Enterprise Social Software: A Comprehensive Approach to Collaboration

White Paper

Introduction

Enterprise social software (ESS) is a new way to work and collaborate. It brings together multiple collaboration technologies into a single, cohesive user experience. ESS platforms can provide numerous benefits, including:

- Breaking down organizational barriers and fostering cross-functional connections
- Facilitating crowdsourcing and promoting innovation
- Connecting to experts as well as uniting individuals and teams with a common focus
- Reducing latency and inefficiency in business processes
- Establishing a sense of social community

The technical considerations of deploying ESS platforms pale in comparison to the organizational change these platforms bring. This type of technology has far-reaching effects on how business is conducted, people within the organization interact, and decisions (from the operational to the strategic) are made.

A technology with such expansive impact requires a comprehensive analysis approach. This white paper illustrates the unique and varied considerations and disciplines that organizations must address to help ensure success when employing ESS platforms. Beyond the standard suite of IT deployment considerations is a set of critical disciplines, which is essential to any successful ESS deployment:

- Roadmap development
- Program governance
- Data governance
- User adoption
- Process impact
- Business integration

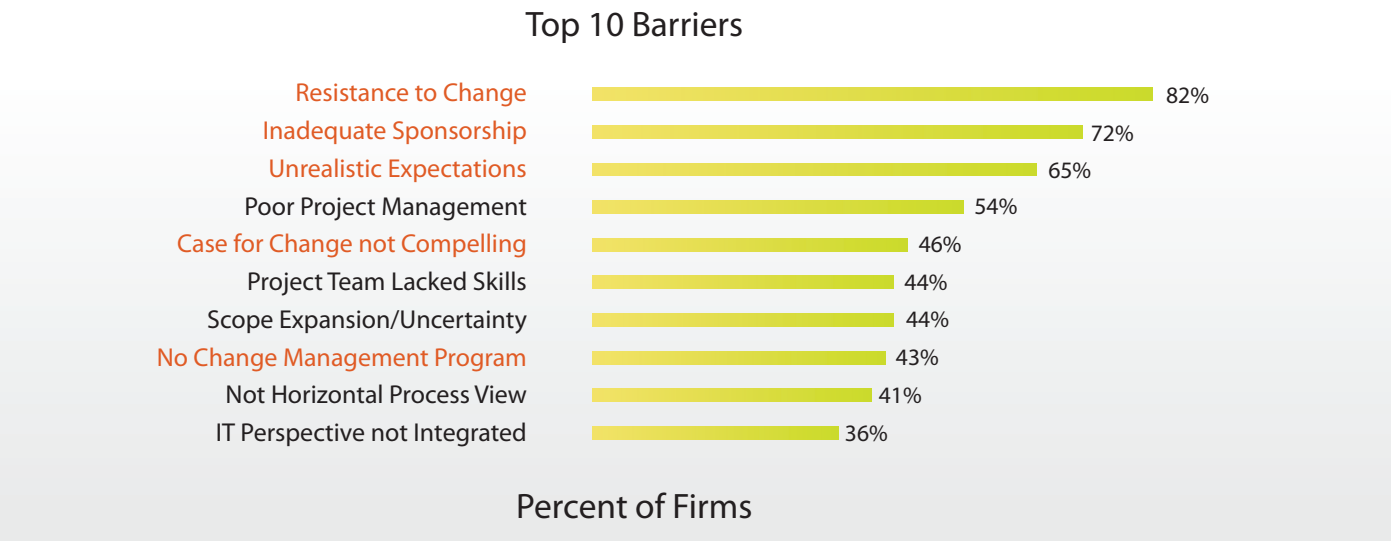
Cisco Case Study: Integrated Workforce Experience

Cisco's large-scale strategic deployment of the ESS platform, Integrated Workforce Experience (IWE), built on the Cisco® WebEx® Social (formerly Cisco Quad) product (www.cisco.com/go/webexsocial) serves as a case study illustrating how each discipline was critical to its successful deployment. This experience shaped Cisco Advanced Services' methodology and competencies, helping to ensure that organizations choosing WebEx Social have the appropriate planning to achieve maximum organizational advantage with their ESS program.

