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E-Guide

Collaboration and Social Networking in the Enterprise: How, when and where to start

This E-Guide highlights key ways you can empower your enterprise with social networking and the right collaboration strategy. Uncover what collaboration can do for your company – if you use it properly, how to keep pace with social software of today and tomorrow and what you need to do now to build a successful, social network platform for the future.

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A collaboration strategy starts with business objectives, not products

The latest wave of unified communications (UC) tools look so good on tradeshow floors, but adopting them without considering how they fit into a broader collaboration strategy is a serious misstep. Retrofitting a business case to a technology, rather than choosing a tool to answer a business need, can spell failure for these deployments and leave collaborative tools gathering dust on a shelf.

"We [used to] do things more in a silo than we should've, and after the fact somebody [would say], 'I needed a car and you built me a bicycle,'" said Steve Brescia, enterprise architect at American Water, a water and wastewater utility company based in Voorhees, N.J. "But under the new CIO … her focus has really been that we need to partner with the business [to] find out what their pain points are and what their needs are, instead of going back in our corner and saying, 'Oh, this is a cool thing. Here you go.'"

American Water's 7,000 employees have plenty of collaborative tools -- IBM Lotus Notes and Domino 8.5.1, Lotus Sametime, Microsoft SharePoint and Cisco Systems WebEx -- but Brescia is evaluating high-definition (HD) video conferencing as a possible addition to the company's collaboration strategy.

Over the next year, Brescia's team will also work on integrating Notes, SharePoint and WebEx through a series of plug-ins to deliver "a single pane of glass" of collaborative tools for users, who have grown accustomed to toggling between the three applications during a meeting.

Neither project was an arbitrary choice, but rather part of a calculated collaboration strategy, Brescia said. HD video would meet specific needs for an upcoming project, as well as bridging disparate management teams at two call centers.

Meanwhile, Brescia and his team worked for seven months on a technical and financial analysis before diving into the application integration project, beginning with asking themselves what tools employees use most and how those could be improved. The team

has also conducted user surveys and interviews to understand business needs, in addition to meeting with a business and IT review board.

"I, personally, am a big believer that these technologies are tools. If they don't have a business reason, don't [fulfill] a business need and don't make financial sense, then so what? I think we, as an organization, are getting better at [avoiding] that in the three years that I've been here," Brescia said. "You can have the coolest tools [but if they don't] help anybody do their jobs, it's not worth it."

In the spirit of collaboration, Ted Schadler -- a vice president and principal analyst at Forrester Research, who recently authored POST: A Systematic Way to Define Your Collaboration Strategy -- said IT should be at the table but not the only one there when developing a collaboration strategy; business units and users should be included, too. Stakeholders must start with identifying the problem and objective, which IT should use to guide its choice of strategy and technology, he said.

"Nobody owns workforce productivity -- nobody. The CEO is the only individual in the company that really cares about it from a personal incentive basis," Schadler said. "IT has the ability to think broadly across the organization and is not stuck in any particular function, business group or region. They're one of the only global services inside the company."

Other enterprises continue to get their collaboration strategy backwards

Although IT shops may be used to thinking about their jobs in terms of appliances and software, telecommunications and messaging managers will waste time and money if their collaboration strategy doesn't begin with identifying the business need, according to Schadler.

"Failure means it sits there and no one uses it. There's a ton of that [going on in enterprises] -- a lot of plural investments and applications that get built but never used," he said. "When you start looking at these failures stacking up, you realize that you've got to stop pushing technology up the hill and ask, 'What's the problem we want to solve?'"

Collaboration is one of four areas where enterprises seem to fall prey to this mentality of deciding on the technology without identifying its business case, Schadler said. Mobile computing, desktop virtualization projects and Windows 7 upgrades also seem to be barreling ahead without much thought to broader strategy, he said.

But it's not surprising, given the culture of IT, Schadler said.

"The nature of innovation in the tech industry starts with the technology. When new stuff comes in -- good or bad -- it shows up in a box or on a website as an application," he said. "It doesn't start with the business problem, except in the mind of the [inventor] perhaps."

'Facebook for the enterprise' not key to enterprise social software

Enterprise social software vendors love to emulate consumer brands: Facebook for the enterprise, Twitter for the enterprise, YouTube for the enterprise. But intranet designs or collaboration portals don't live or die by how well they emulate the look and feel of popular consumer social networking sites.

