



# Developing an Enterprise Collaboration Strategy

## Executive Summary

Collaboration is much more than communication. It's about connecting resources (employees, partners, customers, data) on demand, wherever they are, in whatever way is optimal, and leveraging them to make business better. This white paper is about how to develop an enterprise collaboration strategy.

Why is it important? Because social collaboration will force dramatic change in the enterprise within this decade. The underlying drivers are the rapid adoption of social collaboration in the consumer space and rapidly increasing mobile accessibility. Both are ultimately about the empowerment of the individual. Just as oppressive dictators have met their demise during the Arab spring, so will organizations be out-manuevered if they fail to listen – to their customers, their partners, and their employees.

Social collaboration is not yet a business imperative, but the social revolution is gaining pace – so it soon will be. Now is the time to get ahead of the curve. To do that, organizations need to develop a business-driven enterprise collaboration strategy and approach, which then drives collaboration architecture decisions, which in turn drive technology choices. Throughout the process, it is critical to keep in mind that technology is the enabler, not the driver.

The key measure of success is user adoption. Driving sustained adoption is difficult, but the enterprise can maximize its chances for success by putting in the time and effort to develop a collaboration strategy that ensures collaboration tools are enablers of more efficient, more productive work – that they make the lives of the organization's employees, customers, and partners, easier and better. How to do that? There are three steps:

- **Step 1:** Define where you are today
- **Step 2:** Identify the key business value your organization can derive from improved collaboration with customers, partners, and within the organization
- **Step 3:** Pick the right technology to support your specific collaboration needs

This white paper offers a 30,000-foot perspective on those three steps; it's about how to develop a strategy and approach for enterprise collaboration. This is the first of a series of three papers designed to provide an organization a roadmap for collaboration. The next paper will focus on developing an enterprise collaboration architecture; the third will cover technology selection.

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## The Social Collaboration Revolution Is Here. How Will You React?

Social collaboration will force dramatic change in the enterprise within this decade. Driving the change is the rapid adoption of social collaboration in the consumer space and rapidly increasing mobile accessibility. The largest social collaboration platform, Facebook, has 800 million users in almost every country on the planet. More than half use the site every single day. 350 million access it via a mobile device. One needs not look far beyond the images of the Tunisians, Libyans, and Egyptians (who have just overthrown their oppressive regimes) holding “Thank You Facebook!” signs to understand the power, and the reach, of social collaboration.<sup>1</sup>

To date, many enterprises have prohibited employees from engaging in consumer social collaboration (Facebook, Twitter, blogs, even LinkedIn) in the workplace. But just as command-and-control leadership in those Middle Eastern countries crumbled under the power of social collaboration, so will command-and-control leadership need to adapt to new ways of working within the enterprise.

We have entered the age of the empowerment of the individual. The reach of the Internet, social networks like Facebook and Twitter, and mobile accessibility empower individuals as both consumers and employees. What do employees want to do with this newfound power? Mostly, they just want to be as efficient and productive in their jobs as these technologies have allowed them to become in their personal lives.

When Salesforce.com CEO Marc Benioff pronounced the beginning of a “corporate spring” akin to the Arab spring that toppled regimes in the Middle East, he said, “We’ve seen Mubarak fall, we’ve seen Gaddafi fall. When will the first corporate CEO fall for the same reason? Because his customers or her customers are rising up or because they’re not listening to their employees, not paying attention. It’s more important to listen than ever before. That’s the social revolution.”<sup>2</sup>

Benioff’s questions aren’t theoretical; CEOs, like Reed Hastings of Netflix, have already experienced that social revolution firsthand. When Netflix first announced that it would split its DVD-by-mail service (that would become Qwikster) and streaming service (which would remain Netflix), and that customers who wanted to continue receiving both services would have to maintain two different accounts, and pay about 60 percent (\$6) more, the move was greeted well by investors, who agreed that it was in the best interest of Netflix as a company. By customers, it was greeted with outrage.

