which can be linked together. The best example of a wiki is of course wikipedia. Can you imagine using a blog to publish all of the content in it? It would work, but wouldn't be a good solution because they are designed for different purposes.

So, when integrating social into your business processes, it helps to have an understanding of the tools you have available and where they can be used effectively. In the Appendices I describe the tools in IBM Connections and suggest uses for them to give you a starting point.

If we think back to the preparation of our vision and the planning of the iterations then we will have established a purpose and use cases for the different parts of our enterprise social journey. We broke this journey down into manageable iterations and now we are deploying them with our users.

The first step in integration therefore, is to understand what the current process is that we are enhancing. It's difficult to explain this in an abstract form and surely this part is where experience with the social tools is needed, so to help with building your understanding, here's an example.

Currently I need to manage a number of product development processes for an electronics company. These products are key deliverables in the company's product line. I am concerned with product quality, on time deliver, resource usage and staff. As part of the planning processes around introducing social into the current set up I recognised that the following use cases would be useful for me:

1. Develop a product management community for each product to act as a hub for all the communications and materials associated with each product.

2. Establish a blog for each product where my team can inform everyone else in the company about the latest developments.

3. Use Status Updates within the communities to provide a mechanism for the team members to report to each other on the progress of various projects and other issues coming up. I also want them to use it as a means of asking questions and getting answers.

4. We have found that our product documentation gets out of date quickly and that it costs a lot to keep it up to date and keep the company up to date through duplication (especially since we have four production sites world-wide).

I broke these use cases down into the following iteration plan:

1. Establish Product communities

2. Migrate existing content into the communities

3. Capture previous news articles and create a wiki for them. Create one blog entry which points people to these articles for future reference.

4. Establish a blog-per-product and assign blog authors and taxonomy.

5. Establish Status Updates as a means of reducing email and cross-product-team communication.

6. Create wikis for each of the product manuals and populate them with the latest documentation.

There are business processes associated with iterations 3,4,5 and 6 which need to be reviewed to accommodate the new social tools.

The current news article process relies on someone using a word-processor package to gather and create the content for the news update, lets call this person “Bill”.. This goes round in email form over the space of about a week, with many revisions being issued and received over the course of the week. This takes up lots of email and many different versions of files.

We decided that we could replace this process by having Bill work with a blog entry. Each time he works on it he saves it as a draft. We agree that instead of Bill telling me each time he’s updated it, the people who would otherwise have received the emails with the drafts attached will instead “follow” the blog. These drafts will then appear in our activity stream. If Bill wants to draw our attention to something specific in the blog entry, he chooses “Notify Others about this Blog entry” in the blog to have Connections automatically send an email to us. That email contains a URL link back to the draft blog entry. We can post our comments against the blog entry, not by emailing Bill but as responses to the draft. Everyone can see what everyone else is saying and thus the number of duplicate feedback comments he gets is reduced.

When the draft blog entry is ready, Bill deletes the comments and publishes. People in the organisation who are interested in our product updates get an update in their activity stream as well as, if it’s configured this way, an email to let them know that the posting is up there.

This re-working of a process which is important to all of us is a huge time saver. It’s also very much lighter on its use of email and results in people’s inboxes receiving material which is actually for their attention, rather than everyone else’s comments and everyone’s edits to a word-processor document.

The point of this example is to show how I translated my needs for improving the capture and publishing of information into a series of steps (iterations). I also then started adapting my process with some imagination to reduce how much needless information is flowing around.

Companies I have worked with, when taking such simple steps are finding enormous benefit. One such company managed to reduce its process time for a particular information-gathering and publishing process from four weeks to six days.

What I have ignored in this description, of course, is the steps I need to take to ensure that my teams take up our new process and use it wisely. This of course, is only step 1 of our six-step adoption process. We repeat our cycle for each iteration to ensure that the new practices are developed, governed and embedded with people.

So, with our new social process integrated into what people do, we move onto Step 2, Customising the set up.

