three

Walk a Mile
in Their Shoes

This chapter will discuss several case studies from organizations that vary in industry focus and company size. The case studies will give readers an idea of the unique business problems that organizations are faced with and how new enterprise collaboration tools and strategies can help solve those problems. The case studies here are shortened versions of longer and more in-depth cases. Although many other examples are discussed throughout the book, I wanted to devote a section to more in-depth explanations.

Pennsylvania State University

Pennsylvania State University was founded in 1855 and currently is home to around 40,000 students. The university employs around 22,000 people, 1,500 of whom are part of the Penn State Outreach department, the group that made the investment in enterprise collaboration.

What Were the Business Problems?

In 2005 Penn State Outreach conducted an employee survey and found the following:

- Employees felt isolated and were geographically dispersed.

- Employees didn't have the information they needed to get their jobs done.
- Employees weren't aware of how their jobs affected the rest of the organization.
- The executive team was unaware of what was happening at the ground level of the organization.
- Communication was inefficient, and collaboration was virtually nonexistent.
- Employees had no voice within the company.

The organization agreed that all these things had resulted in missed opportunities, poor decision making, and extra spending.

What Was Done to Solve the Problems?

To solve these problems Penn State deployed a collaboration platform, ThoughtFarmer, which is described by its parent company OpenRoad as a social intranet software platform. As a part of the deployment, Bevin (the woman responsible for the initiative) met with all the upper-level managers to convey the business problem and the proposed solution. It was important to get their buy-in and support. Once this was done, volunteers were recruited to help move things into action.

Volunteers were solicited in five areas:

- Content
- Multimedia
- Policy
- Evangelists
- Data/analytics

The volunteers were shown the ThoughtFarmer platform and were asked to help with creating, fixing, and curating content. Although no formal tools were developed, these evangelists had access to links and to information that was shared actively throughout the group. One thing to note is that the value of this initiative was conveyed from an individual level, not from a company level. This meant that employees

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weren't told that "this is how Penn State will benefit as a result of you using this"; they were told that "this is how *you* will benefit." The actual jobs of the evangelists never changed; what did change was *where* the jobs were done.

Some optional training classes were offered to employees, but nothing was forced, thus creating what Bevin likes to call a "seeded organic approach." Penn State made the necessary resources available to interested employees, but again, nothing was forced on them.

No formal standardization process was ever developed; instead, activity on the platform was monitored and employees were coached and encouraged on things they could do to improve their use of the platform. For example, if an employee put information in a certain area and Bevin or her team thought it could be better served somewhere else, she would nudge or suggest to the employee to move the information by saying something like "Let's try doing it like this" (or would move it herself with the permission of the employee). This approach was always cooperative and not forceful. Bevin and her team also kept an eye out for duplicate information by monitoring the activity streams. Old information was also crawled, and relevant links were added in the older content when relevant.

Today the intranet serves a few key purposes:

- It is used to communicate and push information and collaborate on that information.
- Departments put out forms or common things that they use, and others comment on things to be changed.
- Project teams share files and meeting minutes.

The ThoughtFarmer deployment at Penn State Outreach currently includes the following feature set:

- Rich profiles
- Activity streams/status updates
- Shared calendaring
- Embedding of tools in media (YouTube embedder)

- Private groups and workspaces
- Sharing of and collaboration on documents

The Results

At least 75 percent of the employees use the intranet at least once a week and more frequently when new projects are being worked on. It was anticipated that the implementation and adoption of the intranet would take 3 to 5 years, but it actually took around 1.5 to 2 years. It's important to note that there was never an in-depth strategy for all this.

Instead of going with a pilot program, Penn State University chose to go all-in for a few reasons. The first was that a small team was perceived as an "elite" team and was less likely to be listened to. There was already a shadow story that only certain people were able to participate in the interesting projects, and it was necessary to counter that with broad participation to avoid misperceptions within the organization. Penn State also believed there had to be a certain user base to help move the project forward. Social networks in general depend on scale, which means that if you have only a small number of people using something, the value is greatly diminished because the scale is not there.

ThoughtFarmer was purchased on a licensed (with 2,000 seats) model, not an annual per user model. This meant that Penn State had an up-front annual cost of $80,000 for the first year. Around $50,000 was directly related to technology costs, and around $30,000 was directly related to human capital costs. Since the platform is licensed, Penn State pays an annual maintenance fee of around $8,000 plus the cost of a part-time employee to manage the system in any subsequent years. As far as financial numbers regarding how much was saved or earned, I was told that this is not being measured at this time. The funding for the platform came from eliminating an annual event that Penn State hosted for employees. That event involved only around 500 employees, and the decision was made to take the money for engaging one-third of the employee base and invest it in a digital way to engage 100 percent of the employees.

As of now, the anecdotal evidence suggests that the problems are being solved and Penn State is happy and satisfied with the investment. I asked if there were any horror stories that Penn State wished to share with me, and not to my surprise, they didn't have any.

Océ

Océ is a copying and printing company with its international headquarters in the Netherlands. Océ has just over 21,000 employees from around the world.

What Were the Business Problems?

The recession was a crucial factor in propelling this initiative at Océ. As a result of the economy, Océ had a very small budget to improve communications within the company. They had to take a big step back to look at ways to improve innovation, collaboration, and knowledge sharing across the entire organization; that was not an easy task. The challenge was that Océ needed something very low-cost but also powerful. Everything was very isolated, and information was very siloed. People were not talking to one another, and they all kept to themselves. Sharing and collaborating over organizational entities was not easy.

