



Assessing Readiness for Social Business Software

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INTRODUCTION

Purpose

In this paper we define the factors that influence adoption of Social Business Software by organizations and how to interpret them. We discuss a set of factors related to people, processes, and technology that impact adoption of collaboration and “web 2.0” applications in the enterprise.

We will be emphasizing the “people” and the “processes” factors. We also discuss further a “self assessment framework” to help managers plan successful collaboration software initiatives.

Our proposed framework groups factors in two categories:

1. Enterprise level factors that go across the enterprise; these drive overall acceptance and adoption.
2. Process level factors that are more directly related to the particular department, function, or business process that is being addressed.

We’ll be describing how to interpret these factors under the assumption that they are being used in a self assessment by potential Social Business Software users as part of an organization’s overall collaboration planning process.

What we’ll be discussing here are based on our own hands-on sales, professional services, and support experience.

What is Collaboration?

First, let's define what we mean by "collaboration" in the context of an organization like a company, an association, or a government agency of some kind – an "enterprise." Our definition has two parts:

1. People working together to solve common problems
2. People sharing knowledge, expertise, and experience.
 - ▶ Sometimes in real-time
 - ▶ Sometimes via recorded content

Note that both parts of this definition start with "people" and that is why we call this Social Business Software.

Part 1 in our definition is that people are working together to accomplish some kind of shared goal or objective. Note that there may very well be some social- or friendship-associated aspects to this collaboration, but that's not the end goal of what we're talking about here. Our focus is on organizations getting work done.

Part 2 in our definition is that the sharing of "content" -- which we are calling here "knowledge, expertise, and experience" -- is at the core of collaboration. People are sharing information either in real time (say, via a voice-based or text-based messaging system) or they are creating, sharing, and accessing recorded content – say, documents, data files, and audio and video files.

It's important to note that we are addressing both real-time communication and communication around recorded knowledge in our definition. Our idea of collaboration does not revolve around older concepts of "knowledge management systems" that focused primarily on recorded knowledge. Collaboration has to occur at least partly in real time, and the tools you implement to support have to take that into account.

Why Collaborate?

People collaborate for lots of reasons. What it basically boils down to is that collaboration – working together – is a good way to solve problems by creating new solutions or by figuring out better or faster ways to do things.

We will discuss a list of what we've heard from current and prospective customers when we've talked with them about their "pain points."

Those are the types of things that can keep the organization from accomplishing its objectives. Some are related to the sharing of information, some to speeding things up, some to doing a better job of communicating, and some to the deficiencies of existing tools. Directly or indirectly, all of these are impacted by collaboration.

Starting Points

We're making several assumptions here that drive our approach. Let's call these our "starting points:"

1. IT needs to be involved, not just Business. We're a strong believer in the important role of IT even if the "spark plug" is outside IT. Even if the technical solution is remotely hosted, you'll need IT to be involved, especially when issues of security, support, and integration with other systems arise. And if you're talking about an internally hosted solution, there's no question IT needs to be involved.
2. Success depends on BOTH "top down" and "bottom up" initiatives. People at the top need to support the project, and people at the front lines need to be the adopters and the sources of the viral and word of mouth promotion that will drive the project forward. Both are important.
3. Modern collaboration software is NOT just "old wine in new bottles." Collaboration, content management, messaging, and social networking products have been around for decades. But never before have we seen the ease of use, power, scalability, and low cost of systems such as Jive in the "web 2.0" marketplace. This is not your father's client server, file-based technology.
4. Online business culture is changing and is not just a reflection of traditional corporate culture. Whether you like

it or not, the younger people coming into the work force today are changing how business is conducted. Things may not change overnight, but we believe there is an ongoing, fundamental shift in people's expectations about how they live, work, and communicate with others. It's becoming harder and harder to differentiate between personal and business relationships. Systems outside the enterprise are sometimes viewed as more powerful and friendlier than the systems that operate within the firewall.

5. At Jive we don't see that as a problem, we see it as an opportunity.

Why Collaborate Now?

Given that the problems we just discussed have always existed, why does it make sense now to focus on improved collaboration within the enterprise?