Step 2 - Customise

In Step 1 we looked at how we translated a business need into iterations and then into a new process for our team to start using. This is akin to choosing and buying a new house. Until we have had a chance to put the carpets down and curtains up, and move our stuff in, it won't seem like home.

Customising the iteration, therefore, is important to ensure that it fits as closely as possible the users and their needs.

Customisation at a process level can be an iterative process in its own right. A bit like moving the furniture around in your new house, it might take a number of attempts to find it just to your liking. You might choose to structure how you run the process of review of the news before it goes live. You might want to alter the default layout of the blog page to suit user feedback. You might also choose to completely change the format of presentation of the news update because its now in a different electronic format to its predecessor

It is better to take baby steps with customising and implementing social into your processes where there is a high degree of cultural change needed to embrace this approach, or where the processes are complex. For example, having someone upload the finished word processor version of the news article into the blog to be downloaded by people might be the first baby-step you want to take with the implementation of your social process. The next step you take, once the publishing has moved from a mass email to a blog, is to change the content itself to move from being a file to being native text and graphics in the blog entry. There is no right and wrong approach to this, more one which needs to be adapted to suit the culture, the people and the process.

The scope you have for customising the iteration may be limited by a number of factors:

- What the product allows you to change;
- What skills your team has to customise, such as embedding HTML or javascript code to extend the functionality.

For the former the use of a cloud-based solution is likely to allow less customisation than an on-premises installation permits. Do remember that although your options to customise may be limited, the tools themselves can generally be made to do 80% of what you need. You may need to compromise on the remaining 20%, but I have found that often that 20% comes from the "that's the way we've always done it" camp and although deeply entrenched as a set of requirements, may not actually be a roadblock to adoption.

For example, I had a customer who complained to me that their move from Microsoft Outlook to IBM Notes wasn't working. On investigation I found they were complaining about the fact that when each person accessed a group mailbox, Notes would show each user which emails they had not read. Microsoft Outlook, on the other hand, showed which emails anyone in the team had not read. Therefore if I was not the first person to open the mailbox, there would be a strong chance that some of the emails would show up as "read" rather than "unread".

Thinking about this for a moment, I realised that Notes was working as it should. The concept of "read" and "unread" is one which the application uses to show you what's new and what's not. If it showed what other people had read, then I couldn't be sure whether it was me that had read it or someone else.

The customer's entrenched process dealt with this fact but in fact, logically (in my opinion) was wrong. IBM Notes was working correctly and the original process was flawed. This 20% problem took some work to go through with the customer but eventually we altered the process to more correctly show "actioned" and "awaiting action" next to the message. The "read" and "unread" status of the message then because a great boon to the user because they could be sure (at last) what they themselves had looked at, regardless of the status of the request itself.

My point in this story is to say that although in some situations your scope for customisation of a standard product, especially when housed in a public cloud infrastructure, might be limited, you should also look at your processes. It may well be that they are as they are because they had to accommodate an earlier shortcoming which your new enterprise social network addresses.

Coming back to our example, the use of the word processor document as the content display vehicle for news and email as the content delivery mechanism came about because that was the only realistic way at the time to achieve the business purpose. Using a rich text editor in a blog document is now a much more efficient and easier-to-manage process and your processes should be on the table for adjustment to make use of these new tools.

Step 3 - Governance

Governance in an enterprise social network concept is about setting the rules by which everyone will play by. If you are iterating a small community for a workgroup, or a complete system for an entire organisation you need to consider what governance steps you will take. What do I mean by governance?

Most likely your organisation will already have governance in place. It's normally written into the Staff Handbook, if you have one. It might also appear in places like the Acceptable Use Policy for using computers. Governance is probably also baked-into the firewall settings your IT department has set up. You might not be able to access certain sites from the company's network.

