A Framework for 2.0 Adoption in the Enterprise

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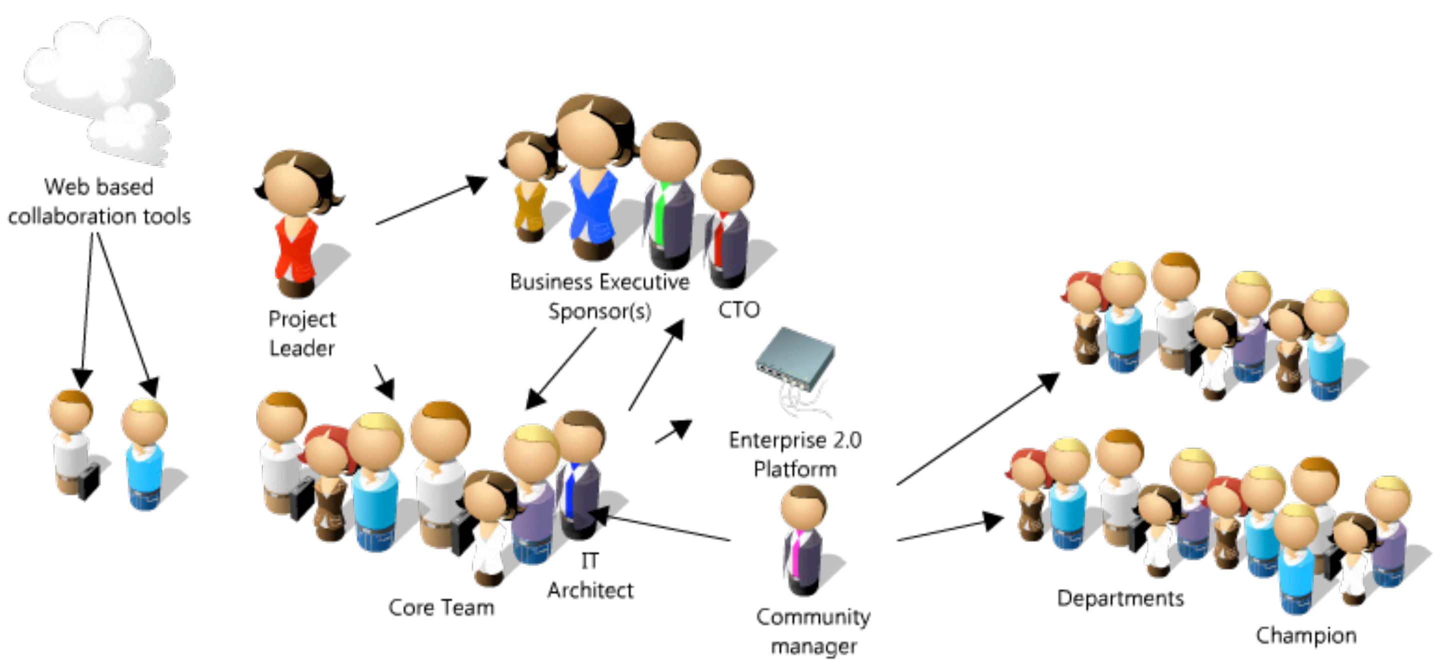
The 2.0 Adoption Council



The 2.0 Adoption Council Research Series | Report No. 1

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The 2.0 Adoption Council

The 2.0 Adoption Council is a peer-based, information-sharing community interested in the latest thinking, best practices, case studies, and helpful tips associated with executing socio-collaborative strategies and projects in the large enterprise.

This research paper is designed to help 2.0 practitioners by providing guidance and recommendations gathered from council members. We also aim to promote The 2.0 Adoption Council and encourage other practitioners to join our group and share their experiences. Membership in the council is currently free to all participating members. Sales of this research report help fund the council wide variety of programs, activities, and services.

Intended audience of this report

We publish this report for three intended audiences:

1. **Corporate Practitioners**. These are individuals and teams whose organizational role and responsibility is to execute an Enterprise 2.0 vision. This oftentimes involves planning, tool and platform selection, training, and a comprehensive roll-out that will impact the work and behaviors for thousands of employees. These practitioners may emanate from different lines of business within an organization, but they typically have a leadership role. The 2.0 Adoption Council is composed solely of corporate practitioners. Effectively, we are primarily addressing our peers with this report and seek to help them by sharing the practices that have helped us succeed.

2. **Strategic Consultants**. There is a growing ecosystem of advisors, analysts, consultants, system integrators, and other such intermediaries who help organizations. These third-party individuals and groups offer services to help select technologies and identify process changes. We address these marketplace players and seek to share with them some of the ways we have dealt with specific issues we've identified from the inside.

3. **Product Vendors**. There is a large collection of vendors who offer Enterprise 2.0 products and solutions. Some also offer strategic consulting and implementation services. We seek to share with them our journey. We believe this report will help them refine their products and approach to take into account some of the challenges we have highlighted and addressed in our framework.

We are open to comments on this report and welcome your feedback. To share your thoughts privately, please email ReportFeedback@20AdoptionCouncil.com. To share your feedback publically, please visit our Facebook fan page at http://bit.ly/20AdoptionFacebookFeedback

Andrew Carusone

Susan Scrupski, Founder
The 2.0 Adoption Council

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A Framework for 2.0 Adoption in the Enterprise

As described by members of The 2.0 Adoption Council

How is the rollout of a 2.0 initiative different from a traditional enterprise software deployment? Starting with a proposal for a traditional waterfall approach, members of The 2.0 Adoption Council refined and revised the approach to reflect their experienced view of how adoption really works in large enterprises. This report draws from the knowledge of full-time practitioners who orchestrate enterprise-wide rollouts in their organizations. We outline patterns of adoption and highlight practical insight that will help your company and your clients plan for the process and help set realistic expectations, for a successful 2.0 rollout.

OVERVIEW

We set out to address the following question:

How is the rollout of a 2.0 initiative different from a traditional enterprise software deployment?