“The company’s mistake,” said Fordham University Professor Paul Levinson in an interview, “was in making the best move for the company – not the consumer.”<sup>3</sup>

CEO Hastings responded on his blog on September 18 with “an explanation and some reflections” on not having communicated the change to its customers. “But now I see that given the huge changes we have been recently making, I should have personally given a full justification to our members...So here is what we are doing and why.”<sup>4</sup>

Not good enough, said the company’s customers. There were 27,831 comments on Hastings’ first mea culpa blog post (and thousands more on Twitter, Facebook, and other social media). So on October 10 Hastings announced that DVDs would be staying at Netflix.com – in other words, no Qwikster (though the price increase would remain in effect).<sup>5</sup>

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**So the question is not whether the social revolution will affect the enterprise. The question is whether you will be a beneficiary, or a victim?**

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<sup>1</sup>“Egyptian Protester’s Sign: ‘Thank You, Facebook’” Social Times 4 Feb. 2011.

<sup>2</sup>Larry Dignan, “Salesforce.com CEO Benioff calls for ‘corporate Spring’” ZDNet 31 Aug. 2011.

<sup>3</sup>Gloria Goodale, “How Netflix went wrong: Qwikster was good for company, not the customer” The Christian Science Monitor 10 Oct. 2011.

<sup>4</sup>Reed Hastings, “An Explanation and Some Reflections” Netflix blog 18 Sept. 2011.

<sup>5</sup>Reed Hastings, “DVDs will be staying at netflix.com” Netflix blog 10 Oct. 2011.

So the “social revolution” is about individual empowerment – about the ability of Netflix customers to reverse a major strategic business decision that had been applauded by investors as the “smart” move for the company. In a world as socially connected as ours is, it is second nature for consumers to take to social media to provide public feedback to business just as we do to our friends and followers. So for the enterprise, the social revolution means you have to **be willing – and able – to listen** to your customers and your employees, wherever and however they’re talking to you. You have to monitor conversations about your products and services, and your brand, on the variety of social networks – then engage in those conversations.

It requires **infusing transparency into your organization** – for employees, for partners and suppliers, and for customers. Now the way that you lead an organization is increasingly based on **establishing trust** and being transparent in interactions with customers and partners. This isn’t about pushing out canned statements; this is about actually listening, about **engaging in a dialogue**. Said David Sacks, CEO of Yammer, “‘Information is power’ used to mean that hoarding information gave you power. Now we’re seeing that *sharing* information is power.”

The social collaboration revolution means that if you want respect (and the business of your customers and loyalty of your employees), you have to earn it. That doesn’t mean you have to be perfect. It does mean you have to be honest. When a video surfaced on YouTube of a Domino’s employee stuffing cheese in his nose while making a sandwich, for example, the company responded not by hiding (how could it really?) but by confronting the issue head-on, and as a result the enterprise recovered from the negative attention.

Most powerfully, social collaboration means that you have the opportunity to design products and services that meet customers’ needs better than ever before. (How do you know? You asked.) You have the opportunity to leverage the tremendously powerful ideas of all of your employees – who heretofore have been largely unheard. Said Harvard Business School professor Shoshana Zuboff, “in this new world value is not created inside the organization. It rests in the unfulfilled needs and desires of the individual.”

The bottom line is that the social collaboration revolution means individuals are now empowered. Employees, partners, and customers are going to use social collaboration to engage with your organization – whether that’s coming to you with a complaint or telling 200 Facebook friends about it behind your back. So the question is not whether the social revolution will affect the enterprise. The question is whether you will be a beneficiary, or a victim?

**The social collaboration revolution represents a systemic, fundamental shift in the way a business operates. Most organizations are not ready for it.**

In June 2005 Dell was forced to evaluate its customer service operations when blogger Jeff Jarvis wrote his now infamous “Dell Sucks” post about his experience with a “lemony” Dell computer and – worse – the company’s “appalling” customer service response.<sup>6</sup> The blog quickly became a top result in Google searches, and was undoubtedly one source of information consumers used when researching Dell computers online.

Clearly, one imperative for Dell was to improve its customer service. But it also had to respond in the place where consumers were voicing their criticisms: online in social media. That meant building new internal structures to engage with customers in a way the company never had before.

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## Does social collaboration benefit the enterprise, beyond “Do it or else”?