Challenges to Achieving Success with Enterprise Social Software

Enabling rich, fluid, enterprise-wide collaboration is not only a business objective, it has become imperative to remain competitive, attract a new generation of talent, and take the next step in productivity. Because enterprise-wide collaboration is more about transformation than technology, it is important to understand why change programs often fail. As Figure 1 shows, the majority of issues that organizations face are cultural and process-centric (highlighted in red).

Figure 1. Top 10 Change Management Barriers



Source: Survey of CEOs Regarding Business Transformation: Barriers to Success, Conference Board, Copyright © EquaTerra 2007. All rights are reserved.

A 2009 Gartner report[1] projected that 50 percent of business-led ESS initiatives and 70 percent of IT-driven initiatives will fail. To avoid these risks, organizations must plan prior to embarking on an ESS journey, so that they are prepared to address roadblocks such as:

- **Lack of long-term vision:** ESS rollouts require multiple phases of functionality and user deployment that need up-front planning.
- **Initial scope too broad:** Focused business needs and requirements define better, more attainable goals. Do not attempt to "boil the ocean."
- **Lack of executive support:** Grassroots efforts can only go so far. Executive support is necessary to push the agenda.
- **"Stuck" in one department:** ESS yields increased value when rolled out across an enterprise. There is limited impact when only one group uses ESS.
- **Too little structure:** Not all enterprises are self-organizing or possess the social software expertise to succeed without explicit guidance and direction.
- **Too much structure:** Too many rules might stifle the innovation and serendipity that are heralded as key benefits of ESS.
- **Security concerns:** A proper security plan and approach mitigate risk associated with the openness of ESS.
- **Scale:** Technical issues around scaling ESS across the enterprise should be addressed to maximize benefits.

- **Not understanding the tools:** Poor usability, instruction, and/or training will make users reluctant to interact with the system.
- **Lack of champions/change agents:** Advocates help get others excited about the platform, provide tips and tricks, and lead the initial content-seeding.
- **Limited process integration:** People require impetus to use the tool. Integration with important business processes makes things easier for users and gives them a reason to use ESS.
- **Unprepared for process impacts:** Organizations should plan for process impacts before ESS deployment.
- **Low usage/desire:** ESS success depends on users and content. If no one uses the site, it will stagnate.
- **Lack of "stickiness":** The more reason there is to be in the tool, the more people will use the tool. Don't make it a secondary place to visit–make it the primary destination.

With proper planning and attention, organizations can address these roadblocks using the six vital considerations previously mentioned: roadmap development, program governance, data governance, user adoption, process impact, and business integration. The following sections examine each one of these areas in more detail.

Roadmap Definition

Given the scale and scope of ESS, as well as the impact it can have on culture, process, and technology, a carefully designed roadmap is essential. It is critical that organizations consider the impact these technologies will have on their business and process workflows. Organizations must evaluate their culture, process, and technology to determine how to phase in the ESS platform's collaboration features and how to tailor them to the various groups within the organization. Table 1 shows the three primary inputs into the roadmap.

Table 1. Inputs into the Roadmap

Roadmap Input	Details
Collaboration objectives and goals	• Understand short- and long-term objectives • Ensure the objectives and goals discussion occurs independently of the technology • Define objectives and goals to create a prioritized plan
User groups and user needs	• Be all-inclusive within the defined scope (do not focus on one department) • Capture pain points, use cases, and requirements from each group since they might differ • Consider the deployment timing of each group; the "all at once" approach of bringing everyone into the system simultaneously might not be optimal • Revisit the groups as the solution is developed (do not capture needs early on and then wait until after deployment to check back) • Prioritize: some groups will benefit more than others based on their potential use cases
Tools and functionality	• Understand the ESS tool's out-of-box functionality • Be aware of how the ESS tool can be extended • Be aware of how the ESS tool can integrate with other systems and applications within the organization • Identify and prioritize custom functionality that would be needed

The roadmap needs to be a living document that is continually revisited and realigned as priorities and other variables change.