Enterprises deploy large-scale software releases when vendors provide new versions or software patches. Occasionally, enterprises elect to move from one CRM or ERP to another. Many large enterprises already have intranet portals that were deployed using traditional, repeatable rollout processes. We ask: Do we need a new framework for rolling out a 2.0 initiative? Why not just repeat the well-known processes we use with other enterprise software? If rolling out Enterprise 2.0 differs from other Enterprise rollouts, then let's understand how and what this means to those who are tasked to implement Enterprise 2.0 in their company.[1]

We typically hear two proposed approaches to Enterprise 2.0 projects: **Top-down** and **Bottom-up**. The former describes enterprise software rollouts that are mandated by a senior executive or empowered IT team. The latter describes viral behaviors on the part of eager employees who find a "better way" to work leveraging 2.0 technologies and despite no official mandate they introduce new technology into a workplace environment. We find that neither approach exclusively describes 2.0 projects accurately. Instead, a well-placed project leader orchestrates a combination of both project styles in order to successfully roll out a cross-departmental 2.0 initiative. We describe this orchestration in this research paper.

IMPLEMENTING ENTERPRISE 2.0 DIFFERS FROM OTHER ENTERPRISE SOFTWARE

Corporations have developed repeatable processes for deploying software across enterprises and divisions for decades. Although these are rarely easy, experienced project managers have a good sense of the steps involved. Many have endured the roll out of new operating systems, office productivity software, ERP systems, CRM applications, ECM tools, single-sign on security, network monitoring, database, or intranet portals. You may hope that Enterprise 2.0 would follow the same patterns. But Enterprise 2.0 rollout and adoption is quite different. Practitioners from The 2.0 Adoption Council articulate the following differences:

- **The very rollout process models the desired behavior sought.** Employee adoption of new collaborative tools and behaviors will be strongly influenced by the rollout process itself. For example, rolling out a CRM does not require internal managers to be listed as "customers" of the CRM rollout process and managed as such. Rolling out Enterprise 2.0 does require the very collaboration that it advocates.

  > *"You have to practice what you preach by using the tools and behaviors that you are trying to encourage others to follow. Otherwise you'll lose their trust – and that's a sure-fire way to kill adoption." – Jamie Pappas, Manager, Social Media Strategy, EMC Corporation*

- **We don't fully know what the desired results should be.** Workplace social computing is sufficiently new and constantly changing. Enterprise 2.0 is still somewhat of an organizational experiment, since the results are still highly dependent on the organization itself, and in particular, corporate culture.[2]

  > *"We're fostering a new skill-set that we need in the enterprise. But it raises a diversity management problem. We are still at the experimental level, and we are learning how this plays out in different parts of the company." – Mark Masterson, Enterprise Architect, Troublemaker, Computer Sciences Corporation*

- **Traditional rollouts limit agility.** Even though we are most comfortable with traditional rollout processes, these don't work well in cases where we need agility to course-correct often. The standard "waterfall" process looks appealing to the project sponsor, but it does not reflect reality.

  > *"An enterprise rollout in a large company like Lowes can take months. But 18 months ago no one was talking about microblogging and activity streams. Now they are pretty much part of any discussion. We don't know what's going to follow in the next 18 months, but we don't want to lock ourselves out of the new capabilities by locking into a traditional rollout process." – Kevin Davis, Research Initiatives Director, Lowe's Companies, Inc.*

The practitioners in The 2.0 Adoption Council we interviewed expressed that 2.0 adoption is very different from the adoption practices for other enterprise software. The most significant element of that difference was the people-centric approach that has to drive the rollout process.

VIRAL ENTERPRISE 2.0 ADOPTION DOES NOT SCALE

The other often cited approach to 2.0 rollouts is described as the *groundswell* or the bottom-up approach where employees adopt and implement the tools and behaviors they need in an unmanaged way.[3] This is based on the observation that eager employees can and do introduce collaboration technologies to fill gaps in the capabilities of the software provided to them in the enterprise.

We found that bottom-up behaviors were an important part of the adoption process. However, without an adoption team, a team leader, and management support, a populist-based adoption is limited. At best, employees can create a collaboration environment for their team, and perhaps others that interact with their team. At worst, multiple teams run their own "groundswells" using different technologies and approaches – undermining a unified approach to organizational change. Given that no organization claimed that an unmanaged *groundswell* was sufficient for achieving company-wide 2.0 adoption, we conclude that the "bottom-up" approach may be necessary, but is not sufficient for our framework.

CROWDSOURCING AN ADOPTION PROCESS

The 2.0 Adoption Council hosts a Facebook fan page encouraging contribution and discussion between council members and other E2.0 practitioners.[4] Benoit Chovet, a UK-based Enterprise 2.0 adoption senior consultant, working on contract for a leading supplier of networking equipment and network management for the Internet proposed a *straw man* adoption process to the council members.[5] An updated model is presented in Figure 1.

