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When Did Everyone Get So Nice?

Social Networks Deliver on the KM Promise

By Andy Moore, Editorial Director, *KMWorld* Specialty Publishing Group

"I love you ... You love me ... We're best friends like friends should be..."

The Barney theme song haunted me for years. My kids—like most kids—were Barney robots, and parked in front of the tube every morning to see the purple dinosaur frolic meaningfully in his carefully diverse neighborhood. And every morning, at the 28:30 minute mark, my two kids would come running into the kitchen screaming, "Mommy! Daddy! The song! The song!" And we would dutifully drop whatever we were doing and come to the TV to sing along with them: "I love you ... You love me ... We're best friends like friends should be ..."

They've since moved on to vastly more cynical entertainment. *South Park*. *Family Guy*. *American Idol*. I thought that the era of warm and fuzzy "everybody contributes in the happiest of worlds" was behind me. Then social networking came along. And—while I wasn't watching—everybody got all nice to each other and stuff.

It seemed to happen overnight, but I'm sure it didn't.

The appearance of public-style social networking in a business context has flummoxed many of the world's best companies, but it is also freeing many of them to achieve something they hadn't quite reached: a state of pure knowledge management.

The Rise of the Social

"The rise of social networks in business allows us to redefine what we really MEAN by the term *information worker*." That's a big statement. But it resonates with me, mainly because it comes from Cheryl McKinnon, director of Enterprise 2.0 at Open Text. I have known Cheryl for a few years, and I know her to be thoughtful, articulate and correct all the time. So I paid attention when we talked about this crazy "social networking" thing.

"There's a struggle over what the word 'social' really means," she started. "To a conservative management, the word 'social' sounds like fun and games ...

playing Scrabble on Facebook ... stuff like that," she said.

"But *social* just means *people*. Think of how we learned the terminology—'society,' 'social institutions,' 'social studies.' Social networking in business simply means a people-centric approach to the way we interact with content and technology. It's not about games and leisure; it's about bringing the human perspective back into our work world."

I told Cheryl that I was one of those skeptics, too. At first. Anyone who has read one of these *KMWorld* White Papers will remember that I originally thought that all those Face-spacys and Tweety-twiters were WAY too much fun to ever be useful as business tools. Then, slowly (I'm slow), I began to realize that any channel that fosters communication between individuals and among groups is a good thing, and represents one of the hallmarks of knowledge management. Every good KM conversation starts with "Let me tell you what I know about ..." (In fact, there is an urban legend that "wiki" is an acronym for "What I Know Is ..." Great story; unfortunately it's untrue.)

"There HAS been a resurgence of the principles and buzzwords surrounding knowledge management," agreed Cheryl. "But this time, it's a grassroots, bottom-up approach." This is opposed, she explained later, to the heavier corporate initiatives of the late '90s that made knowledge management a top-down management effort, imposing taxonomies and forcing structure onto content. "Now, it's more about people struggling to achieve their *own* productivity gains by reaching out to the right people, bookmarking the right content and allowing it to bubble up throughout the organization," said Cheryl.

So I wanted to circle back and start this thing from a place I could understand. "How much does it cost?" I asked. Unlike former content and document management deployments that required investment in software and professional services, it seemed to me that social networking can be done relatively on the cheap. Right?



Andy Moore

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"Before you can determine what the investment will be to deploy social networking—or whatever term you want to use—you need to determine what your ultimate goal is," Cheryl began. "Is it better engagement with customers? With partners? Or is it to create better connection among your own information workers, inside the firewall, for business purposes?"

She continued: "If you are trying to link geographically dispersed offices throughout many time zones, and some of the employees are mobile, and some of them work out of home offices, I would recommend making an investment in some type of infrastructure. The goal is to make sure you have quick, lightweight Web or mobile tools to allow your people to communicate and collaborate."

Sounds reasonable. So you go out and buy a huge global networking product, and teach all of your people how to log on and set their security levels and create collaboration whiteboards, and ...

"No! no, no," she laughed. "This is actually exactly where the thinking has changed recently. You don't need to have every single person in the organization connected to a heavy-duty document and records management system. A front-line customer service agent, an airline pilot ... they do NOT need the full-blown system attached to them at all times. But they DO need to participate, and contribute information.

"The rise of social networks in business allows us to redefine what we mean by *information worker*." (I know I'm repeating her statement, but it's deliberate. This is important.) "We are now able to use lighter-weight Web and mobile tools to reach a broader audience inside the employee ecosystem. What's coming into the market now are tools that allow more cost-effective ways to get more people to participate in the information sharing and collaboration process."

(And she's Canadian, so she pronounces it "PRO-cess." Which I love.)

Having the tools to share information is one thing, I suggested. Getting people to share is quite another. "You're right," she said. "Ten years ago, if there was information in my head, people had to come to me to get it. That was my power. But that was just information. Now, *information* is easy to find. But true analysis, mentorship, the synthesis of knowledge instead of information is more and more difficult to find. The paradigm has gone on its head. You are more valuable as an information worker because people know what your expertise is, and because you share it actively."

