

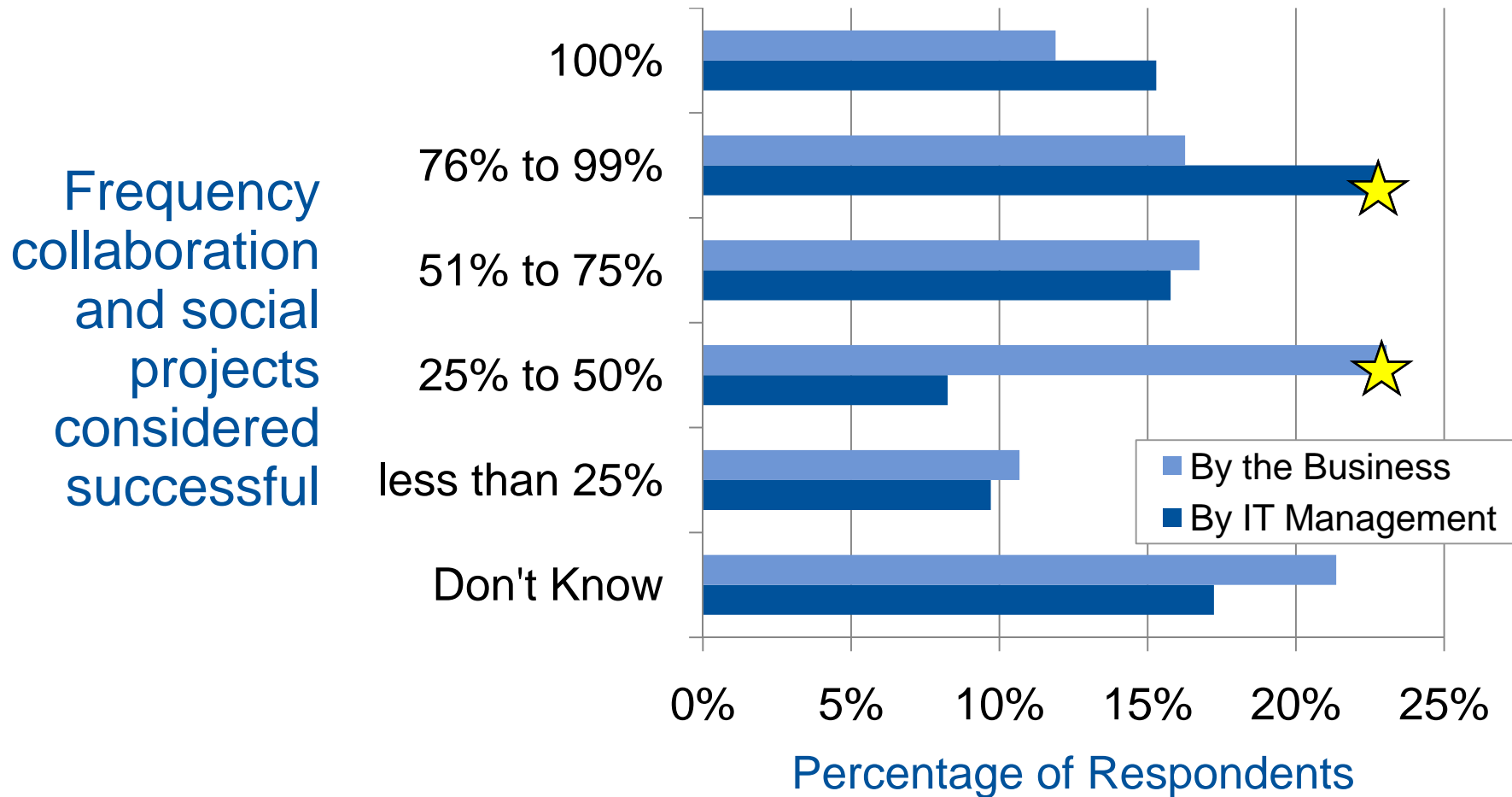
How to Succeed With Collaboration and Social Software

Jeffrey Mann

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"On Average, Half Our Collaboration and Social Projects Succeed..."