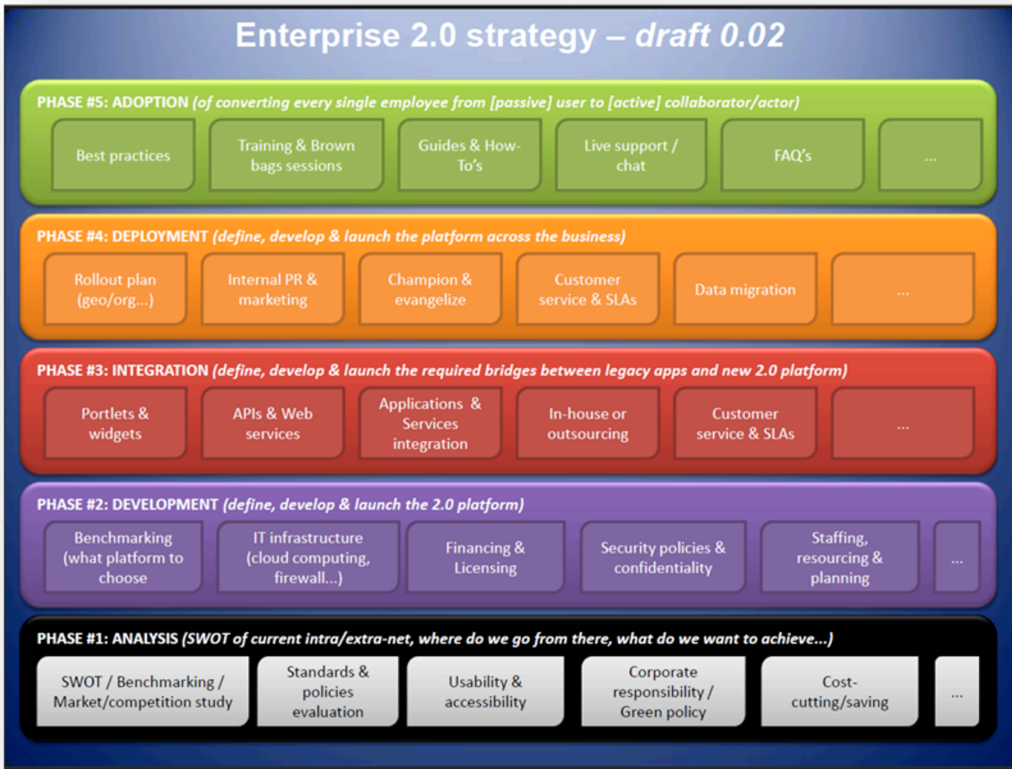


Figure 1. An early attempt at a repeatable process for Enterprise 2.0 Adoption

The ensuing conversation by The 2.0 Adoption Council resulted in a consistent reaction:

> *This is a great start at articulating the many steps involved in different, familiar phases. But, this is not a realistic model that describes what we really do.*

The diagram above looks like an elegant 5-course-meal, and it reflects what Management are accustomed to investing in. Like patrons in a restaurant who get their appetizer and soup before the main course and dessert, this waterfall model describes an ordered sequence of steps. But this does not represent the actual process involved in creating the meal. Meals are prepared in a very different order than how they are served. Similarly, the ideal Enterprise 2.0 adoption framework must reflect a nimble and seemingly chaotic reality. After some discussions, we worked with M. Chovet to produce a revised graphic that reflects the process of agile iterations between process steps (see Figure 2).

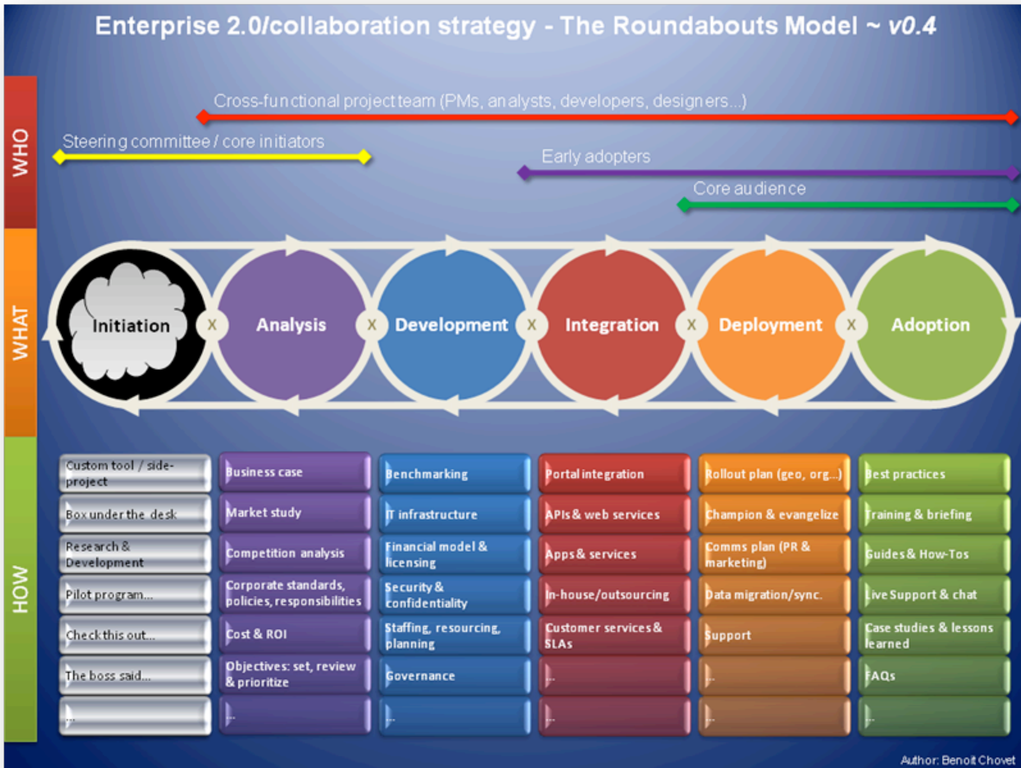


Figure 2. A revised depiction of the process for Enterprise 2.0 Adoption

Though largely inspired by the initial waterfall model, this "roundabouts" depiction does a much better job of reflecting the non-sequential nature of 2.0 Adoption realities. It includes:

- **Iterations**. As progress is made in some areas of the project, the team will revisit steps it already took and improve upon them in light of new progress. This allows the project to experiment and learn without having to complete every part of one step before moving to the next step.
- **Checkpoints**. The "X" points are process checkpoints where teams will determine if they are ready to move to the next stage, to further progress in their current stage, or to cycle back to an earlier stage (a refinement, not a regression).
- **Handoffs**. There are different primary actors in each stage, although there is quite a bit of overlap too. This graphic, however, does not convey the degree of participation when there is overlap.

- **Flexibility**. This approach allows for experimentation, piloting, and even the discarding of ideas that don't work. This can prevent the project from spending too much time and money on approaches that might not work.
- **Scale**. This model applies to rollouts of all sizes and scopes. This model may be used to describe the rollout within one large group, division, or entire company. In fact, one may think of this model as a basis for a fractal, where each macro-implementation is composed of similar mini implementations.

What works about this model is that it does not force a process that practitioners would not follow anyway. Rather, it provides a general structure for managing and accounting tasks within various stages of the project. But the model still does not provide enough guidance to measure progress or articulate suggested next-steps. There is a missing "when" step in the model. It's unclear how long any step should take or if any tasks must be accomplished before moving to the next iteration.

Moreover, there are some steps that might co-exist in parallel. For example, iterations in the analysis and development phase may be a regular part of the project. But once a population of employees has adopted new tools and processes, someone may need to provide support and integration services while the project may be iterating back to more analysis.

What this model also (deliberately) makes ambiguous is the specific steps that one would take at each stage of the process and when those steps are taken. For example, the "portal integration" step in the Development cycle would only be relevant to some implementation scenarios; same with "data migration" in the Deployment cycle as well as "live support and chat" in the adoption cycle. These steps illustrate reasonable behaviors that many adoptions would take, but this graphic is not intended to imply a cookbook approach.