"Whether it actually looks like Facebook, Google, Amazon or whatever is somewhat irrelevant. What our users are saying works best for them is what decides [the tools and interface]," said Mark Morrell, intranet manager at BT Group, formerly British Telecom, one of the world's largest telecom operators, headquartered in London. "If you really ask people, it'll be functionality over design, but it's got to be a functional design."

Collaboration and intranet professionals say they don't aim to specifically emulate LinkedIn or try to develop Twitter or Facebook for the enterprise. Instead, many look at what makes those user interfaces so successful and determine whether some elements could be applied to their own portals to increase adoption.

"Certainly, [enterprise social software] needs to be very usable and meet the needs in that organization and fit with the culture that exists in that organization," said Morrell, who blogs about managing the BT intranet and satisfying its 140,000 users around the world. "If Facebook is what people are very connected to in an organization, then why not emulate something that is successful?"

Although enterprise social software vendors don't make any claims about emulating consumer sites, many recent releases, including Microsoft's SharePoint 2010 and Cisco Systems' Quad, provide user interfaces that bear uncanny resemblances to popular social media outlets.

But that's not a bad thing -- even if Twitter or Facebook themselves fizzle as fads and join MySpace and Friendster as ghosts of social media past, according to Zeus Kerravala, distinguished research fellow at Yankee Group.

"Companies need to understand that what they're putting in today is likely not going to be the thing we look at 20 years from now or 10 years from now -- but that's OK," he said. "That's part of the evolutionary process of technology."

Peter Richards, intranet manager at Tabcorp Holdings, a gambling and entertainment company based in Melbourne, Australia, said enterprise social software that gives a consumer-esque experience will fail if that is its only purpose.

"All users are different, and all organizations are different. There is no single solution that is perfect for everyone, and it's an intranet manager's job to get out there, learn about how your company operates, meet and observe as many users as possible, and identify what they need," Richards said. "Identifying a need and delivering functions that workers use often will do more for user adoption than simply implementing the current trend just because you can."

Tabcorp's intranet has one Web 2.0-inspired application -- a blog run by the company's managing director with user comments enabled. Richards said he is trying to determine whether it would be valuable to include more, but he remains skeptical.

"If we were to discover a workplace situation where a microblogging function like Twitter would streamline a work task or process, then we would definitely consider it," he said. "[But] at this point in time, and considering the diverse workforce within my organization, I believe that delivering an intranet that looks and works like Facebook would run the risk of isolating a large percentage of users."

Enterprise social software inspired by, not emulating, Web 2.0

The podcast platform on BT's intranet is "very similar in look and feel and in the philosophy that you've got with YouTube" in terms of its ease of use, Morrell said. The company's blog platform is built with Wordpress. His corporate wiki, BTpedia, is based on the same application that online encyclopedia behemoth Wikipedia has used, MediaWiki. It gives BT intranet users a Wikipedia-esque experience, he said.

BT's intranet now hosts 500 blogs, several hundred podcasts and about 2,500 articles on BTpedia, Morrell said. Nearly 80% of the blogs were updated at least once in the past month. Those measures of success are partly a result of employees' growing comfort with mainstream social media user interfaces, he said. A recent survey of his users revealed that 90% of employees under 25 years of age use social media; just under half of employees 50 years or older claim to do so as well.

"For wikis, people do like the format that is used for Wikipedia. They like the simplicity of [our blog application] Blog Central because it's very, very similar to the external version of Wordpress," Morrell said. "There have always been early adopters, but what we've found now is the 'normal' people are coming on and using [enterprise social software]."

When users log into the corporate portal for American Electric Power (AEP) -- an electric utility company headquartered in Columbus, Ohio -- they see a news feed with status updates and alerts about colleagues commenting on posted videos and blogs, said William Amurgis, manager of internal communications at AEP.

But what users see would not be mistaken for LinkedIn or Facebook, he said.

"As intranet managers, we owe it to our employees to keep pace with the consumer space," Amurgis said. "We're not going to have an internal iTunes for people listening to music at work, but we will look at [interfaces] and features of things people use in the consumer space and will adopt those tools that have a business context."

Amurgis expects that his team, which builds all of its applications in-house, will eventually have to support field workers who will expect to geotag and upload photos directly from their mobile devices to their personal and group intranet pages to get colleagues' input -- just as easily and with the same familiarity they have now on consumer portals.