Cisco Case Study: Integrated Workforce Experience (continued)

Integrated Workforce Experience (IWE) developed, and continues to maintain, a detailed roadmap that projects a rolling window of 12 months and is updated quarterly. The roadmap, which was published for all Cisco employees, provided the following:

- Release timelines for various capabilities and associated technologies
- Callouts of both new functionality and systems being decommissioned
- Breakdown of features into four main tracks: Video Communication and Collaboration, Web 2.0 Tools and Technologies, Personalization and Relevancy, and Applications and Services
- A schedule showing which user communities would be added each month

Program Governance

The scope of ESS requires governance involvement of the entire enterprise—across all people, processes, and technologies. Although IT plays a major part, ESS deployment cannot simply be an IT-driven initiative. Table 2 highlights six essential areas of focus within program governance.

Table 2. Governance Areas of Focus

Area	Details
ESS strategy and vision	• Create statement of purpose for Enterprise 2.0 • Facilitate creation of multiphase roadmap
Governance framework	• Provide programs oversight • Involve all people and groups (LOBs, IT, process SMEs, and so on)
ESS usage policies	• Create policies, procedures, code of ethics, and IT usage guidelines • Police by minimizing abuse to maximize derived value
ESS guiding principles	• Provide guidelines and basic structure (for example, when to use a blog vs. wiki vs. post) • Create publishing rules, content-tagging guidance, and templates
Workforce preparation	• Raise awareness • Set boundaries and minimize confusion • Foster collaboration
Technology architecture	• Provide ESS tool setup, configurations, and enhancements • Create IT standards (branding, GUI, and so on) • Establish network rights/privileges, authentication, and personalization • Create reporting/measurement

Cisco Case Study: Integrated Workforce Experience (continued)

IWE uses a multilevel "federated model" for governance that spans the enterprise. This type of model allows stakeholder organizations to have the freedom to make their own decisions based on their specific business needs, but within the bounds a higher-level policy set forth by the IWE statement of governance. Within IWE, the governance, rules, and policies that apply depend on where you are collaborating within IWE. "Federal" (IWE-wide) level governance is pervasive (always applicable), however, additional controls at the "state" or "local" level are the choice of leadership of those structures and might differ among organizations or communities. As we move toward a Web 2.0–enabled collaboration environment, the goal and expectation are that governance, control, and decision making move from being centralized toward the end users.

A Cisco commissioned study from 2010[2] highlights the current lack of focus on IT governance in the process of adopting and implementing these technologies. Findings include:

- Only 1 in 7 of the participants noted a formal process associated with adopting these tools for business purposes, showing the risks are either overlooked or not well understood.
- Only 1 in 5 participants identified any policies in place concerning the use of ESS. These organizations have yet to define who "owns" social software strategies.
- Companies struggle with policy creation. Copying an established governance process from other, more structured areas often does not work for social software.
- Only 1 in 10 respondents noted direct IT involvement in social software initiatives.

Data Governance

Another type of governance that is especially crucial when it comes to ESS is data governance, as it deals specifically with the regulation of ESS users, content, and communities. Organizations must decide where in the spectrum they want their governance approach for managing their users, content, and communities to fall. This varies based on culture, business, willingness to share, and willingness to use new technologies. The spectrum runs from the unstructured to the structured approach. (See Figure 2.)

Figure 2. Spectrum of Data Governance Approaches

Table 3 highlights the caveats of both approaches.