What Was Done to Solve the Problems?

Océ implemented a series of collaborative platforms and solutions, including the following:

- A Wiki that was implemented in 2006 was used as a tool to process information, mainly by the research and development (R&D) department.

- Internal blogs that were started in 2008 were used for thought leadership, knowledge sharing, and subject matter expertise.

- Océ TV, which was launched in 2008, included an internal video platform that was used to share news, announcements, updates, and communications from the senior team.

- Microblogging (Yammer, begun at the end of 2008) was used for announcing company updates, asking questions, sharing content, and sharing information on projects.
- Social bookmarking, which was initiated in 2009, was used to store, share, and save relevant and interesting information.

Unlike Penn State University, Océ took the piloted approach to enterprise collaboration by starting these initiatives in the R&D department and then growing them from there. Océ believes that it's always important to justify the business case for everything that it does. In the case of the wiki, Océ had a problem housing and organizing project information. The wiki didn't solve that problem, but it did solve the problem of managing process information, which became the use case for having the wiki and thus the catalyst for getting it created.

Despite all this, there needed to be some sort of force of influence to propel all those efforts within Océ. Thankfully, Jan and Samuel (two of the evangelists for the initiative) had two key areas of influence, and for lack of a better phrase, they worked the system. It's actually quite an interesting strategy. Their two key areas of influence were as follows:

1. A steering committee for the intranet was formed:
   - Both Samuel and Jan are on the committee.
   - They already had a vision and an idea of where they wanted to go.
   - Budget disappeared because of the recession, and so they went with free tools.

2. Jan works in the corporate communications department:
   - He developed the communications plan.
   - He selected the tools: "These are the tools corporate communications is going to use."
   - Department managers approved it.

It was very difficult to coordinate work between the IT department and the business units, but they were able to manage it. With Samuel

working in the IT department and Jan in corporate communications, they were able to work together to make it happen. When Jan ran into IT issues, he brought in Samuel to support him, and vice versa. Together Jan and Samuel brought a great mix of business and IT.

Traditionally, employees were not encouraged to ask questions or be open about personal doubts and ideas. Employees were often perceived as being weak if they had doubts about something, and as a result, they refrained from asking questions or challenging ideas, especially in a collaboration platform among their peers and colleagues. They overcame this culture of closed communication by leading by example. This meant a few things. The first is that Samuel and Jan had to show their peers that other organizations have successfully adopted an open culture of sharing ideas and expressing doubts and uncertainties. The second is that Samuel and Jan had to "walk the talk" and lead by example. They had to ask questions and openly express their doubts, uncertainties, and need for help.

The Results

As a result of Océ's use of collaborative tools (supported of course by strategies), there were several noticeable benefits. The most visible change was that Océ suddenly saw horizontal communications lines open up across various silos. Within those new communications lines, Océ witnessed idea sharing, collaboration, and employees talking and working with one another more efficiently. Overall, employees at Océ were surprised at the ease of use of the Enterprise 2.0 (E2.0) tools that were deployed. The traditional model required that the IT department get involved with a new tool or technology deployment. However, this has changed, and it's now quite easy (and quick) for employees to do something such as set up a blog in around two minutes without the involvement of IT. Employee use of Yammer was the biggest shock at Océ. Through the tool, employees who had never met were helping one another in a meaningful way.

From a communications standpoint, employees became much less dependent on the corporate communications department to communicate with one another. Employees could now do things on their own

and didn't need to rely as much on the IT department to facilitate communication. There was also far more company feedback than there previously had been. People were now sharing information and receiving feedback. This again was a result of employees supporting their own communications needs.

There was also a strong financial impact. Océ had an annual intranet deployment budget of around 350,000 euros, which it was able to reduce to approximately 5,000 to 10,000 euros, resulting in cost savings of around 340,000 euros annually. Océ realized that the intranet was not a critical business tool and was able to replace a lot of what the intranet did and stored with free tools. As a result of the recession, Océ had to look at where it could cut costs, and the intranet was one those areas. Océ stopped all intranet change requests and halted any external hires required to support the intranet (it's interesting to note that Océ also cut back on travel costs and replaced travel with WebEx meetings and e-training).

The current intranet still exists; it's going to stay the way it is. The support team for the intranet platform used to include a program manager, a roll-out manager, a project leader, and a technical team; all those roles were eliminated since the intranet was now in "maintenance"-only mode. Océ stuck to free tools, which required fewer people to manage and very low (if any) development costs. The intranet still gets around 1.5 to 2 million page views a month, but it is no longer seen as a critical tool. Instead, the budget goes toward projects such as enterprise resource planning (ERP).

Océ is a great example of how an enterprise company can reduce costs by implementing an E2.0 strategy within the organization. Following is my favorite financial impact story.

The chief financial officer (CFO) at Océ had his own ideation blog where employees contributed around 60 ideas over time. One of the ideas involved incentivizing delivery employees who were driving leased cars to use gas stations in local towns instead of filling up on the highway. The idea behind this was that gas was cheaper in local towns than it was at gas stations near the highways. The idea was implemented, and employees who filled up at local gas stations were incentivized and rewarded. The financial impact of the idea was a cost saving

of over 800,000 euros a year. Océ TV saved the company approximately 40,000 euros annually because the employees could now make their own videos (with simple cameras) and upload them instead of incurring professional video development costs.

