



## **Social Business in the Cloud: Achieving Measurable Business Results**

January, 2014

**Contents**

Acknowledgements..... 3

Executive Overview..... 4

Motivation & Considerations..... 5

Principles of Social Business ..... 6

    Principle 1: Recognize social technology as a means to better business outcomes ..... 7

    Principle 2: Be the architect of your own success ..... 7

    Principle 3: Take it one step at a time ..... 10

    Principle 4: Put your users first ..... 12

    Principle 5: Big thinking..... 14

Conclusion..... 15

References ..... 15

Appendix A: Social Business Capabilities ..... 15

Appendix B: Find an Expert..... 18

    Business Challenge..... 18

    Social Capabilities..... 19

    Business Outcomes ..... 20

    Industry Nuances ..... 21

    Technical Challenges..... 21

    Use Case Recommendations..... 22

© 2014 Cloud Standards Customer Council

All rights reserved. You may download, store, display on your computer, view, print, and link to the *Social Business in the Cloud: Achieving Measurable Business Results* white paper at the Cloud Standards Customer Council Web site subject to the following: (a) the document may be used solely for your personal, informational, non-commercial use; (b) the document may not be modified or altered in any way; (c) the document may not be redistributed; and (d) the trademark, copyright or other notices may not be removed. You may quote portions of the document as permitted by the Fair Use provisions of the United States Copyright Act, provided that you attribute the portions to the Cloud Standards Customer Council *Social Business in the Cloud: Achieving Measurable Business Results (2014)*.

## Acknowledgements

The major contributors to this whitepaper are: Alberto Manuel (Process Sphere); Don Buddenbaum (IBM); Dion HinchCliffe (Dachis Group); Ed Krebs (Ford); Jeff Calusinski (IBM); John Meegan (IBM); John Mertec (SugarCRM); Larry Hawes (DowBrook Advisory Services); Lloyd Fassett (Azteria); Michael Foss (TD Ameritrade); Rawn Shah (Alynd); Shane Jones (Waubonsee College)

## Executive Overview

As social technologies have evolved, they have increased in adoption across a wide spectrum of businesses, industries, and geographies. Some organizations, usually with strong business and IT alignment, are realizing that social technologies initiated for one business activity can spark innovative uses in other areas. This insight creates motivation to widen the reach and adoption of these investments. Unfortunately, this is not always the case; many organizations are still struggling with how to justify social business investments in a way that reflects their actual business value. This inability to quantify the business impact of social technology has become a key inhibitor to adoption. Further exacerbating the challenge is the perceived complexity of combining social technologies with investments in adjacent technologies like cloud, big data, and mobile computing.

Both business and technical perspectives must be taken into consideration when evaluating success criteria for social business capabilities implemented in the enterprise. Successful acceleration of social technology adoption is dependent on establishing business and IT alignment through:

- Common success criteria that can be traced to enterprise business measures and the requirements of the people impacted: the end users, business managers, business process owners, and IT departments.
- A core set of social capabilities that enable business and IT to develop consensus on how social technologies will be made to inter-operate across key use cases and organizational boundaries.
- A common open architecture approach that prescriptively enables social solutions to add value at the intersection of social, cloud, mobile, big data and analytics, etc.

While the most value will come with industry agreement that allows all participants to maximize their contribution to social business based on a common measureable view of success, there clearly is value in establishing alignment in the enterprise. This paper introduces the following five principles as a guide to succeeding with social business technologies:

- Principle 1: “Recognize social technology as a means to better business outcomes” describes an iterative, value-add, and platform creation approach to introducing social capabilities.
- Principle 2: “Be the architect of your own success” describes how to identify social capabilities that contribute in a measureable way to achieving business objectives.
- Principle 3: “Take it one step at a time” describes evolving social business as a set of available social capabilities to align and deliver on the enterprise business strategy.
- Principle 4: “Put your users first” describes targeting the business user as the key to social business technology adoption and usage.

- Principle 5: “Big thinking” establishes a forward looking vision for introducing social capabilities and reaping the benefit of resulting data into the big data and analytics platforms used to optimize and amplify business value creation by the organization.

The following sections elaborate on these principles in more detail. The goal of this paper is to provide guidance on how to incorporate the principles into the enterprise to accelerate social business adoption with measurable impact on business results.

