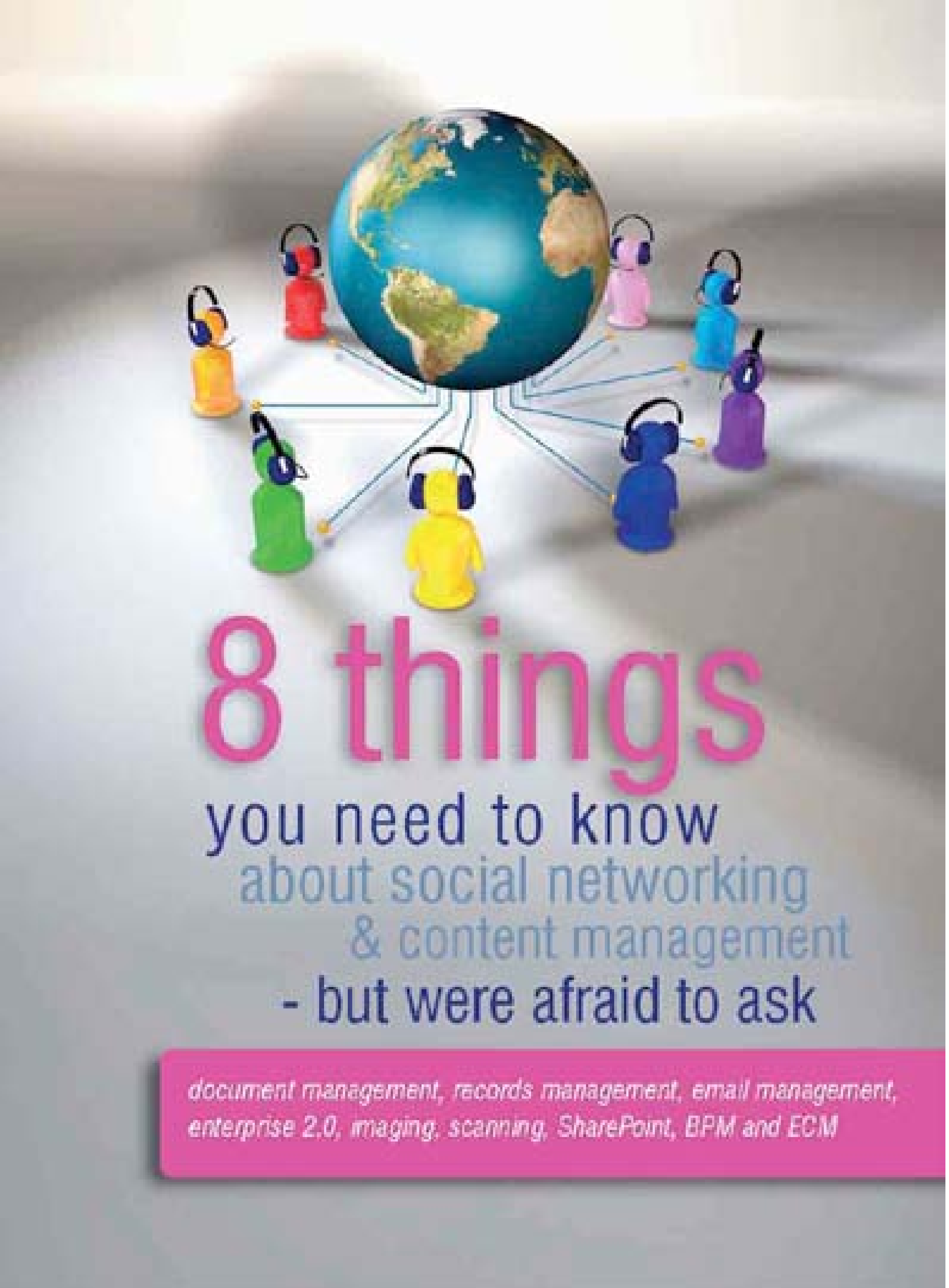

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by AIIM President - John Mancini

About this eBook

My thanks to all the guest bloggers who contributed their work to this e-book.

The intention of this e-book and the other e-books in the series is NOT to provide a set of detailed technical requirements for how to create a strategy for managing information. There are other places for that — the AIIM web site and AIIM training and AIIM webinars and seminars are good places to start.

Rather, the purpose is to increase awareness across a broad cross-section of organizations and industries about the kinds of issues you need to think about when you begin to adopt a more strategic approach to managing information.

So the purpose of this series is educational and evangelical rather than technical.

You are free to share the link to anyone to download the book — and we encourage you to do so.

Links to this free e-book (http://www.aiim.org/8things) may be copied, distributed, reposted, reprinted and shared.

Table of Contents

8 Ways to Garner Adoption for Social Computing in Your Company

Jeetu Patel co-runs Doculabs, a strategy consulting firm focused on ECM, social computing and collaboration as well as process optimization. He also serves as a director on the AIIM board. Follow him on Twitter at http://www.twitter.com/jpatel41 or on his blog at http://pateljeetu.wordpress.com.

A few weeks ago, I wrote a blog post on the essentials for social computing and collaboration for business. The first of those essentials was a recommendation to have a maniacal focus on garnering adoption. As I speak with customers around the world, I find that an increasing number of companies are struggling with the mechanics of how to accelerate adoption of the social computing capabilities they've made available to the enterprise. Worse yet, many are apprehensive about moving forward with some of the truly transformative ways to use social computing because they fear that their organizations are more conservative than most, and their users are probably not going to be up for using these cutting-edge ways of interacting and collaborating.

While these seem like perfectly reasonable objections, accelerating adoption is possible in the most conservative of user bases.

Here are a few ways to do so in your organization:

1 — Help Users Imagine the Possibilities.

Classic IT methodologies for deployment of technologies start with requirements-gathering, followed by technology provisioning. I am oversimplifying to make a point, which is that we typically start with what users want, and then deliver what they are looking for. There's one problem with this approach. It's the assumption that the users always know what they are looking for. With social computing and collaboration, it is quite the opposite. There is tremendous transformative potential, but it's not always obvious to all how a "Facebook" or "Twitter"-like functionality is beneficial for the enterprise.

The very first thing we recommend is to help your potential users understand in very simple ways how capabilities like microblogging could truly open up boundaries of interaction among employees – ideally in the context of a scenario that users engage in on a frequent basis. We at Doculabs recommend the storyboarding technique, which demonstrates how certain small activities could be materially improved through the use of these new ways of interacting. What storyboarding provides the user is a logical and visual depiction of how social computing can enhance their experience for activities they are familiar with. Showing users a mock-up of a sequence of vastly improved activities which wouldn't be possible in the past tends to create a high level of interest in users.

Recognize that this is not a new problem. Back in the days when telephony was first invented, people had a hard time envisioning why one would need a phone. Or when someone at IBM thought that the worldwide market of PCs was in single digits. So start with helping people imagine the possibilities. That truly is the biggest challenge that stands between social computing and its broad-based adoption.

2 — Analyze Your Demographics and Roles.

Most organizations assume a phased, and universal, approach to infrastructure-level functionality. And it makes sense in the long run. Everyone today uses a cell phone. Everyone today uses email in business. However, think back to when these two very ground-breaking mechanisms of communication were first introduced. Not everyone had a cell phone. I remember in our company when only those who travelled received a cell phone in the mid-1990s. And that wasn't that long ago. Don't expect people whose jobs prohibit them from working in a transparent and open manner to be the early adopters. Someone in the legal team is less likely to be an active microblogger than someone in marketing, or executive management. There is more reason for a CEO to use it as a means of communicating in a more direct way with employees to engage them in a personal way, than someone from corporate finance. Identifying roles, understanding their predispositions, and then enabling them with the relevant social computing capabilities, is key to seeing the value.

3 — Adoption = Some Contribution + A Lot of Consumption.

I often hear that a company tried to roll out blogs, but no one used them. Social software requires few thought-provoking content contributors who can make it worthwhile for a lot of content consumers to get on. As I've mentioned before, there is going to be participatory variability among individuals. But a few will contribute a disproportionate amount of content to start with that most will simply consume. Eventually they will comment on some of it. And finally more will start originating a contributory cycle. Identifying the strong contributors and creating incentives for them is absolutely critical to creating a viral effect.