Océ has embarked on an interesting Enterprise 2.0 journey, and although it is not currently where it wants to be, the company has certainly learned a lot along the way. Over the course of the last few years one of the most valuable lessons learned is that technology is interesting and great but Enterprise 2.0 is really not about the technology. It's about the concepts and the people; the technology simply enables things to happen. Océ also realized that pilot programs are effective and help justify the case for E2.0.

Focusing on trying to persuade people to use a particular technology has also proved to be a bit of a waste of time. As Océ realized, the best approach is to explain to employees how to use a new type of technology and the benefits of doing so. However, if an employee doesn't understand or refuses to use a new tool or platform, there should be no hard feelings. There are always going to be early adopters and laggards. The hope is that in around six months or a year after initial deployment, employees who initially didn't want to adopt new tools will start using the new tools and technologies.

Océ also learned that having IT and business units working together is a powerful combination and can prove to be extremely convincing for senior-level management. Having people from both IT and business units work together provides a much better perspective on what can be done and what needs to be done. Enterprise 2.0 does not fall under IT or communications at Océ; it's somewhere in between. Like most companies, Océ believes that it is very important for employees to be able to try new things. Océ always had an understanding that some things would work and some wouldn't. There is nothing wrong with that, and companies shouldn't be scared to experiment.

Finally, Océ realized that money was never an issue with Enterprise 2.0; the issue was organizational. Océ never had any money for E2.0 initiatives, yet that never stopped them. The biggest obstacle is overcoming organizational challenges.

I asked Océ to tell me the worst horror story with anything related to its E2.0 initiatives. Perhaps there was an angry employee bashing the company internally, a security hack, or a leak of some type of secret information. Océ's response to this question was, "We have had no issues with anyone trying to harm the brand, any security issues, or any type of information leaks; we have had no incidents."

FSG: Social Impact Consultants

FSG is a nonprofit consulting firm specializing in strategy, evaluation, and research that was founded in 2000 as Foundation Strategy Group and has experienced a decade of global social impact. Today FSG has around 80 employees. This case study was put together after extensive interviews with Carl Frappaolo, the director of knowledge management. FSG is a much smaller company than the others in these case studies, and that is why I wanted it here: to show that emergent collaboration isn't just for companies with thousands of employees. I should also point out that at the time of this writing the implementations were just a few months in.

What Were the Business Problems or Drivers?

The main reason FSG invested in collaborative technologies was growth. FSG was growing very quickly and realized that knowledge sharing and collaboration under the old model didn't scale very well. They went from one geographic location to three and then to four, with a commensurate uptake in work experience and employees. As they expanded, there was a realization that collaboration via e-mail and the shared drive was starting to show cracks from stress. They relied heavily on traditional systems such as the phone, e-mail, and the memory of employees. Someone might ask or pose the question in an e-mail—"Did we ever do this type of project in this geographic area?"—and employees would remember and answer.

New employees in particular had trouble knowing who to go to with questions or where to go to find information. Employees could spend too much time searching for information. This often took up

the valuable time of the most-senior consultants, and the question they kept asking was, Is this the best use of our time? The interesting thing is that for FSG the business driver wasn't really dollars and cents, cost savings, and profitability, but a desire to grow and have greater impact and thus for newer employees to become productive more quickly.

The final business driver was to allow communities of interest and communities of practice to organize together and share information in a dynamic, asynchronous, and flexible way.

What Was Done to Solve the Problems?

This was a very top-down initiative for FSG; in fact, most of the senior leadership team was behind it. But there was a grassroots, albeit less formal, push in this direction as well. There was a fair amount of renegade and rogue use of collaboration and Enterprise 2.0 technologies. They were not official or widely deployed, but teams and individuals were using them. For example, Dropbox, Basecamp, and Google were already being used by teams and individuals. Each employee also had his or her own taxonomy and approach to file management and organization on the individual computer drives. It was very autonomous. The senior team didn't have a problem with this because it helped the employees get their jobs done. However, they realized that what was being done was not in the best interest of the entire organization. These pockets of emergent collaboration were not strategic, and so the process needed to be centralized.

Over the years, employees became used to their own routines or approaches to getting work done, and those approaches became almost second nature to them. It's not that there is resistance to the actual change imposed by a centralized and formal approach to knowledge management; it is a matter of having to consciously remind themselves that there are new tools and technologies. It's a bit like having a particular route that you take to work all the time. You know that route so well that you can travel it blindfolded and don't have to think about. Now, all of a sudden, someone is asking you to take a new route to get to work. The second nature concept immediately goes away, and you have to be much more conscientious of the turns you take. Eventually

you make it to where you need to go, but you get lost a few times along the way. It's going to take time before you get used to the new route, and the same thing is true for new tools and technologies.

Breaking down the autonomy isn't easy. It's tricky because the entrepreneurial and creative spirit that comes with it needs to be preserved. Furthermore, FSG leverages a culture composed of more carrots than sticks. At FSG, one of the best ways to encourage individuals to accept change and break away from the comfort of established routines is to show employees that there are better ways to do things. Employees need to understand why using the new tools and technologies is good for them individually as well as why it's good for everyone as a company. Value added, both personally and collectively, will drive change.