1. Tools are becoming cheaper and easier to use. This means that initial cost barriers to adoption are reduced and that initial training is easier.
2. Younger employees and the public expect more collaboration and communication. In some cases we are seeing that younger employees are generating their own applications and using publicly available platforms, such as Facebook, to support work related communications. We're also finding that customers are becoming more sophisticated when it comes to what they expect from corporate web sites.
3. Businesses are emphasizing agility and innovation to maintain competitiveness. Internally, especially within highly competitive industries, we're seeing greater attention being given to reducing time to market and to out-innovating the competition. Making it easier for people to collaborate across organizational silos addresses both of these areas.
4. Use of collaboration technology has moved beyond "early adopter" stage. Our own market assessments show us moving beyond "early adopter" tech-oriented companies to more mainstream industries. We are seeing that interest in collaboration and social networking is no longer limited to

software, computer, and "knowledge intensive" industries. It is a competitive driver across verticals.

5. Reduction of email in collaborative situations provides an immediate "low hanging fruit" justification. People are realizing that email based collaboration just doesn't work, especially when unstructured data and access to common content is needed. They're also seeing that shared directories and file management systems are only part of the solution.

Why a Self Assessment?

There are four reasons why you should perform a self assessment before selecting and implementing technology to enable collaboration systems.

1. It's part of the planning process. From what we've seen, planning the introduction of a collaboration application increases the likelihood of its use -- and its success.
2. It uncovers potential opportunities -- and issues. Once you start working through the various ways collaboration applications are used additional opportunities will be identified. At the same time, issues and problems may surface, some unexpected. It's best to know about these in advance so that you can plan accordingly.
3. It identifies business processes that may need to be changed when new technology is introduced. This is a "biggie." Making an application available behind a corporate firewall or on the corporate intranet may be the simplest part of the overall process. Collaboration by definition involves people working together, and this is going to impact -- and potentially change -- how they do their jobs currently. It will also help identify the people who need to be involved in the adoption process.
4. It helps clarify the role corporate culture plays in technology adoption. Anyone who follows the "enterprise 2.0" and "web 2.0" debates knows how often pundits point to "corporate culture" as a defining factor in corporate adoption of new collaboration and social networking tools. In this document we provide several suggestions on how to take "corporate culture" into account.

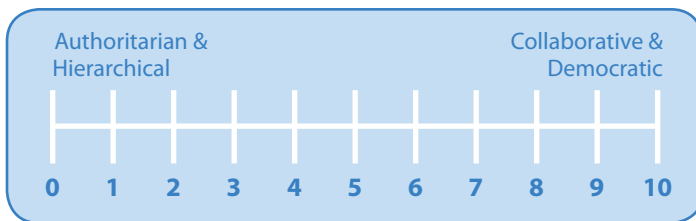
ASSESSMENT PART I: ENTERPRISE LEVEL ASSESSMENT

In Part I of the assessment, we look at six different “enterprise level assessment factors.” These provide an overall global view of your organization’s readiness for adopting Social Business Software. For each factor we’ll describe a “zero to ten” scale that lets you score your own organization in terms of its readiness for collaboration.

Keep in mind as we walk through these different factors and scores that our goal is to help understand the organization’s current state. This is not intended to be an assessment of the “goodness” or “badness” of the organization. In fact, as we discuss this scoring, you’ll see that a “low score” on a given assessment factor really means that your strategy for promoting the adoption of collaboration systems will be different from your strategy for promoting collaboration in a high scoring situation.

1. What is the Enterprise’s Management Approach?

Our first zero-to-ten enterprise level factor refers to the enterprise’s overall management approach.



The “zero point” on the left represents an organization that operates in an authoritarian and hierarchical fashion. The “10” on the right represents where management operates in a collaborative and democratic fashion.

Think about where your own organization fits. Again, this is not intended to be a “beauty contest.” We’re not making any value judgments. We are simply trying to understand the implications of your organization’s culture for implementing technology-enabled collaboration.

Low scores

Let’s consider low scores first. If you look thoughtfully and objectively at your organization and think it’s more “authoritarian and hierarchical” than “collaborative and democratic,” you’ll score your organization towards the left side of the scale. This has at least two implications.

First, you’re most likely going to have to convince top management of the time and cost savings from collaboration, e.g., time saved through reduction in email imposed delays in collaboration. Clearly time and cost savings are always important, but if your organization is at its heart not inclined towards the promotion of collaborative solutions, you’re going to have to justify based on something it already understands and appreciates.