## Motivation & Considerations

Social business, like other new and evolving concepts, has numerous definitions and interpretations. As a result, confusion exists when business and IT try to determine where social business fits related to business objectives. Social business can be thought of as a set of consumer-based interactions, or as a way to improve workforce effectiveness. Therefore, establishing a social business definition as well as guidance on how social can be used to solve business challenges is important. We propose the following as a definition:

*“Social Business is the convergence of social collaborative capabilities and enterprise business processes. These two seemingly independent activities, when brought together transform the way businesses interact with their employees, partners and customers. This transformation is achieved by empowering participants to connect and interact with each other; as well as, contribute or consume content in the context of a business process. This fusion of social collaboration and business processes allows organizations to create an environment where participants can more effectively generate better business outcomes.”*

Similar to social business, cloud computing is an emerging concept and technology that is evolving at a rapid pace. Unlike social business though, cloud has a well-understood definition, which has been published by the National Institute of Standards and Technology (NIST) with broad scale adoption.<sup>2</sup> Therefore, one of our goals is to leverage the benefits from cloud adoption and apply them to social business.

Cloud computing today, has several different service models including Platform as a Service (PaaS) and Software as a Service (SaaS), each enabling a wide variety of usages. Likewise, social business implementations can benefit from multiple deployment models. However, due to the emergent nature of these technologies, integration comes at a risk if steps aren’t included to mitigate interoperability challenges.

The NIST work highlighted important cloud characteristics that should be present when developing a cloud solution, for example “On-demand self-service”, “Rapid elasticity” and “Measured service”. These characteristics provide a means of evaluating a particular cloud implementation. Enabling social in the cloud creates advantages beyond private deployment, by extending the cloud characteristics to implementations of social technology. On the other hand, extending cloud benefits to social also forces consideration of how unique social characteristics are impacted. By leveraging lessons learned from

existing social business environments in private deployment models, we have identified specific areas that should be considered when implementing social business solutions in the cloud.

- *Manageability*. The need to leverage well-understood interfaces that can be managed at design and run-time.
- *Choice*. The ability to change or substitute components of an organization's social business solution stack through common approaches, allowing new implementations or alternative suppliers to be leveraged more easily.
- *Data Safety and Security*. Data needs to have proper controls related to access, encryption and discovery.
- *Better Integration*. Integration between on premises and off premises, with multi vendor solutions.
- *Interoperability*. By establishing a shared definition of social interactions, a stable service vocabulary needs to emerge that describes social interactions in a way that enables people or components to share a consistent approach to interacting.
- *Measurable Total Cost of Ownership (TCO)*. Need to have a mechanism for evaluating the cost to deliver social capabilities across multiple user contexts.
- *Shared User Experience*. Social business solutions need to operate in a more consistent manner to foster higher user adoption.
- *Context Preservation*. Social business solutions need to provide access to people, data and processes in a way that is business relevant and supports the creation of better business outcomes.
- *Innovation*. Enabling innovation by those closest to the problem, often times outside the realm of centralized investment functions (Shadow IT) can provide critical advantage to the organization when done in the context of open architectures and adjacent technologies like cloud or mobile.

The above considerations are broad in nature and are byproducts of an evolving social business environment. Deploying social in the cloud will put increased focus on these and other considerations from big data and analytics, mobile, etc., while requiring industry leaders to deliver open architectures that ensure the disparate pieces fit together.

Successfully building social solutions in this context requires focusing on common capability requirements (functional and non-functional). The recommended approach to considering common capabilities is to factor requirements from use cases, and then represent these commonalities in reusable component models. Component models then enable creation of the business measurement models and metrics that can be used to determine success.

## Principles of Social Business

In this section we explore in detail, principles that experience has shown lead to measurable success for enterprise social business enablement.

## **Principle 1: Recognize social technology as a means to better business outcomes**

Social applications enable sharing resources, skills and knowledge by getting the right people the things they need when they need them, to achieve better business outcomes. Using open social technologies makes this easier based on access to substantial experience using this approach for solving business problems. Experience shows that when a common and repeatable way of doing something can be defined, social business enablement is accelerated and value is increased. The challenge is defining and maintaining a consistent approach across enterprise wide data and processes. Such a scenario has the potential to introduce errors related to complexity, duplication, incomplete or unanticipated data and process states; problems that if created are likely to surface far from the source.

For this reason, it is important to realize that social enablement requires best practices that experience shows lead to success. It's not about a killer application. It's about adding capability to the enterprise in a way that, over time, results in a platform of interoperating services with well-considered boundaries for how they deal with people, processes, and data. Realization of this ideal is made possible by using open architectures and technologies. This approach establishes a common set of services that provide business and IT with a succinct way to describe social capability with known functional and non-functional characteristics.

Open social architectures, discussed in more detail later, define how services should interoperate. Service interoperability promotes the reuse of social building blocks when developing social solutions; a common set of services can then become reusable building blocks that enables consensus between business and IT. This consensus makes solution composition less about how the capabilities are built, and more about the value they create. This flexibility goes a long way towards getting business and IT to agree on the intended purpose and the business challenges they will solve. Appendix A provides a potential vocabulary that covers many of the common social capabilities.

At present, industry agreement on the definition of social business capabilities and their organization into a component model of reusable building blocks is slowly evolving. As a result, organizations are encouraged to join these efforts, while leveraging open architectures to establish the proper positioning for their own implementations.