Employees aren't forced to use anything. Instead, they are shown what they can get from the new tools that they don't get from the existing ways of doing things.

The Results

FSG found that one of the big value statements for employees is that they can leave behind their work and others will find it instead of colleagues having to contact or e-mail anyone looking for information. For example, if someone wants to know if anyone did a project with the AIDS epidemic in Africa, there is a way to check that.

One of the big changes at FSG associated with this initiative was the creation of a new department called knowledge management (KM) and the staffing of it at the director level. Earlier approaches included part-time employees and staffing the role at a more junior level. In addition to the KM director, there are local representatives of the knowledge management team in each office on a part-time basis (one or two hours a week). FSG periodically meets as a team to discuss what's going on in the company, but each of the team members has another "full-time" role to fulfill as well. It's a great approach because these individuals bring an on-the-ground real-world perspective to the discussion.

Less formally, FSG also has KM (knowledge management) evangelists. Some of them are on the knowledge management team, and some are simply consultants and other staff members who "get it." These evangelists share their experiences, tips, and ideas and encourage others to use the new technologies. They exist at various levels. For example, there are at least two managing directors who are very supportive of the initiative and act as senior-level sponsors.

Employees, especially in the communities of practice, are definitely using these tools; they are putting content in central libraries and commenting on information and on other comments. Some are creating small projects within the collaborative sites and managing them there. The rate at which work product is being reused is going up, and employees are remembering that they can access a search tool to look at precedent work products. These tools are making it faster, simpler, and, they hope, more nimble to collaborate and to do so in a fashion that leaves behind a record, so to speak, of that collaboration so that it can be "discovered" and repurposed.

These are some of the tools being used:

Salesforce. This is being used for account management: who the clients are, who the prospects are, who the company is selling to, and what stage that is in.

Central desktop. This is a collaboration hub and content management system. In time it will also be a project management system.

The technology cost is in the low tens of thousands of dollars for two years but will most likely increase in the future as the company considers additional integrations and customizations. Annual labor-hour costs run in the range of $150,000 to $200,000.

The biggest lesson learned was that no matter how prepared you think you are or how diligent you are, there are always going to be surprises. FSG thought it gave a very comprehensive list of use cases to the solution providers it evaluated, but once they deployed, plenty of other case studies came up. Even in known situations there will be glitches and bugs. There is a big difference between a controlled environment and a live environment. The other lesson learned was that the absorption and adoption rate is very different from person to person.

The platform absolutely has to be intuitive. The days of expecting users to go through weeks of training are over.

TELUS

TELUS is a national telecommunications company based in Canada with over 35,000 employees.

What Were the Business Problems or Drivers?

The driving forces behind emergent collaboration at TELUS were threefold: overall employee engagement, its Customers First program, and its Work Styles program.

Emergent collaboration was seen as a way to help improve an already impressive level of engagement at the company. TELUS defines engagement as being a genuine connection between its employees and the company and it wants employees to come to work feeling inspired and fulfilled by the work that they do. Engagement is measured easily and regularly by asking employees how they feel about working at TELUS through routine Pulsecheck surveys.

On the customer front, TELUS has developed the Likelihood to Recommend (L2R) model, which is essentially a net-promoter score. The model asks customers if they would recommend TELUS to their friends or family members. Customers First was launched to help TELUS become the "best in class" in terms of the likelihood to recommend customer metrics. The tagline of the Customers First program is "Promise Made—Promise Kept."

Work Styles, introduced in 2007 and launched nationally in 2009, is an enterprisewide program that supports team members, in eligible roles, to work when and where they are most effective—at home, in the office, or in an alternate location. Work today is more collaborative and mobile than it has ever been and TELUS's Work Styles program combines human resources, IT, and real estate to embrace this changing nature of work. More than half of the TELUS team is remote-work enabled and this future friendly approach to work enhances productivity and reduces

environmental impact. By 2015, TELUS plans to have 30 percent of team members working from within TELUS buildings (resident workers); 40 percent of team members working on a mobile basis (mobile workers); and 30 percent of team members working from home on a full-time basis (at-home workers). TELUS listened to what their employees were asking for, which was a more flexible work-life relationship.

A strong link exists between employee engagement and customer satisfaction. At TELUS a "three legs to the stool" concept has been introduced to support organizational enhancements. These legs include an open leadership framework, a connected learning model, and emergent collaboration technologies. Notice that the focus is on collaboration as opposed to being "social."

What Was Done to Solve the Problem?

The early stages of this initiative began in 2009 with the concept of "Learning 2.0," which sought to empower team members to learn and share with and from each other. The theory behind Learning 2.0 is that learning is not merely an event; it is a continuous, connected, and collaborative process bound by formal, informal, and social learning modalities. These initiatives mainly came from the bottom up, but senior-level leaders are directly involved in discussions about improving collaboration and employee engagement. The formal program for emergent collaboration began in 2010.

The first introduction to emergent collaboration technology came when a Confluence Wiki license was purchased to get the ball rolling. This became the corporate standardized wiki and blog platform, later dubbed "Habitat Collaboration" (named after their existing intranet, which was called Habitat). Eventually Confluence was connected and integrated to the existing intranet. This and all emergent collaborative technologies launched since are referred to as "Habitat Social," the umbrella brand for all learning, social networking, and collaborative tools and technologies. There were additional deployments of collaborative technologies at about the same time, but Habitat Social has now become the de facto place for collaboration to occur.