4 — Create Policies to Empower Users Rather than Highlight Risk.

Many organizations are very concerned about how employees will behave when they are given the capability to speak freely to large audiences, especially outside the organization. The reality is that this freedom is already available to all of us to begin with. No one stops us from sending an email outside the organization to others filled with confidential data, but employees don't because there is a negative consequence to the personal brand and long term success by acting irresponsibly. Policies regarding social computing can tend to be very punitive in nature, rather than encouraging. Instead, consider the following message for the welcome screen before the user enters a social stage: "You're about to become a powerful voice for our company on a public stage with a global audience. Please proceed carefully." This gives the user a sense of empowerment and responsibility rather than a sense of fear.

5 — Ensure Mobile Access to Social Software.

Facebook is used twice as much by those that use it via mobile devices over those that don't. This isn't pure coincidence! Social computing has a lot of capabilities that require partial attention, with continuous connectivity. If you allow participation in your social computing and collaboration environment via mobile devices, there is a much higher likelihood that people will adopt it on a broader scale, with far greater frequency.

6 — Use Email as a Client to Social Computing.

Technology innovation is often positioned as zero-sum-game. Will PCs replace mainframes? Will paper be obsolete? Will Microsoft be able to survive Google's innovation engine? Will Apple own the mobile advertising market? Will email be replaced by Web 2.0 technologies? While there's this tendency to talk in hyperbolic terms about technology, history has shown us that innovation is often additive, and for better or worse, incumbent technology and practices have a long tail.

Email is here to stay. It won't be used in all the ways it is today, but there will also be new ways that email gets used in the future. My guess is that more people have email accounts than own a computer. So why not use email as a client for social computing? A great example is how blogs accept posts directly from an email. You simply email your post to an address, and the subject line becomes the title of the blog, and the email text becomes the body of the post. It's a great way to enable contribution via a mechanism that people already know how to use.

Don't try to get rid of email. (In certain instances, that will happen naturally.) Instead, try to extend the use of email to make your social experience richer. And see how that impacts adoption when a user doesn't feel they have to learn something new to do something that is pretty NEW!

7 — Reward Transparent Behavior.

At a very basic level, most individuals aren't necessarily incentivized to share knowledge. In fact, they are typically, and unintentionally, incentivized not to share information for their personal survival and growth. This is possibly the largest cultural shift that the older generation will find counter-intuitive. An organization taking extra steps such as ensuring that those that share knowledge openly with others are given public recognition, or consistent contribution by the early adopters are given a small financial incentive or an ability to win a trip or a contest makes it fun and exciting to work in an open environment. It isn't about giving out a lot of money, as much as it is embracing the behavior by public recognition that goes a long way. The most visited blogger of the month being given the opportunity to have lunch with the CEO might be another way to incentivize employees to work transparently. It allows employees an accelerated vehicle to contribute high value and get rewarded by notoriety and recognition while bypassing bureaucracy at a different level than was possible in the past.

8 — Don't Overemphasize Productivity.

Place greater emphasis on "group-think." Productivity is only one of the by-products of social computing. It isn't just what you can do faster that gets a person excited. It is what people couldn't even think of doing in the past that they can now do in an almost effortless way, that holds the greatest potential. One area that can truly motivate people to use social tools is engaging with a group to collectively think. This might yield to higher productivity, or it might not. But what it definitely leads to is better ideas and faster time to innovation. Any users who are in the front line developing products, engaging with customers in marketing activity, etc., will inherently find social tools appealing if they are shown how this sort of group think can occur as a result of such capabilities.

These are some of the ways that adoption can strategically be accelerated in a sustained way, where thinking socially becomes the common operating procedure. It isn't just about temporarily spiking adoption. The key is to consistently grow usage, and sustain the growth.

I have also come across a great whitepaper written on the same topic by Michael Indinopulos at Socialtext titled "6

Steps to Drive Social Software Adoption" which is worth a read for anyone keen on learning more about the topic.

> **AIIM Enterprise 2.0 Community**
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> http://www.aiimcommunities.org/e20/

8 Ways Your Organization Can Collaborate and Stay Safe

Adi Ruppin is vice president of marketing and business development for Confidela, provider of the WatchDox document control and tracking service.

Successful businesses, particularly those that aspire to global operations, must share and collaborate with people inside and outside the organization, typically on a daily basis. However, businesses frequently overlook the risks involved and may possess various misconceptions as to what they should or should not do.

1 — Stay Away from Email.

It is easy to forget that email was not designed for secure collaboration and sharing of sensitive documents. Be aware of that before you send out passwords, social security numbers, credit card numbers or sensitive documents. Email may be intercepted by third-parties or by your own email provider (if you're using a Web email service) and is not designed for security and reliability.

2 — Adding Password Protection is Not Enough.

A common misconception is that if you send out a document that is password-protected (such as a password protected PDF document) then it's secured. While possibly preventing a third-party from eavesdropping on the actual communications, a password-based approach is seriously flawed. After all, this password can be forwarded just as easily as the document itself, and therefore offers little security throughout the lifetime of the document.

3 — Encryption is Not enough, Either.

As mentioned before, password-based encryption is inadequate. Essentially, any form of encryption in which the recipients receive the document and decrypt it is just as insecure – no matter how strong the encryption is. Once decrypted on the recipient side, all security and control are lost, and the recipient is free to copy, print or forward that document to anyone without your permission or knowledge.

4 — Don't Think Just Because You are Using an Enterprise Content Management (ECM) System You've Got Security Covered.

Whether you're using Documentum, SharePoint or another content management solution, keep in mind that it is probably still relying on password-based authentication. This means that once a user has accessed your documents and downloaded them, he or she can still print them, copy them, forward them (either accidentally or on purpose). Imagine, for instance, the potential damage from an employee who has left with all the company's sensitive documents on his or her PC. Clearly, having a brand-name ECM system is no guarantee that your data is secured at all times.

5 — There is Such a Thing as Too Much Security.

Your first priority is to be able to share and collaborate. This means the other party must be able to access the data. Imposing unreasonable security requirements that are extremely cumbersome means that either you will not be able to get the job done or that people will find less secure workarounds that work for them. An example for such an extreme requirement is forcing the receiving parties to install software on their end in order to access the shared documents. Such is the case with many of the legacy Enterprise Digital Rights Management (DRM) systems.

6 — Tracking is Important.

Controlling documents is only one aspect of securing them. For regulatory and other purposes, it's important to be able to know who has viewed your documents, when and where. This too requires that you have some control over your documents at all times – even after they have been shared.

7 — Establish a Corporate Policy.

It's important to establish some guidelines or policies as to how to secure documents that are being shared. Sometimes, just coming up with such a policy is a challenging proposition. Individual users are prone to making mistakes, so once a policy is in place it's also useful to automate the enforcement of this policy and make it as seamless as possible to the end users.

8 — Be Mindful of What You Share.

As always, any policy or technical solution will not replace your personal judgment. The more aware you are of the risks and of the pitfalls of different sharing and collaboration methods the more likely you are to effectively safeguard your organization crown jewels.

AIIM E2.0 Training: Worker Model for Enterprise 2.0

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8 Essentials to Consider for Social Computing and Collaboration in Business

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2009 was the year for social services taking off for consumers. 2010 seems like the year where momentum is rampantly building for social services and software use in business.

However, risk exposure for organizations actually being successful with social computing and collaboration (SC&C) can't be ignored. Here are some factors that can contribute to an increased probability of success for organizations:

1 — Focus on Adoption.

If Warren Buffett were to simplify SC&C, he would probably say something like: Rule #1, Focus on Adoption. Rule #2, Don't forget Rule #1. If there is a single criterion to bet on for the success of social computing, it should be to encourage adoption. This is a viral phenomenon, and that is the best part of it. Disproportionately focus effort on adoption acceleration!!

2 — Ensure a Very Iterative Deployment Model.

One way to ensure failure in social computing and collaboration is to treat it like an ERP project. This cannot be an 18 month long project. It must have short planning, execution and iteration cycles with a maniacal focus on measurement of behavior, trends and usage patterns.