## **Principle 2: Be the architect of your own success**

A measurable outcome is how a business validates effectiveness. It also helps to determine if change is needed and where it should be made. Enabling service measurability pre-supposes that we have a means of identifying interoperable services with well-considered boundaries for how they deal with people, processes, and data.

IT and business both need to support measurability. Each traditionally takes different approaches. The business looks at business outcomes and IT looks to architecture and implementation. One such architecture designed to help illustrate key aspects of social business is available from the OpenSocial

Foundation<sup>1</sup> (OSF). OSF has identified a set of social technologies and APIs that have been field proven to provide the necessary interoperability amongst social capabilities designed to make people, data, and processes available to the right people at the right time to enhance business results. OSF provides a standards-based component model for cloud based social applications, including support for:

- Activity Streams<sup>2</sup> as a way to share events amongst participants in the social network.
- A common component model for surfacing and embedding applications to accelerate deployment.
- A common JavaScript API that developers can leverage to access social features and related data from existing applications.
- Common REST APIs to access, create and update social data.
- Interoperability with existing frameworks and programming languages (PHP, Node, Java, JavaScript, Ruby, etc).

Selecting an open architecture that integrates social, cloud and mobile can become the means for addressing the key social characteristics described in the *Motivation and Considerations* section. Once in place, the open architecture establishes a common reference point for defining a consistent set of metrics.

Agreement on the actual metrics for social business capabilities can be a challenge. For example, from a big data and analytics perspective, enabling an organization to derive and ultimately amplify business value via collected social data, requires that the source of the data be relevant to the analytics being performed. When selecting measurements to validate specific social capabilities, it is important to consider the business metrics that the organization will ultimately want to use to drive the enterprise. Selected metrics have to show how each social business capability contributes to business outcomes.

The line of business needs to measure outcomes of social business capabilities related to processes that are repeatable and have human touch points. Repeatable processes like claims processing, expertise location, account opening, and online ordering are good candidates because industry experience provides well-known reference points for determining business impact. Social business capabilities today are typically not instrumented in a way that allows businesses to easily determine their value. However, just because proper instrumentation is not available, doesn't imply there isn't a need for measurement.

The issue faced by many, is that the onus for defining the measurement is on the enterprise. Until there is consensus in the industry that the measurement is a required aspect of the social capability; each organization will be forced to develop their own.

---

<sup>1</sup> <http://opensocial.org/>

<sup>2</sup> <http://wiki.activitystrea.ms/w/page/1359261/FrontPage>

It is imperative that those outcome based metrics be recognizable by both business and IT (An example of an outcome based metric is “Reduce call center average call length by 5% in the next 3 months.”) The business can then use these metrics to adjust a wide range of operational assumptions that yield concrete insight into the business value contributed by adding a particular social capability to the enterprise. IT, on the other hand, has a quantitative way of evaluating the success of a particular implementation, namely whether it achieved the expected outcome.

One way to accelerate consensus, while protecting investment in measurement, is for the enterprise to donate the identified metric to the appropriate consortia. It’s unlikely the metric itself is an enterprise differentiator, but it is quite likely that industry adoption of the measurement and numerous interoperable implementations of the required technology are quite valuable to the enterprise.

A measurable approach requires looking at an aggregation of core capabilities, with a shared goal, that satisfy a set of business requirements. This can be complex when consensus is required, but is additionally difficult when the goal is to use capabilities as building blocks. To help simplify this challenge, the well-understood notion of use cases should be adopted.

A use case helps satisfy two needs. The first is to provide a format that can illustrate a way to think about the important capabilities in support of social business. It is important to ensure there is IT and business agreement of what will be accomplished, leveraging a common business component model, mapped against a well-understood open architecture. Secondly, a use case helps establish realistic expectations for social business implementations. Specifically, it documents the business and technical challenges that must be addressed, desired outcomes, and required social capabilities. Defining a common use case template is beneficial and should include the following critical elements:

- **Business Challenge:** Clearly document what the business or users are trying to achieve, where social business constructs can provide value.
- **Business Outcomes:** These are based on selected business metrics (aka Key Performance Indicators or KPIs) that will be positively impacted to help drive the business forward. These should be outcome-based goals, not business activities goals.
- **Social Capabilities:** Candidate list of the social business capabilities that address the business challenges and support the business outcomes.
- **Industry Nuances:** Each industry has a set of requirements that may be unique or are shared with other industries. In some cases the differences may impact measureable outcomes and the choices of which social capability to select to adequately address key business challenges.
- **Technical Challenges:** Identify the technical gaps or challenges when using particular social capabilities. This is important when considering alternative deployment models like cloud.