Table 3. Caveats of Governance Approaches

Approach	Caveats
Unstructured	• Content duplication and redundant community creation • Users each develop their own approaches for using the system • Users might view the ESS platform as an encumbrance instead of a productivity tool and choose not to use it, reverting back to "the old way of doing things" (for example, email) • Little guidance for users who might not be sure what to do
Structured	• Structure and mandates go against the "self-organizing" principle, which many believe is core to ESS • Too much control can stifle organic growth • Heavy moderation might "scare" people from using the system • Reduces the opportunities for serendipity, which is what happens when putting a random mix of people together to see what unfolds

Cisco Case Study: Integrated Workforce Experience (continued)

To provide initial structure and guidelines, IWE started out closer to the structured end. All initial communities needed to be manually provisioned, and a "provisioning scorecard" had to be filled out for each request, with sponsorship, success criteria, use cases, community size, and so on. However, as we move toward a Web 2.0–enabled collaboration environment, the goal is that governance, control, and decision making move from being centralized (structured) to the end users (unstructured). The IWE leads continually monitor the "balance" of empowerment (self-governance versus central control) to help ensure they are at the appropriate place in the spectrum.

User Adoption

Because content and user interaction are vital to ESS success, user adoption should be a critical aspect of any organization's ESS initiative. There are various areas within an adoption plan that need attention. Every organization requires different levels of focus in each area based upon factors including their corporate culture, willingness to change, willingness to accept new ideas, existing training processes, existing technology rollout, and adoption processes. Table 4 outlines the primary areas.

Table 4. User Adoption Areas and Activities

Area	Activities
Readiness	• Understand user context and culture • Identify existing tools and technologies, training approaches, adoption approaches, executive communication approaches, and organizational layout • Identify business goals, roles/stakeholders, the solution to be adopted, and so on
Strategy and promotion	• Create adoption roadmap • Create communication plan: Lay out messages that must be sent out during the process and determine who will send them • Create incentive plan: Identify options for recognizing and rewarding users, usage scoring system, and platform champions to serve as subject matter experts
Content and process	• Create a prioritized list of important business processes where ESS might help • Document "as-is" processes: Identify affected users and processes and understand current approach • Document "to-be" processes: Highlight how users can change the way they work by weaving in collaboration tools • Advertise wins by documenting and promoting process efficiencies
Training and resources	• Understand and evaluate existing training approaches • Review how to use the tools and why they should be used • Establish and reward platform champions from within the user population • Conduct "ask-the-expert" training and roundtable discussions
Benchmarking and metrics	• Assess adoption progress and identify areas of improvement • Identify and capture software metrics • Assess customer satisfaction and productivity gains • Publish executive dashboards to demonstrate progress
Innovation	• Review usage patterns and ongoing customer satisfaction • Continuously adjust each focus area as appropriate

Cisco Case Study: Integrated Workforce Experience (continued)

The ongoing change management effort addressed several areas, including setting vision, addressing culture, addressing communication, and enabling the workforce. IWE used a dedicated change management team to promote these adoption/change management items, with a goal of making sure that change occurs and persists. Although there are many facets of adoption/change management, the IWE team learned that the primary step is "getting the vision right," where key messaging is established to facilitate successful change.

Process Impact

ESS deployments might impact business processes, and, when properly applied, they can help enable greater levels of business performance, transforming the ESS platform into a performance platform. The first step is to identify the "as-is" processes that might be affected. After those core process flows are documented, organizations should understand the challenges and determine how the ESS platform can alleviate them. This evaluation of how the ESS platform can be woven into the process requires subject matter experts in the flow as well as functionality experts for the ESS platform to document the future process flow. ESS can help business processes in many ways, including boosting productivity, improving efficiency, increasing innovation, shortening time to market, enhancing quality, and scaling the business. (See Table 5.)

