

Best practices for establishing a new way to work: Implementing IBM Connections



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Executive summary

This white paper is one of two white papers on the topic of organizing and executing a successful implementation of the IBM® Connections™ collaboration platform in your enterprise. Both white papers are intended for those of you who have seen the need for your organization to change and want to learn how to make it happen. The first white paper focused on the benefits for both the organizations and for the employees as target audiences and principles for time planning. This paper outlines practical initiatives to use in a mix suitable to the context and culture of your organization. This is your fast track to IBM Connections adoption in your organization so you can turn collaboration into a new way to work.

Changing the work culture, even the way work is defined

A deployment of IBM Connections or any collaboration software to help your organization reach its full potential is not a task just for your IT department alone. The very purpose of installing IBM Connections should be to change the way work gets done. For that to happen, more than providing login IDs and making the new software available is necessary. To reduce risk and ensure success, you need to run a proper change management program according to the M²E²ME formula:

- M² = Motivate Management
- E = Easy
- E = Embed
- ME = Motivate Employees

That formula might appear somewhat egocentric, but remember that any group of “we” consists of many “mes.” For work, if you want to reach fundamental change beyond the first early adopters and enthusiasts, you need to pay attention to what makes individuals (every one of which is “me”) work the way they do. And what can make them change, for the better.

For example, corporate executives work strategically, with the aim of looking after the well-being and long-term health of the entire organization. The rest of the organization, especially in large enterprises, focuses on what is good for their teams, their departments, their unit, their clients, themselves. If a company is publicly traded, they work quarter by quarter.

The advantages of collaborating and working with increased transparency often do not materialize in the first quarter, but, given time, benefits can be reaped by your own team and every other team in your organization. They might not fit into traditional descriptions of job roles and typical delegation of business goals, but they do infuse efficiency and agility into everything an individual does.

For extensive adoption of new, collaborative and transparent ways of working to materialize, you need to work with organizational values and the way you define work and performance. This requires:

- Thinking of your business as one company that is working together with a shared vision for the long term by enabling transparency, sharing (not hoarding) and helping (not competing)
- Enabling trust and empowerment instead of command and control by:
 - Managing by values rather than by instruction
 - Uncoupling communication channels from decision-making structures
 - Encouraging and engaging in dialogue
 - Recognizing that having valuable expertise to share does not require being an expert
 - Realizing that small contributions count, too
- Defining work by focusing on what gets done rather than where and how and by allowing and encouraging investment in shared knowledge

M²: Motivate management

Motivating management to want to engage in changing the organizational culture and the ways to work and communicate is where it all starts. Without management support, no budget will be allocated for software and IT changes, nor will transformation team and change management activities be established.

Secondly, crucial to the success of an IBM Connections implementation is that leaders communicate their endorsement and visibly engage and adopt the new ways of working. Finally, for the transformation to be far-reaching, management must actively participate in changing the way the organization operates (embed) by setting goals, by establishing criteria for performance assessment and promotion criteria and by facilitating process changes, system integration and more.

Motivating management has several components. Which mix best suits you depends on your organization, your leaders and context, but don't rely on one component only.

Vision: “Imagine the possible” workshop

The default starting point of executive and management endorsement is a shared vision of where to go, why and—at least to some extent—how to get there. Although the outcome of the workshop is the creation of a shared vision, the vision should be preceded by assessment and agreement on the current state, especially current pain points and obstacles. A sufficient level of understanding of the new way to work and the benefits of it to the organization is also critical and is often achieved with testimonials and success stories from other organizations, the similar the better.

In the vision phase of the workshop, using personas of selected roles in the organization is good practice, as is including grass root participants from the front line. These participants can provide revealing insight into pain points that interfere with crucial aspects such as customer satisfaction, work efficiency, quality and risk.

Sufficient experience and subject matter expertise is not always found from within an organization. IBM, therefore, is happy to support you with the preparation and facilitation of such workshops.

“Show me the money”

Given management's eye to the budget, positive and tangible results of the new ways to work must be demonstrated. Initially, the focus should be on making it easy to understand which results to expect. Substantiating the results actually achieved should follow—the sooner, the better.