3 — Recognition of the "Power Law of Participation"

50% of content on Wikipedia is contributed by approximately 0.5% of the user base. This participatory variability is a fascinating dynamic. And I don't deserve credit for the concept. Ross Mayfield, founder of Socialtext was the first to coin the term "Power Law of Participation". What is important is to recognize and set contribution targets of your user base for activity, which is much different from consumption targets. If you launch a blog service and 3% to 5% of your user population participates by contributing content, it might be more than enough for the remainder of the population to participate and derive immense value from the exercise of consumption of content. Recognize the significance of this participatory variability. Not everyone needs to contribute for the network to derive value.

4 — Identify the Right Skills to Drive the Effort.

Folks driving this effort have to be active users of social tools and socially active individuals. Citing a personal experience, it took me 6 months of using Twitter before I saw the full power of microblogging. Those that aren't active with these Web 2.0 methods might not be in the best position to drive a strategy that truly understands the fundamentals and the philosophy of the transformation. It cannot be understood purely at a conceptual level. It has to be experienced! Therefore, my next point!

5 — Emphasis Should be Placed on Experience, Not Process.

Often times, technology initiatives within organizations place emphasis on optimizing business processes. While process optimization might be the end result of SC&C within an organization, what will drive adoption is an almost obsessive focus on user experience and ease of communication from anyplace, at any time, on any device to any delivery channel. As you develop strategies for social computing, focus on demonstrating how a "day in the life of a user" or an activity of a user changes experientially. Sometimes it is simply a scenario that gets enhanced rather than a full process optimization exercise.

6 — Shoot for Group Productivity Over Individual Productivity.

While social computing is great for individual productivity, it is group productivity that is most impacted. The measure of success should be removal of silos to enhance group think and surface correlations.

7 — Augment and Extend Email, Rather than Trying to Kill Email.

Email to most of us is a necessary evil. We can't live without it because it is so pervasive, but yet in so many ways it is tremendously inefficient. And those promoting social computing tend to think that social tools are a refreshing replacement for the antiquated ways of email. While that might be very true, tight integration of your social strategy with email is critical to garnering adoption. A blog service for example is nowhere near as useful, unless one can shoot an email that directly publishes a blog post. Microblogging at times can be so much easier via email. Notifications are nice to receive in a unified inbox, which is my email box. Yes, email is not the most efficient document repository, but it is a necessary catalyst to drive adoption.

8 — Encourage Transparency for those Opposed to it.

There are times that employees inherently feel that operating in a transparent fashion will impede their future growth potential at a company. And they aren't always wrong. Cultures of companies can very well encourage lack of transparency. The more an environment is created to encourage transparent and open thinking, and reward those who are willing to be transparent, the better off it will be in driving purposeful adoption; which is adoption of tools that have tangible business benefit.

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8 Reasons Why You and Your Organization Should (NOT!) Be Afraid of Social Computing

Brian Kellner is VP of Products, NewsGator Technologies, www.newsgator.com.

As VP of Products at NewsGator Technologies, I have come across more instances than I can count of companies wanting the productivity, innovation and collaboration benefits of social computing, but fearing risk (most unfounded) regarding such a solution. There are numerous excuses which I've heard decision-makers at organizations concoct to try to rationalize why they should not implement social computing. Here are eight rather typical ones I've come across – and why I strongly believe they're not justified.

1 — Social Computing Tools Are Not Enterprise Ready.

While there are several new entrants in the enterprise social computing field, with little experience in the marketplace, there are also several vendors that have products that are already 2 to 3 years old. As a point of reference, NewsGator Social Sites launched in mid 2007 and is now in build 3.1, and is in use by over 2 million users, and is deployed at some organizations with up to 300,000 employees.

2 — It Won't Deliver Any ROI.

A properly deployed enterprise social computing solution will, indeed, produce ROI. We have seen our customers benefit from reduced premium content costs, lower printing budgets, reduced email volume and support costs and decreased enterprise application integration costs.
In addition to hard cost take outs, there are also soft cost benefits such as improved productivity or time savings.

For example, CME Federal Credit Union, documented a 30 minute daily time savings per employee after they implemented a social computing platform.

3 — People Are Just Going to Waste Time With This.

This is, of course, the same argument that was made against all those other crazy technologies like instant messaging, email, and telephones. If you have employees that you don't let use email or telephones, you probably shouldn't give them a social computing solution either. For the rest of your employees, social computing tools just extend and enhance these existing communication and collaboration capabilities. The same mechanisms your company has today to ensure people are productive apply just as well when social computing is added. Remember, in a good enterprise social computing solution, no action is anonymous. Time wasted on social computing is actually more visible than time wasted at the water cooler.

4 — It Will be a Nightmare to Support.

This point speaks to the importance of IT's involvement in the selection of an enterprise social computing product. If IT selects a technology that integrates into their existing infrastructure, support issues should be greatly mitigated. Also, selecting a solution that is all-inclusive, rather than having to support specific, individual solutions for every type of social computing (blogs, wikis, microblogging, etc.), can actually significantly reduce support issues and IT upkeep – by consolidating and simplifying the overall social computing experience.

5 — No One Will Use it.

We all know that management and IT hate to spend time and resources to implement something business users asked for only to find out that those very users never end up using the solution to its full potential. But a solution that is integrated into employees' daily workflow and your organization's existing infrastructure will greatly increase the likelihood of success. In addition, the right enterprise social computing platform will be easy to use, viral in nature, and self-sustaining.

6 — People Will Say Foolish or Offensive Things.

When I hear statements like this, I am often tempted to ask what they think would happen if a whiteboard and markers were suddenly placed in a hallway. Would the employees start writing foolish and offensive things? In consumer solutions, a "report abuse" feature often shows up. But that feature exists because anyone can create an account, and the worst repercussions are typically being banned from the system. In enterprise social computing systems, it is important that users be able to understand just how visible their actions will be and it is important for users to be able to delete or edit mistakes. But the idea that giving users a new kind of whiteboard and markers will make them all lose their minds in a fit of electronic profanity is really misplaced.

7 — Users Will Compromise Company Information.

It's tough to be an IT security professional. Every new system looks like a new attack vector. If users don't realize the scope of their statements, it is possible that they will reveal something to someone that they should not. This is a fair concern for a security professional. Similarly, if users have to make lots of security decisions, it is a fair signal of possible issues. But consider the alternative of not having an enterprise system. For most organizations with whom we've spoken, this means that some of the conversations will happen in public systems like Facebook or Twitter. While it may be possible to block all these avenues, in general, it seems much better to give users a secure system behind the firewall for this kind of communication.

8 — My Manager(s) Will Hate it.

For any, or all of the reasons above, you may worry that you won't be able to get buy-in from your management. We have seen the market transition over the last year from 'should we do social computing?' to 'we are doing social computing; how do we get it right?' If your company doesn't make the leap to social computing, it risks being left behind. Implementing a social computing solution could even impress your boss. One of our customers, a top 3 aerospace and defense company, had a team take a risk on social computing; less than one year later, they were honored with an award from the CIO. So while there are risks and hard work involved with implementing a social computing project, it may we be one of the most productive and far-reaching impacts you can have on your business.

Where does that leave us? Nearly every company wants improved collaboration. Some companies spend most of their time and energy thinking about the risk. They try to dream up excuses for not implementing social computing solutions. But, in reality, the companies that have done the most with social computing typically find very few problems – and we have plenty of data and evidence to support this.

If you are considering a social computing project, you definitely should get your legal, privacy and security people involved early. But you don't need to be overly fearful or concoct reasons to keep your organization from making the leap to social computing. The real world results of enterprise social computing show that the underlying fears have no real world justification.

8 Ways to Make Sure That Collaboration Adds Business Value

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Collaboration is a business process and we have been collaborating long before computing technology changed the landscape. Building a ship a few hundred years ago required collaboration and project management to achieve an outcome. Evidence of such collaboration was carefully documented and managed on paper. We now collaborate with powerful technological tools that allow us to deliver outcomes faster. What needs to be considered in the race for faster communication and collaboration is maintaining adequate controls in order to minimize business risk.

When looking to collaborative tools consider this…

1 — Collaboration is Part of a Process.

