Approaches to Help Ignite Adoption of Social Collaboration

Executive Summary

Technology tools and trends often start in the consumer space and eventually work their way into the enterprise. This effect, known as the consumerization of IT (Source: http://www.infoworld.com/t/consumerization-of-it/consumerization-of-it-190132), is helping to lead the rise of social tools in the workspace. With the usage explosion of consumer social tools like Facebook and Twitter, email has become a secondary means of communication and collaboration for many in the consumer world. This trend is leading enterprises to evaluate ways that they too can harness the power of social media tools.

This rise of social collaboration in the enterprise is powered by social software. Gartner states that objective of social software is to "encourage, capture, and organize open and free-form interaction between employees, customers, and partners," and that it helps create and exploit "collective knowledge." (Source: http://www.gartner.com/technology/it-glossary/#18_3).

Many believe that this shift towards social collaboration represents the next major wave of enterprise collaboration - with its predecessors being the telephone and email. And while it may seem foreign that there was a time when people were resistant to using email or even the telephone, those times did exist. To think that there were companies that once tried to determine return on investment for using email is almost incomprehensible. It is obvious now how those methods of collaboration can help. But social collaboration is newer and people are still trying to understand it. Until there exists the same level of acceptance and understanding with social collaboration, there will be a need to shepherd its adoption.

This need for such stewardship is quickly realized by most anyone who has been involved in an initiative to roll out social software across an enterprise. They can testify that it is challenging to persuade employees to adopt this emerging way of sharing information and collaborating with co-workers. This can be discouraging because adoption of other types of systems, especially task-oriented systems (e.g., finance systems or human resources systems) and document-oriented applications (e.g., productivity tools) seem to be much more straightforward. Those types of systems are typically very clear in how they should be used, why they should be used, and by whom, in part because they have been part of the work culture for so long. So it is easy for workers to incorporate these tools within their everyday work experience.

However, people-oriented systems (e.g., communities, enterprise social networking) that rely on enterprise social software can be more challenging because they are very new to the work culture.

This challenge raises a couple of questions: How can a company build that initial momentum? Where does the enterprise begin? Business value (as well as personal value to employees) increases as more of their colleagues participate within the environment, so finding an answer to these issues is vital to the success of the social collaboration initiative. This is referred to as the "network effect," which explains how a product can become more valuable as more people use it. (Source: http://articles.businessinsider.com/2012-03-05/research/31123118_1_ios-android-platform).

The utmost consideration when deploying a collaboration platform is the upfront business strategy - the explicit business objectives and goals that the enterprise wishes to accomplish. If that strategy has not already been defined, then the adoption strategies presented here will fall short. If the specific business objectives and goals are not explicitly identified as a part of formal collaboration strategy, then the best an adoption program could do is influence utilization of the collaboration platform and hope that in turn, that utilization translates into real business value (all without a specific business strategy to actively direct and manage it).

That being said, as it relates to adoption, strategists and project leaders involved in deploying an enterprise collaboration platform typically need to consider two strategies that will be covered in this paper:

Organizational Strategy: This framework deals with how adoption is addressed in the context of the various user groups and user segments. It can be divided into two areas - Release Tactics and Audience Tactics. Release Tactics covers the different ways that enterprise social software can be deployed across the user base. Audience Tactics covers where to place the focus across the various cross-sections within the organization.

Participation Strategy: This framework deals with how to engage users regarding social collaboration. It can also be divided into two sub-areas - Seeding Tactics and Personal Value Tactics. Seeding Tactics covers methods to attract people to the platform - through content, people, applications, or events. Personal Value Tactics deals with approaches to incent participation at the individual level in ways that can enable personal gain of some type. The approaches presented here rely on the premise that the use of the platform is ultimately, completely voluntary.

However, it should be noted that there are methods of governance which can mandate the use of social platforms (or any enterprise IT system), thereby making adoption mandatory and not voluntary. Such heavy-handed adoption strategies will not likely create all desired behaviors, but should be acknowledged as an alternative approach for seeding participation.

To illustrate how these two fronts can be unified and used to deliver actionable adoption practices, Figure 1 illustrates a model that could be considered.

Figure 1.   Adoption Approaches

Within those categories, more detailed, individual approaches can be considered:

- **Organizational Strategy**
  - **Release Tactics**
    - **Viral -** Rather than target any particular business unit or employee group, an enterprise can opt to announce the site and let people join and invite co-workers to participate.
    - **Managed Demand -** This phased approach makes the solution available to segments of the enterprise over time. By constraining availability, business and IT decision-makers can learn, adjust, and iterate based on sponsor and participate feedback.

- ◦ **Enterprise Rollout** - This is the social collaboration equivalent of complete migration. It means releasing the necessary collaboration tools to all users across the enterprise as the same time.
- ◦ **Audience Tactics**
  - ◦ **Top-down -** The top-down approach is when the executives in the organization become active users with the hope that others will follow by example. Sell management leadership teams on the value gained by the enterprise in having their business units and departments participate in the social platform. Involve them as sponsors as well as actual participants.
  - ◦ **Middle-out -** While top-down and bottom-up approaches may gain most attention, there is also strong value in focusing on the middle group. The middle group includes the people managers that are between leadership and the individual contributors. Their influence may be most important because they have the direct attention of those above and below.
  - ◦ **Bottom-up -** The bottom-up approach includes introduction among the working rank and file with the hope that their individual successes will spread across the organization in a viral fashion. Sell employees on the value of the social platform and let them create a groundswell of interest and participation. Nurture the grassroots leaders and help them in their champion role as the local ambassador of the solution.
- **Participation Strategy**
  - ◦ **Seeding Tactics**
    - ◦ **People -** "Champions" often act as vocal supporters and might be power-users themselves. Champions can emerge based on their own passion or are handpicked because they have an affinity for social collaboration and are capable of leading or influencing others. Effective champions can help raise awareness and lead people to the platform. Persuading certain workers that are prominent community leaders or offline community groups to use the site can help influence employees to join and participate as well.
    - ◦ **Content -** Adding new and unique content, or moving existing information from other intranet sites to the social network site, can create a reason for workers to visit on a repeated basis. They learn about the social capabilities as they interact with the information they seek.
    - ◦ **Applications -** Taking full advantage of the platform's social networking capabilities can help deliver new types of applications (e.g., corporate directory and expertise location). These social applications can encourage employees to complete their profiles and use such tools to build relationships with co-workers as they solve business problems.
    - ◦ **Events.** Use of the platform as an environment for different types of employee gatherings (e.g., corporate announcements, webcasts, community town halls, scavenger hunts) that encourages employee participation can also help with adoption efforts.