Governance in an enterprise social network covers many of these areas, but also addresses:

- The way things are named
- The default security model for components
- The formatting or terms used in tagging
- What information can be shared openly
- Rules about things like product names, non-disclosure agreements, language used

I strongly encourage you to consider governance with each iteration as it avoids confusion and ambiguity. You needn't go into huge depth about it, but I would encourage you to consider putting together either a centralised wiki with a page per iteration, or better still, embed a wiki link into whatever you're doing so that people can access the rules easily.

A governance policy can take the following form:

- Define the scope of the policy
- Product names, referrals to the organisation
- Voice
- Non-disclosure
- Language

- Approval process
- Crisis-management plan
- Training
- Enforcement
- Systematic Nomenclature

Define the Scope

You need to be specific about the scope of the governance policy you're writing: which aspects of the system does it cover.

Product Names, Referrals to the Organisation

Without turning it into a branding manual, you need to ensure that your staff are talking about you in the right way. If there are accepted abbreviations for your organization then state these. Explain any special capitalization of product names, etc.

Voice

In most situations, unless you are paid to promote your organization to the outside world, make it clear that your employees online statements are their opinions only, and not necessarily those of the organization. Decide what "voice" they should use. When they are tweeting, are they tweeting as them, or your company? Are they using "we" when referring to your organization or, "they", or the company name? Give examples of the sort of voice and tone you feel to be appropriate.

Non-Disclosure

The one that probably most people are concerned about is the one where a loose-lipped employee spills the beans on an unannounced policy, product, service, whatever. Think about what controls you have in place right now to control list in your organization: what prevents your staff from speaking to, say, a trade magazine, journalist, competitor, etc? The same applies in a social context and hence should appear in your governance statement.

Marketing, sales, HR or some other department should maintain a list of acceptable subjects to be discussed. This should be maintained, of course, in your social intranet and prominent socialites recommended staying on top of it.

Language

This is something which should be easier to document as it is probably already in force in your email acceptable use policy. Obvious ones are around racist, sexist, profane, etc. language. You might want to go further and lock down the referral to other company's products and services, comparisons, etc.

Approval Process

Are you going to allow your staff to talk openly on the wires, or are you going to enforce a structure where tweets, blog posts, etc must be approved before being sent out? I suggest that this is probably not a practical solution and doesn’t send out a message of being transparent and nimble as a social business. A better approach would be to police the output and correct it if it goes wrong.

Crisis Management Plan

Not one for your social governance policy perhaps, but a bit of fore-thought and planning around a social media incident is needed. There is now a large number of examples of how brand reputations were badly damaged by a poor, slow or inappropriate response to a social media issue.

The key to any crisis-management plan is timeliness of response. The quicker you are on it, the quicker you can act accordingly. Thus, you may wish to consider especially in external social situations having some form of sentiment analysis or similar alert you auto magically when it detects your name being used to ill effect.

Training

There are some great tips and tricks that your staff would benefit from when working in social media. Twitter tricks, basic netiquette, blog posting tips, URL posting tips, etc. Consider how you will equip your staff with the tools to help them make your online social presence a good one.

Enforcement

Enforcing these policies may require a change to staff contracts to be truly enforceable. Do you need to do this? If so, what will be the process?

Systematic Nomenclature

"Systematic Nomenclature" might seem like a couple of big words but it's a precise way of saying that you need to state and explain, systematically, how you want people to name things in your iteration. One of the most common areas for divergence is in tagging. You often see "social_business", "socialbusiness" and "social+business" all as tags (without the quotes) for something relating to....social business. This can easily confuse users and can lead to greater difficulty locating information by tag than should really be the case.