In order to enhance our understanding of real-world rollout processes, we interviewed members of The 2.0 Adoption Council and asked them to take us through their real-world roll out story. As it turns out, the model is quite useful, but there is an organizational component that we need to add to put the model in context. We explored this and then generalized the conversation to eliminate company-specific issues. What resulted is the Adoption Framework below. *Please note: this is not the only way to implement a 2.0 initiative. This is a generalization of the ways that have proven to be successful.*

THE ADOPTION FRAMEWORK

We looked at the following aspects of the 2.0 Adoption process to put together a framework:

1. The trigger events that cause Enterprise 2.0 to be discussed in the first place
2. The Enterprise 2.0 project leader
3. The adoption core team
4. IT involvement
5. Getting executive support

6. Piloting adoption
7. The support for organic rollout
8. The role of guidelines and policies

The conversations resulted in an adoption pattern that Enterprise 2.0 practitioners should study and use to guide their adoption processes. This pattern is depicted in full on page 16.

TRIGGERING THE ENTERPRISE 2.0 CONVERSATION

Interviewees shared trigger-point events that caused their company to consider an Enterprise 2.0 strategy. Three typical trigger patterns were prevalent:[6]

- **Employee ambition**. Individual employees were already using unsanctioned collaboration methods acquired on their own. When this activity gained visibility, the organization looked at the need to support or quash this activity. Ideally someone made the case there was an unmet need, and offered an enterprise 2.0 solution to address it in a consistent and well-managed way.

- **Opportunistic initiative**. A keen-eyed person responsible for management effectiveness, process improvement, or innovation found an opportunity that could be addressed with an enterprise 2.0 strategy. Sometimes this is a result of employee feedback.

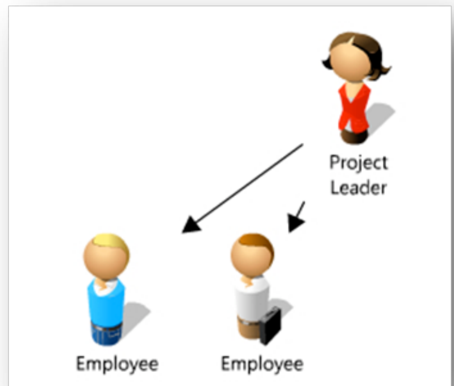
- **Competitive analysis**. Observing or learning about the Enterprise 2.0 marketplace and specifically competitors' success stories brings to light that there is a new opportunity to understand what Enterprise 2.0 can bring to the organization. This happens in market segments where there is already some good traction in Enterprise 2.0 (as in IT-centric organizations).

Most technology-savvy people have more access to technology when outside of work than when at work. iPhones and Web 2.0 sites provide us with capabilities that we cannot get on the intranet. Ambitious workers get their work done using the tools they can get their hands on. All companies want to foster creativity and increased productivity, but also need to ensure that the workplace is managed.

> *"What caught our attention was when we found that many of our younger store associates were texting each other using their own cell phones. A lot of the time these were about work and therefore we didn't want to stop them. But it did tell us that they needed something we were not providing them." – Kevin Davis, Lowe's Companies, Inc.*

When a great idea gets adopted, it eventually gets on someone's radar. But in many cases, the people who adopt the idea are in no position to manage the adoption across the company. So relying on a bottom-up adoption strategy will not work for many large companies. And at this point, someone needs to step up and be the champion of this effort.

THE PROJECT LEADER



Whereas traditional enterprise rollouts may not work well for Enterprise 2.0 initiatives, unmanaged reliance on viral adoption does not work either. Enterprise 2.0 projects require leaders. However, most organizations do not have a role in place for this kind of activity. Someone has to take on a new role and become the project leader.

Enterprise 2.0 project leaders emerge from one of many different parts of an organization. The 2.0 Adoption Council indicated that fewer than half of their enterprise practitioners report into IT roles, such as a Shared Services or Enterprise Architecture (or some other IT role that reports to a CIO, but is neither IT Operations nor Applications Development). The remaining project leaders report into a line of business, internal communications, or a centralized project management role.[7] What is consistent across all successful projects, however, is that the project leader must have the ability to reach out across organizational boundaries.

> *"The secret to the success of our E2.0 deployment was our early involvement of and strong partnership with our IT group. We had early line of business sponsorship from our Office of Innovation, representation from several global business units and ultimately our Global Portal team and CTO responsible for our global collaborative infrastructure." – Claire Flanagan, Sr. Manager, KM and Enterprise Social Collaboration Strategy, Computer Sciences Corporation*

Choosing the right leader is vital to the success of an Enterprise 2.0 initiative. This leadership role requires a fair amount of open-mindedness, but also the ability to make decisions that will be respected and adhered to.

> *"We had a direction. We knew where we wanted to get to, but did not exactly know what would be there when we got there. So we had to accept certain compromises along the way. For example, we bootstrapped the use of the platform with successively larger groups, starting with a relatively small group to choose the platform, moving to a somewhat larger platform to prepare it, and finally, to all of the company. At each step, we used the platform to collaborate on how to use the platform, learning as we went. That balance takes a great*

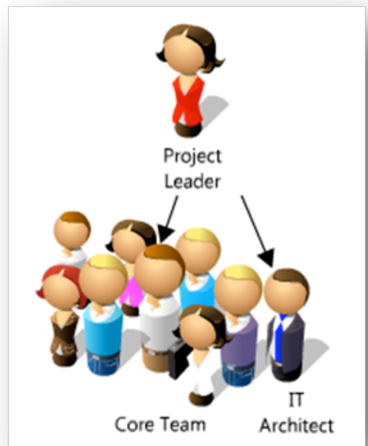
leader, which we were very fortunate to have." – Mark Masterson, CSC Corporation

The project leader must possess organizational credibility and influence, and have a keen understanding of the organizational culture. This will help the project leader focus on the organizational goals of the 2.0 initiative – not just the technical challenges and opportunities.

"We do not want to disrupt current activities. We want to standardize and leverage where there is opportunity to share information and processes. The key is that we bring solutions to already existing and well-recognized problems." – Julien Le Nestour, IT Innovation Manager, Schlumberger

THE ENTERPRISE 2.0 ADOPTION CORE TEAM

An individual project leader cannot support an Enterprise-wide 2.0 adoption program without the help of a core team of adoption champions. The team members represent diverse parts of the enterprise (organizationally, geographically, and socially), and provide the insight and support that helps bring on other parts of the organization.