Second, you’ll need to start with a focused and defined business process to make impacts clear and unambiguous. Don’t think enterprise wide in this regard; stay focused on a definable, measurable business process. (We’ll get into how to decide where to start in the second part of this assessment.)

We won’t pretend that justifying technology-enabled collaboration in a collaboration-averse organization is going to be easy. But we have seen many examples where very basic benefits of information sharing become clear in organizations that are managed in a traditional hierarchical fashion. The reason? People like to get their jobs done and in all likelihood they are already collaborating informally as happens in all organizations. You can take advantage of that.

High scores

Let’s turn though to the right hand of the scale. What happens if your organization scores high? There are at least three implications of higher scores on this scale.

First, the adoption process should be easier. That should translate into less time selling the concept to top management.

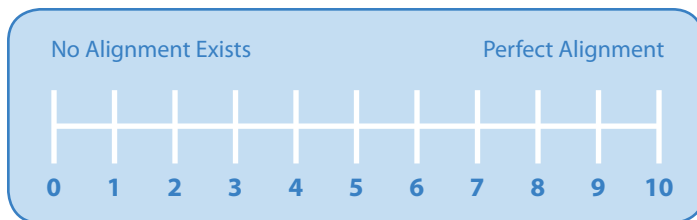
Second, you may have to do something about existing tools. Perhaps multiple older tools are already in use, tools that are less easy to use than what is available today. If that’s the case, you may find you need to address not only retraining issues, but you may also find pockets of management support for older toolsets based on justifications like, “but we already spent X thousands of dollars on that tool!” You may have to hit very hard the argument, “what difference does it make if

we spent X thousands of dollars on these older tools if they're expensive to maintain and hard to use?"

Third, you may find that when management does support a more collaborative approach in the enterprise, you can introduce more sophisticated tools and solutions earlier. For example, if management does support collaboration and the use of tools to support it, you may be able to introduce features such as content management, social bookmarking, and tagging earlier rather than later.

2. How Aligned is IT with the Enterprise's Business Strategy?

Our second zero-to-ten enterprise level factor refers to the enterprise's overall alignment between IT and the enterprise's business strategy. This is an important factor since it will impact management's receptivity to an enterprise wide technology initiative such as the implementation of collaboration software.



The "zero point" on the left represents an organization where little alignment exists between IT resources and the organization's overall business strategy. Examples of low alignment between IT and the business include things such as:

- ▶ No attempt to link IT budgets to strategic business objectives.
- ▶ Over-reliance on "rules of thumb" for setting IT budgets as a percent of revenue.
- ▶ Little or no involvement by IT management in overall corporate management and strategy.

On the other hand, if the IT department is aligned to the enterprise business strategy, the following may be true:

- ▶ IT has a place at the "management table."

- ▶ IT support of strategic business objectives is included in the enterprise's strategic planning process.
- ▶ Templates exist for justifying IT supported business initiatives.
- ▶ IT acts as an agent of change, often introducing new technologies that benefit the business.

Low scores

Let's consider low scores first. If there is little or no alignment, focus very specifically on time or cost reductions in specific processes. Show that having more people thinking on and solving a problem will speed up things or reduce process costs. Draw on examples of informal collaboration that already exist and extrapolate from these to justify broader benefits.

One strategy for reducing risk – and initial implementation costs – is to implement collaboration software via a remotely sourced solution. There may be some security and integration issues associated with this option, but with an appropriately selected target process this could be the fastest and cheapest way to demonstrate benefit to a skeptical management that isn't accustomed to thinking of IT as a strategic resource.

High scores

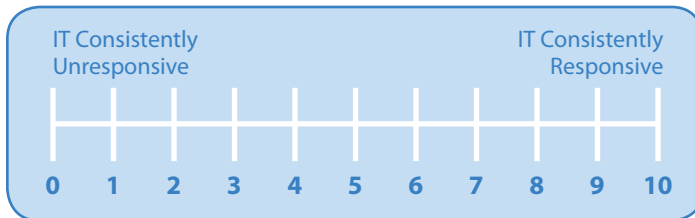
Let's turn though to the right hand of the scale. What happens if your organization scores high? There are at least two implications of higher scores on this "alignment" scale.