Cheryl calls it, with a laugh, *Knowledge in the Age of Narcissism*. "Every blogger I know is obsessed with their hit-rate. This is the typical blogger mentality: *How many people read my blog today? How did they find it? Who's linking to me?* The more hits they get on their content, the more justified they feel in their opinion." Narcissism indeed. Been there, done that.

"Now apply that blogger mentality to traditional content management systems. Why don't people take that same kind of pride and put their skin in the game to create their work content? Even with traditional content management, there are audit trails that follow who authored what, when they posted it, when they updated it, etc. If I could go to those metrics and see that 100 people downloaded the PowerPoint I created on topic A, I am extremely incented to do more on that topic. And if only two people downloaded the PowerPoint I did on topic B, I won't feel as motivated to focus on that subject. As an information worker, it helps me decide how to better use my time and my limited resources. If I can raise my profile in the eyes of 100 colleagues, versus two, doesn't that raise my value as a contributor?" She asked that rhetorically. The obvious answer is yes. But somehow it works better in the blogosphere than the docu-sphere. I haven't figured that out yet. Maybe in the next white paper.

Governance in the Blog Age

The other thing you need to know about Cheryl McKinnon is that she is *very* plugged into the records management world. So I role-played with her to uncover some of the risk factors she has identified regarding social networks. I expected a "New Rules" session that would describe an entirely new species of dos and don'ts that are invading the business atmosphere.

"Not really," she said. "The same governance principles still apply. You should view the content being written to an internal blog through the exact same lens that

you would use if the writer were creating a Word document and attaching it to an email to 10 people. No different.

"If it's *Here are 10 things I learned at a conference this week*, and it has transitory business value and implication, then maybe you can get rid of it. The policies that apply to so-called traditional content creation don't need to be changed just because it's in a blog format." So, basically, sharing a chocolate-chip cookie recipe with a co-worker is still different than a policy declaration from management.

"Sometimes organizations need to re-learn the rules, and update and refresh the policies to include broader forms of communication."

"Yes. Look back at the first few years of email," Cheryl said. "We slowly realized we needed to have appropriate-use guidelines for the kinds of things you should and shouldn't write in an email; what you can and can't say to a customer. What are inappropriate topics of discussion? Product code names? Revenue figures during a quiet period if you're publicly traded? So the first thing a company that is considering embracing social networking, but might be a little afraid, should do is re-trench, re-define and re-emphasize existing appropriate-use guidelines. There is no difference because of the format in which it appears. But sometimes organizations need to re-learn the rules, and update and refresh the policies to include broader forms of communication. Think about things like: What can you say on a discussion forum? Or a Facebook page? Or Twitter? What can (and can't!) you upload to video-sharing sites? The same principles still apply; they just apply to a new world of formats and technologies."

Same Game, Similar Rules

I played a hypothetical game with Cheryl, pretending to have an "old boss" with "old ideas," as a sort of role-playing charade for this interview. In character, I asked: "My boss understands the reasons to

control information inside our firewall. But he's really more afraid of external content that's outside of his control, like user forums. What can I tell him?"

"Just as the development of email automation tools has evolved, so have monitoring tools for content you're pushing out to the Web. For example, there are many products that scan emails to red-flag sensitive works or look for things like a series of numbers that might be a Social Security number, etc. Those same tools are available for Web publishing. If you want to set up a public-facing blog for your chief marketing officer to talk to customers, there are already tools that let you establish a workflow that includes, for instance, a human review process or an automated review for sensitive content, before you hit the 'submit' button. The workflow can stop the publication, or remind the author *Uh, this is a sensitive word. Are you sure you want to use it?*

Made me think of *2001: A Space Odyssey's* HAL computer: "What do you think you're doing, Dave?"

The futuristic aspect is not lost on anyone. Many companies have a management population who is reaching 55+, and who may be subject to early retirement. Losing those senior people is a huge risk to those organizations. But Cheryl thinks these people, who may not have grown up with a laptop attached at the hip, or may not be proficient in Excel spreadsheets or PowerPoint, can use these much simpler—"lightweight," she calls them—communication tools, such as blogs and wikis—to greater effect. It's just type, edit and save.

"If you're trying to get information out of their heads before they either choose to leave the organization or are forced to, this is a much more appealing way for those who do not feel computer-proficient. Simple bullet points, short summaries, etc., are much more comfortable for people who didn't grow up with complex Office applications and a PC on their desktop (or lap!)

"The business social networks, such as LinkedIn, are very different today than they were even just five years ago," Cheryl pointed out. And in today's economy, it may make the difference. "If my travel budget has been cut in half, and I can't travel to meet my group once a quarter, it is an enormous help to be able to include a photograph, and a status line ... *Here's what I'm working on* ... We're just trying to bring that spirit into corporate collaborative tools."

It's hard to deny the spirit behind the trend toward social networking tools in business. That's partly why they have exploded so quickly, and have been met with such fervor. But there are other reasons, most of which are described in the following pages. Get on board; there's more to come. ■

The New World of Social Media

Enterprise 2.0 in Action

By Cheryl McKinnon, Director, Enterprise 2.0, Open Text Corporation

The world of work is changing. Disruptive forces are at play in business and are compelling organizations to rethink traditional content communication and the way we define an information worker. We must address these disruptive forces to stay competitive, deliver services, manage risk and costs and protect the corporate memory resident in employees and applications.