Table 5. Primary ESS Integration Areas

Integration Area	Examples
New employee onboarding	One-stop shop for employees to find onboarding materials, post questions, and find experts to help their setup
Learning and training	Training communities that aggregate relevant material and allow users to "click to collaborate" with training resources
Best practices capture	Community to store best practices, aggregate content, and provide a wiki for any user to update when appropriate
Sales pipeline management	Access control to restrict viewing of sensitive sales data and to enable discussion of sales in a specific community
Executive dashboarding	All metrics in one consolidated place; users instantly "click to collaborate" with others to respond
Employee self-service	One-stop shop to applications and content integrated with the ESS platform
Product development	Innovation through ideation tools, voting/promoting top ideas, and forum-based commenting/discussions
Mobile workforce	Full click-to-collaboration functionality for employees who are not onsite, allowing them to keep in contact with others
Document collaboration	Incorporation of workflow for reviewing, commenting, and versioning documents
Project management	Status tracking, issue tracking, and project document library within project-specific communities

Cisco Case Study: Integrated Workforce Experience (continued)

"Cisco on Cisco" showcases the success of Cisco products as a result of internal deployments. The Cisco on Cisco process was to identify, capture, and disseminate stories to internal groups in a timely manner to address RFPs and other customer meetings. Prior to IWE, there was too much information in multiple places and versioning issues. The goal was to reduce time required to produce content and prepare for customer meetings, increase freshness and richness of information, and minimize cost to product information. The IWE team documented the to-be process, highlighting the role of ESS by creating a Cisco on Cisco community that provided the following: a one-stop shop for Cisco on Cisco content, document collaboration within the community, corralling of disparate groups to that single community, versioning of documents, and community-specific content add/update alerts.

Business Integration

Significant additional value comes from integrating ESS platforms with other enterprise capabilities, data, and/or processes. For example, integrating an ESS platform with these other areas might:

- Establish the ESS platform as the center of work
- Increase ESS "stickiness"
- Improve business value and relevancy of the platform
- Reinforce the idea that the ESS tool is a "collaboration platform"

Table 6 highlights primary integration areas.

Table 6. Primary ESS Integration Areas

Integration Area	Examples
Employee management	• Corporate directory information • HR employee data • Expertise information (both tacit and implicit)
Line-of-business capabilities	• Customer relationship management (CRM) • Finance • Human resources
External collaboration	• Collaboration with external partners • Collaboration with customers
Collaboration tools	• Telephony • Video • Instant messaging • Online meetings
Enterprise content management	• Connecting to separate content stores
Enterprise search	• Searching outside the ESS tool

Cisco Case Study: Integrated Workforce Experience (continued)

IWE created a catalog of more than 100 capabilities that various teams needed to integrate into WebEx Social. The IWE team prioritized test capabilities and included them as part of the ongoing roadmap. One of the essential integrations was Cisco's "Global Platform for Sales" (GPS). GPS capabilities were identified, and the following information was captured: description of the capability, to what community it should belong, visibility rules, and rollout plan. IWE then addressed the technical considerations to weave GPS into IWE's WebEx Social platform, which helped provide the desired collaborative benefits.

IWE also focused on identifying capabilities from the following areas:

- HR services (comp, staffing, benefits, learning, HR support)
- Finance services (payroll, stock, 401k, procurement)
- Workplace resources services (cafes, shipping, facilities)
- IT services (mobility, computing, network, IT support)

Conclusion

Rolling out an ESS platform requires unique considerations and focus in several areas outside of technology. There is no clear blueprint for success. Each organization needs a different balance of focus. Although deploying an ESS platform might not be easy, the potential benefits of reinventing the way people work are compelling. Cisco's cultural shift from command and control to collaboration is proof of the efficiencies that an ESS platform can yield.

To find out more about the benefits gained during the deployment of the Integrated Workforce Experience powered by Cisco WebEx Social, along with details behind each of the six disciplines, contact your local Cisco Services Account Manager or visit: www.cisco.com/go/webexsocial.

1 "Predicts 2010: Social Software Is an Enterprise Reality," Gartner, December 2009.

2 "Social Media: Cultivate Collaboration and Innovation" (2010), IESE Business School in Spain, Rochester Institute of Technology in the USA, and Henley Business School in the UK, April–September 2009.