It’s not just that a social collaboration revolution is happening whether you like it or not. Social collaboration presents tremendous opportunities for the organizations that learn to leverage it. How, exactly, can it benefit the business? Collaboration...

- enables the discovery of skill sets, knowledge, and capabilities within the organization
  - connects people and ideas, breaking down silos to enable efficiency, discovery, and higher-value conversations within the enterprise
  - allows employees to more effectively reach other employees, customers, and partners and drive business processes forward from anywhere – and do so much faster
  - allows for easier access to institutional knowledge, which leads to efficiency gains, increased employee productivity, and higher quality of work
  - allows enterprises to ask their consumers, “What are your likes? Your dislikes? Your sources of pain?” and design products and services around customers’ responses
  - facilitates work in an era of dispersed workforces, rapidly evolving markets and an overall accelerated pace of business
  - engenders immensely powerful loyalty among both employees and consumers by giving them a place to belong and a way to be heard
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<sup>6</sup> Jeff Jarvis, “[Dell Learns to Listen](#)” BusinessWeek 17 Oct. 2007.

First, Dell sent technicians into the blogosphere to ensure that complaining bloggers had their problems resolved. Next, the company started its Direct2Dell blog where chief blogger Lionel Menchaca embodied the very social notion that a company’s brand is a reflection of the people who work there. Then Dell launched IdeaStorm.com, where visitors take part in “hyper-focused idea-generating sessions” – crowd-sourced business solutions and product development.

Today, Dell’s Listening Command Center is “accountable for the timely and accurate resolution and public response for all serious issues.” The company has subject matter experts who are “listeners across all functions and business units who keep real time pulse of their customers.” And its Support Outreach Service boasts a 35% conversion of demoters to promoters.<sup>7</sup>

Even beyond using social media as a customer service tool, Dell also leverages social networks to make money (through June 2009 the company attributed \$6.5 million in sales to its engagement on Twitter). The example is reflective of how a change toward social collaboration at the front end of the business has to flow through to the rest of the organization – and how getting the shift right can dramatically impact the business’s bottom line.

So social collaboration requires a shift in the organization’s structure and in the tools the business uses, but it also requires a shift in philosophy (at some companies, a massive one). It is, in part, a philosophical shift for the enterprise to say: now we have to figure out how to also listen and respond back to consumers and employees. Organizations have gone from talking at customers, partners, and employees to talking *with* them. That’s a big shift.

Social collaboration isn’t yet a business imperative, but the social revolutionaries move fast – it soon will be. Now is the time to get ahead of the curve.

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**Figure 1: What Is Collaboration?**



<sup>7</sup> [Social Media Leadership Forum - Dell Case Study, 2011.](#)

**Figure 2: Collaboration Strategy Elements**



## Developing an Enterprise Collaboration Strategy

So the fact that social collaboration is coming whether the enterprise likes it or not is clear. As are the benefits that the enterprise can realize from doing collaboration right. How does the organization do that? First, by understanding that implementing a pure collaboration for collaboration's sake almost always results in failure. Instead, let business imperatives – those benefits you want to realize – guide your collaboration strategy. Take advantage of the opportunities presented by adopting a holistic architectural approach that focuses on aligning IT with the needs of the business. And remember, collaboration is about much more than just the technology. Ultimately, it's about people. User adoption is the key to success.

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### Step 1: Define Where Your Organization Is Today

First, ask – based on what you have today – what do you need to do to start building your collaboration architecture? How do you make the best of your current investments? Of course, one size does not fit all – the right collaboration strategy for you is dependent on a wide variety of variables, not least your current collaboration framework, your organization's culture, what you do and how big you are. There's no right or wrong answer here, but in order to determine how to proceed through steps 2 and 3 you need to know where you stand today. The quiz that follows will help.

**Quiz: How Collaboration Mature Are You?**

**1. How do you leverage your Intranet? (Check one)**

- We use it as a publishing platform/broadcast tool - 1 pt.
- We try to foster bi-directional communication, but we're mostly just pushing content out - 2 pts.
- We use it as a bi-directional communication tool - 3 pts.