TELUS also developed their own "Enterprise 2.0 Adoption Council," where anyone can join biweekly calls every Friday from 8 to 10 a.m. to discuss new tools, idea, and strategies for collaboration.

One of the big challenges at TELUS, as with any other large company, is balancing the need for hierarchical leadership with the desire for flexible leadership styles. Managers and leaders need emergent collaboration tools to help lead their teams, and a big part of being able to make that happen is leadership DNA. Leaders need to understand whether they have a more "command and control" or "cultivate and coordinate" mindset. Are they open and compassionate toward their employees? If not, these are opportunities for improvement.

As an organization, TELUS needed to be aligned toward a unified goal of collaboration, and change management had to be addressed on three levels: for managers and leaders of the organization, for existing employees, and for new employees who were just joining the organization.

TELUS developed an internal way of classifying the enterprisewide behavior model. TELUS used to be what they call "tight-tight," meaning employees were tight on clarity and understanding of what the future of the company and their roles looked like (a good thing), but they were also tight on empowerment, meaning that team members did not feel empowered and engaged with TELUS. Those who work at TELUS need to feel as though they have a voice that can be heard. The opportunity here was to switch from being a tight-tight company to a tight-loose company where employees felt empowered, fulfilled, inspired, and engaged at work. Decisions at TELUS should not just be made by a few select people. Team members needed to be more engaged and given the opportunity to explore ideas before execution occurred.

As an organization, TELUS wanted to augment the physical water cooler and add the virtual water cooler. This became evident even with the switching of department names. For example, "enterprise learning services" became "learning and collaboration."

TELUS is more interested in an evolution, not a revolution.

TELUS has deployed a robust and integrated technology stack, shown in Figure 3.1, which depicts a timeline of implementing various collaborative tools and technologies.

Implementing Social – Not a Big Bang

TELUS

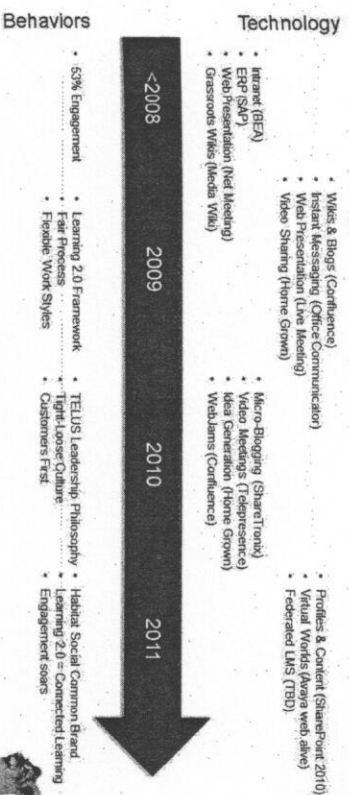|	<2008	2009	2010	2011
Technology	• Intranet (BEA) • ERP (SAP) • Web Presentation (Net Meeting) • Grassroots Wikis (Media Wiki)	• Wikis & Blogs (Confluence) • Instant Messaging (Office Communicator) • Web Presentation (Live Meeting) • Video Sharing (Home Grown)	• Micro-Blogging (ShareTronix) • Video Meetings (Telepresence) • Idea Generation (Home Grown) • WebJams (Confluence)	• Profiles & Content (SharePoint 2010) • Virtual Worlds (Avaya web-alive) • Federated LMS (TBD)
Behaviors	• 63% Engagement	• Learning 2.0 Framework • Fair Process • Flexible Work Styles	• TELUS Leadership Philosophy • Tight-Looser Culture • Customers First	• Habitat Social Common Brand • Learning 2.0 = Connected Learning • Engagement soars

4 TELUS Confidential

Figure 3.1 TELUS technology and behaviors timeline

Notice that TELUS broke down this timeline not just by technologies but also by behaviors, a crucial component that many organizations forget to consider.

TELUS has done quite a bit in just four short years. The list of technologies adopted has included everything from Cisco Telepresence to Micro-blogging to virtual worlds. The beauty of all this is that it integrated within singular navigation that looks like a navigation bar that hovers above various employee collaboration technologies (see Figure 3.2).

As you can see in the figure, Dan is able to access everything he needs to get his job done by clicking on the navigation bar seen at the top. This particular screenshot shows a profile page built on top of Sharepoint 2010. TELUS does not have a "field of dreams" mentality in which they build things and hope people will come. This all had to be built into the team member flow of work.

As previously mentioned, obstacles had to be overcome on three levels: managers and leaders, existing employees, and new employees.
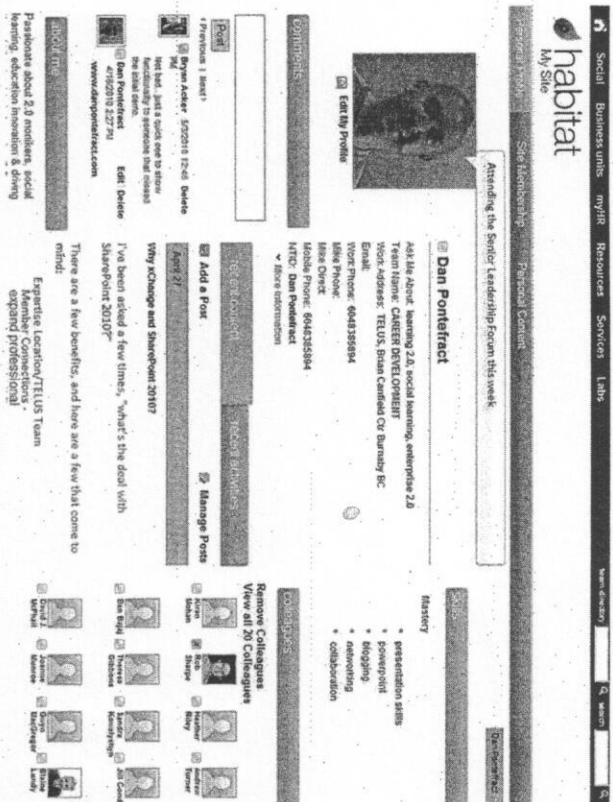
Figure 3.2 TELUS Habitat Social employee page