"Even a traditional utility company will equip everyone with smartphones, and that influences our design right now," he said. "We're preparing our intranet for that saturation date."

Empower your enterprise with social networking

Among the most valuable renewable resources of a viable business is the innovation and creativity of its employees. What if enterprises could harness the ideas and innovation of their employee base along every line of the organizational chart? That would be a powerful tool. That powerful tool could be social networking.

There's a new show on CBS called Undercover Boss that touches on the untapped value of deep collaboration. Each week, this series depicts executives going undercover, rolling up their sleeves to work alongside their employees. In doing so, executives see firsthand the impact their decisions have had. They hear uncensored insight into problems and solutions from employees who otherwise would not have a voice. Bosses can also see who is consistently shining.

Social networking as middleware

By adding a social layer within the enterprise, all employees can connect in an actionable, organized way without going undercover. Think of social networking as middleware -- a scalable tool that transforms fragmented information like email directories and IM buddy lists into a visual network that participants can interact with.

Social networks bypass traditional hierarchical management models, providing a destination to build online communities where ideas and information trump organizational positioning. These communities aggregate the information exchanged in emails, conference calls, presentations, and water-cooler talk into shared spaces where leadership is broadly distributed — augmenting person-to-person collaboration.

Online communities provide an open venue for people from different business units and geographical locations -- groups that typically have little to no interaction -- to brainstorm and collaborate. A simple idea or approach commonplace to one group may be a huge value-add to another. And that's just the beginning.

If corporations provide all participants within the community with a voice and empower employees with the notion that they can catalyze change, ideas and innovation can grab traction and vine in ways that previously just weren't possible.

Netting the collective intelligence of the social layer

The social layer becomes a net, catching the collective intelligence of the entire enterprise. This collective intelligence is sorted, ranked and searchable, providing an efficient means for participants to share or find specific information.

Having strong search capabilities, including federated search capabilities, is critical to building a successful social networking platform. Federated search indexes content from other systems and repositories, queries third-party search engines and accepts requests from other search engines. Search capabilities can extend to employee profiles. If profiles are filled out completely, co-workers will be better equipped to find people with domain-specific knowledge and get the answers they need more efficiently.

Social networking communities enable user-generated feedback, such as tags and content-rating systems. Tags correlate topics to a taxonomy driven by participants, sorting related content topics.

Participants can also rate content relevancy. This ranking framework not only helps people find the most accurate information, it encourages employees to help one another.

Training and support with social networking

Technical support and training needs can be streamlined through online communities. Questions can be sent out to a large group. Recipients can control whether they want to allow all questions or define more specific parameters and just receive questions from certain groups or people. If people find the answers they need on the social network, they can bypass the help desk, reducing help desk tickets and saving resources.

Social networking also provides a platform to train and acclimate new hires to your culture. Providing introductory material on the social network -- how to set up a conference call, for

example, or where to send expense reports -- makes it easier for new hires to self-synchronize to their new environment and saves others time answering questions.

By coupling relevancy rankings and user activity levels, HR has another tool to manage talent. New leaders can be filtered out for promotion, and current leaders can continue to build their legacy within an organization.

Social networking can streamline business process outcomes. Employees can network with one another within the communities and solve problems as they arise. If decision rights are extended to these workers, issues can be addressed quickly without having to wait for a top-down process.

Common workspaces can bolster the benefits of real-time collaboration and cut costs. If several people are working on a report, for example, that report could reside in a common workspace where people can post comments rather than passing around emails. Document updates are immediately available to the group. Since updates are accessed via the common workspace, storage costs could be reduced by decreasing the number of emails and attachments that are sent over the network.

Fostering a healthy social network

Some staffers will be more reticent about sharing ideas and speaking up. To foster participation, companies need to embrace the freedom of social networking and not get too bogged down trying to police the information that gets posted to an internal social network. If people feel they are being closely monitored, they are likely to shy away from participation.

Organizations may be inclined to set up access restrictions on communities because of transparency, compliance or privacy concerns, but gating communities will probably inhibit the viral nature of social networking.

Social networks break down organizational silos, increase ad hoc engagement across the organization, build dense connections and improve the knowledge base. If this is executed properly, employees will log on to the social network rather than email accounts.