



## Five Best Practices For Enterprise Collaboration Success



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## Collaboration: We've been doing it the hard way

Collaboration is simply a series of conversations to get to a goal. It involves gathering people, asking questions, collecting answers and ideas, surfacing information, getting feedback on interim deliverables, and the like. It is the way most work gets done.

*Employees spend up to 25% of their day looking for information, which can be 25% of your staff costs.*

We've been collaborating for a long time, but we've been doing it the hard way. Using today's business tools – email with attached documents – collaboration has been slow, difficult and ineffective.

Topics get fragmented across many places – individual emails, different versions of presentations, excel files and word documents – stored in different desktop applications, shared drives and content management systems. Corporate employees spend up to 1/4 of their day looking for information, according to research firm IDC. The cost of this unproductive time can be as much as 25% of your staff costs. And according to a 2008 IBM study of 400 human resources executives, only 13% of people can find someone with a particular area of expertise in their own company. This means the bulk of work doesn't leverage the specialized knowledge that exists right there in the company, because there is no good way to find it.

Collaboration solutions, based on wikis and other Web 2.0 technologies, are focused on solving these problems. But a collaboration solution only addresses these problems to the extent it enables conversations to move quickly towards the goal while tapping the right people and surfacing the right information. With the right collaboration solution, group productivity and organizational effectiveness can be dramatically increased, and decision cycle times greatly reduced.

*The bulk of work done doesn't leverage the specialized knowledge that exists right there in the company.*

These results may be critical to survival in difficult economic times, and the right collaboration solution is the easiest, most cost effective way to achieve them. This paper is designed to inform your search for a collaboration solution that achieves these business results.

## Best practices for enterprise collaboration success

### #1: Tightly integrate social networking

#### ***Get a rich picture of the people behind the work***

The way work gets done is by people working with people, "bouncing ideas" off each other, tapping into each other's expertise, leveraging each other's knowledge and insights, re-purposing each other's output. Any collaboration solution you consider should give a rich picture of the people behind the work. It should connect people and give them a full picture of each other. When people have the context of the who, what, when, where and why of the others they are working with, it builds the level of trust they have in each other and results in greater teamwork and higher quality work.

### ***Help people get to know each other***

Profiles in the social collaboration solution should truly help people get to know each other, with content such as photos, background, experience, expertise, interests, links and stories. Profiles should reveal who the person is following so others can learn from their network, and what they've been working on most recently so others can learn what they're up to. Profiles should include tags; both the tags a person gave him/herself and tags others gave him or her. Profiles should also show the workspaces in common between you and the person, as this provides further relationship context.

### ***Discover others who could be valuable***

A great deal of the value of social networking comes from connections with all the people not directly involved together on a formal project, what sociologist Mark Granovetter calls the "strength of weak ties." Until recently, collaboration solutions have focused on making "strong ties," or active working relationships, efficient and effective. But it is "weak ties" that can unblock and accelerate group productivity. These connections offer new perspectives, ideas and insights. The collaboration solution should provide a variety of quick and easy ways to make associations and leverage weak ties to get work done faster and yield more informed and innovative outcomes.

*A collaboration solution should provide a variety of easy ways to make associations & form connections that might not occur otherwise.*

You should be able to pivot directly from any contribution to the contributor's profile to learn about the person. You should be able to browse a collection of tags, to get a big picture of the makeup of the community, and to surface ideas for new connections. You should be able to search tags to locate someone with the exact expertise needed to inform a decision, guide thinking or provide more context for a project. And finally, the profile should show all the people a person has subscribed to, which gives you another way to discover new connections.

### ***Learn from observing others who are more skilled***

We all get better at what we do by watching others who are more skilled. Someone who wants to be a great orator watches other great orators. People get better at their jobs by observing others. Any collaboration solution you consider should let users observe and learn from the people who can be valuable to them. As they watch the flow of useful content created, they also learn what's important to the person, how they approach situations, how they prioritize and make decisions. People get to mentor others and increase their reputation simply as a byproduct of getting their work done.

*People get better at their jobs by observing others.*

### ***Keep up to date automatically***

The collaboration solution should let people stay in touch with a large network of colleagues, allowing them to keep up to date automatically with that others are doing, working on, and producing. Every person should be able to keep the network informed of what they're up to, simply as a byproduct of doing their work. For people working together directly on a project, the unproductive time team members spend today informing each other of what they are working on and their progress on those items should be virtually eliminated.

## #2: Ensure absolute confidence in adoption rate

### **Adoption is everything**

The success or failure of any solution you consider will be directly aligned to its adoption rate. 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.