Let's look at the productivity benefits of collaboration. In isolation there is no doubt that with modern collaborative tools we communicate and make decisions faster. Does that mean it's good for the overall business need? Think about a highly regulated industry where decisions made without control mechanisms in place and the ability to audit those processes puts the business at risk of Government or court imposed penalties.

Organizations need to deliver products, services and outcomes efficiently and effectively and do this within internal governance constraints and in accordance with the legislative rules and regulations. In this context we should consider collaboration as events and processes that are a subset of broader executive set business outcomes. Records management controls should therefore be established over collaborative processes to reduce the risk of adverse business consequences.

2 — Control is Essential.

Organizations always consider risk and benefits when making decisions. This applies to how we manage the information that is part of business activities. For example in the context of information, poor records management introduces risk of inefficient business processes, inability to deliver services efficiently, high cost of products and services, bad publicity, and the inability to bring information to hand to defend or prosecute legal action.

Control of information processes is critical to reduce risk. This applies to the most fundamental of decision making processes, collaboration. Without collecting evidence of collaboration, a black hole of information will exist as to why certain decisions are made. Without control and good record keeping, collaboration is no more than idle chit chat, albeit well intentioned. Without control, ad hoc decisions without consultation with corporate policy may see critical business information inappropriately retained or destroyed, or not even captured which can result in operational, legal and financial risk.

3 — Records Management is a Discipline.

When adopting new technologies, it is easy to lose site of the broader business implications of a new technology. Take for example the viral adoption of email. Whilst communication became instantaneous with decisions made quickly, the consequences that lack of control caused it still apparent today. Collaboration tools using Web 2.0 content is the new widely adopted solution that is permeating business operations. It is the role of information specialists to ensure that such use of technologies support the business and do not introduce unintended consequences as a result of poor information management practices.

Collaboration is a business activity that needs to be recorded in context with the broader business process and according to the corporate policies. Records management is the discipline that meets the challenge of capturing and managing all business activities and ensuring that this information is retained for operational and historical purposes. Records management systems enable management of all corporate information assets including content from collaboration tools.

4 — Consider Content Sources and Types.

Having established that information needs to be managed for its life according to corporate established policies, let's think about types of content. Organizations need to capture evidence of business events, no matter their source, into logical collections that provide context to the evidential record of their business activities.

Employing this discipline simplifies the management, retention, disposition and discovery of information in its business context. Business records may be created by office productivity tools, be received by email, physical mail, emanate from line of business applications, and of course, collaboration tools. Collaboration environments e.g. in SharePoint add complexity to records management.

5 — SharePoint Collaboration.

Microsoft SharePoint collaboration is being widely adopted and is a prominent example of technology enabling business to be more productive with its use of web 2.0 content types. These new content types of discussions, calendar items, blogs, wikis, and complete sites are also discoverable and must be managed as business records. A blog or wiki could just as easily expose an organization to considerable risk as an email if unmanaged as a business record.

Consider all content types and sources and not just your collaboration environment when choosing your enterprise records management approach to managing corporate content.

6 — Educate.

Collaborative tools are an enabling technology that used without records management processes and systems in place are little more than a casual unrecorded chat. Education is critical in planning for an information governance environment that supports the needs of the organization. This means education of executive management who will understand governance and risk, technology management and system administrators, and knowledge workers are the powerhouse of the business process. It's the knowledge worker who uses the tools, and we need to consider the productivity of the knowledge worker.

7 — Consider the Knowledge Worker.

It's the knowledge worker who collaborates, who makes the decision on where to store important information, and who strives to deliver for the business. They are the cog in the wheel without which the desired business outcomes just will not happen. Why do we attempt to overload knowledge worker with the responsibility of deciding what is an important business record? As IM professionals it's incumbent upon us to enable knowledge and process workers, and at the same time deliver to the corporate objectives of the organization. So consider records management primarily as an administratively established function.

8 — Records Management Should be Back-End Driven.

The last thing we need to do is burden the knowledge worker with administrative tasks. Systems need to be employed that embed the records management rigor into all information management systems. Consider systems that provide knowledge workers with transparent records management with administratively set and systems based processes to ensure relevant business records are managed transparently. This is not a nirvana it can be a reality.

Organizations should consider collaboration in context with all business processes and look for enterprise information governance solutions that have as a fundamental design concept transparency for records management.

8 Ways to Use SharePoint for Social Computing

An integral part of Risetime's Managing Consultant Team, **Joe Cromer** enjoys the challenge of staying up on the latest Microsoft technologies. Joe and his team have completed a wide variety of Microsoft SharePoint consulting projects. A few notable clients include, as Dollar General, Ariel Investments, Suzlon Wind Energy, Global Lead, McHenry County, and Lake County.

Since 1984, Risetime has been serving the needs of organizations looking for a strong partner to provide business and technology solutions and services. Headquartered in Chicago and a Microsoft Gold Certified Partner, Risetime focuses on a wide range of IT consulting services as well as business process management, content management, and web solutions.

You probably are aware that SharePoint is a great fit for most organizations document management and collaboration needs. What about social computing? SharePoint gives you a good starting point. What do you do when SharePoint falls short? Here are 8 ways companies can extend SharePoint's out-of-the-box capabilities to better fit their social computing vision.

1 — SharePoint My Sites.

SharePoint's My Sites functionality encourages interaction among employees and offers a very basic, but corporate equivalent to a Facebook profile. My Sites let employees learn about each other's interests and expertise. However, My Site can also be pretty underwhelming and stale for the avid Facebook user. To make it a viable social computing tool, organizations should consider extending them past their out-of-the-box limitations. Consider installing third party products like nGage by OI Software. nGage gives My Sites a real WOW factor such as a visual "reputation," scoring user contribution using criteria such as their openness, creativity and contribution level.

2 — SharePoint Team Sites.

Team Sites provide a centralized collaboration tool to manage teams and projects and include tools such as document libraries, lists, group calendars, tasks, contacts, and announcements. It is possible to extend this functionality with products like Kiiro collaboration software. This extends the basic SharePoint team site to allow Twitter-like status notes by team members giving instant updates as well as an impressive "Who's on What" type of dashboard.

3 — SharePoint Blogs.

Blogs can be a top source for up to date expertise from subject matter experts. User generated content often provides in-depth knowledge garnered from individual interests and subject matter experts. Harnessing this knowledge within the organization can provide a wealth from untapped resources. Within SharePoint, every My Site includes a blog. Individual blogs, as well as blogs associated with Team Sites can be archived and indexed for searching, becoming a resource for collective organizational knowledge.

As internal blogs become more successful you'll quickly outgrow SharePoint's standard functionality. With a little technical help during implementation, leverage Community Kit 2.0 available for free on CodePlex. Extend SharePoint's basic blog with Tag Clouds, friendly URLs, multiple categories for postings, and even comment spam detection if you want to implement this on your public facing website.

4 — SharePoint People Search.

Another key desire for many organizations is to easily locate users within the organization by searching their profiles for specific keywords. NewsGator can extend search past the keywords and find experts your coworkers have scored as the most knowledgeable. Extend SharePoint's people search to display these traits in the results, enhancing SharePoint with a very efficient way to track down the top experts for any challenge.

5 — SharePoint Wikis.

Wikis created within SharePoint are an excellent alternative to share knowledge, allowing others to edit and contribute through a simple interface. SharePoint wikis incorporate all of the features of SharePoint to secure and control the content: permissions, version history, document check-out and in, and approval workflows. Again, we recommend the Community Kit for SharePoint. Add custom page templates, tools for importing content from other wikis, and a web part that shows pages ranked by hits/popularity. It's easy and free.

6 — SharePoint Community Sites.

SharePoint gives you the ability to create community sites and invite or give access to users. SharePoint security groups control access to the content in the community. Blogs, discussion groups, and Wikis can easily be added and monitored using basic SharePoint functionality. NewsGator offers a powerful tool to quickly create and facilitate community sites around new ideas and innovation inside a company's SharePoint Portal. Encourage quick and lightweight conversation with features like MicroBlogs. Automatically populate community sites with content related to their community site topics. NewsGator is also already boasting how they extend SharePoint 2010 features and seem well ahead of the pack on the R&D side with their product development team.