**2. To what extent do you use stand-alone collaboration applications? (Check all that apply)**

- |   |   |
|---|---|
| <input type="checkbox"/> Web conferencing/online meetings - 1 pt. | <input type="checkbox"/> Dashboards - 2 pts.            |
| <input type="checkbox"/> Instant messaging - 1 pt.                | <input type="checkbox"/> Mashups - 3 pts.               |
| <input type="checkbox"/> Email - 1 pt.                            | <input type="checkbox"/> Microblogging - 3 pts.         |
| <input type="checkbox"/> Distribution lists - 1 pt.               | <input type="checkbox"/> User profiles - 3 pts.         |
| <input type="checkbox"/> Project tools - 2 pts.                   | <input type="checkbox"/> Role-based workspaces - 3 pts. |
| <input type="checkbox"/> Enterprise content management - 2 pts.   | <input type="checkbox"/> Wikis - 3 pts.                 |
| <input type="checkbox"/> Workflow systems - 2 pts.                | <input type="checkbox"/> Forums - 3 pts.                |
| <input type="checkbox"/> Blogs - 2 pts.                           |   |

**3. To what extent do you leverage social collaboration systems/platforms? (Check one)**

- We only use stand-alone applications - 1 pt.
- We mainly use stand-alone applications, with one or two enterprises systems - 2 pts.
- We have fully adopted a collaboration platform that provides a base layer of capabilities on top of which we have built applications - 3 pts.

**4. What is the focus of your current social collaboration efforts? (Check all that apply)**

- Internal - 1 pt.
- Partners and suppliers - 1 pt.
- External (customers and prospects) - 1 pt.

**5. Who in your organization drives social collaboration? (Check one)**

- Executives only - 1 pt.
- Executives and certain "community leaders"/SMEs - 2 pts.
- Everyone - 3 pts.

**6. What are the benefits you currently realize from social collaboration? (Check all that apply)**

- Increased employee productivity - 1 pt.
- Improved internal communication effectiveness - 1 pt.
- Stronger corporate culture and community - 1 pt.
- Compliance to internal processes - 1pt.
- Corporate knowledge and expertise are easily leveraged by everyone in the organization - 1 pt.
- More efficient internal processes - 1 pt.
- Better customer satisfaction through engagement on social media channels/sites - 1 pt.
- Better brand awareness through engagement on social media channels - 1 pt.

**Add up your points and look to Figure 2 to see where you are on the collaboration maturity scale.** Remember, there are no right or wrong answers here (only a handful of organizations are truly mature in this space). The point here is not to pat yourself on the back for how mature you are (or beat yourself up if you're not), but rather to assess where you are so you can know the best steps to take moving forward.

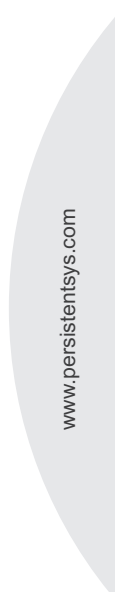


Figure 3: How Collaboration Mature Are You?




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Developing an enterprise collaboration strategy need not be about completely throwing out the collaboration tools you already have. You can leverage them. The Intranet, for example, is an ideal starting point for most organizations to begin their internally-focused collaboration.

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Developing an enterprise collaboration strategy need not be about completely throwing out the collaboration tools you already have. In fact, Step 1 is about assessing the tools you have and how you can leverage them. The Intranet, for example, is an ideal starting point for most organizations to begin their internally-focused collaboration.

The simplest collaboration strategy is one based on stand-alone applications, each meeting a given need within the organization. For organizations that are novice or at the lower-end of amateur on the maturity scale, leveraging a stand-alone application on an as-needed basis is likely the easiest way to get into enterprise collaboration.

As organizations become more sophisticated in their collaboration efforts, though, a large number of stand-alone collaboration applications used in different ways by different parts of the organization can become complex and difficult to manage. At that point a more systemic platform approach to collaboration may make the most sense for the organization.

## Step 2: Define Your Collaboration Approach

There are broadly two ways to approach the development of enterprise social collaboration strategy: by use case (aligning business processes with collaboration tools) and by business transformation (a systemic, enterprise-wide collaboration platform that fundamentally changes the way the organization operates).