Core team members play an important role in representing the concerns of their division to the initiative. They are trusted partners that help serve as a bridge between the 2.0 adoption effort and their work groups. They listen and advocate for the business, *and* they help the business understand and adopt when the time is right.

Employees in the many parts of the organization will seek help understanding how the 2.0 adoption impacts existing work processes from the core team members that represent their interests. Some will join the core team members to form mini teams within their divisions to support wider adoption.

Choosing the right members of the core team is a very important part of a successful adoption program. Practitioners reported a variety of ways to find the people for the core team; including volunteers, assignees, and people they knew were natural connectors.

"We took a scientific approach to selecting our team of evangelists. We performed some organizational social graph analysis to find the employees who were natural brokers." – Mark Masterson, Computer Sciences Corporation

Although core teams represent the business, in reality project managers rely upon a good dose of volunteerism and leverage their social networks of contacts to help seed the initial effort. Many times there are parts of the business that are under or over represented. This eventually works its way out in a manner that is unique to each environment based on the politics and relationships formed in each organization.

GETTING IT INVOLVEMENT

Getting IT involved in the project is also essential for the success of initiatives that rely upon technology integration for the 2.0 project – as most do. We found three patterns used by the companies we interviewed that describe how they ensure IT is involved with the project at some level.

- **Core team IT representative**. Some organizations ensure that IT has representation on the core team by having an IT representative, such as an enterprise architect or intranet director, participate as a core team member.
- **Project Leader reporting into IT**. Some organizations have the project leader represent the needs of the business, but report into the CTO or CIO for the duration of the project.
- **Running Parallel team.** Some organizations indicate they run parallel teams, one that addresses business and organizational concerns and the other that addresses technical concerns. The team leaders coordinate as needed.

In addition to core IT concerns, some organizations choose to involve the office of HR, risk management, security, or project management in some manner. The degree of involvement varies and is largely reflective of existing organizational behaviors and politics. So for example, it may be wise to include a representative of a very influential group that could impact the adoption project.

GETTING EXECUTIVE SUPPORT

The Enterprise 2.0 adoption project leader must prepare for their conversations with senior management. Most Enterprise 2.0 projects are not initiated by executives. As long as there is no executive visibility and sponsorship, the adoption can be limited and run the risk of being shut-down. Getting visibility and buy-in is a critical project milestone, as it usually indicates that there is enough groundwork already being prepared for the executive conversation. In some very large organizations, however, executives remain unaware of these activities. Expect a typical set of questions from executives – such as:

- How much will this cost?
- Why should we do this now and not next year?
- What happens if we did not do this?

One strategy that some adoption professionals shared is to discuss the following question within the core team "*What's in it for the executive*?" Sometimes this will result in a side project. One company shared the story of how they gave their executive a blog in order to get his buy-in to the new platform. Another group created an exclusive executive discussion forum. These side-projects allowed the executives to find value in the tools, enabling their support for larger-scale rollouts.

Executive side projects should not be viewed a sacrifice to the self-interested management- gods. Rather, these side projects serve as pilots, and provide insight into some business, technical, and usage issues. If your executives find value in Enterprise 2.0, then their support will be helpful and based on the value they got from the initiative. If not, then the core team needs to examine the project and determine if any changes in strategy are required before rolling out to other parts of the organization.

Getting executive sponsorship is a critical milestone to the success of a 2.0 adoption. Prior to sponsorship, any activity can be viewed as going against some other corporate initiative or encroaching into someone's political turf. This can spell doom for an otherwise helpful progression to a more productive workplace environment. We asked Enterprise 2.0 adoption champions about the external influence they use to inform management about the Enterprise 2.0 industry and their best options. We found the three primary tools are used:

- **Consulting**. Enterprise partners provide insight into the marketplace from their perspectives and share what they are doing for other clients.
- **Published research**. There is now a wealth of syndicated and free research papers, blog posts, and articles that discuss the Enterprise 2.0 phenomenon.
- **Competitive analysis**. Through both formal and informal means, companies learn about the activities in their competitive arena, which alerts them to the relevance and opportunity.

> *"The consultants told us this was the right thing to do, and we read some of the analyst research too. But when we discovered what our competitors were doing, that motivated management to act." – Kevin Davis, Lowe's Companies, Inc.*

PILOTING THE ADOPTION

There is some discussion in the E2.0 blogs about the value of pilots.[8] Most professionals see pilots as a way to learn about full-scale deployments as well as way to prepare some parts of the workforce for the future. Yet, pilots of 2.0 initiatives have to be extrapolated carefully, since the very values they measure are impacted by scale of adoption. In other words, pilots are valuable, but if not constructed or interpreted well, they can be highly misleading.

We report the successful strategy that CSC took so that they could leverage a pilot to learn about adoption. Rather than pilot to a small group (which limits the effectiveness of the pilot), they opened the pilot widely – but limited other elements which gave them certain flexibility to react to issues and mitigate risk.

> *"CSC ran a global, opt-in pilot that was limited in duration, not in audience. Any employee could participate in the pilot. This allowed us to move more quickly than we otherwise would have been able to, delivering something of value to our users more quickly while moving through the final stages of the business case, success factors and business terms. Furthermore, it allowed CSC to test the 'people' component of the deployment. So often, tools are piloted to test the technology, but since E2.0 tools represent such a major innovation to how people collaborate and interact with each other - CSC opted to test how well the platform met its employees' requirements. In essence, CSC piloted their organization change plan to see if it would enjoy viral success while watching and measuring the critical success factors outlined for the pilot."*
> *– Claire Flanagan, CSC*

SCAFFOLDING FOR THE ORGANIC ROLLOUT

We described above that 2.0 adoption is neither top-down nor bottom-up, but a careful orchestration of both. The organizational scaffolding is the orchestration process that makes 2.0 adoption unique. Team members of the core team represent their divisions – and by joining the core team they connect their division's activities with the 2.0 adoption. However, this framework is flexible and adapts to the needs of the business units who are participating in the adoption process.