A more social workplace and marketplace raises productivity even as resources become scarce; it taps into the collected intelligence across employees, customers and other external stakeholders; it opens the door to mentorship and knowledge sharing to information workers who are not traditional desktop PC users; and it connects people to the content and processes they need to get their jobs done.

Setting and communicating goals and measurable objectives for an Enterprise 2.0 initiative is critical to successful implementation and for navigating change management challenges. What are the business objectives of the project? What engagement levels are expected and achievable? Where do you start? Identify tangible business objectives with measurable and meaningful milestones, include participants from a variety of job levels to test and pilot solutions, consider risk and compliance issues proactively and ensure business managers are

supportive of goals and targets... these are the keys to success.

Why Enterprise 2.0?

Enterprise 2.0 allows organizations to adapt the innovations of Web 2.0 to meet business objectives. It facilitates cooperation among information workers, provides a secure and managed collaborative environment for content creators and producers and helps orchestrate your people, processes and content to achieve strategic success.

Organizations are recognizing that they need to innovate to thrive. But disruptive forces are at play, and business and government are under pressure to reduce costs and freeze or reduce workforces while delivering the same quality of product or service. Technology can facilitate this new productivity imperative. Delivery of the *social workplace* and *social marketplace* while meeting *social compliance* objectives is the end goal of an Enterprise 2.0 strategy.

The “social workplace” is an ideal expression of Web 2.0 technologies to connect people with their peers and with critical content and information. Culturally, it helps break down hierarchical and administrative barriers to innovation and idea exchange among rank and file employees. Technologically, it introduces simpler content creation and

communication tools and uses the Web to bridge geographical and generational gaps.

The “social marketplace” recognizes that the Web has opened up conversations among and between customers, prospects, employees, citizens and external trusted advisors. Business is increasingly done based on peer-to-peer or word-of-mouth recommendations. Content and information can flow unimpeded out to a diverse audience who can consume the personalized data as needed and then offer rapid and simple feedback and commentary to the enterprise.

“Social compliance” is a necessary consideration for organizations that recognize the value of the social workplace and social marketplace but need to balance the risks inherent in opening new channels of peer-to-peer and frontline-to-client communication. Traditional compliance pressures are reactive—records retention mandates and restrictive access to content are often driven by external regulations. Social compliance ensures proactive prevention of unauthorized information exchange as communication channels become more transparent.

Achieving Objectives

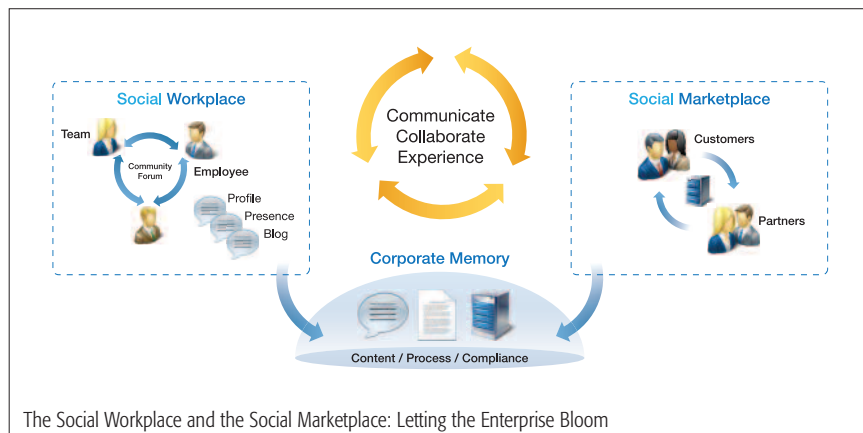
Accelerate employee engagement and productivity. Employees that use technology to strengthen their internal social and expert networks can respond quickly to demands and opportunities. These tools make collaboration and information access easy and intuitive, allow streamlining of routine tasks that free information workers to focus on more complex and challenging tasks.

Protect and value corporate memory. Preserving corporate memory—the content, context and discussion that led to decisions and actions—is essential for continuity of operations, consistency of goals, archival preservation and education of employees. Capture of content, however, is not sufficient. Allowing people to share, reuse and learn from this collected knowledge contributes to productivity and accurate information disclosure.

Develop trusted relationships. Trust occurs when we become aware of the expertise, experience and track-record that surround people as nodes in that network. Trust in the sources of knowledge greatly affects the decision to subscribe to, use and communicate information.

Educate and enable channels. The most critical battles are won by those organizations that can deliver knowledge and insight to partners, customers and prospects at precisely the right moment. This builds loyalty, engagement and ultimately revenue opportunities.

Reach out to new markets. Customers can be the voice of your success. An organization can spend millions of dollars on brand awareness or it can let the brand speak for itself through the positive communication across



The Social Workplace and the Social Marketplace: Letting the Enterprise Bloom

existing ecosystems. Embracing social media, cultivating effective online engagement and delivering superior customer experiences will result in new business opportunities.

The Social Workplace

Employees who actively share their knowledge emerge as experts, and companies that encourage employees to share their expertise build stronger peer-to-peer networks, accelerating internal productivity gains.