One example of a use case is, *Find an Expert*. Just as the title implies, the intent is to locate someone who is an expert at something. What that something is, will be industry and usage specific. Appendix B provides additional details for the *Find an Expert* use case including guidance on how the elements of the use case template should be completed. This guidance is intended to provide insight on how to replicate the approach with other use cases.

### Principle 3: Take it one step at a time

There are multiple ways to get started with social capabilities. Each organization has its own starting point depending on the technical infrastructure, organizational structure, and culture. As social business has become more popular, so has the idea of establishing maturity levels. Maturity levels help with evaluating the current state of the enterprise in relationship to others, with the idea of providing experienced insight on a consolidated set of next steps. However, as of today, based on cross-industry experience implementing social business solutions, social technologies have not progressed enough for establishing multiple levels of maturity in a comprehensive way. Therefore, the focus must remain on a way to evaluate and evolve social business capabilities based on the nature of the enterprise.

Social business needs to evolve in an organization in a way that is consistent with its business strategy in support of measurable outcomes. This doesn't imply it should be slow. The rate of adoption is really dependent on the culture of the organization. Accelerators should be used to get started, such as the *Find an Expert* use case that was provided earlier as an example.

As organizations start to evaluate cloud as one of the deployment options for social business, just picking use cases might not be enough. Bigger thinking, across a larger picture is necessary. Some common approaches for building social business strategies and roadmaps have emerged.

Below is a phased approach that has been quite successful in helping organizations considering social business capabilities. Each phase has a set of outputs that are the inputs to the subsequent phases. The six phases, in order, are as follows:

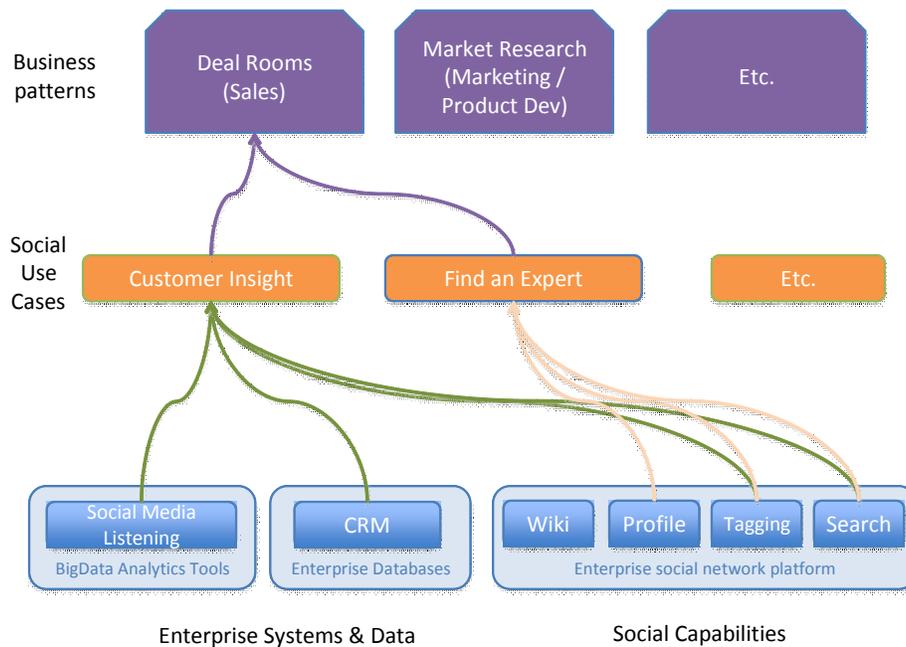
1. *Incubate*. Inspiration can come from many different sources. Sometimes it originates from inventing new ideas; other times, from innovating based on existing experiences. The outputs of incubation are social business capabilities. These capabilities can be simple (i.e. tagging), to complex (i.e. an integrated collaborative environment). Incubation is the catalyst that causes users to want to understand more about social business.
2. *Understand*. Historically, social business has been ambiguous and has lacked a clear definition, thereby creating confusion. The understand phase is intended to provide a deeper insight and better rationalization of social business. The insight and rationalization needs to be based on both a business and a technical perspective. A common language, taxonomy and ontology would help the organization better understand social business.
3. *Decide*. During this phase it is important to understand the deeper details around the macro issues as it relates to the organization. The organization needs to come to consensus if the social business capabilities will provide value and if further efforts are needed. It is common for organizations to enhance their social business roadmap during this phase. Governance approaches are consulted and high-level capabilities are identified.
4. *Align*. During this phase detailed work is done to align the appropriate business area with social business capabilities. The capabilities identified in the *Decide* phase are refined and finalized. Business value assessments are conducted and ROI models are created. Open technology and architecture selection is performed based on the final list of capabilities. The governance structure is put into place, and a governance group is created to provide guidance for the new

capabilities.