To help illustrate the scaffolding network, let's take the CSC rollout as an example. CSC is a large organization, with approximately 90,000 employees. The organizational scaffolding they used allowed one full time leader to manage a team of champions. These champions (along with their community manager) work with a network of over 100 advocates within the many groups in the company.[9] Eventually a fourth level of support evolved – they call them Lifeguards – who support adoption and participation within their departments and groups in a consistent and coordinated manner across the organization (see Table 1).

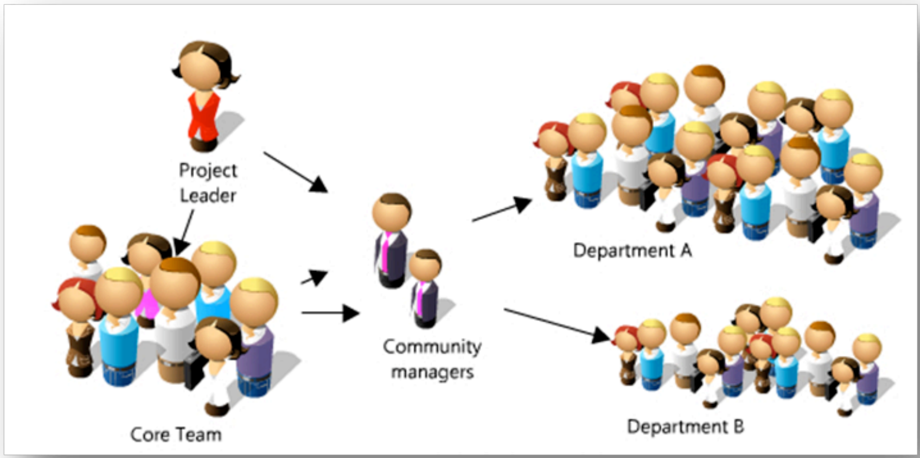
Project leader	Community Champions	Advocates	Lifeguards
1 Program leader	1 Community Manager and 12 Champions	100+ members of divisional core teams	Unknown volume of second-wave advocates
Responsible for overall E2.0 program.	Champions are enlisted advocates throughout the organization.	Advocates seeded 200+ groups around practice, competency or interest groups.	Lifeguards emerged to further the adoption and provide local support as needed.

Table 1 Four layers of advocacy for CSC's 2.0 Adoption

The resulting adoption pattern and velocity exceeded CSC's expectations. CSC's adoption team achieved 25,000 registered employees on their Enterprise 2.0 platform within the first 20 weeks of setting the system in place. Successes in one part of the business helped encourage successes elsewhere. The "lifeguards" that emerged as adoption started to take place were a huge asset to the process. And CSC's core team and advocates were careful to provide templates and tools (such as help topics, presentation decks, logos, posters, etc.) to ensure that groups were sharing consistent practices and getting the support they needed to be successful.

> *"By getting involved in the planning, the champions got early access to and influence over the deployment of the tool. They were asked to help influence their peers, their local executives and teams in the adoption of the platform. Furthermore, the champions and the advocates were powerful layers of peer-help the minute we opened the pilot up to the entire organization. Since these employees had played a significant role in preparing the site, testing and planning, they served as a very powerful first line of support when new users came in. This proved to be even more of a significant best practice for us. New employee posts were watched and monitored by this early group and provided immediate support and guidance. This immediate support and guidance provided a good 'first impression' for new users. We heard things like - "Wow! I can't believe how quickly I got my question answered". – Claire Flanagan, CSC*

The CSC case provides an excellent *straw man* for resource planning purposes. Depending on the size of your organization and target rollout, you may want to adjust the size of the core team and extended teams to meet your needs. When the core team gets too large to be effective, you have to set up smaller teams. But each team has to connect back to the core team in order to maintain a feedback channel and process consistency. Some practitioners noted the importance of having representation in different geographical locations as well as different business units.



GUIDELINES AND POLICIES

When asking about barriers to adoption we heard that many senior managers raise the concern about ensuring the appropriate use of Enterprise 2.0 tools. The Enterprise 2.0 practitioners were in agreement that guidelines are useful to have, but not nearly as critical as one might think.

> *"We launched the site and sat back to see what happens. We had no guidelines in place then. We found that people did the right thing. After a while we started to see some behaviors that we needed to control. Some people were creatively using the tools to circumvent some business processes, and this was causing confusion. So we created some guidelines to help encourage good behavior. We didn't have any problems that weren't easily fixed." – Jamie Pappas, EMC Corporation*

Guidelines serve to assuage legitimate concerns on the part of senior management or risk/compliance functions. But keep in mind to:

- **Review existing corporate policies**. Most companies already have policies in place that govern the use of email and web technology. These policies usually satisfy HR and IT risk concerns with at most some minor additions.
- **Collaborate on the development of new policies**. Developing guidelines is itself a great testing ground for collaboration on a new tool. These typically benefit from multiple perspectives, and

give employees a sense of buy-in to the process. Crowd-source elements of a new policy in order to get buy-in and engender trust.

- **Describe what you want employees to do.** The best guidelines instruct employees what they are encouraged and expected to do – and are quite different from typical policies that enumerate what not to do. These are remarkably simple and effective.

  "In addition to the formal intranet-use guidelines we have as a company, we also remind employees of these user-friendly, common sense principles:
  1. Be a nice, respectful corporate citizen.
  2. If you break rule #1, expect to get guidance on how not to do so in the future.
  3. Help others follow rule #1. " – Mark Masterson, CSC

- **Don't erode the trust you want to create**. Policies send a message about what risks you feel are important to address. In some environments, a very detailed policy about obvious issues may be viewed as demeaning. This could turn people off to the whole idea of sharing information.

  "After many discussions, we decided to turn off the profanity filter when we installed our E2.0 platform. First of all, it only filtered English swear words. But more importantly, it sends the wrong message to our co-workers. They are professionals and adults. So turning it on would do more harm than good. We know this feature is useful in other contexts, but we also know that it would not work in our culture."– Mark Masterson, CSC

THE PATTERN OF SUCCESSFUL ENTERPRISE 2.0 ROLLOUTS

Enterprise 2.0 adoption poses an interesting challenge to organizations and practitioners alike. In addition to implementing organizational change – which alone is quite a challenge – the implementation process is also original and unique. 2.0 Adoption follows neither the top-down nor the bottom-up pattern. Rather, we find that successful implementations carefully orchestrate the two patterns in the following manner:

- Bottom-up and opportunistic events initiate interest in the program.
- Formal leadership runs the program.
- Business representation forms a core team.
- IT (and other stakeholders) gets involved.
- Executive support is secured.
- Some form of piloting and early-stage rollout takes place.