First, it should be easier to justify technology and business process changes. Management should be more receptive to IT's suggestions, especially when they are couched in benefits that link to the organization's business strategy. Plus, metrics and templates for relating technology investments to business benefits may already be available for re-use.

Second, even if you do have a good alignment between IT and the enterprise's strategic business objectives, you may still find that certain benefits, such as the relationship between collaboration and innovation, are difficult to quantify.

3. On a Day to Day Basis, How Responsive is IT to the Needs of the Business?

Our third factor refers to how responsive, on a day to day basis, the organization thinks IT is to its needs. This perception of IT, when broadly held, will impact how willing people in the organization are to see IT as a valuable partner.



The “zero point” on the left represents an organization where IT is viewed as consistently unresponsive. Examples of this include:

- ▶ People think that IT’s “backlog” is so big that making any new requests will be fruitless.
- ▶ IT’s unresponsiveness has driven individual users and departments to seek out their own technology support – including use of publicly or commercially available collaboration solutions, bypassing IT

On the other hand, if the IT department is viewed as “responsive,” the following may be true:

- ▶ Business users come to IT with requests and don’t try to “bypass” its services.
- ▶ Business users work with IT to develop and implement appropriate solutions.

Low scores

Let’s consider low scores first. One place to start with implementing technology-enabled collaboration, if people don’t view IT as responsive, is to focus first on areas where local non-IT solutions have already started to evolve. For example, have individuals or departments started to use Facebook groups to communicate with “user communities?”

Another reality is that leadership will need to come from business, not from IT, especially if IT’s credibility is low. If you

can’t find a “business champion” to support an IT-supplied collaboration solution, you may need to re-think your strategy.

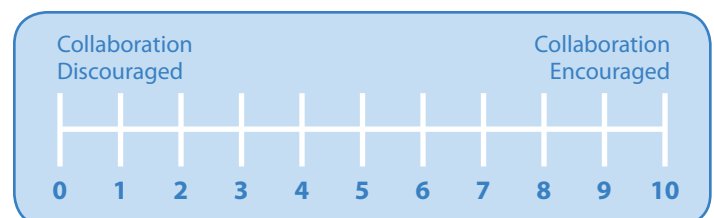
High scores

There are at least three implications of higher scores on this “responsiveness” scale.

1. It’s easier to justify both technology & process changes based on existing metrics. That’s good – this should speed the adoption process.
2. There may still be some difficulty capturing qualitative collaboration impacts, e.g., potential impacts on innovation. It may be that for qualitative impacts a “storytelling” approach will be more appropriate than a spreadsheet oriented quantification. Capturing user descriptions of impacts on video could be a very useful tool to use in promoting adoption later on.
3. Adoption process may be accelerated. This would be based on a good working relationship between business and IT. Usually this is good, especially when technology adoption becomes “viral” and expands through person-to-person demonstrations and word of mouth. Be careful, though, to make sure that the IT department can, in fact, keep up with user demand, especially if the collaboration solution you pursue does require an upgrade to hardware or software.

4. How Much Collaboration Occurs Within the Enterprise?

Our fourth factor refers to whether or not the enterprise already encourages collaboration among its workers. If it does, then adoption of technology-enabled software will be easier. If it doesn’t encourage collaboration, you need to find out why.



The “zero point” on the left represents an organization where collaboration is discouraged. Examples of this include:

- ▶ Talking with people in other departments is discouraged.
- ▶ Separate IT systems exist to support different departments, perhaps as the result of corporate acquisitions that have not been completely integrated.
- ▶ Different groups within the enterprise are “siloesd” and perhaps even in competition with each other.

On the other hand, if the enterprise actively encourages collaboration, the following may be true:

- ▶ Departmental affiliation and hierarchical lines of authority are secondary to solving problems in the interest of the enterprise.
- ▶ People are rewarded for working together to creatively solve problems.

Low scores

Let’s consider low scores first. Find out why collaboration is discouraged. There may be good reason. For example, there may be legitimate reasons why information is not being distributed, perhaps in relation to security or potential legal liability.

Leadership will be needed from key impacted areas, not just from IT. Even if the initial target for collaboration is a within-department solution where cross-department collaboration is not (initially) an issue, do not assume that the IT department can promote a solution without local or departmental leadership.