Benchmarking and references

References and benchmarks against similar organizations or against competitors is often powerful. Not only is imagining the potential positive impact on your own organization easier, but few executives want to be seen as late adopters of new ideas that can benefit the organization and the owners. When looking for benchmarking measurements, make sure to connect business values to the changes in behavior. “Showing the money” is always the strongest way to motivate management, but not always easy to do. Helping them see the money—or the risk—is often a good second choice.

Surveys before and after

Many of the benefits of the new way to work often do not match well with traditional ways of measuring business performance. The challenge, therefore, is to use existing metrics to measure the positive impact of changing ways of working. As an alternative, consider surveys of employees about topics such as time needed to resolve challenges, time needed to find required expertise, time saved by re-using shared knowledge instead of starting from scratch and more. Such surveys help show progress because starting values are part of the process. To show the value of the “after,” you must establish the “before.”

Performance analytics before and after

If your organization has the capacity for business analytics, you might be able to design new metrics to connect with changed behavior. Just as with surveys, you should prepare by collecting starting values.

Pilots

Seeing the positive values of new ways to work is sometimes difficult. Sometimes management can be motivated by seeing a new way to work actually resolve an issue or problem. Pilots, sometimes referred to as use cases, involve selecting one issue and demonstrating the value of resolving it. You can select a business pain point or a management pain point for your demonstration.

Pilots targeted at business pain points

For the pilot, look for bottlenecks, inefficiency and causes of frustration and poor performance, with the aim of alleviating those problems by changing processes and ways of working with collaborative capabilities and practices. Then:

- Identify and engage sponsors.
- Determine the character of the issue at hand. Is it speed, waste of resources, quality, risk, knowledge or skills, lost opportunity, employee engagement?
- Identify the impact of the issue.
- Determine if an alternative approach for resolution is possible. What is the cost or effort needed?
- Investigate which groups of employees are impacted by the issue and how they're affected. Are they also part of the potential solution? If not, who is?

Pilots targeted at management pain points

For a pilot that hits “closer to home” for management teams and individual managers, you should focus on improving collaboration, transparency or flexibility in the management team or on boosting the direct reach of managers throughout their entire reporting structure. They are a perfect fit because they are busy, always on the go, heavy users of mobile access, but still in need of having information and help available on short notice.

Success story harvesting

Collecting and communicating success stories is a key part of motivating management (business success) and employees (personal benefits). They serve the double purpose of proving the benefits of new ways of working and explaining them, so seeing how they could be applied to your own context is easier. Champions and community managers are usually good sources for success stories. You might want to run campaigns to collect stories, but providing channels for spontaneous contributions when people happen to have a story to tell and time to tell it can be very effective. You might even consider offering editorial support for selected stories.

The adoption curve

Figure 1 shows all the activities and the focus for motivating management. As you can see, the activities move along the curve from endorsement to engagement and then to embed. This is because, as time goes on, and the activities for motivating management take hold, embedding IBM Connections is the focus and the result.

Support for Executives changes over time as well as the character of their engagement