5. *Execute*. The actual build out of the solution occurs during this phase. Validation of the business value association with the open technology selection occurs. The deep technical integration between the social business capabilities and the core business processes are finalized. Plans are put into place for user adoption and feedback to the governance group. Finally a roll out plan is created and executed.
6. *Monitor*. During this phase the solution is in production and the organization is engaged in social interactions. This requires regular participation in the social interactions, while measuring the value the solution is providing. The measurements, metrics and feedback from this phase should be provided to the governance group to further improve the overall system.

As organizations go through the phases described above, two things should be remembered. First, social business capabilities are not static; they constantly evolve. Second, time spent in each phase will increase as you move from one phase to another. For example, most organizations spend more time in the Decide phase than the Understand phase and more time in the Align phase than the Decide phase.

Once an organization iterates through the above phases multiple times, capabilities will start to emerge. These capabilities can be the core building blocks to solve more complex business challenges. Figure 1 illustrates a building block technique where fine-grained social capabilities at the lowest level (e.g., wiki, profile, tagging, etc.) are the raw materials for input into the social business use cases shown on the second tier. The use cases are then grouped together to define a business pattern that addresses common business activities shown on the third tier. For readability, several examples are shown on each tier, but only the first example is fully illustrated. This is a powerful approach to understanding social business technologies and the capabilities required to solve business challenges. It also starts to highlight the need to evaluate and evolve social capabilities in support of the enterprise.



**Figure 1: Building Block Technique**

In Figure 1, a Customer Insight use case aggregates capabilities of social media listening, the data from enterprise customer databases and CRM, and the metadata in search and tagging. This Customer Insight use case can be used in different business contexts. For example, in sales, customer insight gives sales people better information about the customer they are focusing on for a new deal or sales engagement. Alternatively, the same methodology of customer insight can prove useful for other capabilities like market research and product development. The point is that separate use cases like Customer Insight can be aggregated with our earlier *Find an Expert* example, into higher-level *business patterns* such as *Deal Rooms*.

The approach described above for evaluating social business capabilities will allow organizations to better align their capabilities for reuse in other contexts and support multiple deployment approaches.

### Principle 4: Put your users first

Social business implementations don't transform IT; they transform business activities where people are working with other people around business processes. Having a compelling user experience is a critical aspect of driving adoption. When social tools achieve user expectations, they entice adoption and they empower users to leverage these tools in a wide range of scenarios thereby increasing productivity, generating new opportunities and transforming the way people work. When these same tools operate consistently with familiar tools from a user's personal lives the rate of adoption is further increased.

Enterprise users have started to gravitate toward consumer based social cloud solutions because of the ease of use and familiarity. DropBox file sharing capability is one such example.<sup>3</sup>

With end users increasingly becoming technology buyers, the cloud Software as a Service (SaaS) model is allowing business managers and non-technical staff to acquire social technologies. This presents a significant organizational challenge when purchases are not made centrally through the CIO's office. A conflict is created between the ability of IT to deliver and a business user's desire to become more efficient. End users are frequently resorting to consumer-oriented tools that are not enterprise ready to conduct business, but are selected anyway based on familiarity and ease of use. At the very least this can bring into question trust of the data, and issues related to security and privacy.

Experience highlights the need for establishing open technology guidelines to establish baseline Platform as a Service (PaaS) interoperability requirements for the enterprise in order to balance the ease of use needs with enterprise requirements. Embedded Experiences and Activity Streams are examples of standards that help support improving the user experience of social interactions. Knowing that ease of use is a primary consideration for adoption, establishing streamlined navigation and contextually aware access to social capabilities goes a long way towards addressing this challenge.

Taking this a step further, adoption and outcomes improve when capabilities are put into the context of data, processes and supporting systems. As a result, any means of establishing end user adoption is worth considering, but an experience-based approach that improves social capabilities in a way that positively impacts end users work experience and improves business outcomes is highly desirable.

Improving social capabilities based on experience exposes a couple of issues. First, context (for example a user profile) is needed across all of the social interactions to support seamless interactions. It cannot be assumed that the social capabilities are all serviced by the same platform or from the same location. In a cloud environment, it is possible for separate social capabilities to be delivered from different cloud platforms that may be owned or operated by different business entities. Therefore, the idea of context across boundaries is critical to deliver an easy-to-use solution.

Second, for common concepts (for example, the definitions of the content in a user profile), a similar argument can be made that the rapid adoption of social business capabilities depends on the ability of people to search and communicate common concepts seamlessly across numerous types of technical and business boundaries.

Third, there needs to be a mechanism (feedback loop) to allow the social capabilities to enrich each other's data based on the context of the user interactions. In the Find an Expert use case described earlier, the usability of locating an expert can be dramatically improved by allowing social capabilities like tagging, serviced by a separate platform, to provide feedback to the User Profile capability.

---

<sup>3</sup> Refer to <https://www.dropbox.com/> for details on DropBox.