7 — SharePoint Announcements of New Employees.

If a SharePoint Portal is in place, adding new employees and posting an announcement to your landing page is quick and easy. Asking everyone to fully complete their My Site profile on their first day also allows information to be instantly available to co-workers and more fully integrate them into the organization right away.

Add key data to new employee announcements using products like AASoftech's OrgChart Webpart. Integrating directly with SharePoint, this web part adds a great resource for an HR department to add further detail to a new employee announcement. Instantly update your company's org chart and announce how they fit in by just adding the new employees to Active Directory.

8 — SharePoint Social Computing Outside Your Network.

SharePoint Groups are an efficient way to control user access to all your SharePoint content. As security models go, SharePoint is a pretty effective security structure for controlling how your Social Media features are viewed and used inside your network. But what if you want to involve your customers, partners or vendors?

Trying to design and maintain an efficient security strategy can be overwhelming when planning for a large quantity of external users and groups. If you're looking to extend your social computing strategy to include customers, partners and vendors, Awareness Social Media Marketing Software offers you tools for handling security as well as extending your strategy to include users outside your organization.

AIIM SharePoint Training: Communities/Enterprise 2.0

This eLearning module is available alone or as part of AIIM's SharePoint Practitioner eLearning Bundle or Classroom Course.
http://www.aiim.org/training/courses/422

8 Ways to Benchmark Your Collaboration Strategy

Rob Koplowitz is a Principal Analyst at Forrester Research, where he serves information & knowledge management professionals. He is a frequent contributor to Forrester's Blog For Information & Knowledge Management Professionals.

It used to be that a company-wide collaboration strategy was a nice-to-have. No more. Now, it's a strategic necessity.

Even in the current economic climate, 37 percent of organizations surveyed in Forrester's Q4 2008 enterprise and SMB software survey consider implementing a collaboration strategy important in 2009.

What's driving the collaboration wave? Forrester sees two broad trends driving this: there is a critical need to drive information worker efficiency and to manage the unstructured content artifacts they produce and, while the value of improved collaboration is clear, the path to success has become more complex.

Collaboration strategies today need to encompass a broad array of organizational and technical criteria. The potential benefits can be substantial, and the risk associated with poor management of collaborative content and communication artifacts can be costly.

1 — Assemble Stakeholders.

Collaboration has broad implications, and the stakeholders who you will need to drive the strategy must represent various organizational and geographical parts of your organization. Expect to work with a broad array of business and IT users, including users representing broad business perspectives and other representing broad geographic requirements, IT professionals representing broad business capabilities, infrastructure and operations professionals and human resources and legal professionals.

2 — Determine Collaboration Objectives.

A collaboration strategy needs to be anchored by business requirements. Key business objectives that require assessment are workers' ability to find relevant information and to identify expertise within the organization. Once information and expertise are identified, what mechanisms are in place to facilitate efficient interaction and knowledge reuse?

3 — Conduct a Workforce Assessment.

Not all workers will want or require the same collaboration capabilities. Forrester recently published its Workforce Technographics data, a survey of over 2,000 information workers on what enterprise tools they are using. Some will need specialized capabilities like extensive mobile support or the ability to collaborate across organizational and firewall boundaries. Provisioning the correct level of capabilities for each segment of a heterogeneous workforce can drive down costs associated with a broad collaboration project.

4 — Pay Attention to Organization and Policy.

Collaboration software requires special attention in regard to organization and policy. The ad hoc nature of collaborative interactions opens the door for breaches in security, privacy, and regulatory compliance. While some of these can be handled programmatically through one or more technical solutions, many will require specific policy. With proper diligence, introduction of new collaborative technology to the environment does not increase risk. In fact, it can aid in significantly lowering risk. Further, collaborative technology is increasingly integrating with other business applications. To that end, the organization supporting a collaboration environment needs to include stakeholders to represent those systems.

5 — Select a Collaboration Technology.

While technology is only one component of collaboration success, it remains the biggest slice of the collaboration budget and an important lever for business productivity. The landscape of available collaboration technology is rich, and choosing and integrating the right technology for an organization is a challenge. The assessment instrument provides detailed guidance on every major collaboration category: information-sharing, communications, social networking, and an integrated user experience across all tools.

6 — Develop a Service Delivery Model.

Collaboration requires enterprise-scale services to manage team sites globally, use a single network that allows global presence or search, and implement global standards for the tool kit. In best practice, this means implementing a service delivery model that encompasses operating globally for consistency, access, and governance; deploying servers regionally to lower latency and to allow incremental deployments; and pushing administration and needed control down to local administrators to empower the needs of specific groups and regions. Our assessment tool will help you prioritize and assess gaps in these areas.

7 — Develop a Change Management Strategy.

The old saying, "If you build it they will come," has not always been true for collaboration solutions. Many organizations have struggled to drive adoption of technologies like workspaces, instant messaging, and knowledge management systems. Information workers have a great deal of autonomy in carrying out their jobs and may be hesitant to adopt new tools if they doubt the value. A change management strategy is needed to assess the requirements of tools by workforce need and ensure proper adoption.

8 — Measure the Impact.

To link technology investment to business impact, a collaboration strategy will mandate metrics on adoption, use, and impact. A collaboration strategy will help you prioritize metrics in four tiers: adoption, activity, cost avoidance, and productivity improvements.

The road to success can be complicated, but is definitely manageable. The greater the rigor that can be applied to the process of developing a strategy, the greater the chances of success.

8 Things You Need to Know About Twitter and Business

1 — In Many Ways, Twitter is Like instant Messaging.

As in instant messaging, the emphasis is on short, punchy messages. In fact, the very definition of Twitter is 140 character messages that describe "what are you doing?" That's not much real estate. Longer than an IM, but shorter than an email message.

2 — There is a Big Difference Between Twitter and Instant Messaging - Twitter Messages go out to the World.

This is an aspect of "content" publishing that drives many above the age of 40 berserk. It is the same objection that many initially had to blogging – who cares to hear your opinions about all the minutiae of your life? I've heard Clay Shirky talk about this (Here Comes Everybody) and he notes that earlier generations of one-to-many publishing had a built in filter – publishing mechanisms were expensive and thus the publisher became the filter and editor. Social media throws all that out the window because anyone can publish anything, essentially for free. But I diverge. The point is that an instant message goes to exactly whom you specify. Tweets can be viewed by anyone.

3 — Much of Twitter Terminology will Make you Feel Like an Idiot.

It is hard for a grown professional person to even use the term Twitter without generating snickers. Much less terms like twitpeeps and tweeting and retweeting and twit-this and twit-that and Ashton Kutcher. [Note: There is a somewhat off-color joke that Steve Colbert told on the Today show about Twitter one morning that I will tell you sometime if you buy me a beer.]

4 — The Key to Understanding Twitter and Marketing is not Followers. It's Folders.

Many I know who have not become twitpeeps ask me, "Why on earth would you ever want to 'follow' anyone. It's like being a stalker." Or even more likely, "Who are all those people following YOU? Some of them are just plain creepy." I think the key to understanding all this is to forget about the following and followers. Educate yourself about hashtags. Hashtags are denoted by the pound (#) sign and are essentially folders of tweets that relate to a particular topic. Hey, folders are something that those of us in document management know something about. You can also search on particular terms. I find the biggest value I get out of Twitter is through following a set of tags and terms that relate to our industry. For example, one search I regularly run reports on the following: #ecm, #aiim, #erm, "content management", "document management", and "records management". You get the idea.

5 — Twitter Itself as an Interface is not Very Good.

You can enter your searches and twits right on Twitter itself (http://www.twitter.com) but it is not very satisfying. There are a number of clients out there, but the one I like is Tweetdeck. Very simple and satisfying to use. There are a gazillion (large number) of Twit apps and clients out there. Fun to browse, but many are goofy.

6 — Speaking of Goofy, do not Expect Twitter to Provide Moments of Classic Literature.

There is much weirdness out there. I don't really get the point of tweets sent out to the void like this (real one): "Moving home facts: eating out vs cooking 80/20 vs 5/95, no cheddar, smoked shortback bacon or cumberland sausages." There is an option to direct tweet someone - just put a D in front of their name - but too often these kind of weird and bizarre personal messages are just sent out into the world rather than to a particular person.