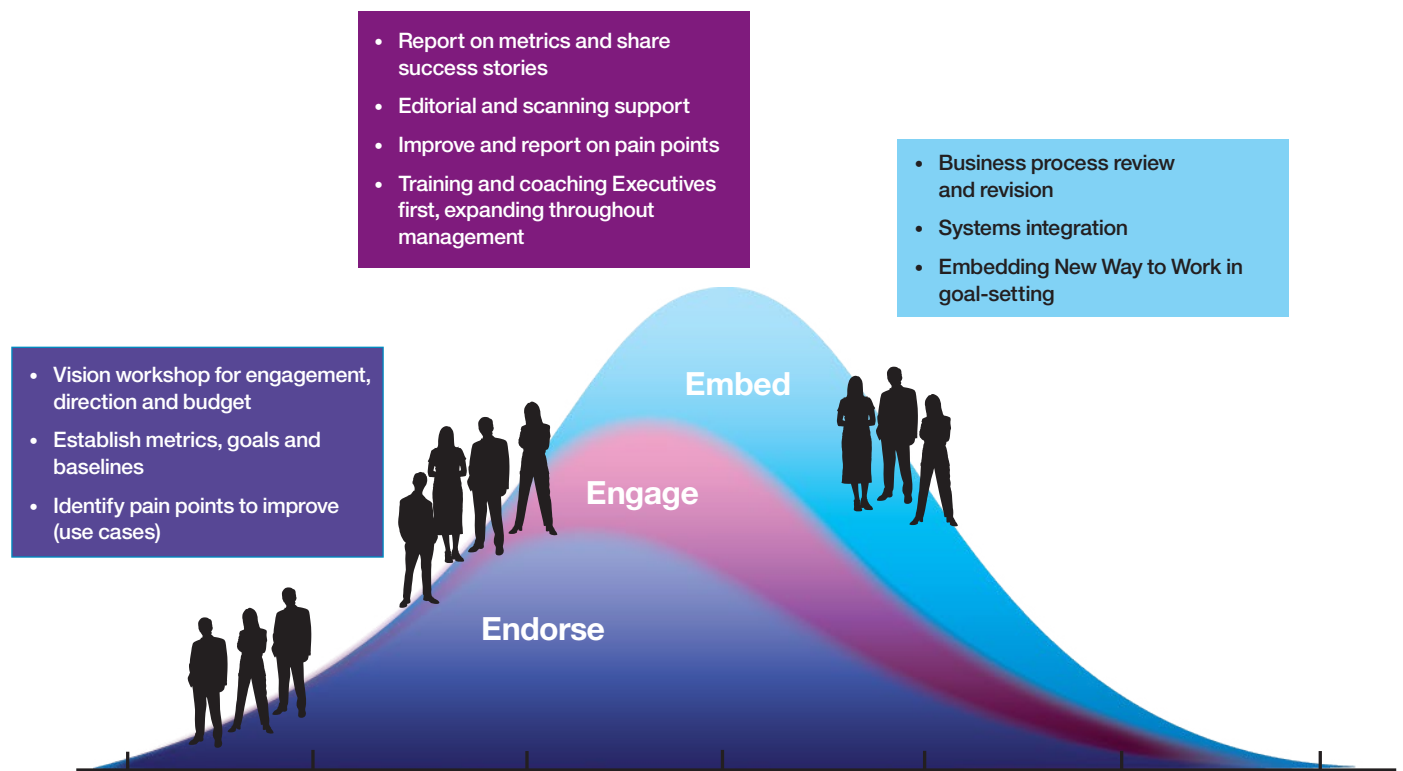


Figure 1: Summarizing focus of and activities for Management in relation to the adoption curve

E: Easy

The smaller the amount of effort needed to change, the less you need to invest in training and change management. User experience, easy access, consolidation of tools and availability of good support are essential for adoption of IBM Connections and are good investments, too.

Clear guidelines

Insecurity has a negative effect on willingness to try new things. Clear guidelines for social computing and information security go a long way toward countering that insecurity and making adoption easier. You might get inspiration from the [IBM Social Computing Guidelines](#).

Tool consolidation

Some organizations have a tendency to shop around for tools to support different aspects of collaboration and networking. Having a fragmented collaboration landscape results in either having to monitor updates in several places or having to deal with email notifications that bloat the inbox. Neither is desirable. The more people collaborate, the faster the flow of updates will be. IBM Connections offers the opportunity for improved collaboration and update flow because it is a consolidation of capabilities all in one.

One activity stream

An underappreciated aspect of IBM Connections is that updates from all components feed into the same stream of updates: network, blogs, activities, wiki edits, forums—all. You only need to manage one stream.

Internal and external

IBM Connections enables you to consolidate updates from internal and external networks. Combining this flow of incoming communications further increases the efficiency of communications.

Mobile access

Increasingly, work is not a place but a state of mind. People work wherever they are, whenever they need to. On a personal level, the smartphone has quickly become the primary screen. Always close, always on. Why would work be different?

Full and secure access through mobile devices is a given, therefore. It is also the easiest answer to reaching employees who might not have a work computer, such as store associates, factory workers, delivery personnel and others. With mobile access and the excellent mobile capabilities of IBM Connections, employees without computers can easily participate in collaborative efforts extensively.

User experience

The easier something is to understand and to use, the more likely you are to try it.

Focus on user essentials

IBM Connections offers features that you get from half a dozen different other platforms for personal use. It is full and robust. Therefore, you are not likely to use all of it as much, just as you probably are not using more than half of the features available on your office software. For that reason, launching IBM Connections with limited features but to a broad base of employees enables them to see quickly how easy it is to use it. This is more likely to result in viral adoption and champions than launching a pilot implementation with full features only to a limited group of employees.