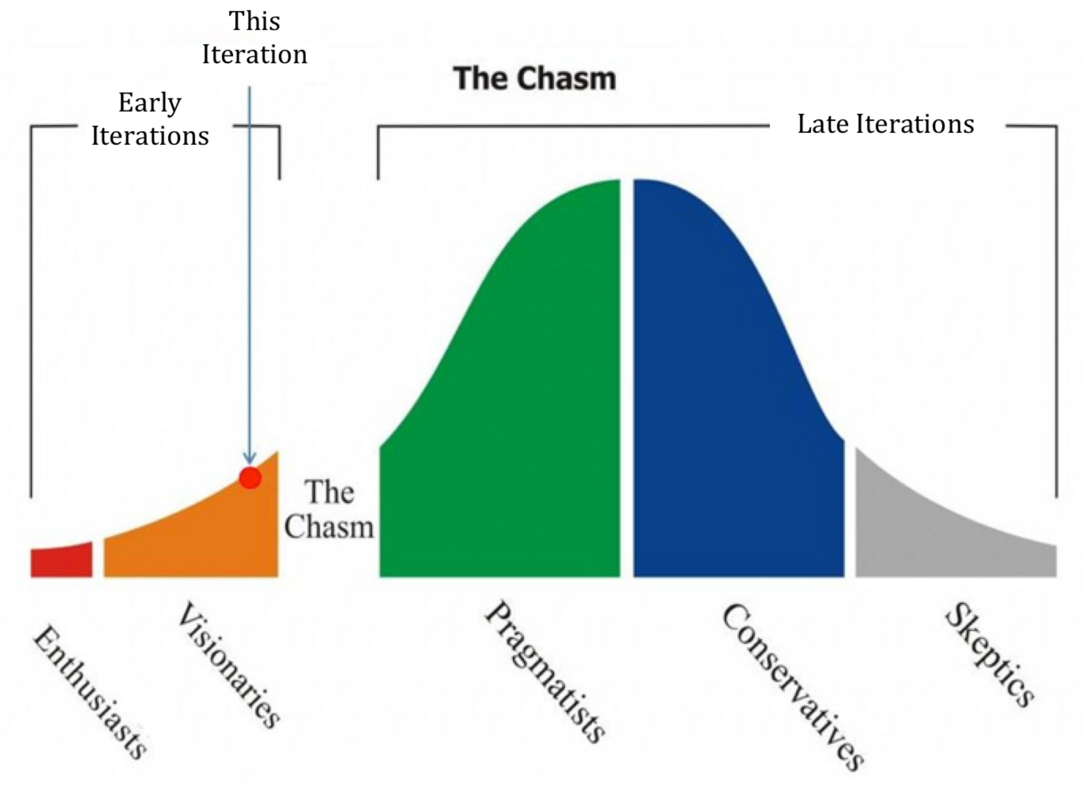
Agree with the users what the systematic way will be of naming things and both stick to it and enforce it. For example, you might decide that where a tag needs a space, such as "social business" then you will use an underscore character to provide that space: social_business. Otherwise, IBM Connections will see the space as being a separator between two tags: social and business.

Step 4 - Evangelise and Motivate

You will likely experience apathy, derision and a general "so what" amongst the users when you are rolling your iteration out. I would hope in the early iterations that this would not be the case, but you should be prepared for it.

The so-called "chasm", coined by Geoffrey Moore in his book "Crossing the Chasm" highlights from a marketing standpoint how the adoption curve can go. This adoption curve also works, in my experience for social business adoption:

Figure 6.4. The Iteration Chasm



So what can you do to evangelise and motivate people in your iteration about the enterprise social network? How do you convince your end-users that this is for them? How do you enable them to get started and motivated to become social knowledge workers and gain the 20% productivity improvement McKinsey in their 2013 study "The Evolution of the Social Enterprise" found? Well, a good place to start is to understand what commonly motivates people at work. Maslow's Hierarchy of Needs is a well-known psychological model you can use to understand what motivates your end users:

Figure 6.5. Maslow's Hierarchy of Needs

What Maslow found was that people are motivated by achievement and demotivated by company policies and administration. This gives us a hint towards what steps you can take to evangelize about the benefits and gains to be had from the social intranet. Recognition of someone's efforts in the system must not go unnoticed. Getting feedback on what they say and share builds motivation to do more.