Organizations that provide simple, interactive, personalized community tools can achieve measurable positive results with a social workplace: attraction, retention and management of talent; transparency in the corporate governance and communication of disclosure rules; accurate and timely enablement of frontline staff; enablement of the more virtual enterprise; and respect and protection of corporate memory.

Managing human capital. Collaborative tools, skills and learning management, expert finders, employee on-boarding and mentorship, alumni networks, succession planning and career development — these are key to an organization's ability to attract, maintain and cultivate a talented employee base.

Self-service and peer-to-peer empowerment. As companies downsize, right-size, reorganize, merge, acquire or go global, complexities compound, and productivity and a sense of accomplishment suffers. Disengagement sets in. Organizations that strive to build a social workplace make effective use of simple and intuitive content-creation tools suited to team environments. Measurable productivity gains, reduced search times and efficient reuse of shared content are demonstrated with Web-based authoring tools for FAQs, site-visit notes, project knowledgebases, product documentation or meeting notes. Easy location of in-house experts, regardless of level or role, becomes a natural part of internal knowledge discovery.

Transparency and corporate governance. The social workplace allows corporate management to communicate with employees about shared objectives, strategy, values and culture. Knowledge sharing and more transparent collaborative tools allow for broader perspectives and internal expertise to voice concerns on patterns of risk or incorrect assumptions.

Highly regulated companies often struggle to educate all employees—including frontline, field and remote workers—regarding obligations to observe health, safety, disclosure or information-handling policies. Consistent communication across generations, geography and language differences can be achieved by using a range of media forms.

The virtual enterprise. An online social workplace for employees who work away from the physical office is important. Geographical separation can lead to a

disconnection from team- or organizational-shared goals. A social workplace allows distributed organizations to offer a “virtual water cooler” networking experience to remote staff.

Enable the front line. Sales teams, customer service representatives, marketers, inspectors and emergency responders are mobile professionals who require accurate, timely data at their fingertips. Often the most accurate intelligence on field conditions, competitors, hazards or safety issues will come from peers... this is the “buzz,” the “scoop,” the first-hand observational knowledge. Organizations that get better at capturing and disseminating the intrinsic knowledge held in the frontline field will find competitive advantage.

The Social Marketplace

Social marketplaces are developed to gain trust from customers, prospects and partners. As online relationships bloom into a new phase of online interactivity, customers and prospects will share information, seek feedback and create content pertinent to the business cycle.

Customer engagement and proactive peer-to-peer support and recommendations; development and solidification of communication and recommendation channels; ability to spot and react to new opportunities for markets and prospecting; and community engagement with your brand to build loyalty and customer commitment... these are the fundamental values the social marketplace delivers to business.

Optimize customer service. Engagement and cultivation of new opportunities are top priorities for organizations adopting the social marketplace. Focus groups, self-service sites, peer-to-peer discussion groups, online rich media catalogues, test-drive centers, feedback management systems... this is the new language of customer service.

Enable channels and partnership networks. The social marketplace holds trusted relationships together. Efficiencies and expert sources emerge, reducing duplication of efforts, reinvention of content and minimizing of inaccurate or incomplete information. Social supply chains emerge as organizations adopt rich Web- and mobile-based communities to communicate shared content, set mutual objectives and adopt common customer service obligations.

Spot opportunities in unexpected places. Be willing to extend the social marketplace to where interested and informed people congregate. Understand the online landscape of personal and professional networking sites, social media communication tools and involvement in association or industry discussion rooms. The social marketplace—even as it moves into the less moderated open Web—succeeds only when

authenticity underpins the development of this extended trusted network.

Cultivate brand engagement and loyalty. Customers who invest time, money and their staff resources with your company expect to be viewed as stakeholders in key decisions. One-way push of marketing or technical content to customers and prospects no longer resonates; the socially networked world requires interactive engagement... customer reviews, recommendations, feedback and consultation on product and service delivery.

Social Compliance

Social compliance is a proactive perspective on mitigating risk. The enterprise that embarks on a strategy to bloom with the social workplace and social marketplace must understand both rewards and risks. Finding the right balance for your business will mean success, and social compliance permits a layer of control and audit to the safely transparent enterprise.

Beyond the reactive compliance compelled by regulation and e-discovery rules, proactive social compliance allows the enterprise to monitor outward-facing communication to ensure appropriate use and disclosure practices are respected. Providing the assurance and comfort to corporate legal and management that a more open culture will not compromise consistency of message, brand, vision or leak proprietary information, personal data or inappropriate language is the protective layer social compliance brings to the social workplace and social marketplace.

The most valuable information within any organization often resides in the minds of its knowledge workers. This “intellectual asset” has remained relatively untapped because there has not been an effective way for organizations to capture this knowledgebase, allow it to grow and share it company-wide. Social media moves the conversation from the water cooler directly to your secure corporate network, creating a historical knowledgebase of ideas, opinions, experiences and content that can be easily accessed by anyone with permissions at any time. Employees no longer have to rely on email, conference calls or private meetings in employee lounges to share ideas and stay informed. This is a new era of collaboration, of community-based environments where great minds meet, share, network and experience the power of collective knowledge. ■

Cheryl McKinnon is the director of the Enterprise 2.0



Cheryl McKinnon

strategy team at Open Text™ Corporation (NASDAQ: OTEX, TSX: OTC), the Content Experts. Open Text's ECM suite unites people, processes and content, helping organizations empower business users, control costs and risks and enable the agile enterprise.