Tailor to target audiences

Some audiences or situations might require tailored features or interfaces. If they are strategic or big enough, consider an investment in tailoring. A solution designed specifically for users or audiences is likely to be easier for them to adopt and use.

Continuous delivery and improvement of collaboration services

As employees increasingly adopt new ways of working, they ask for added capabilities, especially when they compare what is available to them on the personal level, from well-known social networks. IBM Connections is upgraded frequently, especially the cloud deployment platform, so new capabilities get introduced.

But observe and listen carefully to your users to determine which integration with other systems—one direction or the other—will bring the best value.

Support

When trying to use new tools, you are bound to get stuck from time to time. Ample availability of tutorials and in-context help can go a long way to getting you through, and IBM Connections offers them out of the box. If you want more, video tutorials are available for additional support. General support communities can also be helpful. These communities can be set up using IBM Connections standard features and functions:

- A forum for handling questions and providing answers from early adopters, champions and more
- A blog for keeping everyone up to date on what's happening and how to use new features and upgrades
- Files for sharing presentations, graphics and other resources, often provided by early adopters as part of their advocacy
- Status updates for sharing news, experiences and snippets of information
- Ideation blogs for collecting ideas and suggestions for improvements
- A wiki to provide a stable information structure

After participating in forums, sharing tutorials and blogging in the community, users will quickly turn it into the place to go to for coaching and support. Your champions will handle most of the answers.

Expert tip

In your general support community, make sure the character of the materials leans toward “How to do what I want to do while using IBM Connections to improve the outcome” rather than focusing on how the features work.

Along with the in-context support and the community, which provide individual support, you should offer support targeted to specific groups.

Support for leaders

As the visible engagement of leaders is crucial, they should be offered targeted “white glove” support in the form of:

- **Coaching.** An effective approach to consider is to recruit “executive social coaches” from the ranks of champions. Provide them with training and training materials and pair them up with executives for coaching engagements.
- **Mutual mentoring.** In this activity, you use existing mentoring relations and the support of the people being mentored to offer added value by “mentoring them back” on matters of collaboration and networking. In addition to the same kind of support offered to executive social coaches, mutual mentoring usually requires a greater portion of “train the trainer” activities.

- **Editorial support.** You might consider offering executives editorial support in creating blog posts and communications coaching and support to help them with other, more faster-flowing aspects of collaboration and transparent communications.
 - **Scanning support.** Because of the powerful motivational aspect of leader feedback on employee contributions, you could consider offering a “scanning service” for leaders. Such a service produces a regular digest of interesting content for them to view and respond to.
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Expert tip

Steer clear of impersonal and mass-communication styles because employees expect authenticity and quickly sense when change only “goes skin deep.”

Support for champions and role models

Champions tend to be curious, fast learners, extroverted and self-motivated. Your job is to maintain and boost that momentum and to support them while they support your goals. Your focus for champions should be to help them support each other, share examples and lessons learned and ask each other for advice. For you, this support is about facilitation and providing encouragement, probably to a large extent as public recognition of efforts and achievements. Listen to them, acknowledge their value, engage them, show them trust and give them recognition transparently.

A collaborative support community goes a long way in enabling champions to support one another. Online web meetings that take advantage of the skills and experience of advanced champions in order to coach fellow champions on topics based on member challenges is a standard component.

Support for community owners or managers

Helping each other is essential for community owners and managers, and they are likely to require your active support. Some might be early adopters who need coaching on their use of IBM Connections. All have a primary concern, which is to nurture their communities. Therefore, be prepared to have assistance available that can show them how to boost membership engagement and richness of knowledge and interaction between members, and thereby attract new members to thriving communities.

Knowledge harvesting

Much of the most valuable company knowledge can be found with the busiest employees, in the busiest projects. As a result, they run the risk of being unable to find the time to prepare their deliverables for sharing. Anonymity might be necessary because of financial information that should not be spread throughout the organization, or information that is sensitive or confidential. Unless they have help to extract knowledge from the sensitive details, this valuable knowledge might never be made available for the benefit of other employees or the company as a whole.