- ◦ **Personal Value Tactics**
  - ◦ **Rewards and Gamification -** This area focuses on ways to recognize employees' participation and to encourage positive contributions. It focuses on how platform capabilities can be used in conjunction with change management practices to motivate people, often in the form of badges and leadership boards.
  - ◦ **"What's in it for me?" (WIIFM) Promotion -** Many organizations fall into the trap of not properly communicating to individuals what the business value is for them to use the platform. For instance, how can it make their job easier? How can it make them more productive? How can it help them increase efficiency? These questions are not always answered well but they need to be. Since the platform is a social environment where people participate voluntarily, helping them understand how their individual needs are being satisfied is important.

The remainder of this white paper is meant for the practitioner, and will present a more detailed technical view into each of the approaches in the model. It is important to also call out a few crucial areas that require attention but which will not be covered in this white paper. They include:

- **Factors influencing adoption -** Adoption of social collaboration is heavily influenced by many dynamics, not all of which can be controlled (e.g., demographics, culture, geographic spread, familiarity of employees with social tools, technical aptitude, etc.); there are no "one size fits all" recommendations. Based on the unique characteristics of an organization, one or more of these approaches might work better than others.
- **Pulse checks and refocusing the adoption strategy** - Adoption practices should be continually evaluated and adjusted as needed. Behaviors will change, attitudes will change, use cases will change, and functionality will change. Constant pulse checks on adoption in the form of metrics and analytics, formal surveys, and anecdotal feedback will help provide that insight needed to determine how to adjust your strategy and tactics.
- **Governance and process** - The strategies and approaches presented in this paper should be evaluated and implemented within the context of an overall governance and change management program. There must be an overarching program directing the effort both up front and during maintenance that defines the necessary processes of the program around which these strategies and approaches are evaluated and executed. It is strongly recommended that users establish a governance and change management framework from within which these adoption tactics can be channeled properly.
- **Business value adoption versus Utilization -** There is a sizeable difference between simply using collaboration tools and using them specifically within the context of impacting the business. The ultimate goal is to have workers collaborate socially to increase productivity, innovation, or efficiency. But some of the approaches here will focus more on luring those initial users to the enterprise collaboration platform from a strict utilization standpoint, with the belief that that shift will lead to collaborating socially, ultimately leading to business value.

Practitioner's Guide: Describing and Applying the Model

Breaking Down Organizational Strategy

The following section explores in detail specific approaches and considerations that should be taken into account when addressing social collaboration adoption from the organizational perspective.

Viral

Figure 2 highlights the viral release tactic within the Organizational Strategy umbrella.

Figure 2. Viral Release Tactic

The term "viral" has become ubiquitous in the consumer space to describe the consumption of social media (videos, pictures, articles, etc.) that has rapidly spread and been viewed by large numbers of people in a short amount of time. The term and concept also carry over into the enterprise space, where it is used to describe the similar effect of the rapid spread of collaboration tool adoption. Viral adoption is a hands-off, unstructured approach which is often unpredictable. Because of its unpredictability, some organizations may start off with a viral approach but evolve into a more semi-structured, bottom-up strategy (discussed later) to move the effort beyond ad-hoc pockets of adoption.

Despite the focus on it being unstructured, there are a couple ideas to keep in mind - both relying somewhat upon the spontaneity and internal push of the user base. Table 1 examines viral considerations.

Table 1. Viral Considerations

Consideration	Details
Self-Organizing	- Many references are made to social collaboration being "self-organizing." This means that the structure does not need to be specified and there does not need to be explicit instructions on what to do because the masses will figure out the best way to use it. - This approach makes the assumption that the masses have some degree of familiarity with social collaboration. Without the familiarity, the viral approach will be futile. - This approach also makes the assumption that there will be some leadership shown within those initial pockets of users - and those emerging leaders will be the ones helping to pull others in and build momentum. - The most difficult aspect of this strategy is that it is not necessarily a strategy that can be managed. In many ways, it is something that just happens or may not happen at all. It is being included in this list because it is important to be aware of it. Since it is rooted in the masses, it can have a powerful effect.
"Organized Chaos"	- As mentioned above, since viral adoption is something that just happens (to some extent, spontaneously), it can be a bit chaotic. An alternate approach is "organized chaos" - a term used to define provision of some levels of control to the viral initiative. - Ensuring users are properly trained and have all the help materials they need is a good way to help prepare for "organized chaos." Without this, they may give up if they encounter a roadblock. - It is important to provide an area to go to for additional help or questions. To keep the momentum, identifying a core group to help will help keep moving things along within the various pockets of users. This could mean providing a discussion forum so that these initial users can share ideas and help one another or even providing a way to contact the core team with any major issues. If an organization is in the early stages of deployment, the normal help desk or IT group may not yet be supporting the platform. If that is the case, a tier 0 or tier 1 support mechanism should be set in place. - Seeding ideas, content, and communities can also help provide initial structure and content so that the initial users are not walking into a blank slate. For example, as mentioned above, providing support for these uses is important so it may be of value to have a community set up for the initial users to share ideas and offer help to one another.