*Adoption happens when users want to use the product, and they take action as a result.*

While certain best practices encourage fastest adoption (a topic that deserves its own paper), adoption is not something that can be forced on people. 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.

### **Must be dead easy to get started**

The first requirement for adoption is that the solution be completely intuitive for the typical business user. A basic familiarity with popular desktop and internet applications should be the only skills required. A user should be able to open the interface and start productively using the solution with ease. How do you know this will be the case with the solutions you are considering? The best way is to sign up for a free trial and use it for yourself. Also, it is a good idea to find out the provider’s adoption and renewal rates.

### **Must be self-evident: What’s in it for me?**

It needs to be self-evident to users that the collaboration solution will benefit them. Make sure any solution you consider includes personalized group productivity tools with intuitive appeal. One of the new “killer apps” for personalized group productivity is a dashboard that lets each user compile their own personalized and customizable home page by filtering in the information they want with easy-to-use, standards-based widgets. The user gets a 360-degree view of everything they need including projects they are working on, people who are important to them, and information from enterprise systems and the web. This has a high intuitive appeal for users. Not only do they have quick access to everything they need, but, more importantly, they see activity as it occurs, stay apprised, and know when something needs their attention.

Other features with high user appeal include:

- A profile that includes not only the standard corporate information (which should be synchronized with the LDAP directory or Active Directory) but a way for the user to add pictures, additional means of contact, a story about themselves, and tags so others can find them based on expertise or common interests.
- The ability to subscribe to the activity feeds of colleagues.
- The ability to subscribe to alerts that summarize changes made to workspaces, in the format and on the schedule desired.
- The ability to set up a new workspace and invite others as you choose.
- The ability to put a “watch” on any particular page or blog and be notified immediately when changes occur.
- The freedom to eliminate the practice of giving status updates, as updates are now a byproduct of what each user does.

### **The user must be in control**

A knowledge worker who is accountable for what they produce should, have a high degree of freedom over how they produce it. For a

*For a collaboration solution to be successful, the user must have a high degree of control.*

collaboration solution to be successful, the user must have a high degree of control. They must be able to make all of the choices highlighted in the above section without having to involve anyone else. They must be able to adjust their choices and settings on the fly, as

part of the process of learning how to use the solution to best fit their needs. As their needs change, as projects come and go, as new applications and information sources become available, they need to be able to change their subscriptions, notifications, dashboard and everything else, easily, on their own.

#### ***The structure must be fluid***

A collaboration solution that requires a user to involve IT to create a new workspace, manage permissions, form a new group or customize their home page will not adapt fast enough to enable productive collaboration. If it doesn't allow users to make these changes, as and when they wish, on the fly, it will slow down collaboration and will not gain the level of adoption needed for success.

In addition, if changes require IT intervention, a new overhead burden will be created for IT, one that is endless and thankless.

#### ***Should have high social incentive***

Social Software applications like Facebook, LinkedIn and Twitter have gained fast adoption because there is a strong social incentive to use them. When people you respect are using an application to reach out to you and build social networks you'd like to be part of, there is a high degree of personal incentive to use the application. You want to choose a solution that lets this social effect work in your favor.

### ***#3: Make sure it fits the way people work***

#### ***Email integration***

To get high adoption, a collaboration solution must fit in with the way people work today. Since employees rely heavily on email, email integration is critical. A collaboration solution should allow users to easily create a new wiki page, or add to an existing page, by sending an email. Users should be able to title the new page, for example, by simply typing the subject line of the email. The body of the email should create the body of the page. If a file is attached to the email, the file should get attached to the wiki page. Anyone who receives the email should be able to add to the page simply by replying to the email. In addition, users should be able to easily forward an existing wiki page to others via email. An easy way to do this is for the collaboration solution to simply present the user with the list of all authorized users and let them create the email distribution list right there, with a few clicks, without leaving the page. Another important email integration feature is email notifications. Users should be able to specify the frequency and content of email notifications for pages, people, and workspaces.

#### ***Support for mobile devices***

Today's workers rely heavily mobile devices. People are accustomed to being able to get work done on the go. For a collaboration solution to get high adoption, it needs to work seamlessly with mobile devices so people can continue to collaborate on the go. The people who are mobile, in fact, are often the ones on the front lines with customers and prospects, and have the greatest need for fast access to information, ideas and insights from their colleagues. The collaboration solution should automatically detect mobile device access, and present the appropriate interface across a wide range of devices.