## A. Business Transformation Approach

For organizations that are already mature in their collaboration strategy, the next logical approach may well be to develop an overarching enterprise-wide collaboration structure. This kind of endeavor is really a business transformation approach, where collaboration touches every employee in every area of the business.

Yum! Brands Inc.—the world’s largest restaurant company (it has nearly 38,000 restaurants in more than 110 countries and territories) — offers a good example. When it decided to take a business transformation approach to social collaboration, it did so to break out of organizational and geographic silos — to “work as one” to aggressively drive international expansion.”<sup>8</sup>

At Yum! social collaboration was, at least to some extent, already part of the company culture. But the company lacked an *enterprise-wide* collaboration structure, and executives felt that they could achieve their business objectives by creating a business collaboration network. Because the point was to infuse collaboration enterprise-wide and break down organizational silos, they wanted a one-source solution.

Toni Ewton, Communications Technology Manager at Yum! Brands Inc. explained, “At Yum! Brands, we’ve got thousands of employees across the globe. But we had to find a way for all of us to talk together, to find out what each other is doing and make sure that we’re going all in the same direction.”<sup>9</sup>

The solution for Yum! was a business transformation centered on a collaboration tool they dubbed iCHING (the “i” is for Internet and “CHING” is Chinese for “relationship building”). Explained Dickie Oliver, Vice President of Global IT, “iCHING is a tool for employees — across multiple time zones and geographies — to share best practices and foster breakthrough thinking and innovation in every area of the company’s business.”<sup>10</sup>

Much more than just a Facebook for business, iCHING includes wikis, blogs, and areas for collaborating on meeting minutes and project plans, internal websites, and data/content sharing tools. Employees create profiles that display their professional and personal interests, and they can connect with other Yum! employees based on those interests (and on job functions, brands, and location).

Success has not come easy, of course, but Yum! Brands’ collaboration network has succeeded well so far — user adoption was 60 percent just six months after rollout and the tool has yielded a number of new products. The end-goal is for iCHING to “become the default work environment for corporate employees.”<sup>11</sup>

To date, only a small handful of organizations are actually mature enough to dive into a collaboration-driven transformation. But ultimately, this is where all organizations need to be within the next decade — at the place where social collaboration is as second-nature as the telephone or email, where the collaboration structure largely replaces those traditional communication tools (as is the goal at Yum!). To get there, organizations need to consider:

- How should the enterprise be organized to accomplish work most effectively? This may necessitate restructuring the organization.
- Are work teams designed to maximize information flows, and jobs designs to make the best use of that information?
- Are employees incentivized to work together, and to collaborate with partners, suppliers, and customers?

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<sup>8</sup> Jive Software case study, “[Driving 24-hour collaboration — and competitive differentiation — around global brands in the restaurant industry](#)” 2010.

<sup>9</sup> Ragan Communications, “[Internal social network as popular as Facebook](#),” YouTube video, 14 Jun. 2010.

<sup>10</sup> Dennis McCafferty, “[KFC, Pizza Hut and Taco Bell: Delicious Collaboration](#),” CIO Insight, 6 Jul. 2011.

<sup>11</sup> Kim S. Nash, “[Yum Brands’ Recipe for Global Collaboration](#),” CIO, 2 May 2011.

## B. Business Process/Use Case Approach

Most organizations – all of those falling into the “Novice” and “Amateur” categories described on the previous pages – will likely be better off starting their collaboration development with a business process/use case approach. Here is where you test how well the organization is set up to leverage collaboration tools. It’s also where you can demonstrate the benefits of collaboration by realizing some quick wins.

In 2007 JetBlue developed its social media engagement strategy not as a business transformation, enterprise-wide endeavor but rather as an innovative response to the PR nightmare that ensued when some passengers were held on the tarmac for 11 hours.<sup>12</sup>

Today, the company has almost 1.7 million Twitter followers, more than any other airline. It uses Twitter primarily as a customer service channel, to quickly resolve customer complaints and to relay important information like flight delays. Said Manager of Corporate Communications Morgan Johnston, “Think of Twitter as the canary in the coal mine. We watch for customers’ discussions about amenities we have, and what they’d like to see made better.”<sup>13</sup>

When a customer realized that he wasn’t seated next to his wife and 2-year-old daughter on a cross-country JetBlue flight (fully booked), his first move was to call customer service. The rep told him to talk to the gate agent. Instead, the customer posted a request for help on his Twitter account: “@jetblue Advice to get both parents and 2 yr old seated next to each other on flight later today? Right now only one parent. Full flight.”<sup>14</sup> Within a half hour, the customer had a seat with this family.