Consideration	Details
"Technographic Profile"	• Forrester describes the participation behaviors of employees as it relates to social tools through "Social Technographics," which segments the workforce in the following roles: Creators, conversationalists, critics, collectors, joiners, spectators, and inactives (Source: http://blogs.forrester.com/category/social_technographics). • A viral adoption is largely driven by those on the top rung of the profile - the creators, conversationalists, and critics - because they are the ones fleshing out the platform with content. These are the people creating posts and blogs, uploading documents, commenting on the content, etc. • But as the technographic profile calls out, there are many other profiles to take into account. It can be argued that the viral wave will be led by the creators, conversationalists, and critics, but those on the lower rungs - joiners, spectators, and inactivesdo not share the personality characteristics that would lead them to engage. So the viral approach may simply end up attracting a very homogenous group of users which do not reflect the profile of the enterprise as a whole.

Managed Demand

Figure 3 highlights the managed demand release tactic within the Organizational Strategy umbrella.

Figure 3.   Managed Demand Release Tactic

Many enterprises opt to deploy their social collaboration platform in a phased approach to help focus the efforts and provide more control over the initiative. Rather than launch to all users at once, specific groups are targeted. This allows for more focused training, messaging, and end user support.

Managed Demand is a type of phased deployment with the added purpose of generating buzz and demand from the groups who are not yet a part of the deployment. As other groups see and hear about how the platform is being used and how it can address their own use cases, the hope is that demand will build. Table 2 below outlines some critical areas to consider when utilizing this approach.

Table 2.   Managed Demand Considerations

Consideration	Details
User Group Profiling	• Different user groups vary on many levels such as their business objectives, process workflows, potential collaboration use cases, and collaboration pain points • Because of these differences, it is important to identify and profile the various groups • Based on the profile, it can be evaluated which group(s) should be included in the initial deployment and which should not
User Group Phasing	• A phased deployment centers on having a roadmap that shows the deployment timing for each user group • A variety of factors should be taken into account when determining the phasing of various groups, such as size, number of locations, geographic spread, potential use cases, potential need, functionality need versus functionality available, etc. • This deployment roadmap should be treated as a living document since there may be factors that arise which may require adjustments during the rollout • The roadmap should also be made publically available and posted so that everyone is aware of the timeframes for their respective groups
Marketing Promotions	• One approach to potentially generate demand is to publicize the successes of the currently deployed groups, using newsletters, live meetings, etc. If a group of users has their own victories publicized then others can gain ideas on how they can make use of the platform; this may generate discussion and adoption within those other groups

Enterprise Rollout

Figure 4 highlights the enterprise rollout release tactic within the Organizational Strategy umbrella.

Figure 4.   Enterprise Rollout Release Tactic

The opposite of the phased rollout is the enterprise rollout, where the platform is deployed to all users at the same time. While this approach does require far more governance and upfront planning, the benefit it yields is that it can boost the potential number of users activated on the platform. The more users there are, the more workers are able to collaborate with one another. A critical factor in determining whether to phase the user rollout or not is the overall size of the enterprise. Deploying to an enterprise of 1,000 users all at once will not be nearly as challenging as it would be to roll out to 100,000 users. If the decision is made to do an enterprise-wide rollout, Table 3 lists considerations that should be kept in mind.

Table 3.   Enterprise Rollout Considerations

Consideration	Details
User Group Profiling	• Just as it was important with managed demand, user group profiling is equally important with an enterprise rollout • Just because the platform will be rolled out to all users at once does not mean they entire enterprise should be treated as a single entity. That is a dangerous pitfall that must be avoided because the individual groups that comprise the enterprise will have their own processes, ways of collaboration, and motivations • It will still be important to cater to the specific collaboration needs and address the collaboration pain points of each group individually • More coordination and planning will be required because there will be multiple streams of planning and analysis
Training and End-User Enablement	• With a phased approach, it is easier to make incremental adjustments to the training approach, deployment approach, and overall user-readiness approach • Deploying to all users at once does not offer the luxury of adjusting approaches based on lessons learned from the previous release. Therefore, it is even more important to make sure that all the necessary controls are in place to support the influx of users
Maintaining the Program	• Even though there will be a single rollout from a user perspective, that should not be the only phase for the program • The program team needs to monitor the usage patterns, solicit feedback and enhancement requests, and continue to learn how the platform can be enhanced to increase the ability to achieve business value through its use • Just because all of the users will be activated simultaneously does not mean that the platform should stop evolving; there should still be a defined roadmap that shows the functionality enhancements and tool integrations that are anticipated in future phases

Top-Down

Figure 5 highlights the top-down audience tactic within the Organizational Strategy umbrella.

Figure 5.   Top-Down Audience Tactic
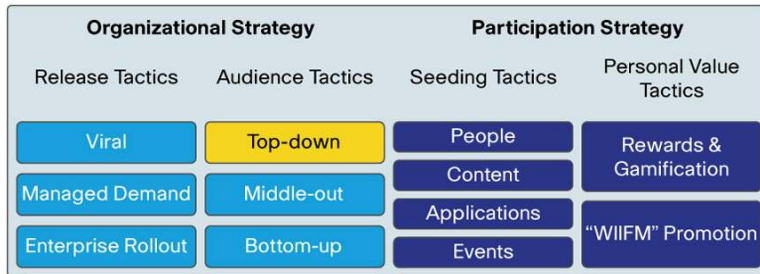
Ever since there have been leaders, there have been followers, looking to emulate their words and actions. The same holds true in the business world. Executive teams, explicitly and implicitly, have tremendous influence on how employees perceive their own participation within a people-centric social collaboration platform. Active participation from leaders as they themselves contribute to a social collaboration environment, coupled with effective communications to the workforce, demonstrates management commitment through action, not simply by edict. These are the principles upon which the Top-down, or Executive Role Modeling, approach takes. By having the executive team interact with each other and with employees, they can attract an expanded workforce base into the platform as workers follow the executives' example.