## Principle 5: Big thinking

Experience shows that achieving enterprise social enablement tied to business metrics creates exceptional value for the organization that can stand on its own merit. The 5 principles provide a means of overcoming any potential investment gap (risk) between expected outcome and solution realization.

However, there is an additional benefit of social enablement that should be leveraged as a source of exceptional value. Data, created by an enterprise and its partners operating in a social fashion, should be leveraged to better understand what is being said about the organization and its products. This insight in turn facilitates the organization making smarter decisions, and ultimately enables it to take more effective action to build competitive advantage.

The challenge is that social data is created with a volume, variety and velocity that overwhelm traditional capabilities to use and comprehend it. This scale requires cloud enablement to facilitate modern analytic platforms and big data capabilities that help an organization identify and visualize trends and patterns in areas, including customer analytics, which can have a profound effect on business performance. Big Data and analytic platforms can help users compare scenarios; anticipate potential threats and opportunities; better plan, budget and forecast resources; balance risks against expected returns and work to meet regulatory requirements. By making analytics widely available, organizations can align tactical and strategic decision-making to achieve business goals and optimize business outcomes.

The principles described in this paper advocate a measured approach to implementing social capabilities. Similarly, the nature of the analytics that should be introduced to leverage the social data generated should also follow a measured approach, until there is proven consistency between the data produced by the social enablement and the intent of the analytics.

However, in terms of enabling the organization as a whole to successfully use Big Data for enterprise analytics, consideration should be given to establishing a platform approach to achieving the widest possible range of data enablement. As capability is introduced in to the enterprise, there may be limitations in the scope of best practice analytics undertaken on this data, but these are only temporal in nature. As more capabilities come on line, the restrictions are alleviated and backward looking access to data that is now trusted can prove to be invaluable.

Organizations that succeed at aligning social capabilities with analytics build trust in the data being consumed and the insights being discovered.

While there are many other Big Data and analytics considerations related to driving, optimizing, and amplifying business opportunities that should be investigated, these are more related to the organization's ability to build Big Data and analytics expertise. From a social business enablement perspective, an enterprise should plan for the eventuality of having that skill, and factor social data availability into their architecture, thus acknowledging the imminent demand for this data and resulting insights.

## Conclusion

The five principles are designed to communicate the experience and insights of the Cloud Standards Customer Council (CSCC) on implementing enterprise social business capabilities in the context of adjacent technologies like cloud, mobile, and Big Data and analytics. It is recommended that these principles be applied within the organization as accelerators to help leap frog any challenges faced in realizing the value of integrating social technologies with core business processes.

Given the enterprise value that can be achieved at the intersection of these technologies it is recommended that the reader seek out other related CSCC publications to gain further insights to guide work in those areas. Summarizing from a social business perspective, there are some overarching takeaways that when considered in the context of the 5 principles provide guidance for enterprise efforts:

- 1) Human interaction is the new source of business intelligence.
- 2) Establish a foundation of policies and best practices to protect your brand and participants.

Finally, we cordially invite you to provide feedback on this document to the CSCC. More importantly, we hope you will consider joining our future efforts to accelerate measurable social business adoption.

## References

- *Social Business Analytics: Gaining business value from social media*, © Copyright IBM Corporation 2013 - <http://www-01.ibm.com/common/ssi/cgi-bin/ssialias?infotype=SA&subtype=WH&htmlfid=YTW03279USEN>
- *The business of social business: What works and how it's done*, © Copyright IBM Corporation 2012 - <http://www-935.ibm.com/services/us/gbs/thoughtleadership/ibv-social-business.html>
- *Analytics: A blueprint for value: Converting big data and analytics insights into results* © Copyright IBM Corporation 2013 -ACC <http://www-01.ibm.com/common/ssi/cgi-bin/ssialias?infotype=SA&subtype=WH&htmlfid=YTW03279USEN>
- Collaborating in Sales force Enablement  
<http://www.socialenterprise.it/en/index.php/2013/01/20/collaborating-in-sales-force-enablement/>
- How does Social meet process?  
<http://www.socialenterprise.it/en/index.php/2012/12/02/socialmeetsprocesses/>
- Appendix A: used with permission from “Adrift in the Current”, Larry Hawes, © 2013 DowBrook Advisory Services – All Rights Reserved.