★ mode (most frequent response)

"...We Can't Figure Out Which Ones..."

Aggregate Value	Collaboration and Social Projects
51%	No definitions of what constitutes success
63%	No prior agreement with the business on success criteria

Gartner Conclusion: Reports of perceived success are likely overly optimistic

Top 10 Failure Modes

1. No behavior targets
2. No business strategy
3. Clean slate
4. Infrastructure focus
5. Culture clash
6. Ignoring choice
7. One size fits all
8. Closed and non-social
9. More is less
10. Non-inclusiveness



Image source: http://en.wikipedia.org/wiki/File:Sapona_Panoramic.jpg

Top 10 Success Modes

1. Set behavioral targets
2. Business alignment
3. Analyze and augment
4. Suboptimize infrastructure
5. Culturally compatible
6. Exploit choice — nudge
7. Use new segments
8. Open and social
9. Less is more
10. Be inclusive

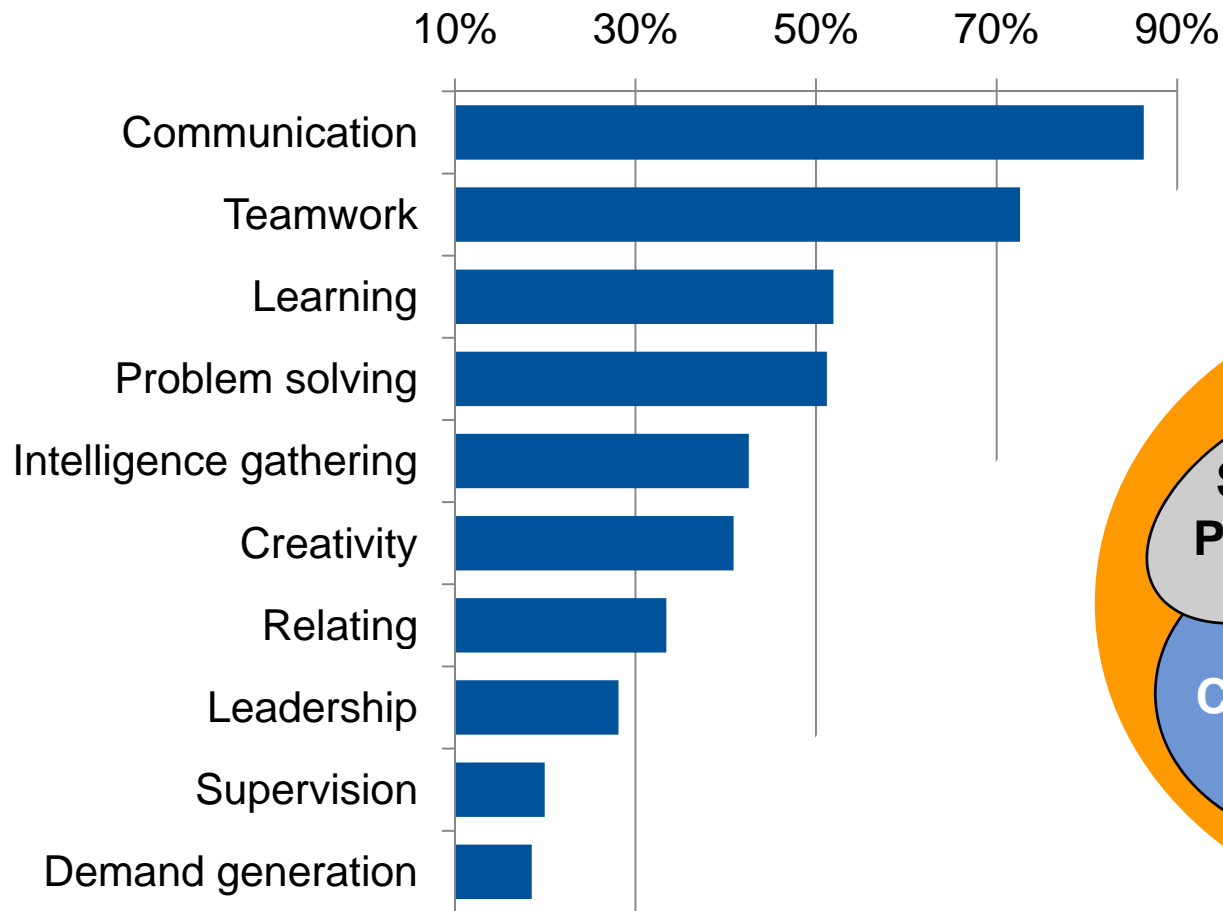


Image source: ©2003 tom.austin@gmail.com

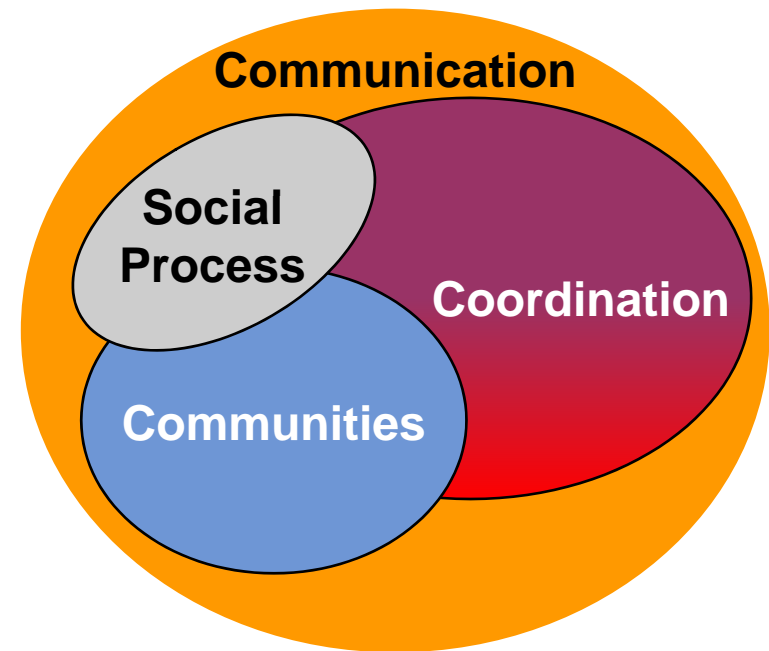
1. Behavioral Targets and Collaboration Confusion

Survey Data

% of respondents selecting each activity



Client Inquiry Synthesis



Source: Gartner, 2010 (n=412, US-only survey)

2. Business Alignment

Why does your enterprise invest in collaboration and social software?



Source: Gartner, 2010 (n=412, US-only survey)

Actions

1. Set behavioral targets
2. Achieve business alignment — agree on strategy, goals and metrics

3. Clean Slate?

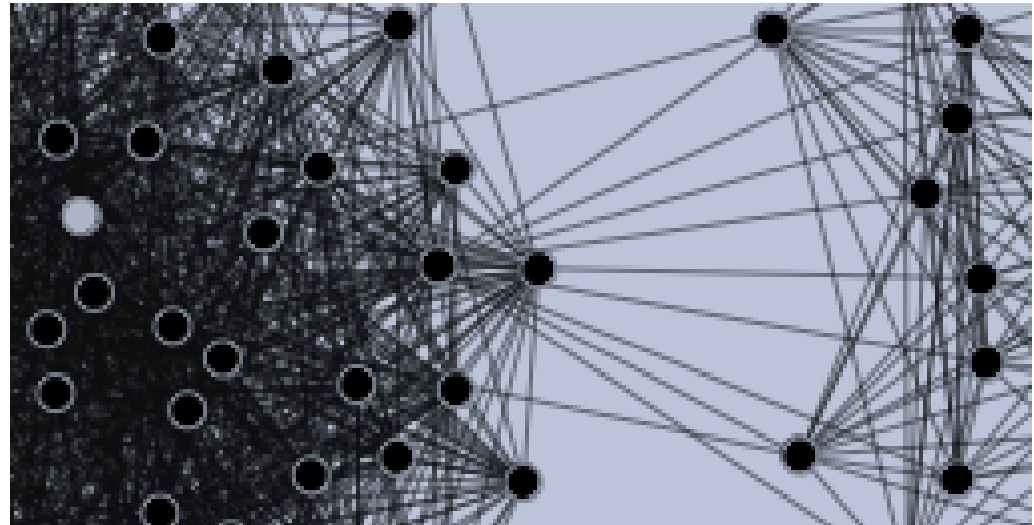
**Don't bet your career on
a roll of the dice!**