There are typically two challenges that one may encounter with this approach. One is that the executive may not have enough time to focus on these activities and the other is that the executive may not know how to use the platform. In either instance, the role of an executive assistant becomes critical. Executive assistants who are versed in the platform can help by doing a lot of the foundational work of populating content and also serving as direct support for the leadership team. This is why executive assistants should be a part of all training and enablement activities. Authenticity is very important. Executive participation should always be done directly and not by a delegated individual. While content creation by an executive assistant is sometimes an option, it is generally the better route to have direct participation by the executive. Table 4 lists top-down considerations.

**Table 4.**   Top-down Considerations

Consideration	Details
Microblogging	• The most atomic element of social collaboration is the microblog, popularized by Twitter, which is a short update akin to Tweets of what the person is doing or thinking, or even a general question to the larger group • A major benefit of microblogging is that it takes a matter of seconds for someone to write a microblog so an executive can update multiple times throughout the day and have it only take a few minutes of time • An executive who frequently microblogs helps the larger group gain better insight into their activities and what they are doing and thinking; They may more closely identify with organizational goals • This may inspire users coming into the tool as lurkers to use the functionality as well
Executive Blogging	• Executive blogs can be used to share what is on the mind of the executives in an informal way • Executives should aim to blog on a regular basis (not necessarily a hard schedule but persistent) and avoid dropping out after awhile • A blog encourages people to comment and interact with the executive - creating a direct means of communication that normally employees may not have. This is a core benefit of social collaboration and helps to flatten out the organization.
Organizational Communities	• An executive-sponsored online community can be used for a number of purposes, such as strategic projects, special interest topics, innovation hubs, etc. Select communities can act as a feedback loop directly to executive sponsors, giving employees the sense of having a direct voice to senior management.

Middle-Out

Figure 6 highlights the middle-out audience tactic within the Organizational Strategy umbrella.

Figure 6. Middle-Out Audience Tactic
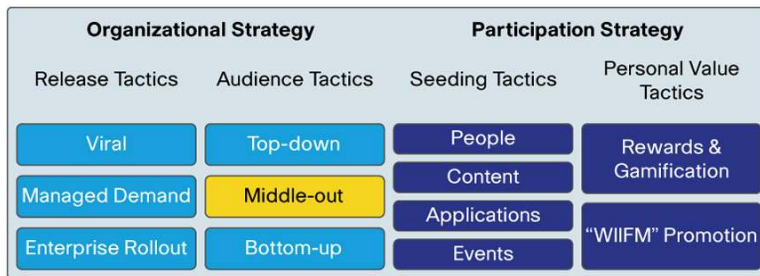
While enterprises deploying a collaboration platform typically focus on either the top-down approach (using executive role modeling) or the bottom-up approach (using grass roots efforts), it is also important to consider those groups of employees in the middle layer of the enterprise. Often these groups provide daily supervision and direction of work activities. Without their support, an enterprise can be left with a gap that lessens impact of everyday business activities. They are able to bridge both ends of an enterprise and can be primary influencers towards making social collaboration more directly involved in "real work" (e.g., CRM, ERP, etc.).

The individuals in this group will most likely be the people managers, mid-level managers, and project or team leads whose daily work puts them in a number of significant areas that can be used to influence employees to use the platform. Table 5 lists middle-out considerations.

Table 5. Middle-out Considerations

Consideration	Details
Team Management	There are a number of activities that occur between a people manager and the team being managed that could benefit from social collaboration. Examples include: • Team or individual goals - Posting a list of goals, assignments, latest progress, etc. • Team calendar - Listing of team meetings, upcoming out-of-office times for members, training, etc. • New employee onboarding - Storing all introductory documents, new-hire checklists, initial training, etc. • Capacity planning - Posting a schedule that shows the people on the team where they are spending their time The one downside is that this type of usage of social collaboration is that it engages subordinates only and not necessarily those groups above
Project Management	• Project items such as status updates, meeting minutes, and executive dashboard metrics can all be moved out of email an onto a community • Documents related to the project can also be stored in a community library • Not only will these approaches led users to the platform, but they can also encourage collaboration around those documents
Personal Communications	• There are many aspects here that are similar with the executive role modeling approach. The individuals in the group not only serve as role models to those below, but also can help lead the way for those above. • Redirecting personal communications from methods like email may encourage others to use the platform as well • Using the platform to provide dashboard status updates or other deliverables can direct people to the site and also encourage collaboration around those documents

Bottom-Up

Figure 7 highlights the bottom-up audience tactic within the Organizational Strategy umbrella.

Figure 7.   Bottom-Up Audience Tactic
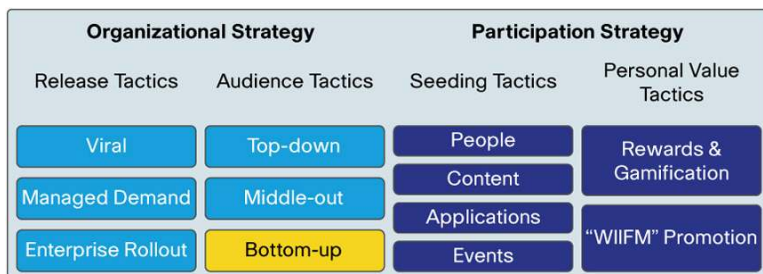
Grass roots initiatives have long been a staple of increasing awareness and involvement to a variety of causes throughout history. Grass roots initiatives start at the local level with the masses. The same type of community-building approaches used in prior knowledge management initiatives can be used in this situation as well. The push for using the platform is rooted with the everyday worker. The ultimate goal of this approach is bottom-up adoption - having the usage spread in a loosely-structured manner horizontally across various employee groups, sub teams, etc. Table 6 lists bottom-up considerations. Table 6 lists bottom-up considerations.