7 — Do Not Activate the Text Message Delivery Option.

I know a lot of people like this. It delivers twits from your followers directly to your phone. I tried it and it drove me nuts.

8 — Lastly, and Most Important, if you are Using Twitter for Business or Organizational Purposes, Tweet with That Purpose in Mind.

My advice:

Decide where you want to have a presence.

Find the hashtags associated with those topics.

Use the relevant hashtags in your tweets.

Don't just tweet junk. Tweet information that means something. Try to be somewhat educational. TRY THIS SOFTWARE not really worth doing.

Be generous in retweeting the tweets of others who are saying something meaningful about the topics you care about. Follow these people.

Use links. Shorten them (Tweetdeck does this automatically) before sending. Drive people to your web site.

Don't use up the full 140 characters. Leave 20 or so to make it easy for people to retweet you.

Set some time limits for yourself or all this can be pretty addicting. Like 15 min at the beginning and end of the day. Or on your cell phone when you're just standing in a line or waiting for an airplane.

AIIM on Twitter

Follow AIIM Staff on Twitter.

http://www.aiim.org/Connect/Twitter

8 Steps to Getting Started With Twitter

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1 — Create an Account – and Use Your Own Name if Possible.

Of course there can only one @johnsmith on Twitter. If that's your name, but isn't you, try e.g. jpsmith, jsmith80249 (ZIP code), etc. And by no means should you use a Twitter username that is in any way offensive. Also - if you're Tweeting on behalf of an organization, there are two schools of thought about what handle - organizational or personal? I don't think there is a "right" answer, but it's helpful for folks to know if it's the official handle and who it is that's actually doing the posting.

2 — Fill Out the Bio.

If your handle doesn't use your name, you might put it here (e.g. Jesse from Access Sciences). I prefer reasonably professional bios - succinct and concise to be sure, but tell me what you do. If your bio says something like, "I make stuff", that's not real helpful. Better examples: @jmancini77, @skjekkeland.

3 — Upload a Pic - Preferably of Yourself.

Note also that people will judge you on your picture - if it's a beer, a sports team, a political slogan, a cartoon, etc., consider that it may turn some folks off.

4 — Follow Some People.

If you have no bio, the default avatar, and no followers, I assume you are a spammer and will not follow you (and in fact may actively block you). If you're just getting started with Twitter, here is a list of ECM/DM Twitter users and here is a list of RM/archives/library Twitter users.

5 — But Don't Get Out of Control With the Following.

Another big spammer indicator for me is someone who follows hundreds of accounts but themselves is only followed by a small handful. Try to be proportionate (say, 3-5 follows for every follower).

6 — Post Some Updates.

Answer Twitter's question ("What are you doing?") but also "What are you thinking about?", "what resources have you found of interest?" "What are other people talking about that you think others might be interested in?" and so forth. Whatever you want to post – post something at least every couple of days.

7 — Don't Worry That Everyone You Follow Doesn't Follow Back.

There are any number of reasons why that might happen, almost none of which have any relation to your value, friendship, professionalism, etc. Accept that Twitter is inherently asymmetrical and in fact that that is part of its value. For myself, if you have a bio, pic, reasonable proportion of following/followers, and post every once in a while, I'll give you the benefit of the doubt.

8 — Don't Spam Your Followers.

People that follow you do so for a reason but it's not so you can sell them stuff, whether that's your company's stuff or just your thoughts and opinions. They want to get good, real information, they want to converse, and they want to relate. A good rule of thumb is to post maybe 1 "spammy"/"sales-y"/PR post for every 10-20 posts you make on other stuff. Those other things can be retweets, links to neutral but compelling content, updates, etc.

8 Things You Can Do With an Enterprise Wiki

Stewart Mader is founder of Future Changes and author of Wikipatterns.

Many people think Wikipedia when they hear the word wiki, but there are multiple ways to use a wiki within an organization that are very different from Wikipedia, and more strongly aligned with the day to day activities, needs, and goals in a work environment.

Let's look at eight ways a wiki can help you readjust your valuable time to get more of your essential work done, spend less time on meetings and redundant activities, and more efficiently assemble, refine and reuse valuable information.

1 — Meeting Agendas.

Instead of emailing your meeting agenda as an attachment, put it on a wiki page and email a link to the page to your team. The problem with emailing an agenda is that whenever someone needs to make a change, they'll email you to request it, thus adding another message to your inbox, another piece of busywork, and another email to send out with the revised agenda. When you post the draft on a wiki page, members of your team can directly make changes as needed, and discuss the agenda items online before the meeting. Often, people will make decisions about some of those items before the meeting, this shortening the meeting itself.

2 — Meeting Minutes, and Action Items.

Once people are used to assembling the agenda on the wiki, take minutes there as well. It's easy to simply edit the agenda page to add minutes to each item. Encourage everyone present in the meeting to help write the minutes. When one person is designated to take minutes, you have one less person actively contributing to the meeting, because that person is scrambling to document what's being said. When everyone contributes, you get a more comprehensive picture of what was discussed, and each person spends a much shorter amount of time contributing to minutes. (10-15 minutes, in my experience). Also, when people are on the wiki contributing to minutes, they can maintain a list of action items and check off items as they're completed, which helps when drafting the agenda for the next meeting.

3 — Project Management.

Meeting agendas, minutes, and action items lay the groundwork for using the wiki as a project management tool. Once you're discussing and deciding on projects, keeping minutes, and tracking progress via action items, you just have to add a few more items to the wiki in order to manage your projects in one place. For example, if one action item is to assemble a project proposal for a client, draft that proposal right on the wiki. People are already in the mindset to use the wiki, so assembling the proposal, reviewing and revising it together, and getting approvals can all be done on the wiki, which saves a lot of back-and-forth email, confusion about attachments, and time wasted.

4 — Gather Input.

Lets say you need input from a dozen people on that project proposal. Give the appropriate people permissions to read and edit the page, then send out an email asking for input, and include a link to the page. If you've given people access to both read and edit the page, they'll be able to directly edit the contents of the proposal. Other might only have permissions to read the page, so they can add comments below the body of the proposal, but not edit it directly. This is much more efficient because everyone involved can see the latest version of the document, including all previous revisions and comments, thus saving you the effort and time involved in reconciling multiple, redundant edits that would be made to copies of the proposal sent by email.

5 — Build Documentation.

This is great for software developers and technical writers, because they can build drafts of documentation that incorporate the latest technical details that the software developers can offer, and technical writers can focus on maintaining a destination for documentation, discussion and Q&A in an ongoing fashion instead of racing to publish an isolated piece of documentation each time a new edition of software is released.

6 — Assemble and Reuse Information.

As the wiki is used to build and maintain project proposals, documents, and other reusable pieces of information, the process of creating future versions becomes easier. For example, an urban planning firm could reuse standard elements of an earlier proposal, such as definitions of key terms, product specifications, and legal codes when preparing a new proposal for a similar project.

7 — Employee Handbook.

An organization's wiki is an ideal place to provide general-use information to an internal audience. For example, the human resources department might publish the employee handbook on the wiki. Pages containing policies would only be editable by HR staff, but employees could use the comment feature to ask non-confidential questions, get clarifications, or suggest improvements. HR staff could respond via the comments, thus answering an employee's question and providing an answer anyone else with the same question could see. This cuts down on repetitive questions email to HR staff. Also, whenever HR staff need to update the handbook, the comments, questions, and suggestions present in the comments on each policy would directly let them know what needs to be updated. Another benefit: publishing the handbook on the wiki provides employees with the most up to date version while saving tons (literally) of paper, and reducing confusion about which PDF version of the handbook is the latest. Whatever people see on the wiki is the latest version, by default.

8 — Knowledge Base.

The previous seven wiki uses are internal-facing. Now, let's look at how a company can use a wiki in an externally-facing manner. Westnet, an Australian telecom company, uses a wiki for its MyHelp customer support knowledge base. This is visible to the public, and customers can find setup instructions for a cable modem or TV set-top box, frequently asked questions, and news about the company's services. They're also allowed to directly contribute to knowledge base articles once they register for an account. Articles are moderated by Westnet staff to ensure the quality and accuracy of information submitted. This allows the company to build a robust help system where customers can help ensure that information is up to date, help other customers, and build a stronger relationship with customers that helps increase satisfaction.