A corporate program was developed for managers and leaders at TELUS called "Leading Your Team: The Fundamentals." This program included formal classes and informal opportunities, such as webinars, book chapters, leader highlights, and virtual and in-person chats, for leaders to learn how to become more collaborative while using new tools to help them lead. Additionally, every year an event called the Senior Leadership Forum (SLF) is held for 600 members of the leadership team (directors and above), where specific strategic themes are discussed for three full days. SLF helps to ensure that leaders are aligned, and it gives them the opportunity to build bonds with each other as well as to discuss any issues or ideas that need to be addressed. This event helps to show leaders that collaboration is not just encouraged, but expected. The most recent SLF was focused on three themes: customers first, quality, and collaboration. The fact that the third theme was entirely about collaboration shows how seriously TELUS is taking this enhanced strategic direction. For existing employees, numerous

resources were made available for their education and training. When "Habitat Social" was launched, a 17-minute introductory eLearning course was developed to help guide employees through the platform and to understand the value of using it. Yes, formal learning was being used to teach social learning. Regular monthly sessions called "Lead and Grow" were (and still are) run. These 45- to 60-minute sessions also help employees understand what opportunities exist within the organization and how they can take advantage of those opportunities. Many self-help resources, tutorials, and one-on-one mentoring programs were also put into place so that employees were able to get access to all the resources they needed. TELUS also did something quite unique, which was to develop a type of collaborative starter kit. This is an internal site that employees can access to help them learn about what tools to use for various situations and for various roles.

When employees access the site they can answer a series of questions, and based on their responses they are given options for what and/or how they can proceed to use the company tools to become more collaborative and engaged. The site also lets employees sort and filter information based on certain attributes. For example, employees can access the site and sort through technologies and tips based on their role within the organization, how much time they have to devote to these new tools, how skilled they are at using these tools, or they can even sort by a specific tool. This means that an employee can access the site, tell the platform that he is a "beginner" when it comes to these new tools, and then the platform will provide recommendations for how he can advance.

Finally, TELUS launched a program called "A Day in the Life." Ten employees participated in candid video interviews in which they talked about how emergent collaboration tools and platforms are helping them to solve problems within the organization and how these tools are affecting such things as the way they work and their career development. In other words, TELUS took advantage of storytelling from multiple team members' perspectives.

TELUS employs over 35,000 team members, so it is hiring constantly. In order to accommodate the new strategic collaborative direction for

TELUS, the entire induction program was reworked. It used to be just a two-day class that employees sat in on. Now, new employees are taken through a 90-day collaboration scavenger hunt that educates them on what it means to be collaborative at TELUS. In fact, employees even get access to a special collaborative portal so that they can engage with their fellow workers who are also going to be starting to work at TELUS. These new team members get something called "Passport," which is almost like a Foursquare-type concept where employees receive a badge or a "stamp" for every action that they complete on the collaborative platform. At the end of 90 days, employees get a certificate that they can proudly display. They are now accustomed to using the tools at TELUS to collaborate effectively and to be part of the TELUS team.

What Were the Results?

TELUS team members have told the organization that it is much easier for them to find people and information. In fact, over 70 percent of all team members have seen an improvement in their performance. Learning has also been democratized, meaning that employees are helping to share and educate each other. For example, an employee who might have a solution to a problem or process can simply post a video of the solution, which can then be accessed by other employees. Team members creating their own user guides on some internal products is actually quite popular within TELUS. This means that everyone at TELUS is always learning and always teaching; it's a perpetually learning organization fueled by its team members. Team members are also able to share their opinions, and overall they feel more fulfilled and empowered at work. Finally, communication has also become much more horizontal instead of being strictly vertical.

Rather than hiring new employees to take on roles to support collaboration and engagement, TELUS instead distributed these tasks and responsibilities among the existing workforce who already oversaw or were involved in related areas. The results?

- 750 videos were uploaded
- Over 40 percent were actively participating in social/collaborative learning

- Over 60,000 pages of content were created and over 20,000 comments were posted on blogs and wikis
- 14,000 employees were microblogging
- There were 25,000 original posts and over 100,000 comments

The most obvious example of impact comes in the form of employee engagement. As of 2011, engagement of its 35,000+ team members rose from 53 percent to 70 percent, an outstanding 17 percentage point increase.

The business value of their strategy is evident. Employee engagement is way up, the company is rallying around their Customers First program, and financial results have improved year over year. The organization has clearly set itself up for additional successes in the coming years as a result of their emergent collaboration strategies.