Table 6.   Bottom-Up Considerations

| Consideration	Details
Initial Groups	• One of the primary challenges is identifying where within the organization to start the initiative; what groups make most sense to be the forerunners • As discussed earlier with phased rollouts, a crucial consideration is selecting the right groups based on their characteristics. If the initiative is started with a group that is not willing, not ready, or not capable, then social collaboration adoption will have a high probability of failing from the start. Select the initial base wisely since those groups will serve as the foundation • The initial groups do not need to be connected. For example, there may be a small pocket within the IT team, another pocket within human resources, and another pocket within select project teams that are good pilot candidates. Each will require a degree of shepherding but can be tracked individually and may provide their own unique perspectives on what works and does not. If the initial focus is on three groups, one may flourish while the others may falter. The flourishing group will serve as the root as the initiative spreads and the others will serve as guidance as to what needs to change
Bottom-Up Versus Viral Approach	• The viral and bottom-up approaches share many similar characteristics • The most important shared characteristic is the need to have some leadership shown within those initial pockets of users. These leaders can be most effective if they exhibit three skillsets: 1) Technical competency to help them confidently explore the various areas of the platform; 2) Social collaboration savviness to help them determine the best ways to make use out of the platform; and 3) Influence of others to help pull people onboard and win them to social collaboration adoption. If no one rises up as a champion, then the initiative may stall with this particular approach

Breaking Down Participation Strategy

The following section explores in detail, specific approaches and considerations that need to be taken into account when addressing social collaboration adoption from the individual worker participation perspective.

People

Figure 8 highlights the people seeding tactic within the Participation Strategy umbrella.

Figure 8.   People Seeding Tactic
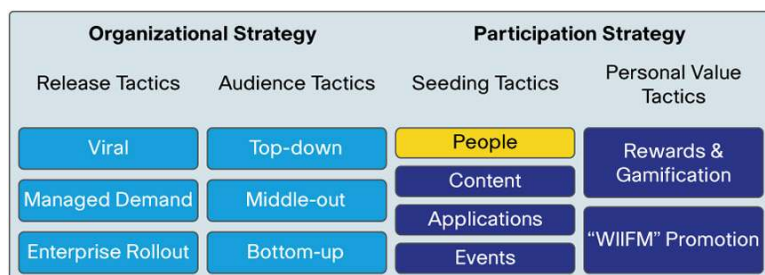
In terms of their ability to grasp the concepts of social collaboration, the employee population will most likely be quite heterogeneous. Their levels of openness to collaboration will vary; their levels of initial comfort and familiarity with social tools will vary. This is why the focus should initially be on those who are already comfortable and familiar with the concepts of social collaboration (through the use of a prior enterprise social tool, or, to a lesser extent, through their use of consumer tools such as Facebook, Twitter, LinkedIn, or WordPress blogs). By working with this initial group of users and having them serve as "champions" (also referred to as power-users), it creates the opportunity to get a significant portion of the population engaged and using the platform. Then, allow the champions' experiences to set an example for others in the organization who may be more skeptical about the value of social collaboration. Seeding the platform initially with these experts helps the enterprise make use of the knowledge of those that are already looking for the collaborative experience and generates initial momentum. Table 7 lists people considerations.

Table 7.   People Considerations

Consideration	Details
Selecting the Best "Champions"	• A common mistake is to simply ask the general user population who wants to be a champion. It is not just a matter of having people eager, but more importantly, the need is to have people with the right skillset to be effective in this role. • One approach is to handpick champions by evaluating who the active collaborators already are within the organization. This can be done by looking at use of any existing social collaboration tools that may be in use. • If there are no existing social collaboration tools in place, it may be helpful to identify who the active users are on the consumer tools mentioned above. This can be done through manual inspection, which may be a bit laborious, or by polling the user population on their use of those types of tools.
Point the Champions in the Correct Direction	• If the champion group is a small subset of overall users, there can be a lot of direct, focused messaging and training provided to them. • From a messaging perspective, it is important to be very prescriptive with what their role entails. They need to know who they should help, how they should help, and how they should be using the platform. • From a training perspective, a common approach is train-the-trainer - where champions are taught everything they would need to help others. This training would not only include a detailed review of functionality but also the best ways to provide guidance to the masses

Consideration	Details
"Tier-Zero" Support and the Self-Building Help Wiki	• While it may be normal to open up a trouble ticket with IT for issues related to email or one of the back-office systems, an enterprise collaboration platform by its nature is different and should be supported differently. One concept that often works well is establishing the champion group as "tier-zero" support. Before sending an end user through the formal process of opening up a trouble ticket and contacting the help desk, they could instead take the opportunity to reach out to the champions for support. • A self-help community can be created within the platform itself that would allow end users to posts questions and non-urgent issues. Champions would then be instructed to patrol that community as their time permits and respond accordingly. • This approach not only takes advantage of the collective knowledge of the workforce, but it also results in a help wiki that is built automatically. Unlike a traditional trouble ticketing system, where only the submitter can see the solution to their issue, this approach would keep everything in the open and continually growing so that other users can benefit from previously answered questions and solved issues.