Enabling Organizational Agility

Social Networking and Extended Enterprise Collaboration

John McCormick, General Manager, Knowledge Worker Product Group, EMC

Social computing tools including blogs, podcasts, wikis, RSS feeds and tagging, as well as networking capabilities similar to those on Facebook and LinkedIn, are increasingly finding their way into the enterprise. Tools like these can help knowledge workers get work done more efficiently and cost effectively. They also make collaboration across different companies (“the extended enterprise”) easier and much more efficient. Social collaboration technologies can help companies attain the organizational agility necessary to thrive despite the current economic downturn.

A recent *Economist* Intelligent Unit global survey of 349 executives, sponsored by EMC, examined the “benefits, challenges and risks associated with creating a more agile organization.”¹ The resulting briefing paper, entitled *Organizational Agility: How Business Can Survive and Thrive in Turbulent Times*, presents several findings:

- ◆ 90% of the surveyed executives stated that organizational agility is critical for business success;²
- ◆ 27% said their organization is not agile enough to anticipate fundamental marketplace shifts, presenting a competitive disadvantage;³
- ◆ A large majority (80%) had taken steps to improve agility over the past three years, but 34% have not produced the intended results due to internal barriers; and⁴
- ◆ Technology has an important role to play in enabling organizations to become more agile.⁵

The survey also found that companies are not pulling back on initiatives, but see strategic investments in technology as a way to drive down costs and improve agility. Specifically, the survey asked, “*In light of the economic downturn, what do you believe are your organization’s priorities in terms of improving agility?*” The top three responses were:

- ◆ Improving process efficiency (38%);
- ◆ Improving knowledge management and information sharing processes (33%); and
- ◆ Encouraging (and extending) collaboration across the business and beyond (30%).⁶

Next-generation enterprise content management (ECM) systems—specifically those

that incorporate social computing tools, collaboration and advanced search—provide the ability to accomplish these three priorities.

Improving Process Efficiency

For better or worse, many knowledge workers spend a significant amount of each day collaborating in email, where they send and receive all types and sizes of files. While soliciting and sharing feedback via email has become quite common, relying on an email system for project or team collaboration efforts is not secure, cost-efficient or effective. Version tracking quickly becomes impossible, and visibility is limited to those on the “To” and “CC” lines.

Hoping to discover and repurpose that email-based content at some future date? Forget it—especially if the recipient has left the company or moved to a new role. In short, using file shares, email or similar tools is not secure, cost-efficient or practical—especially where there are governance, risk and compliance concerns.

Next-generation ECM systems with social computing functionality drive down the costs and risk of collaboration across functional, geographic and organizational barriers. Today’s leading ECM systems provide not only modern collaboration capabilities like wikis, blogs, RSS publishing and user-driven tagging, but also intuitive search and discovery, document management, centralized retention management capabilities and more. With a powerful ECM system combined with the latest in social computing tools, knowledge workers—whether in the office, or on the road—can collaborate across the extended enterprise in a secure and cost-efficient manner. And IT can centrally manage throughout the lifecycle the content objects and their surrounding context according to policy. Security, scalability, cost efficiency and ease of use—these are all essential elements of a modern collaborative experience.

KM and Information Sharing

Most knowledge workers typically search for information on an application-by-application basis, wasting precious time. Enabling

them to find information easily wherever it resides is essential to improving knowledge management. Advanced search and discovery capabilities that allow single-query search of an unlimited number of information sources—such as SharePoint, Google, file shares, email archives, ERP systems and other ECM systems—can be a significant help.

But just as important as finding the information is the ability to filter search results so that users can navigate quickly to the most relevant result—whether it’s a Word file or information about a subject-matter expert. Today’s leading next-generation ECM systems feature an intuitive navigational experience of search results that ensures the right information or the right person can be found across a variety of repositories and locations.

Extending Enterprise Collaboration

The ability to respond quickly to changing market conditions is always important, but it’s especially critical in the current economic environment. Companies don’t work in a vacuum, but rather need to collaborate seamlessly and securely with their partners, suppliers, and customers. Today’s ECM provides for quick, easy internal and external collaboration without IT involvement, facilitating idea sharing and relationship development among knowledge workers, customers and partners. Internally and externally facing community workspaces let contributors share and exchange ideas and activities—breaking down formal and informal information barriers and fostering cross-project visibility and awareness for easy program management of simultaneous projects.

Social computing and collaboration tools provide the ability to improve agility, but are they secure? Do they introduce risk? Blogs, for instance, often include a company’s hard-won intellectual property. The same can be said about wikis. Regardless of how content is created, it must be archived and managed by a lifecycle in order to mitigate risk.

Next-generation ECM platforms deliver security, retention and governance behind the scenes—pervasively, but not intrusively. They enable anytime/anywhere access to content while securing content outside the enterprise via information rights management. And they feature a scalable infrastructure that makes them enterprise ready. ■

EMC® CenterStage, a new set of Web-based clients for EMC Documentum®, is a new standard for extended enterprise collaboration. With modern social collaboration capabilities like blogs, wikis, RSS feeds and discussion forums, CenterStage lets users and companies connect, share ideas and collaborate more efficiently, cost-effectively and securely than ever before. To learn more, visit www.EMC.com/centerstage.