Consider starting with a departmental focus and build on that initial success.

Find justifications for collaboration based on competition and comparables. Sometimes a “what other people are doing” argument can be effective, especially if the “other people” are the competition.

High scores

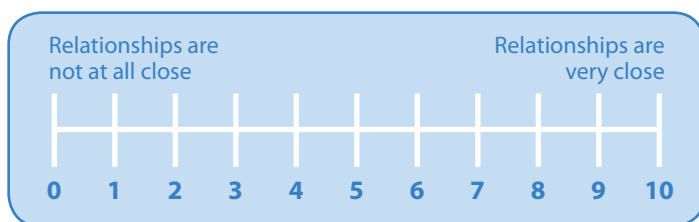
There are at least four implications of higher scores on this “collaboration” scale.

1. Adoption will be accelerated. As we noted earlier, moving quickly may have both good and bad consequences.

2. You may need to address a switch from a mix of multiple existing tools. If people are already using existing tools to support collaboration, even if they are obsolete or difficult to use, you need to consider how to manage the changeover. For example, do people necessarily know the most efficient way to use instant messaging? If a user group only has experience with email and voicemail, you’ll need to take this into account.
3. Use technology consolidation as part of the justification. Eliminating duplicate technologies, associated administration and integration costs, and having a single user interface greatly reduces cost and accelerates adoption.
4. Make sure that “lessons learned” are disseminated. Capture stories about early adoption, and make these stories available to others, both as “FAQ” files and as part of training. Encourage people to report and document their own experiences.

5. How Close is the Enterprise to its Customers and Partners?

Our fifth factor refers to “closeness” between the enterprise and its customers and partners. At issue here is whether the enterprise is receptive to extending its investment in collaboration to include customers and partners.



The “zero point” on the left represents an organization where the relationship between the enterprise and its customers is not at all close. Examples of this include:

1. Customer and partner opinions about the company’s products or services are seldom solicited.
2. When opinions are solicited, they are seldom acted upon.

3. Little thought is given to engaging customers and partners actively in product development or support activities.

On the other hand, if the enterprise is close to its customers and partners, the following may be true:

1. Input is actively sought at all stages of product or service life cycles.
2. Formal processes exist for regularly soliciting input.
3. Continual increases in customer and partner value are key elements in the enterprise's business strategy.

Low scores

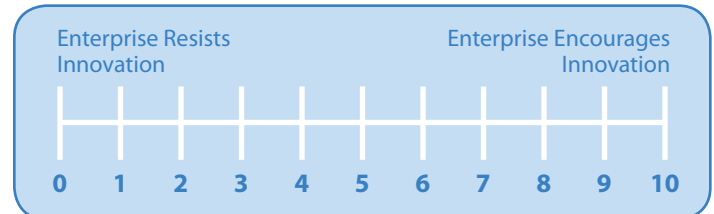
1. Focus on cost reduction. Use collaboration to reduce support costs, e.g.,
2. Self help via better access to existing resources (i.e., reduce demand for support)
3. Customers helping customers. (replace staff time with time supplied by other customers)
4. Streamlined interface with partners and reduced cost of business development activities.

High scores

1. Continue to improve management of customer and partner relationships to substantially improve loyalty. Better communications will enable the enterprise to respond sooner when problems arise; effective problem resolution, in turn, will drive increased loyalty. Key is better communication.
2. Evolve beyond improved service and support to actively engage customers and partners in cooperative product and market development efforts. This is a more sophisticated view of these relationships that more actively involves customers and partners in product development and branding activities (among other possible areas).

6. How Receptive is the Enterprise to Innovation?

Our sixth factor refers to the enterprise's receptivity to innovation.



The “zero point” on the left represents an organization that resists change and innovation. Perhaps the organization is very rule driven and bureaucratic, or perhaps there is little competitive pressure to change or innovate.

The right side of the scale represents organizations that encourage innovation. Perhaps employees are encouraged and rewarded to change and improve things; and, maybe the organization even has formal processes for encouraging and managing innovation.

Low scores

What if the enterprise scores “low” on the innovation scale? What are the implications for implementing technology-enabled innovation?

