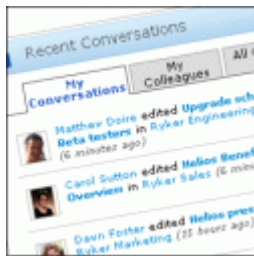# Six Steps to Successful Enterprise Collaboration Implementation

About the Author

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Michael Idinopulos is Vice President of Professional Services and Customer Success at Socialtext. He leads the Customer Success Team which is responsible for all aspects of post-sale customer delivery, including technology and customized programs to deliver training, adoption, and organizational change.

Before joining Socialtext, Michael was a consultant and global Director of Knowledge Technology with McKinsey & Company where he led the creation of McKipedia, one of the earliest large-scale enterprise wikis. He holds a Ph.D. in philosophy from U.C. Berkeley. His recent publications include "Do You Know Who Your Experts Are?" in Knowledge Management and Organizational Learning (Oxford University Press). Michael lives in Philadelphia and blogs at http://michaeli.typepad.com/

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Adoption is everything

Enterprise collaboration solutions – which include Web 2.0 technologies such as wikis, blogs and social networking – are being deployed by enterprises because of their promise to dramatically improve decision cycle times and organizational effectiveness. But a collaboration solution only produces these results to the extent it is adopted by users. An enterprise collaboration solution is a group productivity product vs. a personal productivity product, and as such large-scale adoption is critical to success. A group productivity product can only benefit the group if it is used by the group.

Since the success or failure of any collaboration solution you consider will be directly aligned to its adoption rate, it is critical that you have absolute confidence in adoption before you begin. There are tens of thousands – perhaps even hundreds of thousands – of failed wikis lying unused in corporations. Why did they fail? Because they were not embraced by users.

While certain implementation strategies encourage fastest adoption, adoption is not something that can be mandated. Adoption occurs when users decide for themselves that the solution provides them with a net benefit. It happens when users want to use the product, and when they take action as a result. Users very quickly weigh "what's in it for me?" against any perceived pain, such as giving up the comfort of an old way of doing something.

A short list of the product capabilities most critical to adoption success is outlined in this separate whitepaper, "Five Best Practices for Enterprise Collaboration Success:" http://www.socialtext.com/products/freewhitepaper.php.

This paper assumes the collaboration solution you choose has this short list of product capabilities and is therefore "highly adoptable." The purpose of this companion paper is to outline a carefully planned roll-out process for the collaboration solution you choose; one that will generate the fastest adoption across your enterprise.

Six Steps to Successful Enterprise Implementation

Step #1: Encourage a range of use cases

To get started with an enterprise collaboration solution, you should choose 3-5 lead use cases to pursue in your initial implementation. We recommend a mix of company-wide and group-specific use cases. Company-wide use cases deliver a broad exposure within your company, while group-specific use cases generate deep business value. Below are some potential highest value initial use cases.

Top company-wide use cases:
- Company intranet
- Company directory
- New hire onboarding
- Employee suggestion box
- Competitive intelligence
- Company off-site meetings and events

Group-specific use cases:
- Project teams
- Departments or business units
- Professional communities (e.g., office assistants, finance managers, etc.)
- Social communities (e.g., golfers, running club, reading clubs)
- Customer / partner extranets

Check to see if the collaboration solution comes with templates to help you get up and running quickly on your initial use cases. These templates will let you take advantage of best practices and learnings of other companies who have installed the product, and will help you get results more quickly.

Step #2: Recruit energetic champions

Successful implementation is typically driven by a core group of energetic champions committed to making your company more open, efficient and effective. You should look for these individuals to help drive adoption within your company. Ideally, there will be at least one champion helping to drive each use case. While each champion is different, there are a few common characteristics you should look for:

- Well-networked within the company (professionally and/or socially)
- Personally enthusiastic and willing to take a stand
- Interested in new uses of technology (though not necessarily technically skilled)
- Well-respected within their areas of influence (though not necessarily senior)

Check to see if the collaboration vendor provides materials to help your new champions understand the product, how it will benefit them, their group and the company, and their role as champion. These materials will help you speed up your role-out. As you find new champions, you should help them connect to each other through their own dedicated social network, blog and wiki in the collaboration solution, and through regularly scheduled conference calls.

Step #3: Launch with hands-on activities for new users

You have made sure to choose a collaboration solution that is dead easy to use, with benefits that are self-evident to users. Now you have to get your colleagues to try it. Champions should introduce the collaboration solution in a hands-on way that encourages colleagues to get their "feet wet" immediately. Road shows, lunch-and-learns, and other live presentations are a great way to introduce your company to the collaboration solution. We recommend that you ask participants to bring their computers and try the solution for themselves right then and there, with hands-on exercises. Here are some fun and effective ways to get colleagues engaged:

- ***Social networking:*** Get going immediately with the social networking part of the solution: Have everyone in your company fill out their personal profile. Encourage them to add photos, background information, professional experience, expertise, interests, links and any stories that will help others get to know them. Have each

person choose at least five colleagues to "follow," and place a tag on at least five personal profile pages of others.