1 Marie Glenn. March 2009. Organizational Agility: How Business Can Survive and Thrive in Turbulent Times. *Economist Intelligence Unit*.

2 - 6 Ibid.

Successful Enterprise Social Computing Adoption

By Karyn German, VP Customer Care, NewsGator

The seismic success of Facebook, Wikipedia, Twitter and other social computing tools sets the bar pretty high for social computing initiatives within the enterprise. Though viral in the consumer realm, social computing tools require careful handling—and sometimes a little push—to achieve the desired results in a business context.

What businesses typically expect out of social computing tools are powerful new ways to discover expertise in a distributed organization; collaborate across roles, departments and divisions; recruit and retain employees; capture knowledge from an evolving workforce; and innovate at a faster pace.

Social computing can and does deliver these things, but it's a myth that it happens automatically. So here are six steps you can take to ensure you get the results you want from your enterprise social computing program.

1. Identify business problems that social computing will solve. In addition to yielding broad business benefits, enterprise social computing can help solve concrete business problems. To get the most out of your initiative, identify those problems at a bedrock level. Instead of “better customer relationship management (CRM),” discrete business problems might be: initial customer response is not timely; customer problem resolution is not timely; and/or overall customer satisfaction is marginal at best.

When you've identified the discrete problems, add realistic “phase one” goals with key performance indicators (KPIs).

- ◆ Initial customer response is not timely. *Reduce the time from customer initial contact to response by 15%;*
- ◆ Customer problem resolution is not timely. *Reduce time between initial customer contact and problem resolution by 7%;* and
- ◆ Overall customer satisfaction is marginal at best. *Increase the average quarterly customer survey rating by 20%.*

2. Define use cases of social computing solving those problems. Develop use cases to attack these carefully defined problems. Include the actors and events for each. Continuing with our CRM example, a use case could be:

- ◆ Customer presents a challenging product question;
- ◆ Account manager reaches out to community of individuals with expertise about the customer and the product;
- ◆ Some community members respond; others critique the input via attention data such as ratings, comments and tags;
- ◆ Account manager filters responses with the help of the attention data; answers customer, provides resolution; updates community with specific customer resolution; and generalizes feedback and updates customer support knowledge base.

3. Select the correct tools. Now that you know what the steps in your use case are, it's a question of selecting the right tools. Among the more common choices for the enterprise are blogs, wikis, social profiles, social bookmarking, communities, discussion forums, tagging, micro-blogging, activity streams, status updates, voting and rating.

Let's examine one of the steps in the CRM use case: The account manager might post a question to a discussion forum, browse/search “people tags” to find specific individuals with documented subject-matter expertise, or explore content tags to find creators of content related to the subject matter. Or some combination of the three. Experiment during the pilot phase and choose the alternative that works best.

4. Publish best practices. Some believe social computing in the enterprise should be left unfettered by directions, rules or guidelines. While that's how it works in the consumer world, proper guidelines can increase adoption—and certainly results—in the business context.

Some examples of best practices include:

- ◆ Prior to creating a community, explain its purpose and ground rules to prospective members;
- ◆ Tag articles with terms that are meaningful to the group, not particular to the source material;
- ◆ Discussion participants should stay on topic to preserve the thread's value, and moderators should discourage digression; and

- ◆ Social profiles are vital to a comprehensive social computing strategy, and profile-building “jam sessions” are a good way to get them done fast.

5. Identify obstacles. By 2012, more than 30% of large organizations will operate social software suites for all their employees, according to a recent Gartner report. Nonetheless, large organizations in particular will encounter internal obstacles. For example, employees may already be using Facebook, LinkedIn or other systems and resist alternatives. They may worry about making their ideas public and uncensored. Management may be entrenched in “old school” hierarchical thinking, or worry about reduced productivity. It's prudent to identify these obstacles, prioritize them and develop tactics to address them.

6. Identify desired cultural transformations. As obstacles are overcome, Web 2.0 can make an enormous impact on the culture of a company, including: improved transparency; decentralization of information; increased sense of identity; democratization; emergence of knowledge; and improved communication for a distributed workforce.

An organization should do some soul-searching to ensure it's ready to support cultural transformations like these. They don't occur without a willingness to change and a commitment to improve the bottom line. For those who are ready, here's a good plan of attack for the all-important cultural change piece:

Provide direction by preparing a mission statement for your cultural transformation. Identify specific examples of activities that would illustrate the transformation in action.

Identify the second- and third-order impact of these activities on the bottom line. Identify groups and individuals who are good role models for the transformation, and list their relevant traits. Finally, identify groups that may resist the transformation, and understand why.

Armed with this deeper insight into cultural transformation, the champions of the enterprise social computing initiative can work more effectively with the departments most concerned over possible cultural changes. ■

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Social Computing Plus Product Development

Facebook Meets CAD? Not Exactly...