Content

Figure 9 highlights the content seeding tactic within the Participation Strategy umbrella.

Figure 9. Content Seeding Tactic
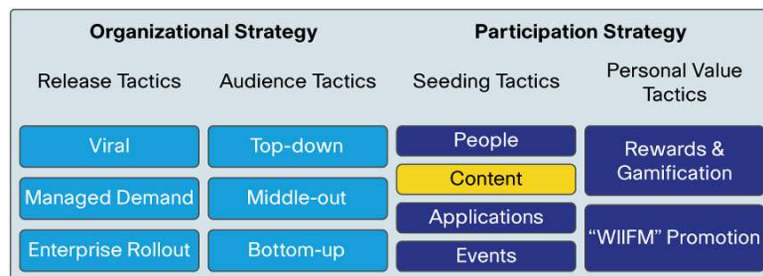
One reason enterprises often see a low adoption rate is that there is no clear reason for the users to use the platform. One of the more extreme approaches that can be very successful is utilizing a content embargo that seeds initial content on the platform. This means taking content that users need for their job, removing it from its current location, and migrating it into the platform. Once that is done, if that piece of content is needed, users will have no other choice but to use the platform.

While this may frustrate users initially because it disrupts their current method of accessing information, it is a definite way to increasing usage of the platform. But like all of these approaches, it needs to be planned out. There can be two types of content embargoes - existing content and ongoing, new content. Table 8 highlights some potential ideas on how seeding content can be utilized.

**Table 8.** Content Considerations

Sample Approaches	Details
Shared Folder Content	• Oftentimes, enterprises have a wealth of content (individual files and documents) that may exist in shared folders, shared drives, or other common location. • Moving that content into the platform will not only reduce the hardware infrastructure required to maintain those shared drives, but that content can now be socially enabled. It will be taggable and much easier to locate since it will be wrapped in the social context of the site. • This would typically be done as part of a one-time migration where a switch would occur at the time of launch.
Web Content and Functionality	• Whenever a new site or application is rolled out, users often complain about having yet another site they need to go to. Part of the benefit of an enterprise social collaboration platform is that it does not just offer social collaboration functionality; if the tool is enterprise-ready like Cisco WebEx Social, then it can play a dual role as both a social collaboration tool and an enterprise portal. • Enterprise portals originated with the proposed benefit of bringing all of an organization's tools, content, etc. under a single umbrella - a place to unify the disparate tools. This concept can still hold with enterprise collaboration portals by porting over various web content, presenting it within context of the social platform, or by creating customized portlets with a new user interface.

Sample Approaches	Details
Email Attachments	• While the top two items mentioned fall into the category of existing content that requires a migration or cutover, the email attachment approach is one directed at the individual level. Because of that, it's more difficult to govern. You will have to rely upon champions and other advocates to employ this method to encourage users to visit the site. • Rather than add an attachment to an email, the user would upload the content to the social platform and provide a link or otherwise direct users to that file. For example, instead of emailing meeting minutes, a project manager would instead upload those notes to a project community or related post and direct users to that instead. • The main benefit with this process is that the collaboration around those documents can occur on a platform that by its nature supports social interaction. Email has its limitations here - the discussions can be fragmented over multiple threads with varying distribution lists. When it is uploaded to the site, the discussion on the document can be preserved for anyone to see. The owner can also have the ability to control permissions centrally, whereas email can spread to unintended recipients. • This also has the added benefit of saving storage space. Rather transporting files over email which can weigh on the network, you can point users to the same link.

Applications

Figure 10 highlights the applications seeding tactic within the Participation Strategy umbrella.

Figure 10.   Applications Seeding Tactic
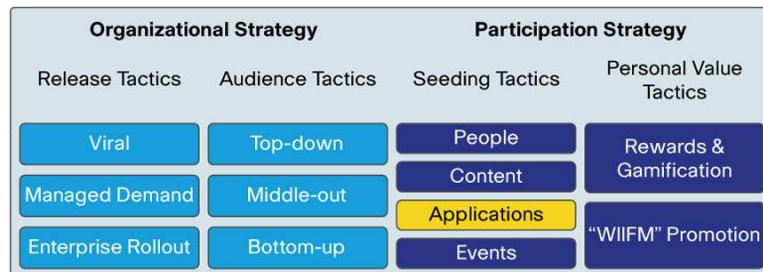
Collaboration platforms can serve a dual role in the enterprise as both a social collaboration platform and a dashboard to pull in non-social applications and content across the enterprise. From a social collaboration perspective, it is expected that they provide the core, social functionality that is typically expected on that type of platform. This would include blogs, wikis, posts, discussion forums, etc. From a dashboard perspective, it is more about creating the "single pane of glass" in which to frame the disparate downstream applications and other web applications. By properly addressing these two angles of applications, the platform can provide much more incentive for use. Table 9 lists application considerations.

**Table 9.**   Applications Considerations

Consideration	Details
Asynchronous Collaboration	• Asynchronous collaboration is the ability of individuals to collaborate at their own convenience. • Email is an example of asynchronous collaboration. The message is sent and then the recipient replies back as time permits. • From a social collaboration perspective, there a few asynchronous applications that should be a part of the platform, as mentioned above. They include blogs, wikis, posts, discussion forums, etc. • These core social applications can provide the base for brining users into the platform.
Synchronous Collaboration	• Synchronous collaboration is the ability of individuals to collaborate real time. • Having both asynchronous and synchronous applications allows for collaboration escalation. For lesser priority or urgency items, asynchronous, or offline may be fine. But as urgency increases, having the ability to escalate that to synchronous collaboration can be critical. • Examples of synchronous collaboration include click-to-call, click-to-IM, and click-to-meet (online web meetings).