## Appendix A: Social Business Capabilities

The following is not intended to be a normative list, but instead sample capabilities found in common use common set of social capabilities, their definition and example of how they are used to solve a

business problem, provides a common vocabulary for the building blocks that are available to address business requirements and achieve measurable business results:

Collaboration Component	Expertise Locator	People Connection	Data, Information and Knowledge Transfer	Work Completion	Innovation	Description of Business Activities
Profile	X	X				Find and follow relevant subject matter experts regardless of their role or location.
Communities	X	X	X	X	X	Locate, connect and share with individuals and groups with common interests, expertise, roles or goals.
File Storage			X			Store documented data, information and knowledge in a common location to simplify discovery and access.
File Sharing and Sync			X	X		Automatically (or manually) transfer latest version of documented data, information or knowledge to those who need it. Collaboratively author, edit and approve content.
Blogs	X		X		X	Publish data, information, knowledge or ideas and collect feedback from others. Identify subject matter experts based on primary topics in their blog.
Wikis			X	X	X	Collaboratively create and share content, as well as its structure. Log project task/ activity progress and responsibility issues, and respond to same from asynchronously brainstorming and evaluating ideas.
Shared Bookmarks			X			Point others to valuable web and intranet content related to specific topics and interests.
Shared Calendar		X	X	X		See schedule availability for potential collaborators. Embed data and information in task entries. Communicate status of project tasks, activities and milestones.

Collaboration Component	Expertise Locator	People Connection	Data, Information and Knowledge Transfer	Work Completion	Innovation	Description of Business Activities
Threaded Discussion Forums		X	X			Engage asynchronously with one or more individuals to ask and answer questions, discuss topics or solve problems.
Web Conferencing		X	X	X		Engage individuals or groups in real time to share data, information or knowledge. Get work done together (e.g. make decisions, co-author documents).
Status Updates and Activity Streams		X	X			Broadcast questions and task to either a broad or targeted group. In some cases, act on a task (i.e. approve a document).
Tagging of system objects	x		x			Automatically-generated or manually applied keywords that is associated with a piece of content. Tags facilitate search, information filtering and expertise recommendation.
Search	X		X			Seek and find needed expertise, data, information and knowledge.
Information Filters	X		X			Manually or automatically screen content that is not immediately relevant to an individual's role or the task at hand.
Notifications		X	X	X		Receive automated notifications of new connections, new and updated content, and community or project activity in email and/or activity stream.
Analytics	X		X			Proactively mine collaboration activities to identify and recommend influential people and subject matter experts, as well as valuable content.
Recommendations	X		X			Receive automated suggestions of individuals and content sources that are relevant to your work, in the context of a specific activity.
Presences Indication		X				See when an individual is online and available to connect.

Collaboration Component	Expertise Locator	People Connection	Data, Information and Knowledge Transfer	Work Completion	Innovation	Description of Business Activities
Instant Messaging		X	X			Synchronously engage individuals who can help you by quickly providing needed data, information or knowledge.
Idea Management					X	Record, share, discuss and prioritize new and existing ideas for products, services, process improvements, etc.
Goal Management				X		Record, share and track creation, progress towards and completion of corporate, group and individual goals.
Task/Activity Management	X			X		Record, share and track creation, progress towards and completion of project tasks/activities.

## Appendix B: Find an Expert

### Business Challenge

A key lesson from recent business cycles is that organizations have learned to become reluctant to replace employees. Instead, the remaining workforce is expected to do more with less, putting more emphasis on making the existing workers as productive as possible.

Some industries anticipating faster growth (Automotive, Health Care, and Retail) are struggling to drive enough efficiency into their employees to become more efficient at finding information; and when successful the overall customer experience is improved.

Both examples benefit from the common capability of spending less time searching and gathering, yet both target different constituencies. One way to mature the organization is by introducing these reusable capabilities as services to appropriate processes.

Every organization has a desire to scale their people resources more than previously possible. Automation technology helps when processes are repeatable and have predictable outcomes. Conversely more emphasis is placed on the productivity of human users, for areas that are not repeatable or predictable. This notion becomes more difficult when: business processes become more complex, less people are available to do work and fewer subject matter experts (SME) exist who

understand exceptions to processes. Unfortunately, SME's aren't scalable. Therefore, quickly locating an expert, who can answer a question or solve a business problem, is important. Equally as important is the alternative capability of capturing the knowledge and making it available for others to locate without requiring direct contact with the SME.

### **Example 1**

Leveraging social business in a call center might work as follows. A contact center person answers a call from a user who is requesting information, but the information is not readily available from the application associated with the account. This requires the employee to initiate a search to start gathering information.

The returned search results are organized based on multiple dimensions including: other employees tagging the content with key words (meta-data), ranking for accuracy and by text feedback. This approach presumes that there is common understanding of the content that is profiled so there is consistent insight and interpretation.

Each result also has a user profile for the content owner as well as the other employees who made social contributions. In the event the author is not available a subsequent search can occur to locate related people who are part of the user social graph. Additionally, the peers of the author, as defined by an organizational structure, are available in the event the initial search result doesn't provide a definitive answer and clarification is required.

One of the key areas of difference between search and social search is that the results returned take the initiator into consideration (by exploring the relevant social graphs), so that results are deemed relevant to the person asking the question.