By Adrian Scholes, Marketing Director, PTC

Today, more than ever, new technologies and the movements that go with them seem to become ubiquitous in a flash. Take social networking. It's difficult to remember a time when there wasn't at least one mention of MySpace, Facebook or Twitter either in the news, in a chat with friends or even at the dinner table. And whether you've just heard about it during water cooler conversation, or like so many other people you've begun encountering long-lost high school friends online, your life has been affected by computer and Internet-enabled social networking.

You may have wondered, as we have, how and when this universe of seamless, multi-user communication might affect the work you do. The answer is clear and present: it's already happening. Today, the changing needs for collaboration have collided with the technological advances of the Internet, and social computing is poised to have a profound impact on product development. The result—simply dubbed social product development—will allow teams to better collaborate across borders and time zones and will enable innovation of endless possibilities.

This enhanced collaboration is being spurred on mainly by two factors that are affecting your industry and so many others: changing demographics and globalization.

Why Now?

Social product development is having its advent now due to two principal factors. The first is the demographic shift in the workforce. The senior side of our workforce is aging, and while this is no surprise, it's crucial to recognize the serious implications that it can have on your knowledgebase. Right now, there is an urgent need to capture decades of valuable intellectual property before senior staff retires. At the same time, the incoming workforce of the next decade, who are at the moment somewhere between sixth grade and their senior year of college,

embodies a new standard of technology literacy. These vanguards will usher in a new way of working and collaborating, undoubtedly influenced by their prolific use of social networking tools and Web 2.0 technologies. Businesses would do well to embrace this inevitability, and not shy away from it. Not only do you need to prepare for it, but you need to determine the best way to facilitate the eventual digital "meeting of the minds."

"The incoming workforce of the next decade embodies a new standard of technology literacy."

The second and perhaps more visible factor is the inexorable global expansion of product development. As a complex set of activities involving a global roster of players, product development success has become a factor of how adept companies are at choreographing the collective efforts of a fragmented team. With social networking advances, we are presently experiencing a shift from the traditional,

unidirectional "push" mentality of the Internet, to a "peer, publish, pull" mentality. When you combine this freer flow of information with anytime/anywhere interpersonal connectivity, you'll see the disparate machinations of your global team working in greater harmony.

How?

Clearly, we're not asserting that Facebook and MySpace are the wave of product development's future. So what's behind this revolution, technology-wise? Social product development is being propelled by infrastructure platforms like Windows SharePoint, through which Microsoft is enabling social tools that can have a real and monetizable impact in commercial settings. Simply put, Windows SharePoint represents a set of industrialized, secure, business-ready social technologies touted by Microsoft as "social computing." Social product development is the result of these capabilities being applied in a product development setting for serious economic and business benefits.

The combination of social computing technologies into a tightly woven, easy-to-use platform for product development provides disparate team members with unique and productive ways to share experiences, exchange information and move the business forward. What happens is simple yet profound: the evolution of ideas into profitable products.

For companies of all sizes, in all industries, the promise of social computing is great. And, without fail, the manufacturing workforce will replenish, technology will advance and users will continually look to make their work lives easier. Now is the time to get acquainted with the vision for pioneering and supporting social product development today and tomorrow. ■

Adrian Scholes has been involved with the CAD and PLM industry for more 20 years, in roles ranging from mechanical designer to value added reseller and software vendor. He is currently director of global marketing for PTC, based in Needham Massachusetts.

PTC's technology for social product development extends the social computing capabilities of Windows SharePoint Services by adding structured data management and rich interaction with authoring and viewing solutions.

PTC enables companies to join the revolution of social product development through its suite of Windows SharePoint-enabled products, including, Windchill ProductPoint, Pro/ENGINEER, Mathcad and ProductView. For more information on PTC, visit www.ptc.com, or join the discussion at: www.ptc.com/go/social.

The Realities of Social KM

By Phillip Green, Chief Technology Officer, Inmagic



Phillip Green

Phillip Green is Inmagic's chief technology officer. In this role, he sets business strategy and product direction for the company's social knowledge management and library solutions. He works closely with strategic accounts

and business partners around the globe. Green frequently presents at industry forums, and has authored numerous articles and papers on the subjects of social knowledge networks and social libraries. Green served as Inmagic's president and CEO from 1990 to 2006. During his tenure, he led Inmagic through a successful transformation, driving the evolution of special library products to the Web, and then Web 2.0.

Social knowledge management (SKM), spawned by Web 2.0 and energized by the new economy, is changing the way we think about traditional knowledge management (KM). Like any new approach to age-old problems, it's sometimes hard to separate fact from fiction.

Everyone can agree that at its core, a successful SKM strategy starts with a knowledge repository where content is managed and accessed, and that it's critical to enhance that experience through the "wisdom of the community."

But that's just the beginning—let's get to the truth about SKM.

SKM is different from social networking (Hint: It's not a social free-for-all)

Truth!

The objective of SKM, unlike consumer-oriented social media, is to create a high-quality knowledge repository. Vetted information must be secure so that it retains its veracity. And having control mechanisms in place ensures that socialized content is chaos-proof. Simply implementing blogs and wikis into an organization is no guarantee for success.

Outside-the-firewall social networking is indeed different than SKM. The stakes are too high for inaccurate or poor knowledge contributions—therefore, MySpace- and Facebook-style social networking is, at best, an uncertain endeavor inside an organization's firewall.