TELUS likes to think of itself as a company in "perpetual beta"; in fact, this is how TELUS believes emergent collaboration should be thought of. In the future TELUS is hoping to get more involved with gamification and badging for employees. TELUS is also looking at business simulations, where high performers or managers can test out ideas in a controlled environment to see how those ideas play. TELUS wants to get more involved with ideation in terms of being able to make various ideas play out as well. Currently team members submit ideas and give them a "thumbs up" (or "down") through a pilot system known as iThink, but the company wants to do a better job of seeing these ideas through from conception to development utilizing collective intelligence and crowdsourcing.

Lessons Learned

TELUS learned a few key lessons during their four-year journey:

1. The journey never ends; it's a continuous evolution of collaboration.

2. It's important to be "technology agnostic"; don't pick solutions because you have a relationship with them; pick them because they are the best solution for your business.

3. Perseverance is crucial, there is no giving up; this is an evolution that will happen.

4. Executive support and buy-in are essential.

5. Champions and early adopters need to get involved during the early stages.

6. Just because someone isn't participating right away doesn't mean they aren't learning. Organizations should remember that lurking is learning. It's OK if employees aren't on-board from the get-go.

7. The behavior change must be treated with equal vigor as the technology rollout.

What Worked and What Didn't—Do You Have Any Horror/Success Stories?

In the beginning, a micro-blogging company that TELUS piloted was overexuberant in its marketing and was essentially spamming employees. Executives and employees would be repetitively e-mailed to invite colleagues to join the platform and e-mails were bombarding everyone. Eventually TELUS went in a different direction, which sent a confusing message to executives because TELUS's internal marketing practices were the exact opposite of what this vendor was doing.

Over the past few years, TELUS also tried some marketing techniques internally that didn't work out as anticipated. A site called "what if" was created to show potential scenarios of what TELUS could look like if it became more collaborative. Videos, discussion forums, and content were all populated on the site but nobody actually participated, in part due to the unclear name of the site itself. This project didn't have the impact that TELUS thought it would.

Elizabeth Glaser Pediatric AIDS Foundation

The Elizabeth Glaser Pediatric AIDS Foundation is a nonprofit organization dedicated to preventing pediatric HIV infection and eliminating pediatric AIDS through research, advocacy, and prevention, care, and treatment programs. Founded in 1988, the organization works in 17 countries around the world and has more than 1,500 employees.

What Were the Business Problems?

The foundation was looking to keep doing what it was doing, but more efficiently. There is a lot of knowledge for employees to share with one another but no way to share it. Glaser needed to make sure that information actually flowed from organization to organization around its locations in 17 countries. This was traditionally done via e-mail or care packages with large quantities of printed documents. Information flowed from the top down but rarely from the bottom up, and that was a problem. For example, the proposal development team had a very hard time gathering necessary information from various countries and departments because this was mainly done via e-mail. Glaser was also not able to find and share emerging best practices at a country level. This was becoming increasingly more important as Glaser grew from around 200 employees in 2006 to over 1,500 in 2011. This growth was largely fueled by PEPFAR, a bill President George W. Bush put into action that provided more funding to organizations such as Glaser.

Along with this growth came the requirement to become more "professional," which meant developing and sharing policies and standards.

What Was Done to Solve the Problems?

Glaser put together a knowledge management task force and then surveyed the members to find the most useful solution to the problem of collaboration and knowledge sharing. This task force was composed of various departments and employees in different countries. This was a collaborative effort with both IT and business units involved.

Glaser originally started on SharePoint 2007, but there were a number of problems: It was not easy to use and was overly complex. The different departments couldn't own their own pieces of content in their areas and would always run into problems and bugs. Furthermore, there were big accessibility issues in Africa, where Glaser has a very

large presence. As many companies, including Glaser, have discovered, SharePoint is a good system if you have a solid IT team in place to handle it.

Instead, the foundation opted to go with a platform called Interact Intranet.

The Results

Channels of information are starting to open, but the big change is that employees are now identifying collaboration as something that needs to be done; this was not a conversation that Glaser was having even a few years ago. People are starting to think about different ways to share information with one another. The country offices are siloed to a certain extent. Employees who are entry-level still don't feel comfortable engaging with senior-level employees, for example, by commenting on an executive blog, but that is slowly changing. Thus, there is still a status gap between employees. Ideally, the foundation also wants to move from letting the experts give advice to allowing everyone to give advice with the experts listening and providing additional insight and feedback.

The two big changes were the creation of a governance committee and the knowledge management task force.

The governance committee is a group composed of the chief operating officer (COO) and a few of the vice presidents from each division; they meet once a month to discuss things relating to the intranet and to address day-to-day issues that come up, such as deciding whether spin-off entities that might need access to certain pieces of information should have access to the entire corporate system.

The knowledge management task force came into being to redesign the intranet. Since that was completed, the task force is no longer active, but many of those people are now content managers for their respective groups at various locations. One full-time consultant was hired who helps the content managers get their information up and running and who also helps with training and organization.

Within IT, the program innovation and policy, and the communications team, there are one or two people specifically devoted to emergent collaboration. These employees do things such as participating in the conversations and groups, helping organize information, and managing content and the knowledge base. On the IT side these employees are mainly tasked with stabilizing the platform, conducting internal demonstrations, and doing project management work. The model Glaser is eventually going for is to have one content owner in each country (curating and developing a taxonomy that makes sense).