### **Example 2**

Customer self service can also benefit from social business. A customer authenticates to a site which has information the customer needs. Once the user is authenticated, they are given the opportunity to search for content and information related to their needs. This information might not otherwise be available. When the search is performed, the user's context is used to help filter the search results. The search results are presented in order based on ranking. The ranking is based on content contributions from other users and relevance of the content.

Search result and associated content contributions are annotated with further social content like rating, reviews, tags, etc. This allows the user to connect to the author of the content and ask questions for further clarification. In the event the expert is not available, a network of peers can be generated to allow the user to connect with someone else who might be able to answer the question.

## **Social Capabilities**

In both cases there are a common set of social business capabilities that exist which can be applied to improve the interaction and experience. These capabilities, though not new, need to have some rigor or standard in order to interoperate and create a common user experience. Below are the social capabilities and their respective definitions.

Social Business Capabilities	Definition
Profiles	A user's personal and/or organizational information used in context of social business.
Tagging	Single or compound words used to provide contextual insight about information and documents
Rating	Numerical representation of the accuracy or value of the content.
Reviews	A user's point of view on the relevance and possible value of the information.
Social Network	Social Graph
Social Analytics	Using analytics on social data to derive better relationships and insight.

## Business Outcomes

Enterprise social enablement using common capabilities like *Find an Expert* will provide greater value to the organization because it reuses the most effective and understood resources available, and positions the enterprise to achieve a quality of service deemed critical to operational goals.

In order to validate the appropriate use of social capabilities, we need to measure the effect of their use against established measurements that describe organizational objectives and expected business outcomes. This measurement will help drive user adoption if it helps achieves measurements critical to the intended audience. Further, it provides organizational insight on which capabilities are of value, which are not, and which are misaligned with organizational objectives.

Below are outcome based goals that can be used to measure the effectiveness of the social capabilities, when implemented to support a call center or customer self-service scenario. Consideration should be given as to whether there is a temporal aspect of the business outcomes that should be factored into the value assessment. In addition, the nature of the business measurements should be considered in the context of analytics being used to drive and or amplify organizational results, to make sure they are aligned for consistency.

Business Outcomes
Reduce call center average call length by 5% in the next 3 months
Reduce the number of call escalations by 20 over one month
Reduce customer abandonment by 10% over the 6 month period
Increase customer satisfaction survey by 5% in the next 3 months
Add 100 new customer referrals each month.

## Industry Nuances

We have to realize that each industry might have restrictions that dictate how users and employees interact and what data is shared and with whom. In financial services and other highly regulated industries, these constraints force organizations to think about how to solve problems differently. Below are some of the industry nuances that should be considered when addressing the Find an Expert use case.

Industry	Nuance
Banking	There needs to be a way for the search to filter based on levels of expertise, licensing and or certifications. For example a Financial planner must have a series seven certification.
Financial Markets	Buy side and Sell side workers need to be segregated and not share communities across the organizational boundaries. These ethical boundaries need to be audited and reported
Chemical	Material Safety Data Sheets (MSDS) must be filtered based on user's profile.

## Technical Challenges

Today there are multiple ways to satisfy the *Find an Expert* use case. But technical challenges exist because there is limited number of social business standards. These challenges need to be considered when attempting to use the social capabilities in a cloud deployment model. Below is a list of some of the challenges.

- In order to gain broad adoption, services need to be deployed that expose people, based on filtering, that can satisfy a set of criteria. These services need to leverage a cross enterprise consumption model where developers can invoke the service across multiple contexts, deployment (on premise vs. cloud, etc.), and delivery (mobile vs. in house, etc.) models.
- Security is a very complex subject that warrants its own focus, but at the very least there is a need for related controls to be established to ensure the service can run both internally and externally

(internal data center and public data center). This includes maintaining a contextually relevant means of access control for the lifespan of the data and security controls to determine if the profile is public, private or hybrid.

- A social network definition needs to be established to allow for sharing of network profiles and a social graph, including a semantic model to maintain a contextually relevant view of the data across service calls.
- As services are invoked there needs to be a way to enrich the results with feedback on the relevance of the information provided. An iterative contextually relevant consumer approach needs to be defined to allow the user of the service to provide insight into which results were valuable.
- The search is set into a common structure of information so that what is being sought has a usage context.
- A usage context needs to be developed to capture relevant profile information for the expert that satisfied the request.

## Use Case Recommendations

- Establish client communication channels.
- Mine and analyze the volume of information which results in accurate conclusions that drive business decisions.
- Interpret and deal with legal and regulatory constraints related to customer interaction.
- Crowd-source innovation.
- Invest in social listening, data analytics, marketing and development which collect and analyze the data for customer insights.
- Establish privacy policies, given that social business predicates clients, partners, and employees openly sharing data. Privacy policies will become critical to continued insight.