JetBlue maintains a separate Twitter account to offer discounted fares and last-minute specials (dubbed “cheeps”) to followers. “These tweets provide an already active and extemporaneous network with the ability to pounce on great deals by simply following these airlines.”<sup>15</sup>

Who’s responsible for Twitter engagement at JetBlue? A handful of staffers can post directly to the Twitter account; they rely on subject matter experts when necessary to address customer questions. It’s a lean operation, and JetBlue has kept its governance relatively informal, preferring to let the social collaboration develop on its own.

While social media engagement is now an important part of customer service operations at JetBlue, it didn’t start out that way. “While they started with social media as an experiment, they now have truly made it part of the fabric of their company.”<sup>16</sup>

To develop your own use case-based collaboration strategy, start by finding an existing business process that could be made better (more efficient, higher quality, more enjoyable) with collaboration. Look for a process that people are already doing within the organization – something that has to be done – and can be made better with collaboration. By initially selecting processes that are already part of employees’ normal workflows, you’ll likely find higher rates of adoption. (Remember, this is not Facebook for fun; this is work, so collaboration must make work better – easier, more meaningful, whatever – for users to adopt it.)

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### Case Study: Improving Communication and Knowledge Sharing Among Employees and Partners

- One Persistent client, a global leader in the beverage industry, had struggled with disparate legacy systems that prevented communication and knowledge sharing between employees and partners. The enterprise worked with Persistent to increase quality and operation control from all levels, encourage a culture of collaboration, and increase awareness towards compliance.
  - Because the client was already set up on a Microsoft system, Persistent developed their new enterprise collaboration architecture around a branded SharePoint portal that integrated all of the client’s quality processes within one system – an integrated repository solution that includes a documentation library, change management application, a collaborative wiki-style reference tool, and a waiver management function.
  - The result: **estimated savings of \$40 million per year** in time and effort; the ability to **capitalize on internal knowledge assets**; and increased productivity, security, and information transparency.
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<sup>12</sup> “[JetBlue Attempts To Calm Passenger Furor](#),” CBS/AP, 11 Feb. 2009.

<sup>13</sup> Brian Solis, “[21 Twitter Tips From Socially Savvy Companies](#),” Fast Company, 23 Apr. 2010.

<sup>14</sup> Michelle Higgins, “[Twitter Comes to the Rescue](#),” New York Times, 1 Jul. 2009.

<sup>15</sup> Brian Solis, “[21 Twitter Tips From Socially Savvy Companies](#),” Fast Company, 23 Apr. 2010.

<sup>16</sup> Francois Gossieaux, “[Interview with Marty St. George, CMO at JetBlue](#),” FASTForward blog, 14 May 2010.

Consider the potential benefits that can be realized with collaboration as well as which business processes or use cases are particularly amenable to collaboration. Then seek out the collaboration tool best suited to that particular process or use.

As is always the case, it's important to ensure that you're not implementing a collaboration strategy just for the sake of collaboration. When organizations do that they end up with what consultant Graham Hill referred to as *OO + NT = EOO* or *Old (un-collaborative) Organization + New (collaboration) Technology = Expensive Old (un-collaborative) Organization*.

Instead, the use case approach should be to choose cases where collaboration can really help make work better. Start with the low-hanging fruit, those quick wins to demonstrate the benefits of collaboration and gain some experience. By demonstrating success in a use case approach, you'll find adoption much easier to come by. By demonstrating immediate value for the organization, you'll find executive sponsorship far more forthcoming. And, you'll be able to gain experience with collaboration tools in your organization. In these ways the use case approach becomes your stepping stone to move into increasingly more complex forms of collaboration, and eventually into a business transformation approach.