Until now the foundation has mainly been doing a lot of online demos for groups of 10 to 12 people. Some on-site training has also been done. The challenge is training and educating many of the overseas employees. It's much easier to do training in the United States than it is in countries in Africa. Glaser also started a weekly e-mail newsletter that goes out every Friday that highlights a few new things that go up on the new intranet; includes a list of people on the core emergent collaboration team, shares some usage statistics, and provides some general and insightful information about the platform. Some video interviews were put together in which employees talked about how they use the new platform in their daily work.

The current biggest obstacle is accessibility in countries, such as those in Africa, where connection is inconsistent. The foundation installed network optimizers that help speed up application-to-application connectivity (not Internet speed). This is where mobile is seriously going to come into play as many employees do use smartphones. A fully mobile version of the collaboration platform that is compatible on all devices has not been implemented, but that was scheduled to change by the start of 2012.

Before the platform went live, a lot of advanced promotion was done in the form of announcements, newsletters, and word of mouth.

Currently, 28 to 29 percent of the employee base has accessed the site at some point and around 15 percent of the global workforce is using it regularly. The platform has been live for around four months. Some countries are mandating the use of these tools in their offices. The COO also feels very strongly that this should be a required tool for employees to use, which means that it might be mandated in the near

future. Many of the VPs at Glaser also support doing this. Discussions about incorporating collaboration into employee reviews have also been addressed, but nothing formal has been put in place.

Employees are now able to get access to information that they didn't have access to before, such as policies and procedure manuals, which previously existed only in print and were outdated. Staff profiles, pictures, and bios are now accessible to everyone so that employees can build communities of interest, something that was not possible before. This is helping build trust within the organization.

Information is now being shared more openly without fear of horrible consequences or reprimands. Employees are opening up to one another and bringing the human aspects back to the enterprise. The senior leadership team also started blogging, which has helped the company become more transparent. Overall, the exchange of ideas has seen a huge improvement.

Like many companies today, Glaser is not measuring success by dollars and cents but by overall company morale improvement and anecdotal evidence from employees who are telling the company that they are now able to do their jobs better.

For the first year technology costs were under $50,000, and ongoing costs after that were under $40,000. The cost of hiring one full-time employee was $60,000 to $80,000. Aside from that, most of the other responsibilities are shared among existing staff.

Summary and Action Items

You are not alone in seeking to invest in these emergent tools and strategies. Many other companies have already made these investments, and they have a lot of insight and ideas that they can share. These are just a handful of some of the case studies that can be found online today. Here are some suggestions:

- After going through the case studies, ask yourself if you would have done anything differently and why. Did you agree with what the companies mentioned in this chapter did?

- Do you see any similarities or practical applications between what these companies did and what is going on at your organization?

- Are there any other examples or stories that you know of that you think would be relevant and want to share with your team? Start a collection of these case studies, examples, and stories so that you can share them with your colleagues. I have started one at http://www.jmorganmarketing.com/collection-enterprise -2-0-case-studies-examples/.

Now I'd like to introduce Bert Sandie, who is the director of technical excellence at Electronic Arts, Inc. Bert has been instrumental in driving the strategy of emergent collaboration at EA, and he and his team have learned a lot along the way.

One of the major challenges for companies that are deploying social software is to persuade employees to fill in their social profiles with additional details to augment the default information. In companies that have more than 500 employees across multiple offices, it is difficult to visit each employee to convince him or her in a face-to-face conversation, so what are the options? And why do we need more than the default information?

We must also take into consideration that in multinational companies, the privacy laws in many countries allow only a small set of information to be included in a default social profile, and so employees need to opt in via an online waiver to add/display information such as their pictures, birthdays, interests, and hobbies.

Over the last two years, our experiences at EA with the adoption of social profiles have found success through a few key learnings:

- Look for many different avenues to encourage and entice employees to complete their profiles. We send all new

employees an e-mail to join, run different contests with prizes every year, and use leaders/executives as role models, showing they have joined.

- Integrate the social profiles into applications that employees use. We have integrated the profiles into our corporate intranet and our global knowledge-sharing solution and have made the social profiles the default company directory.

- Augment social profiles with additional data fields that are useful to your business. We have fields such as discipline expertise, technical skills, gamer IDs, and content contributed to our knowledge-sharing solution that all create a value proposition.

- Provide an enterprise search solution that is fast, is easy to use, and accurately finds employees based on search criteria and intuitive filtering.

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Risky Business

There are risks associated with any business or IT investment an organization makes. In fact, there are risks involved with pretty much anything people do in their daily lives: risks from going outside, risks from eating at a restaurant, and risks from crossing the street. The point is that risks aren't new for anyone, whether an individual or a corporation, so let's not be surprised or intimidated by the fact that a whole chapter of this book is devoted to risk. In case you were wondering, I am not really a Tom Cruise fan, but the title of one of his movies made for a great chapter title.

All good chess players understand the risks of the moves they make on the board and the consequences that can result. However, chess players also have plans in place for what to do if those risks are taken advantage of by their opponents.

Two general categories of risks will be looked at here: the risks of not investing in emergent collaboration tools and strategies and the risks of investing in those tools and strategies. Let's start with some of the risks of not making the investment.

Decreased Productivity and Wasting Time

E-mail does not work as a sustainable collaboration platform, because employees are spending time answering e-mails and searching for