One approach is to start with the areas that are most in need of innovation, not the ones that seem to be doing the best. (We'll talk more about deciding where to start in the next section.)

Another important factor will be to reward people who participate, whether or not they generate useful innovations first time through.

The important thing will be to encourage collaboration, make people aware they are being given an opportunity to make changes and improve things – then let them do it.

High scores

There are some different implications for technology enabled collaboration if the enterprise scores high on innovation.

First, you should check to see how to integrate the collaboration system in with the processes you already follow for managing innovation, if your enterprise does, in fact, have a formal process in place for managing the innovation process.

I use the collaboration system to support speeding up the innovation process, such as idea generation and brainstorming across all stakeholders. Real-time messaging can help involve people in different locations, and a central repository for a blog or wiki can help avoid the delays inherent in getting people physically together. Bypassing email just by itself can save time.

7. Summary of Enterprise Factor Assessment

If scores are generally low:

- ▶ Focus on serious problem areas, not just “safe zones.”
- ▶ Leadership must come from business, not just from IT.
- ▶ Take time to build confidence.

If scores are generally high:

- ▶ Incorporate with existing metrics, project justification, and process management methods (e.g., innovation management)
- ▶ Pay attention to the need to transition from existing tools.
- ▶ Don't let ease of technology deployment disguise the need to modify processes.

ASSESSMENT PART II: PROCESS LEVEL ASSESSMENT

Earlier we talked about very general, high level considerations for determining how ready an organization is to implement software and processes to promote collaboration – Social Business Software.

When it comes down to more specific collaboration planning, though, the specific problem, process, or group you'll be

targeting is just as important as the enterprise factors we discussed earlier. Now we'll introduce some of these more specific factors that will also drive what specific areas of the enterprise you should address first with your collaboration applications.

1. Targetable Pain Points. This means addressing problem areas, not areas that don't really need attention.
2. Receptive Workforce Demographics. This means identifying user groups within the enterprise who will be more receptive than others to using collaboration tools.
3. Knowledge Workers vs. Process Workers. This means knowing the difference between the types of processes that you can address with collaboration tools.
4. Engaged Leadership & Evangelism. You'll need to identify a “champion,” someone who's credible and in touch with the problem area or process.
5. System Ease of Use. Make sure the tools you use are easy to use. This might mean delaying all the toolset's power and capabilities till after basic uses are underway.
6. Customer/Partner Pull. If you are considering involvement of your customers and partners in the use of collaboration tools, even if indirect, makes sure to check to see if there are areas where they are ALREADY using similar tools.
7. Program Management Experience. Make sure you know how to introduce new applications into your organization. That means you'll need appropriate program and project management skills.

1. Where are the Pain Points?

The idea here is to look for specific “pain points” within your organization where you can apply technology-enabled collaboration. These are departments, groups or processes that can benefit from improved collaboration. Examples are:

- ▶ Too much reinventing the wheel. These are the areas where you see, repeatedly, time and money being wasted because somebody didn't know that a problem had already been solved or a solution had already been developed.

- ▶ Email overload. We've all seen it happen – a large group is tasked with creating a common document, and before you know it, document version control problems arise that, literally, add time and cost to the entire process.
- ▶ Losing time, money, staff. Are there areas within the enterprise where “negatives” are constantly being reported, or where new leadership has been installed but the downward trend hasn't been stalled? Would these areas benefit from better collaboration?
- ▶ Lack of common vision. Are you having problems keeping everyone “on the same page?” Or have you created a mission statement, posted it – and nobody came?
- ▶ Geographically dispersed. Are you running into problems with people in different locations or different time zones? Maybe you've already tried conference calls and shared whiteboards, but just scheduling the meetings is a chore, and when key people are missing from a meeting, a whole new set of delays sets in.
- ▶ Worker “sociability” and willingness to collaborate. Workers have to be willing to work together. If some areas have people who, even though they may be comfortable with technology, are accustomed to (and prefer to) work on their own or in an isolated fashion, those areas may not be the best places to start implementing collaboration tools – even though you can identify all sorts of benefits from getting these “solo workers” to free up and share their work products while in process.
- ▶ Eager to try new things. This goes back to the innovative nature of the organization. Are there problem areas where workers ARE interested in trying new solutions?
- ▶ Already using public social media. This is an easy one to check – for example, are there areas within the business where workers have already started using tools like MySpace and Facebook, or even social bookmarking and tagging systems like del.icio.us?