(Instead, study the nature of work, social structure and networks of your organization and *amplify...*)

Improve What Is Already There

Look for existing:

- Informal social structures
- Connectors
- Pathways (communication, influence and consensus formation)
- Dead ends, orphaned links, bottlenecks
- External as well as internal phenomena



Collaboration and social tools amplify existing phenomena
Look for multipliers

Place Many Small Bets

- Pave the cow paths
- Detect and analyze existing social networks using:
 - Paper and pencil surveys
 - Annual HR surveys
 - Communication analyzers
- Look for underlying demand drivers:
 - Non-routine work
 - Adhocracies
 - Virtual barriers
- Hybrid vigor and heterogeneity



Actions

1. Set behavioral targets
2. Achieve business alignment
3. Analyze and augment

4. Cultural Clash

Horizontal

Management systematically and explicitly recognizes and rewards contributions to the success of others.

Flat, horizontal organization with authority broadly delegated to the "end nodes."

Open information access and information flow.

Collaborative, participatory, bottom up.

Status, rank, political capital not key factors.

Fluid working relationships and anyone can communicate with anyone else.

Vertical

Management and measurement systems do not.

Hierarchical organization with authority concentrated at the top.

Information available on a need to know basis.

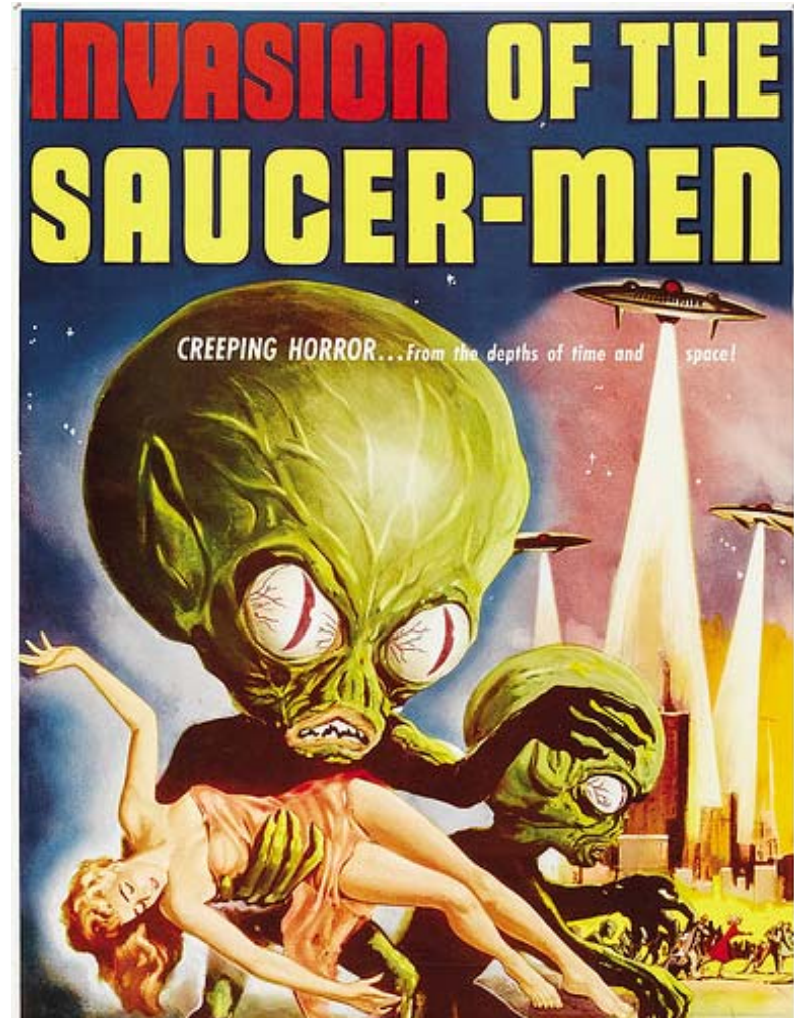
Top down.