On the other side of the equation, streamlining business processes (like we described earlier) reduces the demotivation factors and increases job satisfaction Your social intranet solution can do both of these things – so get out there and do it!

In a practical sense, however, what can you do? Hopefully you have done some planning with your Communications and Engagement plans. Now is the time to put that into action and support the good work you're doing on the deployment of new business processes.

There is no sure-fire solution to enabling your staff and evangelizing the benefits. My advice to you is to try lots of different approaches and stick with what seems to work. You need to live and breathe the system during this process but be humble. Always listen, be social and be around. If you have different locations using the system – GO THERE and make it known you're coming. Make yourself available for the new evangelists to get charged up by you.

Developing a social collaboration system in your organization is a marathon, not a sprint. You have to realize that by pacing yourself you can reach the end with your goals in tact and with your team with you.

In our journey to becoming a social business so far we have managed to get as far as releasing materials for others to pick up and start using for implementing social strategies in their parts of the organization. This is all very well but I am sure we have been on the delivering or receiving end of many projects which start with a lot of noise and enthusiasm only to fizzle out after a few months when the original players have moved onto other things.

Stick with your Community Managers

Your unwavering support for your Community Managers is the first step in keeping the social collaboration flight in the air. Give them the regular feedback and enthusiasm they need to give to their people. Keep combing the internet and periodicals for new techniques you can try, examples to demonstrate that what you are doing is succeeding everywhere else.

Keep Close to your Execs

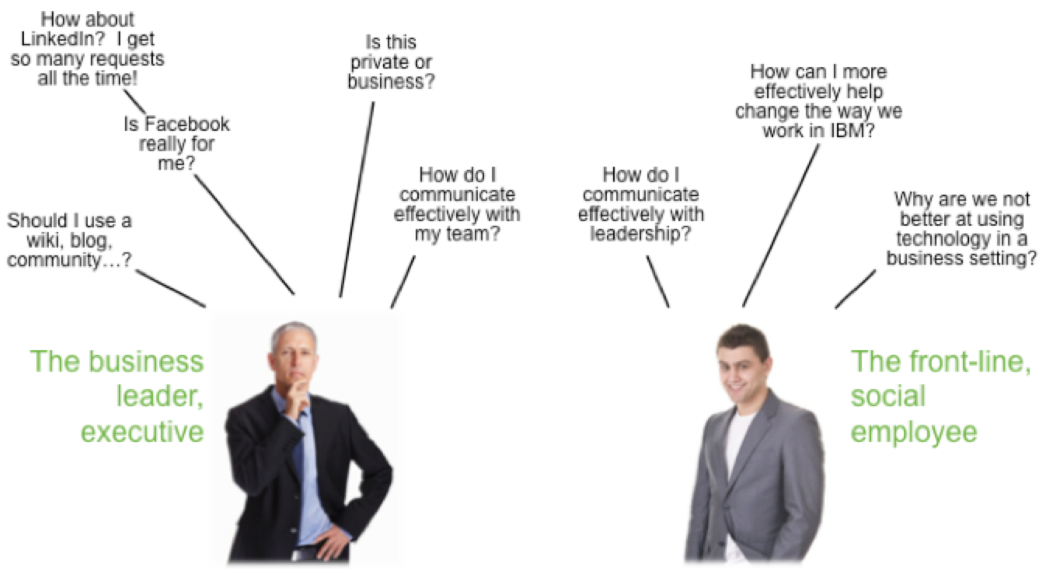
Getting the buy-in of your execs is crucial to the success of the overall plan. You, as the lead adopter, need to keep their motivation up by demonstrating now new parts of the organization are picking up the solution. As we will see in the last step of the process, showing the metrics of adoption, of usage and of uptake will quickly reassure your execs that their efforts and endorsement of your work is bringing benefits to the organization. As them to continue blogging, tweeting, commenting and questioning. If you can get them to change their work habits to work in the system like any other part of the organization.