These events take place in some sequence that might match the above steps. But once formed, the team will perform much of the analysis, development, and deployment work in an iterative manner; reminiscent of agile projects. The team's influence fans out and creates support bases within their business groups; enabling more bottom-up adoption. And this brings us full-circle to the proposed adoption process that initiated the conversation.

We can now connect the model first proposed by Benoit Chovet with the organizational working structure that is put in place to support adoption. Indeed there are stages and iterations; checkpoints and key resources. We find the following depiction brings together many of the pieces of the adoption framework (See Figure 3).

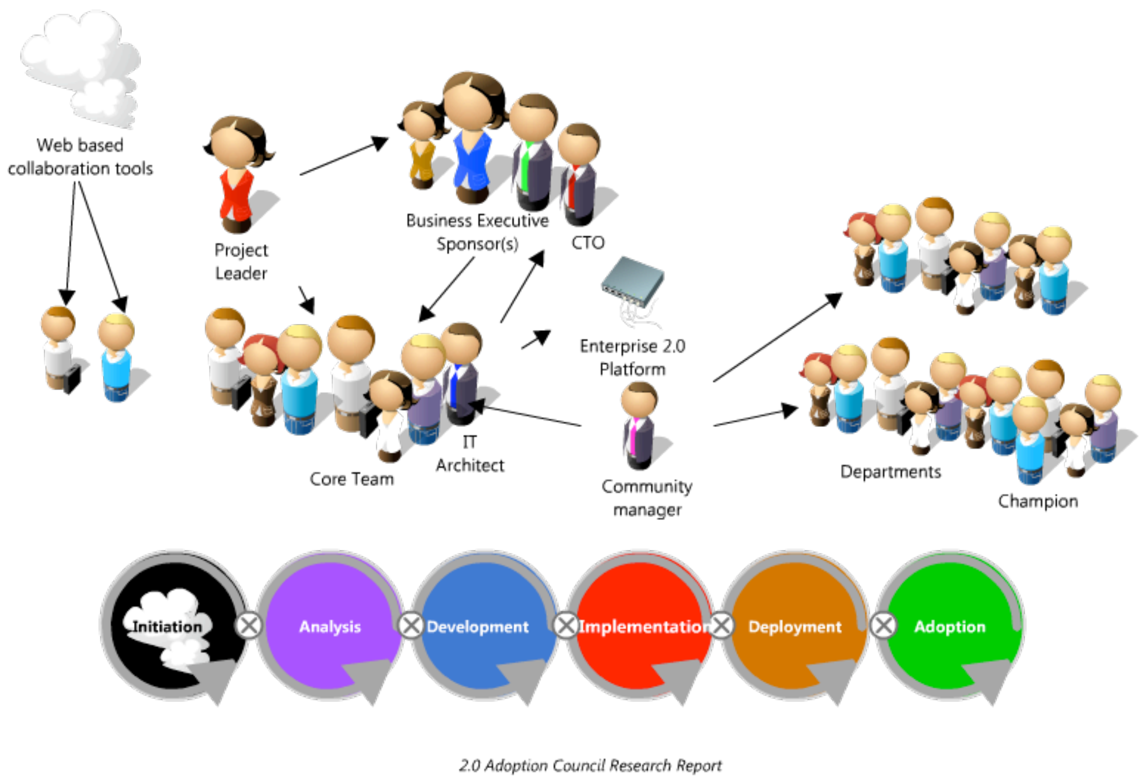


Figure 3. The Storyboard Process for Enterprise 2.0 Adoption

Scan left to right to see the storyboard elements. The generalized pattern involved networks of participants. But it is important to underscore that each implementation will differ in many details regarding timing, scope, and participation. The pattern suggests that neither traditional waterfall processes nor unmanaged viral adoption full supports enterprise adoption. Rather teams that are well-networked, represent a diversity of business interests, and are coordinated to a central effort have been proven to be an effective structure to manage a 2.0 adoption.[10]

RISKS EXPRESSED

Succeeding to roll out and get usage of new collaboration tools in a 2.0 initiative may spell success for the project, but business measures business goals. If the new tools do not solve the problems first articulated by the business, then you run the risk of a successful rollout but a dissatisfied business sponsor. We asked interviewees about project risks we should document in this report. These serve as topics that you should consider when planning your 2.0 adoption process. We note the following risks and abatement strategies:

- **Managing expectations**. A surefire way to sabotage a 2.0 adoption is to over-promise and under-deliver. Some over-promise the potential value in order to get senior management support. What results is an erosion of trust and confidence when the project fails to meet the unrealistic expectations set. Project setbacks are a normal part of real projects, but when trust has eroded it is impossible to recover from a setback. Abatement strategy: Set achievable targets and communicate risks.

- **Resource commitment**. Managing an enterprise-wide project in any large organization takes time and effort. The program management alone may quickly grow to become a full time job. This may add to the challenge of getting senior management support. Failing to get adequate resources and support for an enterprise project will severely limit, or simply put an end to the progress. Abatement strategy: Understand what senior executives are looking to solve and connect this to getting the support and resources needed to achieve their goals.

- **User training**. 2.0 technology and behavior is very new and unnatural for many employees in many organizations. They will need tactical support on how their expected activities should change, e.g. where to put information they want to share, where to find communities, how to search for information they'll need to get their work done. Abatement strategy: Leverage the enthusiasm of the early adopters to help their peers. Many overworked employees are just looking for an easy way to do their jobs, so focus on making the 2.0 practice an easier path to their goals.

- **Technology integration issues**. Technology might not be the driver for 2.0 adoption, but it is certainly relevant. The marketplace offers many E2.0 platform options. Some are delivered as a service or as an appliance. Some integrate with popular enterprise fixtures, such as SharePoint. Some offer many features; others are easier to learn. None are perfect or meet everyone's needs. But you cannot implement technology in a corporate environment without considering technology integration issues. Abatement strategy: Involve IT in the project so that they can help address technology issues that arise. IT may impose constraints on the kinds of technology platforms they can support, but they will be willing to help when they see how the initiative can provide many benefits to them too.