Consideration	Details
Other Critical Social Applications	• Expertise location is the ability to search for experts, view profiles, or search for individuals based on self-defined tags for attributes such as areas of expertise, interests, etc. Typical corporate directories contain only contact information and organization information whereas a social collaboration platform can extend information to include those additional attributes that will help facilitate finding individuals with a specific expertise. • Ideation is the ability to brainstorm and collaborate on new ideas, vote and promote the best ones, and more. This is at the core of innovation, which many experts consider to be a foundational element of social collaboration (along with productivity and efficiency gains).
"Single Pane of Glass"	• A social platform can benefit from pulling downstream applications and content into a dashboard even if those applications and content are not directly social. • By pulling in back-office applications (time and expense applications, payroll applications, human resources applications, legacy self-help applications, etc.) and presenting them within the context of the social platform can create a "single pane of glass." This was an original value proposition for enterprise portals: users no longer need to go to individual, disparate applications. Instead, everything can be housed under a single umbrella to result in increased end-user efficiency. • The other opportunity that this creates is the ability to improve the usability of those legacy applications. This could provide even more incentive to use the platform. Instead of interfacing with the outdated, unfriendly user interfaces of certain legacy applications, having a user interface re-designed and its flow enhanced could improve end-user satisfaction.
"App Store"	• When the first Apple iPhone was released, it came with approximately 15 applications pre-loaded on the phone. While that was enough to gain early success, it was not until a year later, when Apple introduced the App Store that the adoption of the device increased dramatically. The App Store created the development ecosystem that allowed Apple to exponentially increase the different things that could be done with an iPhone. • A parallel can be made with social platforms. The more apps that are available, the more potential there is for individual users to find value. And do not just focus on what is available out of the box, but also what third-party add-ons apps may exist.

Events

Figure 11 highlights the events seeding tactic within the Participation Strategy umbrella.

Figure 11. Events Seeding Tactic
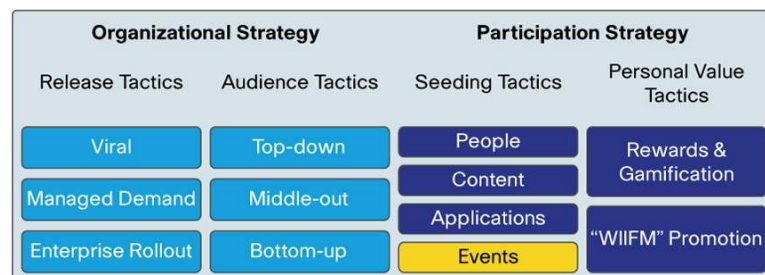
In addition to seeding the platform with people, content, and applications, hosting virtual events on the collaboration platform is another way to increase utilization. Similar to the content embargo, if this is the only place an employee can attend a particular event, then the end-user has no choice but to use the platform. It is crucial to make the end-user's experience on is the platform positive so that after the event, usage will continue. These approaches are largely dependent upon the functional capabilities of the technology. Table 10 lists events considerations.

Table 10. Events Considerations

Consideration	Details
Facilitator Role	• Any virtual event is going to need a facilitator to ensure all the proper content is in place, that access and permissions are appropriately set, and that communications have been sent. • The facilitator does not necessarily need to be the one creating all of the content, but that person should work closely with the content creators and presenters. • The facilitator would be responsible for providing direction on how to use the platform for the particular event.

Consideration	Details
"Tweet Chats"	• Twitter has popularized the use of hashtags, including using them during various conferences and events, where specific hashtags are promoted (e.g. #e2conf for the Enterprise 2.0 conference, #cl12 for the 2012 Cisco Live conference)
	• This allows participants to discuss the particular event so long as they stamp their comments with the appropriate hashtag.
	• Through filtering of the activity stream, it can become a live chat around the topics of the event.
	• Some people may wonder why event facilitators do not use a chat room instead. A chat room falls short on a couple levels. One is data persistence -in most cases, the chat will be lost once the window is shut down and if it is saved, it is saved locally by the user. If it is done through micro-posts or Tweets on a collaboration platform, then it is retrievable by anyone at anytime for future reference.
Live Versus Offline	• When people think about events, they typically think of a live, real-time activity.
	• Many collaboration platforms lend themselves to support offline events as well.
	• An example may be annual insurance elections, where a community can be set up with the appropriate areas for all the various content and information that might be needed. Discussion forums can be established for people to ask questions or provide commentary.
	• An added benefit can be that instead of just posting content, the collaboration platform will allow users to interact around that content. This functionality can turn it into a socially-enabled event.

Rewards and Gamification

Figure 12 highlights the results and gamification personal value tactic within the Participation Strategy umbrella.

Figure 12.   Rewards and Gamification Personal Value Tactic

At the core of the entire adoption conversation lays the basic tenants of human behavior. What causes people to do certain things? What keeps people engaged in an activity? In the context of social collaboration, these questions can become complex to answer, but ignoring them may be ignoring a major facet of what can influence users to adopt the platform.

There are two schools of thought when it comes to gamification. Some believe that it is more novelty than an actual strategy since there is nothing that gamification does directly to improve productivity and efficiency. However, others point out that the indirect benefits of gamification cannot be argued. Even if it motivates users to engage on the pretense of being rewarded or recognized, it still increases usage. As with events, rewards and gaming approaches are largely dependent upon the functional capabilities of the technology. Table 11 lists rewards and gamification considerations.