Bottom line: SHOOT WHERE THE DUCKS ARE.

Bottom line: don't just go after the easy targets. Look throughout your organization with this checklist in mind. If your organization is in any way typical, your list of candidate departments, groups, or processes will be a long one.

2. Where are Receptive Workforce Demographics?

Next, you can check if there are particular groups of individuals within candidate problem areas that might be particularly receptive to using technology enabled collaboration systems.

- ▶ Younger workers. This is an easy one to check; are there groups of younger workers in the problem areas you've identified who are good candidates for using newer systems? This is important for two reasons: the first is, just getting the systems in place and used will be easier: second, having groups of younger workers available to mentor others can help overcome some of the initial impact on the IT department to provide support.
- ▶ Comfortable with technology. Irrespective of age, are there groups of people in the candidate problem areas who are already comfortable with technology? By this we don't just mean using telephones, we mean facility with a web browser and with web 2.0 technologies.

3. What is the Workforce Composition?

By “workforce composition” we mean how many people are “knowledge workers” and how many are “process workers.”

We're not a big fan of this distinction. We know that “knowledge workers” are usually targeted when it comes to traditional content and knowledge management systems. These are the people who create, generate, and consume information content. They are clearly a good target for technology enabled collaboration; getting multiple eyeballs and multiple brains working together, after all, is a big role for collaboration. And we've discussed how that can impact innovation.

But when you do review your enterprise and look for places where technology enabled collaboration might be useful, be sure that you don't sell process workers short.

White collar workers and service professionals aren't the only people who need to collaborate. Just look at the improvements in manufacturing quality that worker involvement has brought about in the automotive industry. And consider multinational companies with factories in many different locations that regularly schedule conference calls and virtual meetings to discuss scheduling and production priorities. Improving communication and

collaboration in these situations through a combination of real time communications and shared document and project workspaces can make just as much sense as with office workers.

4. Engaged Leadership and Evangelism

Another factor to consider is that the area where you start out will have engaged leaders and evangelists.

- ▶ Leadership must come from business, not just IT We've noted this before.
- ▶ Leaders must be respected. And that respect should come not only from the workers in the affected area but also from upper management.
- ▶ Leaders must be acknowledged & rewarded. Be thinking about how this leader is going to be acknowledged and rewarded for his or her involvement. This may be an issue in organizational cultures where "doing something extra" is not what people are usually willing to do.
- ▶ Leaders must be willing to promote the system. Finally – there needs to be an evangelist. That's someone who will not only lead an implementation but will also promote it to others. Personality-wise this should be someone who is outgoing and willing to communicate to others. Being willing to brag a bit isn't a bad idea!

5. System Must be Easy to Use

This might seem to be an obvious recommendation, but "ease of use" will differ from group to group within your organization and from problem area to problem area. Places populated by "technogeeks" may differ in terms of what they find acceptable and easy to use.

Here are some more thoughts on the "ease of use" issue.

- ▶ Phase introduction of multiple features, e.g., messaging, presence, blogging, etc. Not everything at once. If you think that users will need time to absorb the variety of new collaboration features, you may want to gradually promote their use and applicability, starting with ones most relevant to the functions performed by the people involved.

- ▶ Hold off on metadata standards till after messaging and content sharing features are introduced. Any "web 2.0" system worth its salt these days will incorporate "tagging" features that allow users to assign their own descriptive tags to messages and documents. Our recommendation: don't get involved with developing and regularizing tagging and metadata standards until after your staff has time to work with messaging, discussions, social networking, and content sharing features.
- ▶ Keep information and community topology simple. Complex hierarchical structures usually fail because they map to specific needs and do not easily adapt to changing organizations and priorities.
- ▶ Stay away from customizations. It's very tempting to want to play with cool new technologies and tweak them to the uniqueness of a given organization. Hold off on doing that till the application has taken off virally and you can validate if a given customization is really needed or not.

Bottom line: KEEP IT SIMPLE

6. Importance of Customer/Partner Pull

If you are concerned with how your enterprise relates to your customers and partners, then you'll need to consider this. The nirvana of enterprise social productivity is when the collaboration circles of employees, customers, and partners overlap.