Knowledge is more than just top-down vetted information. And it's more than bottom-up social communications and networking. It's the intersection of these constructs where measurable value and organizational impact is derived.

ECM + blogs, ratings and comments = SKM

Myth!

This is the "Goldilocks problem": finding a solution that's just right for a specific organization.

For example, it has been said that enterprise content management (ECM) systems are too big, and that it takes too long to find information within the system. Why?

First, there is the "Google problem"—conducting searches that retrieve numerous and irrelevant results, which means wasting time searching for the appropriate content. Second, ECM often focuses on simply obtaining documents and ensuring that they are not mis-

placed—resulting in content that is "physically captured, but logically lost."

At the opposite extreme, organizations that have implemented social networking approaches, SharePoint or other specialized content management solutions now have too many silos. Information is dispersed across many specialized repositories, and it takes too long to visit each repository to find the information the user seeks.

SKM brings people and content together in one place, enriching the data and improving information accessibility and accuracy to enhance individual and organizational productivity.

SKM does not fall into traditional content management buckets

Truth!

SKM is a game-changing approach to KM. As we all know, "knowledge management" is an awfully broad term and an awfully big bucket that no one technology, product, process or service defines.

There are many other buckets within this realm, including document management, ECM, portals, digital asset management... you get the picture.

SKM addresses problems that no single application can do alone: reducing the time it takes to search for information, complying with regulatory standards, capturing and reusing critical intellectual property, eliminating information silos and, perhaps most importantly, capturing the wisdom of knowledge communities.

SharePoint is SKM

Myth!

SharePoint is the 800 lb. gorilla—it is so pervasive across the corporate landscape that it is impossible to ignore or overlook. As such, it begs the question: "How does SharePoint fit into my SKM strategy?" And it comes down to the age-old "build vs. buy" discussion.

Simply put, SharePoint is a set of tools—not an out-of-the-box solution. Using SharePoint alone brings with it concerns about potential strain on resources—time, staff and cost—to create the capabilities necessary for socializing content, especially if the project must be up and running quickly.

SharePoint can also contribute to the silo problem—a typical SharePoint footprint creates many SharePoint "sites," which can

equate to additional disconnected information silos.

Information silos are the death of many KM initiatives—they're expensive and counter-productive. Successful SKM recognizes the power of leveraging these investments and promoting connections to existing information repositories within an organization.

SKM solutions should be seen as a way to augment and complement existing infrastructure. It's all about leverage, and leveraging SharePoint with an SKM platform enables quick start-up and a maximum return on investments already in place.

SKM provides considerable, quantifiable ROI

Truth!

When implemented and used correctly, SKM produces tangible ROI. And as budgets are almost universally getting tighter, understanding ROI is more critical to a project's success than ever.

One professional services firm calculated ROI by comparing time spent finding information before and after implementing an SKM strategy—and the results were both positive and measurable. Employees had unprecedented visibility and access to information, and the organization realized more than a 40% increase in knowledge worker productivity.

Another organization, R.V. Anderson Associates, Ltd., implemented an SKM strategy that provided ROI after just two months. The technology has been rolled out across 90% of its employee base and the organization has seen operational benefits including increased productivity, centralized intellectual capital, expanded knowledge sharing across regions and decreased time to deliver proposals.

So, now that we've separated the truth from the myths, ask yourself this: How much does your organization really know? ■

KMWorld Best Practices White Papers

Connecting Buyers with Sellers

By the KMWorld Specialty Publishing Group

For more than seven years, the KMWorld Specialty Publishing Group has been connecting buyers with sellers in a most unusual and—happily—successful way.

There is no magic science involved; what we do is pretty obvious. For one thing, the KMWorld White Papers provide a forum for an extended explanation of how certain software solutions work, and can be applied to solve business problems. That's not a trivial task, as any salesperson or consultant will tell you. It's not something you can easily do in a "blurb" or with a colorful brochure. Information management solutions are not only complex, they are usually multi-dimensional, solving many different problems, depending on how they are applied and where the needs of the organization lie. And don't forget: solving one problem only opens the opportunity to face the next one. That's what knowledge management software does best.

Secondly, we think the White Papers have become the "go-to" source when a business owner of any kind is tasked with "learning about this KM stuff." For example, we saw a huge uptick in interest in records management and regulatory compliance (try to guess) when the Sarbanes-Oxley deadline was looming. Similarly, we are seeing increased interest in Web self-service and customer experience management right now, when the mood is swinging back from "cost savings" as a prime directive, toward providing better customer service as the key competitive differentiator.

How It Works

The KMWorld Specialty Publishing Group has created an editorial calendar (see to the right) for a full calendar year. Sponsors are able to pinpoint specific issues where their message will be in the proper context to reach an audience in search of their kind of solution, and their kind of solution only.

Our editors review all submissions for adherence to strict editorial guidelines. We do not allow "hype." We DO allow reasoned explanations of their solutions, and how they can help a business achieve its goals. As a "business solutions" paper, we have every desire for our sponsors' messages to come through loud and clear.

Our editorial calendar is not immovable. If you have a suggestion for a new topic, vertical market or technology space to explore, please contact us. ■

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