Table 11.   Rewards and Gamification Considerations

Consideration	Details
Badges	• Badges are a concept used very much in the gaming world and have spilled over into enterprise social software, building upon the same concept that users want to attain rewards and acknowledgement of their activity.
	• Badges can be given for performing certain activities, such as uploading a document, recording a video, replying to a post, creating a community, etc. For example, one badge might be given for creating 10 blogs. Once a user has done that, they can display the badge for all to see in their profile.
	• Badges can be earned multiple times. So in the example above, the initial badge was attained with the creation of the tenth blog. Once that user creates their twentieth blog, they would receive a second level of that same badge. It can be a counter that shows how many times that particular badge was earned, such as having bronze, silver,

Consideration	Details
	gold, or platinum versions of the badge.
Reputation Levels	• Simply being active on the platform - creating content or commenting on content - does not necessarily mean it is helpful to others. While a user's level of activity can show the extent of usage, it does not give insight into the relevance or helpfulness of content, comments, etc.
	• Reputation levels are created from other users' "likes," or ratings of posts, documents, and comments. It is the users themselves calling out what they are finding to be most helpful.
	• A gauge of respect and knowledge, reputation levels can foster a sense of pride as they are attained. They have the added benefit of pointing users to the most helpful and knowledgeable users. So when it comes to soliciting feedback, it is easy to focus on the replies from those with a higher reputation.
Leaderboards	• On an enterprise-wide platform, it can be quite satisfying and personally rewarding for users to see their name listed on top of leaderboards related to the site - especially when they know that everyone else throughout the organization can see those same names.
	• A common leaderboard that many collaboration platforms have is "Top Contributors." This leaderboard tends to rank users who have uploaded the most documents, created the most posts, etc.
	• Multiple timeframe segmentations help even more. If the only leaderboard is for "all-time" contributors, then any new users will not have much of a chance to enter into the list. It is therefore, beneficial to post leaderboards for the month or even down to the week.
	• Management should recognize those on the leaderboard. The theme of recognition is threaded through all of these ideas. It is not just a matter of being on the leaderboard: it is that others in the organization recognize and acknowledge that accomplishment.
Contests	• Contests are another way to increase usage by users hoping to gain recognition, without being constrained by the platform's functionality.
	• Two examples that focus on users understanding the customization and extensibility aspects of the platform are "Best My Profile Layout" and "Best Community Layout." Enticing the user base to be creative in how they customize their own spaces or a community space will also have the added benefit of giving others ideas of what they can do. The more people understand what they can do, the more they will be able to do. But not everything can be absorbed or addressed during training. There should be ongoing learning so that ideas spread across the users. Contests can enable that momentum.
	• Another effective contest example is the "Best Use of Social Collaboration." This may be even more enlightening and helpful to other users because not only can they see what the platform can do, but they also see real ways others are using it, which can lead them to build on existing ideas.

"What's in It for Me?" (WIIFM) Promotion

Figure 13 highlights the WIIFM personal value tactic within the Participation Strategy umbrella.

Figure 13. WIIFM Personal Value Tactic

One of the biggest factors that can inhibit adoption is that users do not understand why they should use the platform. This is not about training and understanding the functionality. This is about the how well users understand how using the platform will make their job easier, save them time, increase their efficiency, increase their productivity. The issue can also be termed the "What's in it for me?" factor, or WIIFM.

WIIFM is closely related to identifying use cases for the platform - but takes the conversation one step further. Use cases outline the steps various users would take to complete a task or process and what role the platform would play. Use case will tell users what the platform does. WIIFM answers the question of why users should adopt the platform. Together with the use cases, WIIFM creates the most compelling argument for users to adopt. Table 12 lists WIIFM promotion considerations.

Table 12. WIIFM Promotion Considerations

Consideration	Details
Use Case Identification	• It will not be possible to understand the value component of adoption of the platform if it is not clear how the platform will be used. This begins with use cases. • When identifying use cases, it is important to also identify the various sub-groups within the organization because each group may have different needs or collaboration challenges and thus, different use cases. • Make sure to tie the uses cases back to some component of value or some challenge that needs to be addressed. A big mistake that many people make is pushing users to do something on the platform because the functionality supports it. If using the platform does not make their job easier, then pushing users to use it can have an adverse affect on adoption.
Business Value Identification	• Once it is clear how the platform will be used, the business value and WIIFM statements can be constructed. • These should be clear and direct. A sample statement would read something like, "You will be able to do X task 30 minutes faster than without the social collaboration platform because of a, b, and c."
WIIFM-Based Training	• There can be many different approaches to training and one minor mistake is to focus solely on the functionality. • The training should wrap the "how to" functionality discussion within the context of why users should adopt - talking through how to use that functionality to meet the use cases and how that will make a job easier. • Continual reinforcement around how certain features or activities will make a user's job easier is vital. Continual reinforcement will emphasize the point that they should be using the tool and there is direct benefit.
Marketing Promotions	• While training is one good platform for conveying the value for adoption, it should not be the only vehicle. • There should be an adoption team in place that collects user feedback (either anecdotally, through formal surveys, etc.). Part of this feedback should include the successes that individual users or teams have experienced. • As with the managed-demand approach, these successes should be publicized across the enterprise.

Conclusion

When referring to enterprise social software, it is often said that the technology is the easy part. Anyone who has taken part in a social software rollout can attest to that. The real challenges occur after the hardware and software are installed - and the majority of those challenges center around user adoption.

As this white paper has shown, there are a number of different approaches that can be taken and must be evaluated when it comes to planning out a social collaboration adoption strategy. The art lies within the execution, monitoring, and continued iteration.

Adoption is a major component of the social collaboration delivery methodology of the Cisco Social Collaboration Services team and of many Cisco partners who work with Cisco on social collaboration. Sharing our expertise and findings gained during numerous social collaboration initiatives can help ensure your organization is best prepared to embrace this next wave of collaboration.

For More Information

To learn more about the Cisco Social Collaboration Services team please visit http://www.cisco.com/go/webexsocial.

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