AIIM Enterprise 2.0 Community Wiki

Share and contribute.

http://aiimcommunities.org/e20/wiki

8 Business Use Cases for Twitter

Lubor Ptacek joined Open Text in 2008 and as the Vice President, Product Marketing. He is responsible for overall product marketing activities for the entire suite of Open Text enterprise content management products. His responsibilities range from messaging and market intelligence to analyst and public relations.

Twitter can be a powerful business tool—if you can get past the initial thought of blasting your messages to a trusted audience waiting for every word from your corporate news room. The rules of Twitter have been well documented – keep it personal, don't spam with useless info, keep it interesting, and so on. These rules apply to each of the use cases described below, which are the most common use cases for using Twitter and other microblogging services as business tools:

1 — Thought Leadership.

When your key employees actively engage in conversations with other players in your industry, sharing their thoughts, opinions, and favorite information sources, they begin to attract followers. You are not a leader if nobody follows.

2 — Competitive Intelligence.

Following the key employees of your competitors is a great way to gain competitive information about the technologies and trends they are paying attention to, what conferences they attend, what products they are launching, and so on. Even more information can be gathered by following the key players in the competitors' ecosystems – those who don't work for the company directly are usually much more open in their tweets.

3 — Sentiment Analysis.

When you mention a product in your tweet, you often gain another follower – the company that makes or sells that product. Smart companies have realized that they can monitor the overall sentiment or mood around their product by following people who talk about it. They often use specialized software to do this monitoring in a way that allows them to do sophisticated sentiment analysis.

4 — Surveys.

If you want to quickly check the opinions of your followers on a particular topic, use a tweet with your brand as a hashtag. This doesn't yield statistically relevant results, but still provides useful feedback in most cases. For everything else, there are tools like SurveyMonkey.

5 — Customer Communities.

Twitter allows you to respond to your customers' questions publicly. You can demonstrate that you care, you can engage with your customers in a dialog, and you can continuously educate them about your product capabilities. Thanks to its informal nature, your customers might be much more willing to contribute to conversations on Twitter than on other media. They can and will participate by sharing tips, answering each other's questions, or simply commenting on their experience with your product.

6 — Networking and Expertise Location.

Do you want to find out who matters in your ecosystem? Start following some of the key players you know and start watching who they follow. Soon, you'll meet many experts you'd otherwise not know about. It's not their title or profile that makes them experts; it's what they do and say. Twitter is a great audit trail of a person's activities. This is different than using LinkedIn, since Twitter is based on unilateral relationships – the people you follow don't always know you.

7 — Event Coordination.

Twitter is being used on mobile devices at conferences for networking and comments within the participant community, but it can also be used effectively for coordination – such as for last minute agenda changes. The same concept can be applied to the coordination of projects and emergencies, such as accidents or natural disasters. As we've seen recently in Iran and Thailand, Twitter and other social networking services can be used to great effect in organizing political protests.

8 — Marketing Communication.

Using Twitter for blatant marketing propaganda can be a major turn-off, but when used with subtlety and in combination with other tools—such as a press release, material posted on a website, or a webcast—it can be a powerful addition to your marketing mix. The beauty is that

Twitter obeys the rules of permission marketing since your followers are following you of their own accord. Just make sure it stays that way – do not abuse them for your marketing goals.

8 Ways to Balance Collaboration Efforts with Traditional Records Management

Chris Surdak is the Content, Collaboration & Communication Solutions Director for Siemens IT Solutions & Services. Chris has over 20 years of experience including management consulting, IT Strategy, Architecture & Implementation and business process reengineering. Recently, he has focused on the areas of Enterprise 2.0, Litigation Support, eDiscovery and IT Governance, developing solutions in these areas for Fortune 1000 clients.

If you're like most companies these days, you're in the midst of deploying collaboration tools, such as SharePoint, in an attempt to meet users demands for more open communications. At the same time, you're probably maintaining an array of legacy records management systems, deployed a decade or more ago, which are used to manage a specific subset of data in a very specific way. If you haven't already noticed, these systems are like oil and water.

To provide some guidance on how to balance the conflicting goals of collaboration and records management, I offer the following considerations:

1 — Good Governance is Of the People, By the People, For the People.

There seems to be little argument these days over the importance of Governance for both Records Management and Collaboration. However, many people are wondering how to staff up and manage a Governance council. Here are some simple rules of thumb:

Governance teams should be staffed 20% by IT, 80% by the business

80% of the work will be done by IT, 20% by the Business

IT knows what questions to ask, but doesn't know the right answers

The Business knows all of the answers, but doesn't know which questions need to be asked

It is absolutely critical that business people, as users of collaboration tools, directly participate in governance of any collaboration platforms. Without their active engagement, they will not understand, and will never support, the degree of structure and control that IT knows is necessary for proper management of an environment. So, keep the business engaged, but understand that IT will still be responsible for the bulk of the work performed by the council.

2 — Good Governance is Invisible.

Most people don't like being told what to do, and this is particularly true of people who thrive in collaboration environments. While most records management systems have A LOT of structure, rules and controls, if you're going to drive adoption of a collaboration system, you need a lighter touch.

To achieve this, implement structure in such a way as it isn't visible to users. This happens through appropriate design of information architecture, data classification, access rights, etc., but the key is to make people THINK that they're self-provisioning, even if they aren't.

Next, make maximum use of automation. A successful collaboration environment will grow so quickly that manual intervention will be impossible. So, build governance such that new rules can be defined and implemented invisibly, and automatically.

Finally, do not ask users to govern themselves: They can't, they won't, and they shouldn't.

3 — Best-In-Class Solutions Yield Worst-In-Class Results.

Most companies are maintaining what I call "Noah's Software Ark," where they implement 2 copies of every software package in the world, in an apparent attempt to save each "species." It is common to find 10, 20 even 100 different platforms for content management or collaboration in a single organization. Further, it is common for those same companies to complain that they can't find anything, their systems are too fragmented, governance is impossible, etc. Well, duh!

Point solutions, while appearing to be simple, bring massive redundancy in functionality, hardware, software, administration, and of course, cost. They also prevent meaningful enterprise-wide governance and collaboration. So, whatever your plan, make sure that it includes rationalizing your environment and "cull the package herd" as much as possible. Technology platforms such as SharePoint make this easy.

4 — Speeds & Feeds are Dead, Laws & Regulations Rule.

Remember the old days (say, 2002) when you would agonize for weeks or months over where to place your servers, how much bandwidth was needed between location A and location B, how much storage you would need to buy, etc? Those days are dead. Now, compute capacity, bandwidth and storage are as hard to come by as sand in Arabia. Heck, you can't swing a Gucci iPad bag around your head without hitting someone's compute cloud!

Infrastructure planning is no longer about speeds and feeds.

Rather, placement of systems and data is being driven by a new set of constraints: Laws and Regulations. Sound dubious?

Note that at least 44 of the United States have implemented privacy and data protection laws, as have dozens of major international markets. Ignore these requirements for managing corporate data at your own peril. And, for those of you who think Safe Harbor will protect you, think again. Recently, Safe Harbor has been shot so full of holes you could start calling it PEARL Harbor.

5 — Packages are Prisons, Set Your Functionality Free.

IT is very package-oriented. Tell an IT person that you have foot fungus, and she'll tell you, "There's an APP for that!"

But, what the business is asking for, and what IT is hearing are VERY different things. Business people are usually asking for a capability, NOT an application. Unfortunately, since most capabilities are bound up in software packages, that's what IT goes out and buys.

The evolution of software over the last 10-15 years has been focused upon platforms… J2EE, .NET, etc. These platforms, if properly implemented, allow IT to build capabilities that can then be pieced together, Lego-style, to create virtual-applications. Virtual, because once the app is done running, the components disassemble and return to the background, waiting to be used again for something else.

Sound good? Good. STOP buying packages, start building platforms and start dragging your APPs to the Trash can.

6 — Federation is Fool's Gold… Rationalize and Simplify.