Status, rank and political capital are critical determinants of who controls what.

"Skip level" communication works only in downward fashion.

Change Is Hard; So Don't Ask People to Change

- Take advantage of external crises or changes
 - New system or product launch
 - Move to a new building
 - 30% fewer staff
 - On-boarding new personnel
 - Mergers
- Attach to new projects, establishing social as *the* way to do things
- Emphasize individual dependencies



Actions

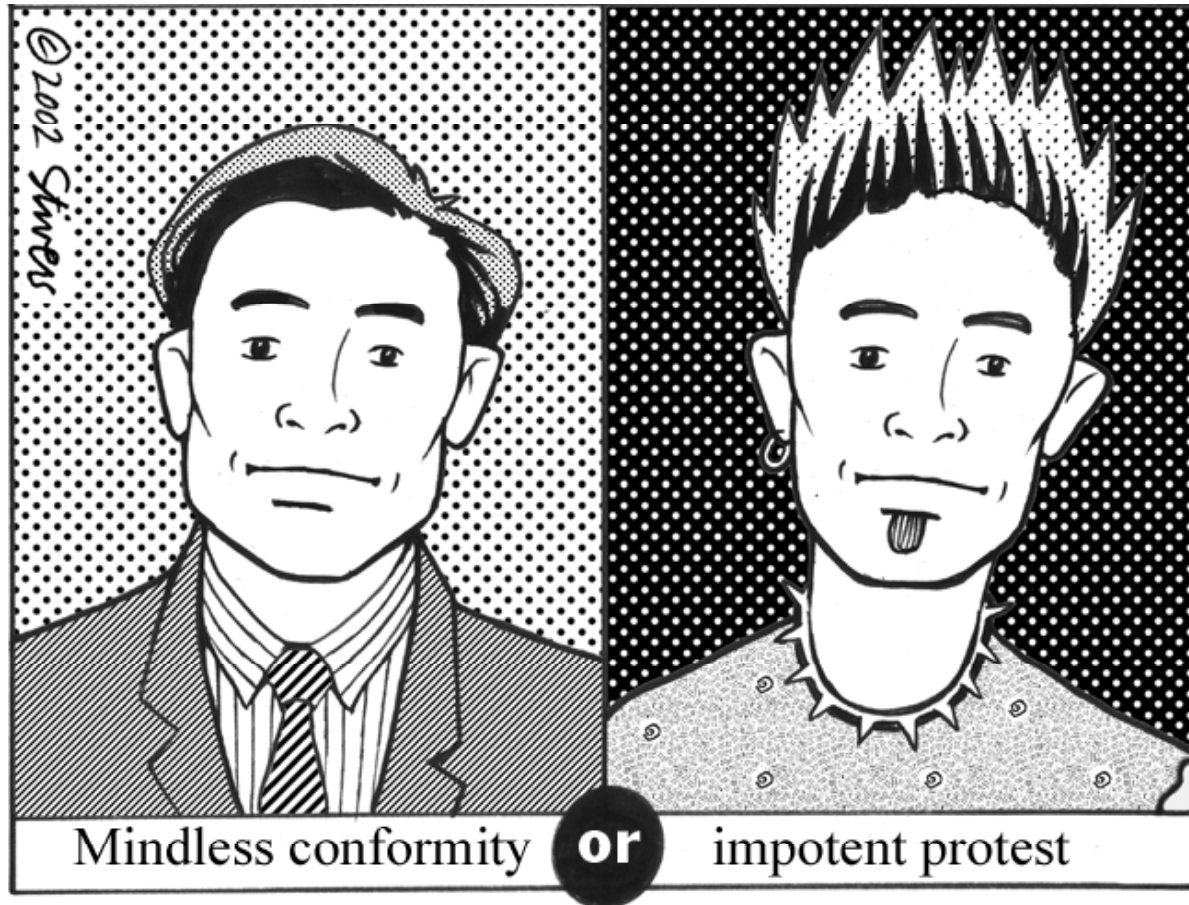
1. Set behavioral targets
2. Achieve business alignment
3. Analyze and augment
4. Align strategy with culture

5. Infrastructure Focus

- The platform on which the tracks are laid
- Vendor focus
- Not sufficient
- May not be necessary
- Raises expectations ante
- Platforms versus packages
- First follow many small experiments



6. Ignoring Choice



What are the
personal
benefits to
each user?