You may want to check if there are areas where customers and partners are already using public systems (e.g., MySpace, Facebook) to engage with others about your products or services. If so, you need to find out what these are, and how you can complement or augment what is already taking place.

Your response might be to continue to use those tools – or you may need to develop a two stage strategy where you interact with the external network and use it as a "recruiting system" to engage more closely with your customers and partners.

Be sure to strategize about best approaches to involving customers and partners in collaborative processes. There's a lot of "buzz" about engaging with them more closely and involving them in enterprise functions that have traditionally been kept separate. The range of possibilities includes things like engaging with support groups, market research, focus groups, panels, and advisory groups as part of your overall

product development, market research and support functions. It can also go beyond these more traditional approaches and expand into more direct roles in product development and research.

Bottom Line – CUSTOMER AND PARTNER SUPPORT IS NOT THE SAME AS COLLABORATION. If you do decide to expand your collaboration with customers in areas that are not traditional with you, you may need to change how your organization manages its customer relationship, and that may mean you need to develop processes for groups other than customer support to interact with customers.

7. Program Management Orientation

The final factor is how “program management oriented” your organization is.

Introducing any enterprise software requires a program approach and Social Business Software is no exception. You need to plan for all the strategies we discussed in this paper and you need to map out how you are going to execute on them to ensure optimal success. No matter how easy it is to implement the technology part (and Jive SBS is very easy to deploy), adoption and success require more than just throwing technology over the wall. So the question to address is where and how to find the right resources to manage and execute the whole program.

Organizations differ in their understanding and use of program and project management techniques. Departments and teams that produce deliverables are usually good at it. Other teams that are more workflow driven might not be as experienced.

In many organizations IT has a good understanding of program and project management practices. This point has its good and its bad side. It’s good since it helps to be disciplined in how changes are introduced. It’s bad if the IT department doesn’t do a good job in involving business staff in the changes. And as we’ve already noted, it’s best for business to “own” – and lead – the introduction of collaboration tools.

BOTTOM LINE – GET THE PROGRAM AND PROJECT MANAGEMENT YOU NEED.

Look for help within your organization on a temporary basis to manage the adoption process, or go outside to the vendor or to consultants for temporary support. Don’t lose control of the process by neglecting appropriate management oversight.

APPENDIX: RECAP OF ENTERPRISE LEVEL ASSESSMENT

Assessment Factor	If Low Scores	If High Scores
<p>1 What is the Enterprise's Management Approach? (hierarchical vs. democratic)</p>	<p>Focus on time and cost savings. Start with specific business processes.</p>	<p>Adoption process faster. Transition from existing tools? Address content mgmt & tagging sooner.</p>
<p>2 How Aligned is IT with the Enterprise's Business Strategy? (not aligned vs. aligned)</p>	<p>Same as above, plus: Initial deployment via remote hosting? Leadership from impact areas, not just IT</p>	<p>Use existing metrics to justify. Also address non-quantifiable impacts, e.g., innovation.</p>
<p>3 How Responsive is IT to the Needs of the Business? (not responsive vs. very responsive)</p>	<p>Find where "home-grown" solutions already exist. Leadership from impact areas, not just IT</p>	<p>Easier to justify based on existing metrics. Still difficulty capturing qualitative impacts. Adoption process accelerated.</p>
<p>4 How Much Collaboration Occurs Within the Enterprise? (discouraged vs. encouraged)</p>	<p>Find out why. Leadership needed from impact areas. Justified from competition & comparables.</p>	<p>Adoption will be accelerated. Transition from existing tools? Make sure "lessons learned" are disseminated</p>
<p>5 How Close is the Enterprise to its Customers? (not close vs. very close)</p>	<p>Focus on reducing support costs via self help customers helping customers</p>	<p>Enhance relationships to improve loyalty. Engage customers in cooperative market and product development.</p>
<p>6 How Receptive is the Enterprise to Innovation? (not receptive vs. very receptive)</p>	<p>Attack real problem areas. Reward participants even when failures occur Begin to develop processes around innovation</p>	<p>Make collaboration part of innovation management process Focus on accelerating processes (e.g., idea generation, brainstorming, idea review, evaluation)</p>