"Fortunately it is usually easier to integrate technologies in 2.0 projects, especially when they support open standards. These tools are usually less complex and more flexible than other enterprise applications."
– Julien Le Nestour, Schlumberger

CONCLUDING THOUGHTS AND NEXT STEPS

After many hours of conversations with 2.0 adoption practitioners, we found that clarity is still a goal to be achieved. We recognize that adoption of new tools and behaviors are subject to many risks, and thus we propose this framework with the following thoughts:

- **Modesty**. The council members never expressed a sense of absolute certainty about this or any framework. Rather each suggestion was posed in a manner that expressed what worked for them, and the hope that it would help others.
- **Openness**. Council members shared information about their successes and failures. We did not get a white-washed story claiming that everything was perfect and remains perfect. Rather, we found a sense of honest exploration and information sharing to achieve a better result.
- **Curiosity**. Recognizing that there is more to understand, council members approached this project with curiosity about what we already know and what more we can learn from each other as we develop our programs.

We present these findings as a first report from The 2.0 Adoption Council**,** with sense of exploration. We recognize that this is only a starting point for many readers. The 2.0 Adoption Council now has more than a hundred members, but we only spoke with a few of the members who engaged in the conversation about this project. We anticipate refinements to this initial framework to be presented in subsequent reports as more council members introspect on their projects and present additional insight into many of the issues they encountered in their efforts. And yet, the information presented in the report is a result of the insight culled from multiple success stories of significant scale. So we are also confident of the value that it provides you.

We recommend that practitioners in the Enterprise 2.0 space follow the council activities on the public community at www.20adoptioncommunity.com. This community provides an open forum for you to listen, learn, and interact with other thought-leaders in this space. Practitioners should also consider learning about the criteria and benefits to joining the council. More information about The 2.0 Adoption Council is found at www.20adoptioncouncil.com.

REFERENCE INFORMATION

RESEARCH METHODOLOGY

The Enterprise 2.0 Adoption Council started with a proposed process submitted by a UK-based Enterprise 2.0 practitioner working for a leading supplier of networking equipment and network management for the Internet. Some council members discussed the proposed process and articulated some refinements to the approach. Afterwards, the author conducted one-hour interviews with members of the council to get their perspectives on the conversation. This report is a result of those interviews. Note: The author is not a member of The 2.0 Adoption Council.

COMPANIES INTERVIEWED FOR THIS DOCUMENT

Computer Sciences Corporation

EMC Corporation

Lowe's Companies, Inc.

Schlumberger

A leading supplier of networking equipment and network management for the Internet

And open feedback from The 2.0 Adoption Council

TERMINOLOGY

The 2.0 Adoption Council recognizes the terminology challenges that the Enterprise 2.0 marketplace faces. Many find that their coworkers and management don't understand the implications of the term "Enterprise 2.0." To some, adding the word "social" to "business" or "intranet" helps, but to many, "social" implies socializing – not work. Terms such as "Intranet" and "Portal" also have either very technical or negative connotations. And yet, despite some shifting of terminology, we find that council members share a common understanding of their work, challenges, and goals.

We heard the phrase "*Implementing Enterprise 2.0*" to be a shorthand for a complex set of initiatives that include software deployment and the adoption of new workplace behaviors. These changes initially enable more productive workplace collaboration between employees, and eventually may result in a transformed workplace. Some use a synonymous phrase "*Implementing a Social Intranet*" to indicate that we are discussing social behaviors that are also workplace behaviors. Others say "*Adopting a 2.0 initiative*" to convey a similar notion.

Please note that this report discusses projects that take place inside the enterprise. Although the social-nature of Enterprise 2.0 conversations is very similar to those that take place on consumer social networks, they differ in many important areas. This report does not discuss the use of public social networks, such as Facebook, YouTube, and Twitter, for external collaboration or marketing purposes.

ENDNOTES

[1] Please refer to the "TERMINOLOGY" section where we explain why we use the phrase "*implementing Enterprise 2.0*" when we are well aware of the fact that the installation of new collaboration software is not the full Enterprise 2.0 vision – but rather one step on the path to the vision.

[2] We find this term "corporate culture" frequently used to describe a set of unwritten social forces within an organization that describes the expected reaction to unexpected behaviors or the expected set of behaviors that are commonly accepted within a particular work environment. It is difficult to discuss 2.0 adoption without discussing corporate culture. However corporate culture is not the primary topic of this report.

[3] The term "groundswell" became popularized by the book *Groundswell*, Harvard Business School Press, 2008 by Forrester Research analysts Charlene Li and Josh Bernoff, as a way to describe the un-orchestrated but observable behavioral movement where masses of individuals flock to socially mediated channels of communications. http://www.amazon.com/Groundswell-Winning-Transformed-Social-Technologies/dp/1422125009 Another term used to describe this phenomenon is *Technology Populism*. This term was introduced in Forrester's research paper: *Embrace The Risks And Rewards Of Technology Populism,* February 22, 2008 http://www.forrester.com/Research/Document/Excerpt/0,7211,44664,00.html

[4] Link to the Facebook fan page discussion:
http://www.facebook.com/topic.php?uid=120953840119&topic=10168

[5] Chovet also represents NewDreamers Ltd, an online consulting agency specializing in Enterprise 2.0 deployment strategy, Collaborative & Social Business Software, and E-commerce. http://newdreamers.com/

[6] Although a 2.0 project can be initiated by senior management, we did not encounter the Top-Down pattern in the conversations we had with the council members who participated in this report.

[7] Source informal poll of 2.0 Adoption Council members, reported on http://www.slideshare.net/itsinsider/enterprise-20-demystified Slide 19 (with note that this survey had a small sample size).

[8] A good starting point to read more is http://www.readwriteweb.com/enterprise/2009/08/poll-are-pilots-a-waste-of-time.php

[9] Describing the potential roles of a Community Manager is outside the scope of this report, but is a relevant concern for 2.0 Adoption. Readers are guided to this excellent blog post on this topic. http://blogs.zdnet.com/Hinchcliffe/?p=913

[10] An observation made by members of The 2.0 Adoption Council is that this pattern has the ability to be applied within itself – like a fractal. The high-level adoption framework may be replicated in smaller scale for some larger divisions or projects.