*No gain? Your
pain...*

Voluntary acts are not production processes

Why Is E-Mail Pervasive in Business?

The alternatives aren't better enough to encourage people to choose to use them

How much is "enough"?

Andy Grove

***New ways have to be an
order of magnitude
better (10X) to take off***

7. One Size Fits All

- The major techno-centric segments:
 - Road warriors
 - Content creators
 - Content consumers
 - Transactional workers
- People-centric segmentation:
 - Expertise level
 - Pioneers versus settlers
 - Working styles

Class-Based Segmentation



Wizards — unfathomable, skills not specified, sometimes "hunches" (Pre-quant baseball managers)

Experts — soft skills documented, copy others, create their own identity (Shakespeare)



Practitioners — standards of care, style guides, classroom training for some tasks (Woodward and Bernstein)



Task Workers — scripts, models, forms, interpersonal skills (e.g., empathy)



Automata

Class Attributes

← *Employee Classes* →

	Wizard/ Magician	Expert	Practitioner/ Professional	Task Workers	Automata
Typical Scale	2% or less	1% - 5%	5% - 30%	65% - 90%	N/A
Skills	Unspecified	Documented	Performance Standards	Detailed & minimized	Algorithm
Training	Varied	10,000 hours to "muscle memory"	Classroom training, practicum	Task specific	
Latitude	Free rein	Broad	Evolving	Narrow	
Task loading	TBD	Very high	Moderate	High	
Risk	Indeterminate	High rote component	Lower experience	Detect and voice	
Evolution	<i>Shift Right (Specify standards and processes, train)</i>				

Different classes have different requirements



Action

1. Set behavioral targets
2. Business alignment
3. Analyze and augment
4. Align strategy with culture
5. Recognize that infrastructure is not the answer
6. Exploit choice — nudge
7. Use new segments

8. Closed and Non-Social

- Interenterprise
 - If you don't provide it, users will go there "unescorted"
- Engaging the Collective
 - Listen
 - Honest dialogue
 - Leverage



"<your company name here> sucks"

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Dashboard Example



Image source: http://www.wired.com/images_blogs/dangerroom/2009/10/truvoice-dashboard_overview1.jpg

9. More Is Less

UX matters.

Simplify.

Less is More

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10. Non-Inclusiveness

- Legal
- Security
- Risk

Include and involve them from the start

Actions

1. Set behavioral targets
2. Achieve business alignment
3. Analyze and augment
4. Align strategy with culture
5. Recognize that infrastructure is not the answer
6. Exploit choice — nudge
7. Use new segments
8. Be open and social
9. Know that less is more
10. Be inclusive

Top 10 Success Modes

1. Set behavioral targets
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Action Plan for IT Executive and Planners

Monday Morning

- *Evaluate* existing enterprise business initiatives.
- *Identify* where and how to be more inclusive.

Next 90 Days

- *Collaborate* with the business developing success criteria for every major project.
- *Initiate* planning and research to analyze existing working relationships.
- *Evaluate* current plans against all 10 suggested success criteria.

Next 12 Months

- *Execute* in multiple, fast, iterative projects.
- *Cultivate* existing pockets most likely to succeed and allow success to propagate virally.

Related Gartner Research

- **Workplace and Social Software Survey Research Plan, Methodology and Demographics, 2010**
Tom Austin (G00175716)
- **Segment Collaboration Into its Four Main Constituents for Maximum Return**
Tom Austin (G00149032)
- **"Pioneers and Settlers: Social Software Maturity Changes IT Support Requirements"**
Jeffrey Mann (G00170601)
- **How Enterprises Can Tap Into Informal External Entities Beyond Their Direct Control**
(G00171121)