Knowledge harvesting offers support to these employees. Management identifies teams, projects or people with valuable knowledge that can be found in documents that need processing before sharing but without the capacity to do such processing. A support team is tasked with collecting the documents along with instructions from the document owners on what should be cleaned. After they are clean, the documents are reviewed by the original owners and then shared on their behalf by the support team.

This support team does not create any new knowledge; they just make it possible to share these documents more freely.

E: Embed

Embedding means making the new way to work such an essential part of the enterprise that the adoption of IBM Connections moves from “wow, this is easy,” to being part of the internal consciousness of the whole organization. People stop thinking of it as “the new way to work,” because it has become “the way to work.” IBM Connections is ingrained in business processes, goals, performance, systems and integration and few people think twice about its presence.

Business processes

Defined business processes can both impact and benefit from the use of IBM Connections. Many are likely to have been defined before or without any insight into collaborative and transparent work practices. Therefore, parts of these processes might actively discourage or even prevent employees from using the capabilities. However, efficiency, resilience or performance can improve when you inject collaborative or transparent ways of working in the process. Indeed, collaboration or employees might benefit from integrating with business processes, if not in any more advanced way than by posting process communications in the update stream of those involved or in a community, as follows:

- **Proposal development and approvals.** IBM Connections Activities and Activity Templates can speed up proposal development and approvals with improved transparency and reduced risk of confusion or double work.
- **Decision-making.** Comments and feedback capabilities in IBM Connections can remove waste and redundancy from review and decision-making processes. One client reduced a decision-making process from 40 weeks to only 6, simply by working transparently instead of relying on notifications that got buried in email inboxes.
- **Branch or store management.** Communication in IBM Connections communities can accelerate onboarding, improve clarity and speed of communications in stores and branch offices.
- **Collection of requirements or suggestions.** Ideation blogs can be used to collect suggestions for incremental improvements of services or products or requirements when developing new products or services. In both cases, voting helps with prioritization.
- **Support ticket handling.** You can use forms to create support tickets as activities, for which support agents can take ownership in a support community.
- **Second or third level support.** When support staff are faced with questions that are new to them or in need of specialist experts, IBM Connections can help them find the people or knowledge they need for help.
- **Skills assessment.** If you have a system for assessing the skill levels of employees in their job roles, employees can enrich their profiles by selecting which skills to show on their profile pages.
- **Professional development processes.** Completed training can be displayed as status updates on profiles or simply added to profile pages.
- **Automated asset maintenance.** Sensors built-into buildings, machinery and facilities register and report their own need for maintenance or intervention. IBM Connections can be configured so those needs are automatically shared as status updates or activities in a community for that building or installation. The alerts get pushed to the activity stream of relevant staff for action. All relevant manuals and documentation are also stored in the community.

Goals and performance

Embedding collaborative and knowledge sharing behavior in goals and performance assessments is a best practice because, to many, this is the way work is defined. “If it gets measured, it gets done.” However, rewards should be for more than just quantity. Large amounts of useless information only clogs communication channels and can degrade the usefulness of IBM Connections. The dimensions should instead be:

- How extensively you collaborate, share and help
- How much others appreciate your contributions (likes, downloads, comments and more)
- How much you add value to contributions made by others (liking, commenting, referrals and more)

The third dimension can easily be neglected, but as volumes of contributions and shared knowledge increase, “knowledge about the knowledge” becomes increasingly valuable. When you’re faced with two possible presentations on the topic you are looking for, deciding which one to use is easy. When you find 50 potentially interesting presentations, the number of likes, downloads and comments are good indicators of which ones you should consider using. This last dimension is about “the intelligence of the crowd.”

Personal goals

To start with, individual business goals should be reviewed to make sure they do not discourage collaboration and knowledge sharing. You should then consider how and to what extent you can add aspects of “investing in collaborating, networking and sharing knowledge for the benefit of the entire organization.”

Managerial goals

Traditionally, goals for departments and larger business entities relate to the aggregated performance of the entire team. Similarly, the “social goals” can be aggregated or averaged for the entire team and their level or development could be incorporated into the goals of the department leader or the business entity. Also the “social profile” of the team could be embedded so outliers that distort the averages receive attention.