It shouldn't be surprising that the potential returns associated with the business transformation approach are huge. But the return timeframe is much longer (plan for at least 18-24 months) and the risk of failure far greater (especially for organizations that have not yet demonstrated collaboration success).

The use case approach, in contrast, yields more modest benefits (but benefits nonetheless), typically in a far shorter timeframe (6-9 months is not unreasonable). Plus, the ROI metric associated with use cases is much more straightforward because you already have the existing process against which you'll measure the new collaboration-enabled process. You know how the process works today, and how you want to improve it. You should be able to make that improvement measurable within 6-9 months.

Whether you choose the business transformation approach or the business process/use case approach, you'll need to develop a governance plan. Especially for large organizations that have set processes and standards defined by regulatory agencies (or even internal groups), governance is absolutely critical. Effective governance is a key determinant of success; organizations with a good understanding of the need for governance are more likely to succeed.

Essentially the question is: who will be providing governance for the collaboration changes (not tools, but actual collaboration changes) that will be implemented? It should either be an internal committee or an executive who owns and sponsors collaboration. The governance executive or team is responsible for ensuring that collaboration strategy, architecture, and platform decisions remain in alignment with other business processes, with regulations and requirements, and with business needs.

Governance in social collaboration is also about developing internal guidelines for how collaboration tools are used and who they can be used by. At Dell, for example, "The importance of assigning roles to employees who engage in social media [is to ensure] that technically unqualified employees do not attempt to respond to tech issues."<sup>17</sup>

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**The potential returns from the Business Transformation Approach are large but return timeframe is much longer (18-24 months). The Use Case Approach in contrast yields more modest benefits but in a much shorter timeframe (6-9 months).**

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<sup>17</sup> Francois Gossieaux, "[CMO 2.0 Conversation with Erin Nelson, CMO at Dell, and Manish Mehta, VP of Social Media and Communities.](#)" CMO 2.0 Conversations blog, 4 Mar. 2010.

### Step 3: Pick the Right Technology

Once you've defined how collaboration mature your organization is and determined how you'll approach your collaboration strategy, then – and only then – is it time to think about which technology you'll use. Remember, technology is not the driver of collaboration, it is the enabler of collaboration. Technology choices should always be made based on where the enterprise is at and how it wants to get where it's going.

Consider your existing infrastructure and your use case to determine the collaboration technology that fits best:

**1. What does your existing infrastructure look like?** What collaboration applications are you currently running? Have you implemented any collaboration platforms or other systemic approaches to collaboration? Again, you need not throw out your existing infrastructure; there are a wide range of technology platforms you can use, depending on your existing infrastructure. For example, if you run...

- Oracle, you could look to their recently announced (but not yet released) platform Oracle Social Network, which is designed to be “seamlessly integrated” with Oracle Fusion Applications<sup>18</sup>
- Microsoft applications, then you can develop a collaboration architecture on SharePoint
- Salesforce CRM, then Salesforce Chatter may make sense
- IBM, then IBM Lotus Connections, which also integrates well with non-IBM products like Microsoft Office, and Outlook
- Cisco Unified Communications, then Cisco Quad fits the bill well, and also integrates with content management systems like SharePoint or Documentum

This is not an exhaustive list; the point here is that there are likely collaboration tools that will meet your business goals and fit within your existing infrastructure. If you want to extend your collaboration beyond company boundaries and use effective platforms for collaborating with partners, vendors and customers, then consider platforms like Jive, Liferay, Drupal and the like.

**2. What is your use case?** What do you want the collaboration tool to do? For whom? The goal you're trying to achieve via collaboration should be a primary driving factor behind the technology you choose. Again, technology enables collaboration, and collaboration for collaboration's sake almost always results in lower-than-expected results. What specific purpose is the collaboration tool meant to serve? Let your answer to that question drive your technology choice.