Gamification

The average age of gamers these days is not 17 but actually 37. Thus, a large part of your workforce is familiar with being competitive in front of a computer or console. Consider harnessing their competitive skills for work by setting up a gamification engine in your social collaboration system. There are many out there. For IBM Connections consider Kudos Badges, Bunchball or Badgeville. These systems are demonstrated to increase engagement in systems by up to 80%. They encourage participation in areas of the system that users would traditionally avoid because their efforts are rewarded. Earlier we described Maslow's Motivation Factors which show that recognition and achievement are the pinnacles of the key motivators for people. Even if you don't implement a gamification platform you can of course do your own thing. Consider an easter egg hunt where a well known phrase is spread around the system and clues are given to completing areas and getting the characters to make up the phrase.

Step 5 - Mentoring

Figure 6.6. The different needs of mentor and mentee



Reverse Mentoring is not some hair-brained scheme dreamt up by some new-age management gurus, in fact Jack Welsh as CEO of General Electric proposed reverse mentoring of the executives in an organization as a way to rapidly bridge the management technology gap. As we have said on many occasions in this series of articles, it's vital for the long term health of your social collaboration project that it gets the buy-in and active participation of your executives. The executives are the celebrities in your organization and the "public" are interested in their points of view, opinions and their participation. When the staff see the system being taken seriously by the execs, they will take it seriously. Like all good compromises, reverse mentoring is a win-win scenario for the mentor (junior member of staff) and the mentee (senior member of staff):

For the Mentor

1. Get exposure to the thinking and approaches of the management. Personal development, insights and guidance can't be bought like this, but will elevate the mentor above his or her colleagues and get them noticed by the people at the top.
2. 2. Valuable training and development skills are gained by the mentor. One-to-one relationships with someone much further on in their career is a valuable intangible benefit.

For the Mentee

1. They get the inside curve on what to do and how to do it.
2. They get to ask what they might think are stupid questions in a private setting.
3. They get a step up on their colleagues and start to be able to use their new skills in all sorts of new ways.
4. Some notable executives are taking part in reverse mentoring. For example, Nitin Kawale, president of Cisco Systems Canada has a regular mentoring session with one of Cisco's Generation Y managers in The Netherlands.

Don't forget, if your executives are getting mentoring, their engagement will increase, their commitment to the project will be visible and they are more likely to be vocal in their support for you.

Of course there are some guidelines to consider when setting up your executives with a reverse mentor, least of all your own career!:

1. FIND A COMPATIBLE PAIR - Consider the personalities of the executive and the mentor. Try to find pairings that work. Consider an ice-breaker session where mentors and mentees can mix in an informal environment. It might be a lunch and learn, an after work session or something similar.
2. FIND THE RIGHT LEVEL - We are all busy and of course our execs are the busiest of all (right?). Educate your mentor to watch for the signs that the exec is struggling, needs to speed up or to slow down. Do it sensitively and seek to find the right pace.
3. IT'S ABOUT BUSINESS, NOT TECHNOLOGY - Remember that the execs are probably not interested in the whizzy social collaboration system under the covers. They're just interested in what it means for the Business as Usual situation: are people working better, communicating better, coming up with better ideas, etc? Your mentor needs to park their technology addiction and focus on how it helps the exec. This in itself is a valuable lesson for the mentor.
4. SET EXPECTATIONS - You should facilitate the preparation of a plan between the pairing. Drive the plan towards what the executive wants to achieve and agree a timescale for it to be delivered. Check in on the process but agree with the pair that it is over to them to agree the process and approach for giving the mentoring.

5. TWEAK YOUR APPROACH - No process can be considered complete without some sort of feedback. Get the candid feedback about the process of reverse mentoring from both sides. Tweak your approach accordingly. When your reverse mentoring process ends, I'd recommend a formal close event. It could just be a meeting or something less "formal", but the event should be marked. At that event ask for the pairings to share their experiences of the process. What did each learn? How would they improve it? What will they use going forward?