- ***Personal dashboards:*** Show everyone how to create their own personal dashboard. Make sure they include widgets that pull in external information such as Outlook email, Google calendars, Twitter, MapQuest, Wikipedia, Del.icio.us, Flickr or whatever information they find most useful to have all in one place.

- ***Scavenger hunt:*** Sponsor a contest, with token prizes for the first person or team who can find 20 specified pieces of information in the collaboration solution.

- ***Hands-on training***: Train new users on the collaboration solution by having their hands (not yours) on the keyboard.

Check to see if the collaboration vendor provides pre-packaged training and communications materials to help you with these sessions.

Step #4: Focus on repeated activities

Your collaboration solution can shine when people use it to make everyday work processes more collaborative and social. To show your company the power of the collaboration solution, you and your champions should route repeated activities through it. Here are some of the most effective ways that other companies have done this:

- Create email aliases for page tags by topic, and add those aliases to email groups that are used to discuss specific topics, issues and ideas.
- Post meeting agendas and pre-reading, and take meeting notes in the collaboration solution wiki pages.
- Post standard documentation (reports, specs, etc.).
- Create Question-and-Answer forums about products, customers, processes, etc.
- Track to-do lists, responsibilities, and progress against completion.
- Distribute interesting and useful materials you've found (e.g., articles, reports, etc.).
- Tell stories about customer interactions, product feedback, leadership lessons, etc. on the solution's internal blog.

Doing these activities in your collaboration solution makes the activities themselves more efficient. When meeting notes, product documentation, customer stories, etc., are posted on wiki pages, they become enduring, searchable assets of the company. Their value accrues broadly, rather than just to a select few.

Step #5: Complement existing systems of record

The more tightly you integrated the collaboration solution into the daily flow of work, the more value it delivers. You should facilitate this by making sure that the solution integrates effectively with other systems your company already uses for core business activities. You should be able to use standards-based widgets to let your users pull in information from 3rd party applications and external web sites, as well as build proprietary widgets that integrate with your own internal systems. APIs should further enable custom integrations by allowing you to automatically import data to wiki pages directly from your internal systems of record.

Here are some of the most valuable integrations with existing systems of record:

- *Company directory.* Use the solution as a company directory with rich user profiles, integrated to your HR data through LDAP or Active Directory integration.

- *Company intranet.* Use links and RSS feeds to integrate with your corporate intranet and other legacy internal websites. You may have a custom skinning option so the interface of the collaboration solution has your look and feel.

- *Document Management.* Complement your DMS or SharePoint implementation by using the collaboration solution for free-form context and discussion.

- *Customer Relationship Management.* Complement your CRM implementation by using the collaboration solution to capture call notes, discussions, and other valuable unstructured content.

Step #6: Leverage the community

Many of the best ideas will come from others who use the collaboration solution. Check to see if the collaboration vendor offers an infrastructure that lets users create an active community. We encourage you to get involved in the community, post ideas, questions, answers, tips about practices that have worked for you. This way you and other users all learn from each other, and you accelerate your time-to-results.

About Socialtext

Social networking connected with collaboration
The Socialtext collaboration solution is a unique combination of enterprise social networking combined with powerful collaboration. Businesses use Socialtext so their people can discover connections and leverage the full resources in the company, focus their attention on what is most important, and collaborate quickly and efficiently. With Socialtext in place, their people also get to know each other better, learn from observing others who are more skilled, and keep up to date with social networks automatically.

Highest adoption, lowest TCO
The Socialtext platform is purpose-built to drive adoption. It is as easy to use as the Internet applications that are so popular today. Users simply click to the interface and start productively using the application. Personal productivity features capture the immediate interest of users, and integrated social networking creates self-perpetuating rapid adoption.

Rapid deployment, Software-as-a-Service
Provided as software-as-a-service, the Socialtext platform can be up and running in days, and returning tangible business results in weeks. Our professional services team provides end-to-end implementation and support services to ensure success.

Business results
Using Socialtext, companies across the globe have reduced the time employees spend searching for information by 30%, and have sped up their cycle times in virtually all functions across the organization. Socialtext customers have reported compressing project cycles by 25% and reducing email volume by 30% or more.

Learn more

Whitepaper: Five Best Practices for Enterprise Collaboration Success: http://www.socialtext.com/products/freewhitepaper.php.

60-second video of the Socialtext platform: http://www.socialtext.com/products/demo_60seconds.php

4-minute video of enterprise social networking: http://www.socialtext.com/products/demo_socialnetworking.php

4-minute video of a user's personal home page: http://www.socialtext.com/products/demo_dashboard.php

Contact sales for a demo: http://www.socialtext.com/products/contactsales.php

Take a test drive with a 14-day free trial: http://www.socialtext.com/products/freetrial.php

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