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### Case Study: Assisting Leading Bank with Collaboration Vendor Selection

- Another Persistent client, one of the world's largest banks, was not happy with its Intranet setup – which was supposed to drive internal collaboration. The organization turned to Persistent for advice on how to revamp their Intranet to achieve their collaboration goals. We began by studying their entire collaboration landscape and the collaboration roadmap they had developed.
  - Next, we interviewed key stakeholders, from technical teams to Intranet users. We worked to understand the restrictions and standards on collaboration in banks, set by financial regulators. We conducted market research to understand how other banks of similar size were implementing collaboration and the innovative ways they were driving user adoption.
  - Based on all of those inputs, we worked with the client to find the right collaboration platform and vendor that would achieve the enterprise's goals, given the current state of its collaboration infrastructure, governing regulations, and industry best practices.
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<sup>18</sup> [Oracle Unveils Oracle Social Network](#), 5 Oct. 2011.

## Conclusion: It's Not Going To Be Easy, But...

Unless you're among the small handful of organizations that have already well figured out how to deploy collaboration tools across the enterprise, then making collaboration work in your organization is not going to be easy. The organization won't automatically realize collaboration success just because social collaboration is immensely popular in the consumer space, or even because you find a process that could be made better and make that process collaborative.

The most significant determinant of the success of your collaboration efforts will be user adoption. The hard work that you do in Steps 1, 2, 3 (figuring out where the organization is at, choosing an approach, and finding the best-fit technology) is all about maximizing user adoption. To date, there have been far more failures than successes in this regard.

But it looks so easy! As Forrester sarcastically pointed out, "If Web 2.0 on the Internet can do this with movie ratings, photographs, and all of human knowledge, then we could use those tools on the intranet for project plans, financial forecasts, and competitive intelligence." It is not, of course, that simple.

It is critical to remember through the process that the motivations for using collaboration tools in our personal lives and our work lives are very different. We have personal incentives to participate in social media as consumers. What are our incentives at work? At the risk of being overly simplistic, at work we are incentivized to get our jobs done and get paid. So the way to drive adoption among your employees is to ensure that collaboration tools are enablers of more efficient, more productive work – that they help us get our jobs done.

Effective user adoption, then, requires change management. Here, change management is an iterative process that runs through the full lifecycle of the change – from defining what the collaboration strategy will mean for employees to training them on how to use the new tools. Even the simplest tools require a change in how people work, and thus require change management. Essentially, it's about holding users' hands through the changes, driving adoption (and championship) with marketing, communications, support, and listening for and implementing feedback.

Yum! Brands, for example, approached its collaboration rollout with "the kind of marketing power and resources typically reserved for marketing a new product in one of its restaurant brands." Even before the company announced the new platform, it generated buzz around the office with posters on the bathroom mirrors and elevator doors. By the time rollout hit, employees were incredibly curious about iCHING.

To help facilitate the change post-rollout, the company has iCHING ambassadors who spend time each week roaming the office halls drumming up conversation about iCHING and answering questions about the tool. The result of Yum! Brands' innovative change management, both pre- and post-rollout: 60 percent user adoption within six months.

The three steps we've outlined in this paper are designed to maximize the probability that your enterprise collaboration strategy will in fact help your employees, partners and suppliers, and consumers meet their needs more easily, more quickly, and less expensively – that collaboration will make your work processes better. After these three steps comes the hard part – actually executing the collaboration strategy that you've laid out. Taking the collaboration strategy to fruition will be the subject of our next two white papers – the first on collaboration architectures and the second on technology platforms.

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Clearly, the benefits to be gained from getting enterprise collaboration right are huge. And, there is no denying that social media fueled revolutions in the consumer space are and will continue to spread to the enterprise space as well. As consumers, as employees, as partners, we are ever more empowered individuals. The organization that acknowledges individual empowerment and takes the opportunity to really listen to and engage internally and externally will be the organization that remains strong in the decade to come.



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## About Persistent Systems

Established in 1990, Persistent Systems (BSE & NSE: PERSISTENT) is a global company specializing in software product development services. For more than two decades, Persistent has been an innovation partner for the world's largest technology brands, leading enterprises and pioneering start-ups. With a global team of 6,600+ employees, Persistent has 300+ customers spread across North America, Europe, and Asia. Today, Persistent focuses on developing best-in-class solutions in four key next-generation technology areas: Cloud Computing, Mobility, BI & Analytics, Collaboration across technology, telecommunications, life sciences, consumer packaged goods, banking & financial services and healthcare verticals. For more information, please visit: [www.persistentsys.com](http://www.persistentsys.com).

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