If ever there was a snake-oil-salesman in the digital age, it's the person who claims that they have a great federation tool. No matter how transparently you can connect two different systems, one truth will always remain: Garbage In, Garbage Out. Most IT systems are poorly designed within themselves. Start stitching them together and you're diving down a digital rabbit hole from which you may never emerge.

Federation itself is not a bad thing. Rather, federation without rationalization is a bad thing. Before tying together two or more systems it's important to fix them independently; driving them towards a balanced, middle ground. To do this, you must first DEFINE this middle ground, and this requires a focused effort to define global requirements for information architecture, taxonomy, and business rules. Only once you know where you're going, can you take a step in the right direction. If you don't know where you're going, any federation tool can get you there.

7 — Taxonomy Alone is a Content Jail, Folksonomies Alone are Gibberish.

Heavy-handed taxonomies, like those in traditional records management systems, make those systems user-hostile. Make a system hard to use and voila, people won't use it. The answer to this problem appears to be the free-flowing folksonomies of collaboration systems, where everyone organizes things their own way. In reality, if thousands of people are classifying information their own way what is the likelihood that the results will be better than no classification at all? This approach is cute for finding funny photos on some foto.com site, but for corporate use, it is sorely lacking.

So what's the answer? The best approach is a balance of both, where a structured taxonomy is in place to provide a "tree" from which users can hang their own "leaves" of Folksonomy.

The folksonomies live within enough structure that they're still useable and meaningful to the business, but not so restricted that they wither and die. Are you noticing the theme of balance, yet?

8 — Abstraction Equals Adaptability.

In any design effort that you undertake, follow this one rule: Abstract, Abstract, Abstract. Whether its data, workflow, access rights, rules, roles, etc., the more that you abstract specific values from their specific use, the more flexible your resulting solution. In other words, don't hard-code the 50 states into a system, rather, design the system to recognize "states", and there may be 50, there may be more. It sounds simple, but few designers use this principle as maniacally as they should.

AIIM E2.0 Training: An Overview of Enterprise 2.0 Extensions
This eLearning module is available alone or as part of AIIM's E2.0 Practitioner eLearning Bundle or Classroom Course.
http://www.aiim.org/training/courses/230

8 Things to Consider for a Successful Multi-Touchpoint Customer Experience

Rene Hermes is responsible for all aspects of marketing of CoreMedia, including strategy, corporate communications, product marketing, channel management, and field marketing. Rene brings more than 15 years international marketing and business development experience to the company. Prior to CoreMedia, Rene held senior global executive management positions at Definiens (German start-up), Genesys Telecommunications Laboratories (USA, California, part of Alcatel-Lucent), and Progress Software (USA, Massachusetts).

Consumers use several sources of information before making purchase decisions – they may seek independent opinions, speak to customer service agents, or examine goods physically. And they are accessing information via myriad touchpoints, including mobile devices, social networks or company websites. Companies recognize this, but consumers consistently rate satisfaction levels for cross-channel experiences as poor, so there is a disconnect.

It is hard enough to ensure that a website delivers an excellent user experience. When you factor in the vast number of web-enabled mobile devices, companies face a huge challenge in creating a consistent and personalized experience for every user. Social media adds additional touchpoints, and complexity.

Organizations that succeed in integrating their communications across all channels can then customize their approach to each specific user, creating the most powerful form of personalization. This ensures that the customer feels valued, helps to identify the best cross and up-selling opportunities and delivers a truly engaging customer experience.

Below are eight key strategies for delivering excellent multi-touchpoint experiences to engage consumers, build customer loyalty and ultimately drive greater revenue and profitability.

1 — Make Sure Your Website is Intuitive on All Mobile Devices.

Consumers are increasingly accessing the Web from mobile devices. By 2014, 80 percent of all mobile devices will be 3G enabled – up from 40 percent in 2009. With the number and type of mobile devices proliferating, you must provide a solution optimized for all devices.

Optimization is not simply a matter of resizing the screen; you should think about the task that users want to perform across different channels and devices. For example, smartphone users are frequently looking for answers to specific questions – they may want to find a particular news item or to locate the nearest retail outlet. Your goal is to guide them to the answers quickly and intuitively. By contrast, when people visit your website on a laptop, they expect a more immersive experience which allows them to browse as well as search. The key is to be able to recognize customers and prospects as individuals and customize your content for them, whatever channel, device or system they choose.

2 — Address the Customer's Context –Not Just the Channel or Device They're Using.

When delivering information across different channels and devices, consider the information that they are seeking to create a personalized experience that addresses the user's context. By 'context' I mean the interaction between the user, the device, the environment and the content itself- this could include the season of the year, time of day, physical location, type of mobile device and, of course, the user's interests and profile. Understanding how these factors interact enables a company to deliver relevant content and target offers with precision.

3 — Start a Conversation- Invite Opinions, Ratings and Reviews.

One of the most powerful ways of engaging people is by opening up your website to their reviews, ratings and comments – enabling them to engage in discussion with you and with each other.

This not only demonstrates your commitment to improving the customer experience, but also creates a forum for passionate brand advocates to persuade others to purchase your products and services. In addition, you can respond to issues through blogs and comments, heading off problems by addressing them early.

Ratings, comments, discussion board and forums can provide invaluable feedback on your current products and services and insights into what is on the minds of your users. You can float ideas and invite users to test products– in effect running 24x7 market research campaign, giving you greater assurance that new products and services will find a ready market at launch.

4 — Unleash the Power of Self-Help!

Offering intuitive Web self help can greatly reduce the burden of supporting your customers through contact centers, decreasing costs and increasing customer satisfaction. It must not only be intuitive, but also appropriate to each channel and device. The key is understanding the potential problems that users encounter and providing the right help at the right moment.

There are many users who relish the opportunity to help others, so providing a forum that allows them to do so unleashes their potential, builds a powerful database of solutions and takes the pressure off your own contact center agents.

If you think of the Web purely as a way of eliminating calls to your contact center, however, you run the risk of frustrating your customers. So don't hide your contact center number away – let people approach you in the way that they feel comfortable. You can offer alternatives to the phone – such as live Web chat. Most important is to ensure a smooth handover between channels so that customers don't have to repeat information – this reduces their frustration and the time your agents need to serve them.

5 — Always Recognize Your Customer.

Many companies take a silo approach to channels – each channel is managed by a separate department. As a result, loyal customers may be greeted as strangers if they approach through a new channel.

An integrated solution provides a total picture of a customer's interests, preferences and buying history across all channels. It ensures that you treat people as valued customers – so, for example, they never have to enter their details twice – and it helps you to identify the most effective cross- and up-selling opportunities.

6 — Use Social Media if it's Relevant to Your Customers.

In 2009, membership of social networking sites rose by 46 percent. There is no doubt that social networks can bring you closer to your customers, and offer candid insights into their views and desires that can inform your decision making and drive your business forward. Using analytics feedback, social networks can automatically inform your Web presence while your content is drawn into the conversation on social networks. Traffic can be driven to your website, user comments can inform your contact center agents, ratings and reviews can be reflected on your website. You can increase the size and loyalty of your audience and maximize your return on engagement.

But two notes of caution. First, only engage in social networks if they are relevant to your audience – there is no point in developing a Facebook presence if your potential customers will never visit it. Second, be honest and open. You should assume that any scheme designed to generate an artificial 'groundswell' will be exposed.

7 — Embrace Opportunities to Create Innovative Marketing Campaigns.

Mix different channels together to create innovative marketing campaigns that ignite the excitement of your target audience. Draw on a blend of online, mobile and real experiences to differentiate your company, strengthen its brand persona and drive new revenues.

Today's proliferation of channels, devices and social networks massively increases the number of ways to approach customers. Creative marketers can seize the opportunity to differentiate products and services through campaigns that intrigue, excite, delight and ultimately sell.

8 — Show That You are REALLY Listening.

There is no point in creating these communication channels and taking the time to make them as engaging and personalized as possible if you are not actually listening to what your customers are saying. The best way to get that return on engagement is by taking the insights and feedback you've gotten from your audiences and putting it into action, making some real changes to your business. Then, take it a step further, and tell them about it! Empowering your customers can go a long way in creating brand loyalty and advocacy.