Integrate systems and processes

For collaboration and transparency to become truly embedded into work, they have to be integrated into the systems and processes that support and guide how work is done and into traditional communications channels. Here are some examples:

- ERP, logistics and similar systems could post updates to the activity stream or post in communities. Or a “people” search from IBM Connections could be embedded into such systems where relevant.
- Communities and their components could be used in training delivery, for reference or maintaining momentum between sessions or for questions and answers.
- Project managers could use communities for their projects, a blog for status updates, wiki for references and forums to discuss problems or ideas and share relevant files.
- Communities could be used for event management.

Integrate communication channels

You have several options for integrating communication channels. Your activity stream can show on your start page of your traditional intranet, with access also to files and your favorite communities. Or, status updates can be used to draw attention to new editorial materials and other information. Other deeper integration is also possible.

ME: Motivate Employees

Easy and embed each have their own section in this paper, but in the formula, they appear as E^2 . This is because they are interconnected: the easier adopting the new way to work is, the more it becomes embedded. The more it becomes embedded, the easier it is for more people to adopt it. Therefore, Figure 2 shows “easy” and “embed” in the adoption curve as two parts of one complete forward arrow, and it indicates the processes that focus on easy and embed in the context of employees. ME, the last part of the formula, is about motivating employees, helping them see and understand “what’s in it for them.” This part of the formula focuses on communications, recognition and role modelling, by both executives and peers.

Emphasis shifting from Easy to Embed

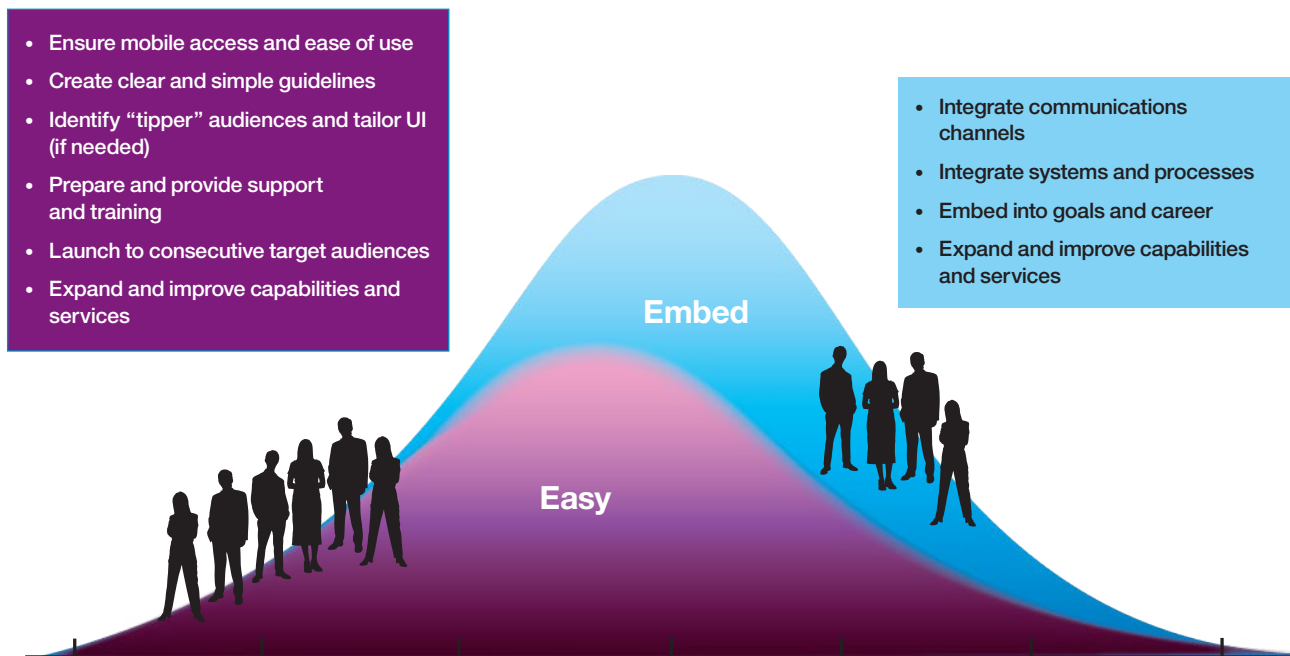


Figure 2: Shifting of focus in initiatives aimed at employees from “Easy” to “Embed” in relation to the adoption curve

Highly visible executive endorsement and engagement

In any organization, leaders set the example. It's part and parcel of the concept of leading. This is more important in very hierarchical organizations, but still important even if the pyramid is flattened. The key here is that the support of the new ways to work must go beyond words only. Leaders who show support with visible actions are convincing. The easy way out for leaders might be to say "I'll start a blog" and then ask someone from internal communications to help them produce the content. Although nothing is truly wrong with that blogging technique, true engagement is manifested by responding to comments on that blog or by responding to content and updates posted by people in their network and employees in general.