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### **Offline access**

There are also times when people need to work offline, such as when on an airplane or otherwise off the network. For high adoption, the collaboration solution needs to allow users to download a single page or a group of pages, read and edit the content while offline, and then synchronize changes back to the server when they come back online.

### **Working with outside 3rd parties**

People in the organization who work with 3rd party contractors and partners can often increase productivity dramatically by creating a shared workspace with the 3rd party. For example, a marketing manager can work much more productively with her contract web designer by managing their joint list of web changes in one shared workspace. By using a shared workspace, a PR manager can stay on the same page much more easily with a 3rd party contractor who is managing speaker submissions. To allow this type of flexibility, the solution should be SaaS-based, lightweight and web-native, so workspaces can be set up without involving the 3rd party's IT department, and without installing any local software.

## **#4: Aggregate information from all sources**

### **A hub for the information and people you need to do your job**

A collaboration solution needs to provide visibility to all information and people involved across all workspaces. A user should be able to search across all the workspaces to which they belong, by key word, page title or tags. People should be able to create links that lead to pages on other workspaces or external sources. A tag cloud should show tags across all workspaces and people. Workspace pages should also support rich text, embedded images, video, links, and attachments, so conversations are no longer limited to a single media format. But beyond these basic requirements, a collaboration solution should serve as a hub for both the information and people you need to do your job.

### **Information from workspaces, enterprise applications and external sources**

People use a variety of information sources to do their job. For example, they may use emails and calendars from Microsoft Outlook or Lotus Notes, lead records from Salesforce.com, documents stored on their computer, on shared drives, or in a system like SharePoint. They may use news and information from media sources, blogs, microblogs and social networks. Once they start using a collaboration platform with integrated social networking, they also rely heavily on the content in the workspaces and the people in their social network. Users should be able to filter in all of this information using standards-based widgets so they have it all in one place. They should be able to drag and drop a widget and configure it for the information they want in a matter of a few intuitive clicks. The widgets should filter in information from all internal and external sources the user finds relevant.

## **#5: Assess Total Cost of Ownership**

### **People services**

Every software application requires people services. The cost of the people services can be the most significant cost in the total cost of ownership calculation. According to Gartner, the cost of the people services to own and manage a licensed software application can be 4X the cost of the software license per year. When a company has no prior experience with an application, which is typically the case with enterprise social networking and collaboration, these costs will typically be higher as IT must get trained and certified to administer and support the unfamiliar application.

IT overhead costs for licensed software are not only significant, they are also typically underestimated. Accurately predicting the licensed software overhead is even more difficult for a new application category, as there is no history to draw on. Since this is typically the biggest cost that needs to be considered, if it is incorrectly estimated, the projected bottom line results can be grossly overstated.

For these reasons, in cases where the application category is new, the software-as-a-service subscription model makes especially good business sense. It avoids investing up front in any one application while the category is still rapidly evolving, it eliminates the risk of underestimating the overhead effort, which is exacerbated by the newness of the product category, and it provides all the traditional cost benefits of software as a service.

#### ***Budget considerations & hidden costs***

Gartner estimates that more than 75% of the typical IT budget is spent simply maintaining and running licensed software and its required infrastructure. This means 75% of the IT budget is not focused on strategic initiatives and core competencies. In difficult economic times where IT budgets are constrained, this is especially problematic as IT needs to affect change with what remains of their budget after keeping existing systems running. Subscription software allows this discretionary IT budget to go further, which is especially important in uncertain economic times. It also frees IT from the risks associated with hidden costs that can wreak havoc on a tightly bounded budget.

#### ***Support***

Any application destined for widespread use has the potential for significant support costs, for the simple reason that it is being used by a lot of people. So support is an important variable in the total cost of ownership calculation for an enterprise collaboration solution. Here again a SaaS-based solution can drive down TCO. The SaaS vendor is motivated to drive adoption and maintain that adoption over time to support their primary financial objective: recurring revenue. Support is a critical success factor in driving and maintaining adoption. You should look for a SaaS vendor who offers the option of direct user support, with a solution that offers clear, easy-to-navigate online help.

#### ***De-risking the single biggest success factor: Adoption***

Social collaboration is a group productivity product vs. a personal productivity product, and as such adoption is critical to success. A group productivity product can only benefit the group if it is used by the group. The software-as-a-service model is much better suited for this type of product, since it is much better suited to drive user adoption. Since software-as-a-service vendors sell a recurring service, the sale does not end when the initial contract is signed. SaaS vendors have a significant financial interest in driving adoption and creating a broad base of happy and loyal users.