Step 6 - Measure

Figure 6.7. If you want to improve something - draw a graph

If you want to see how well you are doing, how something is improving or how far you have moved, put it in a graph. A picture tells a thou- sand words and so therefore putting the practice of business analytics to work in your social collaboration environment will help you see how your business is improving. Armed with statistics like these you can be sure any executive will want to hear from you.

On a recent project the customer had to slow down the deployment of IBM Connections while it was still going through its early adopter phase. Using metrics they realized that the initial group of 25 users had quickly (in two days) grown to 40 users. Within a week they were at nearly 80 and after a month they had over 140 users of the system. That's from an initial team of 25 people. Without this simple metric about the viral adoption of Connections they would not have been able to change their plans for adoption to more rapidly develop training materials. They also changed our plan to offer a "Welcome" community early in our plan rather than at the end.

Business Analytics has left the realms of statisticians and accountants. It is no longer the preserve of (just) your Financial Director. Instead, using metrics on your social collaboration you can unveil a wealth of information about the habits and requirements of your users.

Wouldn’t it be great to know which communities are never visited? Which parts of the Staff Handbook are never visited? What are people saying in comments about the company’s annual results? How does the number of tasks on this project relate to the last project we did like this? Who are the biggest contributors to the system?

This intelligence is the other side of your knowledge equation which forms by using social collaboration solutions. The inputs to the equation are the inate desire by people to do a good job and be social together with the knowledge they have in their heads which they can share with you – if you just know which question to ask. On the right hand side of the equation, the product, your organization gains explicit knowledge and intelligence. Knowledge and Intelligence – two words any chief executive officer would be interested in.

In the latest release of IBM Connections, IBM has included a license to use Cognos BI for the purposes of analyzing the content of the Connections environment. In doing so you can gain a great deal more than the “how many users do we have” statistic I was impressed with on my project. A BI platform like Cognos not only allows you to report on these statistics but also gain insight into the trends forming.

If you haven’t already looked at metrics as a way of measuring your social success we strongly encourage you to do so. It’s a dimension to your social collaboration efforts which moves it from knowledge management and capture to business strategy execution.

One of the many reasons often reported about the reluctance of an organization to deploying a social collaboration platform is “someone might say something bad”. This indicates to that they have missed the point of being a social business in its entirety. How can you become a better place to work, a more productive organization, have more joined-up processes and exceed your customer’s expectations by burying your head in the sand when someone says something “bad”

Why not instead consider Sentiment Analysis to analyze the expressed sentiments in your social system. Wouldn’t it be great if the product development people could get a sentiment analysis of the support requests your helpdesk guys were recording? By embedding social into your business processes in this way you are automatically adding the most valuable product development feedback you can get: the thoughts of your customers.

The tenth step of the process is one of the most important. By MEASURING you can improve. By capturing, reporting, feeding back and analysing what your people and your customers are saying you can become BETTER. According to the IBM Institute of Business Value, 53% of top performing organisations use insights to drive day-to-day operations.

Consider one last area in your measurement of your social collaboration. Predictive Analytics takes your data, applies a model to it and predicts the outcome. The sophistication of the model you apply allows you to be more accurate and confident about the prediction. If you could predict that a project being managed in an Activity in IBM Connections was going to run late, what would that be worth to your organization?

Rinse and Repeat

We've travelled a long way since the start of this first iteration in our iterative adoption cycle. We've come full circle and hopefully completed our first successful implementation of a socialised collaboration environment for a particular group of users in the organisation. How do you feel? Did it work as you thought? What changed? Now is probably the most important time for your efforts. Meet your team, discuss the results, document them and store and share them in your Community for the next iteration. The wider the readership for your "lessons learned" information, the better the next one will be.