Expert tip

Expert tip: Schedule a 15-minute one-on-one meeting with leaders each week, initially, to help establish routines for using IBM Connections to motivate employees.

Personal benefit realization (in both senses of the word)

For the adoption of new ways to work to be self-sustained in the long term, employees must see the benefits to them of investing time and effort in change. First, they have to understand what they have to gain. Later, they will have to experience the benefits, preferably first hand, although seeing and hearing about how peers have benefited can also be helpful.

Visible executive recognition

Getting recognized by executives is strong motivation. It shows that your executives see and appreciate employees and it shows their colleagues, too. Recognition can be divided into two broad types, and the two are not mutually exclusive:

- **Formal.** Formal executive recognition can consist of announcements, designation as a role model and even a monetary award.
- **Bite-sized, informal.** Executive recognition can also come in smaller portions, such as positive comments to online contributions or invitations to network. The challenge here is for the executives to find the time to scan the buzz for what to recognize.

Internal marketing campaign that explains benefits for employees

Practically all communications need an element of "what's in it for you," particularly any change communications campaign, be it online, on posters, flyers and other similar output. Consider a marketing campaign with consistent messages that spans a range of media. Typical themes could be the value of:

- Saving time that can be spent on better things
- Getting inspiration from colleagues
- Boosting your career with personal marketing
- Asking and providing help to others

Motivational training

Consider a training program, especially for your strategic audiences. The most important part of the training should focus on why, not how. Instead of explaining the features, focus on how the features help people complete tasks and overcome challenges. The more you adapt the examples to your audience, the better it is.

Role model publishing

Publishing success stories that feature people others identify with, who are doing things they are familiar with in a better way and are benefiting from doing so, is among the strongest motivational tools you have.

Personal analytics and gamification

Feedback can also be made instant and systematic with gamification or personal analytics. The difference is mainly in design, fun and transparency. Gamification and personal analytics are powerful ways to boost curiosity, but they should be carefully designed to encourage desirable behaviors and not just any kind of activity.

Social onboarding of new employees

New employees should be targeted specifically for motivation. They haven't developed old habits or the all too frequent "I tried it once and never again" attitude. The new habits should be made part of the introductory training and the social capabilities should be used. An example is creating onboarding communities for new hires.

Conclusion and summary

IBM Connections offers a single place to capture innovation, harness it and move it forward. Users quickly search and find expertise from all their knowledgeable colleagues. It offers increased transparency and ease of access to important people and knowledge, along with the promise of more efficient processes, inspiration through accidental discovery of ideas and improved understanding of customer preferences, needs and challenges. A true digital transformation gains momentum over time as the life blood of your organization starts pumping faster and more freely than previously possible.

As with most revolutionary platforms, the value of IBM Connections is not something that can always be immediately realized. It is long term and lasting, and it can only come as the result of motivating management, showing everyone how easy the new ways to work are, embedding them in everyday working lives, and getting employees on board and enthusiastically using it.

You do not have to do this alone. Based on experience with clients around the world, IBM has a number of best practices, solutions, options and services that can help your entire organization revolutionize work in a way that benefits everyone, from executives to people on the front lines.

For more information

To learn more about IBM Connections and the new way to work, contact your IBM representative or Business Partner or visit: www.ibmcloud.com/social

To learn more about the potential ROI of IBM Connections for your organization, read the study “[The Total Economic™ of IBM Connections](#)”, a July 2015 commissioned study conducted by Forrester Consulting on behalf of IBM.

For information on the benefits and considerations when implementing IBM Connections, read “[The only constant is change: Considerations for implementing IBM Connections in your organization.](#)”



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