#### ***Up front investment***

Since social collaboration is a new product category, the market is still rapidly evolving and an organization likely has not had a chance to experience and quantify the benefits first-hand. As such, it makes sense to de-risk your initial investment as much as possible. With traditional licensed software, you typically have to invest in hardware and software infrastructure for the initial application deployment. This usually represents a large upfront cost. With an unfamiliar application, capacity needs are especially hard to predict, so the organization typically faces one of two evils: over-provisioning infrastructure, which underutilizes capacity, or under-provisioning infrastructure, which delivers poor performance. Since software licenses tend to be highly discounted based on volume, organizations also have an incentive to buy more capacity than needed in the initial license purchase. Avoiding these high up-front investments is another

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reason SaaS is recommended for social collaboration. With software-as-a-service there is no infrastructure to acquire. You can easily expand the capacity of SaaS applications as needed. Except for additional Internet bandwidth, there are typically no incremental infrastructure costs to handle any additional capacity you need. And since the SaaS vendor relies on recurring revenue, their focus is on ensuring high loyalty and adoption over time rather than on providing incentives to buy more than is needed in the initial purchase.

### ***Upgrades***

When a product category is new and highly competitive, software applications are evolving rapidly. This means updates and upgrades come faster than they do with a more mature product category. SaaS eliminates the costs of the frequent updates and upgrades typical with a new product category, and in this way further drives down costs for social collaboration applications. With licensed software, major on-premise upgrades can cost as much as 30% of the initial deployment costs. This not only drives up the total cost of ownership, but it causes upgrades to be delayed because of their high costs, which mean businesses don't get the benefits of the new capabilities.

### ***Time-to-results***

Given that the benefits of a new product category are yet to be experienced first-hand, time-to-results is an especially important consideration. In this regard the subscription model again makes most sense. SaaS deployments provide much quicker time-to-results because the organization does not need to concern itself with installing underlying infrastructure, and because the SaaS vendor takes responsibility for the end-to-end delivery of the application. With SaaS, a social networking and collaboration platform can be deployed in days, returning tangible results in weeks. With licensed software, deployment alone can take months, with payback deferred until well after the one year mark.

### ***Administration***

There are several administration capabilities that reduce the cost of ownership of a social collaboration solution. The first is directory integration, which eliminates the redundant cost and needless overhead of managing two separate user directories. Directory integration also eliminates the security risk that an application may be giving access to users who have left the company. With any social collaboration platform you consider, you want to make sure the user profiles are auto populated from your LDAP directory or Active Directory. To eliminate the helpdesk overhead of managing a redundant set of user logins, you also want single sign on. In addition to the cost considerations, single sign-on also removes a barrier to user adoption. Finally, a collaboration application should offer the ability to delegate and share administration. Not only should a user be able to freely create their own new workspace, without involving IT, they should be able to specify who else can add and approve new users to the workspace.

### ***User flexibility***

Collaboration solutions can create a significant and unexpected new cost if they require IT to get needlessly involved in making changes that should be left to the users. The nature of collaboration is such that the people involved in any given topic are changing all the time, and new topics are being added all the time. If IT needs to get involved to add users to a discussion or to create workspaces for new groups or topics, the IT overhead cost grows considerably. Given the nature of collaboration, the volume of these changes is not small or finite.

In addition, in order to come up with a personal home page that works best for them, each user will go through an iterative process of trying new things, and will change their home page when they learn interesting ways to use widgets from others, when new Internet applications are delivered, when their projects change, and so forth. If IT intervention is required to manage the personal home page of each user, the overhead burden created will be endless and thankless.

If IT is the gatekeeper to changes the users need, not only do costs rise but friction grows between users and IT, a significant barrier to adoption is created, and business results are diluted. Any collaboration solution you consider should give users the ability to create a new workspace, form a new group, customize their home page and do other common tasks that should rightfully be left to the users. This will enable the solution to adapt as quickly as needed to support the desired results, and will keep your total cost of ownership low.

## 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 with consumers today. Users simply click to the interface and start productively using the application. Personal productivity features capture the immediate interest of the 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. These results may be critical to survival in difficult economic times, and the right collaboration solution is the easiest, most cost effective way to achieve them.

### ***Learn more***

60-second video of the Socialtext platform:

[http://www.socialtext.com/products/demo\\_60seconds.php](http://www.socialtext.com/products/demo_60seconds.php)

4-minute video of enterprise social networking:

[http://www.socialtext.com/products/demo\\_socialnetworking.php](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](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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