Chapter 7. Conclusions

Implementing a Social Business system, or an enterprise social network is not like any other IT project your IT department will have run before. In fact, I'd strongly encourage you not to have your IT department run the rollout of your system. Why? Because, quite rightly, the IT department is focused on making sure that the machinery and software which people depend on every day is working as designed. You need to go beyond merely ensuring the function and reliability of the network, the computer, the software and the functionality of the software people use. To implement social you need to reach into the business processes people operate on a daily basis and motivate them to share more, be more inclusive and to recognize that their value in the organization is not just what they know, but what they share.

The world is moving into the implementation of Systems of Engagement to complement the traditional Systems of Record we have become familiar with. IT departments implement Systems of Record to provide a business function. People make Systems of Engagement provide an extra dimension to the information they have at had. Where a System of Record provides explicit knowledge about a business transaction, such as the invoice price, the hours spent, the customer's problem, a System of Engagement brings the tacit knowledge and experience which your staff have about these transactions but which are otherwise not included in the organisation's corporate intelligence.

Implementing an enterprise social network with its many tools and approaches to acting as a System of Engagement allows you to bring these two Systems together. It's possible to integrate them with document management solutions, transactional systems and many other electronic solutions through methods such as OpenSocial, ActivityStrea.ms, CMIS and embedded experiences. Indeed, the integration of informal knowledge capture together with the formal transaction information drives "knowledge accidents". Such accidents are the kind of thing that happen all day every day when you meet someone in the corridor or in the canteen or are having an otherwise unrelated conversation with someone. They mention that they were speaking to someone and you discover some snippet of information which helps you solve a problem. The trouble is, these serendipitous encounters don't scale. There could very well be someone in your organization in a different area who knows exactly how to solve your problem or has that key insight into your customer. If you don't have a System of Engagement, where knowledge accidents are allowed to flourish, the benefits of the enterprise social network, which is the union of these two worlds, is difficult to realize.

So you should approach implementing an enterprise social network more like a business change process. It's about psychology, communication, pacing, creativity, positivity and energy – not about technology.

The five steps I have set out in this book guide you through a logical sequence of actions to get you going in your project. The last step, adoption, encourages rapidly iterating through the same steps to deliver the change and get people using it.

I hope you have gleaned from my words that working in small groups on specific problems and then scaling out is the path to success. I meet many people who have not considered setting a vision or documenting the business case, or seeking leadership commitment. These are vital for the monetary and time investment the organization needs to make.

Careful planning is of course essential too, but I have found in developing this material that customers are less concerned about planning. That's a good thing and certainly planning an enterprise social network, from a purely scheduling and resourcing point of view, is not dissimilar from any other project.

What is different, however, is the need for communication and engagement and its for this reason that the skills you need on your team need to come from a much broader population than you might previously have drawn. Be careful, however, of setting the expectations bar too high. Start modestly with your engagement, build on your success. Your confidence, and those around you will grow to a stage where the engagement of the end user is less about pulling teeth and more about stopping a flood! When you have results to show

– simple metrics like time saved, customer satisfaction increased, etc, share these openly. These are the monetary units of success.

Above all, practice what you preach. If you can't do something with your system that you would expect to do then fix it. It's better for you to have experienced the "em, I wonder how we do that" question first so that you have the answer for your users.

Lastly, and something I haven't documented anywhere else in this book, have humility. Thank people for their continued interaction and engagement. Be appreciative of the support you receive from your leadership. Express gratitude to your project team regularly. Make working on the project a pleasure and you will keep your people with you. When people are happy they become creative.

I genuinely hope you have found this book useful and envigorating. I hope you feel now better equipped for your social journey ahead and that I have given you some practical advice you can apply directly in your project plans and iterations. In my job at IBM I hear about some really dramatic returns on investment from organisations who have taken the subject of adoption seriously. I also hear about cases where adoption is confused with training and that customers don't find the purpose (or use cases) which matter to the end users.

Please therefore take this material and apply it in your organization. Build upon my approach and techniques and if it works for you, please let me know. You can find me on LinkedIn and Twitter – search for alanghamilton.

Good luck.