



## RESEARCH NOTE

Number: 2014-44

November 11, 2014

Authors: Jim Lundy, David Mario Smith

### Six Best Practices For Success With Social Networks

Topic: Collaboration

**Summary:** *Deploying a social network can be challenging. Here are six best practices planners should leverage.*

**Issue:** What are the best practices for managing collaboration inside and outside the enterprise?



**Note 1:**

**Six Best Practices for Social Networks**

- Focus on outcomes
- Make it easy
- Make it mobile
- Develop a deployment plan
- Provide governance
- Balance control versus policy

At their core, enterprise social networks (ESNs) are designed to connect people with content and knowledge, as well as with each other. ESN offerings have converged and many offer a standard set of capabilities, though often with different user experiences. Despite this ongoing maturation and their relative familiarity, however, most social network efforts are still challenging – often because key objectives and key deployment criteria are not determined up front. This research note reviews six critical best practices that can help make your ESN deployment successful (see Note 1).

#### 1. Focus on Outcomes

Any collaboration initiative, including social, has to be outcome-based. Outcome-based collaboration is tied to specific business processes and focuses on specific desired outcomes. Business leaders have KPIs that they measure – and are measured on. ESN initiatives that focus on these outcomes have better adoption by being more relevant to how people work.

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ESNs can be a major source of innovation for enterprises. For example, a desired goal for sales would be faster sharing of information (e.g., salespeople can find content in 3 clicks or less via search). Sales leaders stress that having the right idea at the right time and in the right context can make the difference between winning and losing a deal. We spoke with a marketing executive who explained to us how she was able to use her ESN to crowdsource innovative ideas for a major marketing campaign that ended up going viral.

## **2. Make it Easy**

One of the most important characteristics of an ESN is that it must be easy to access and join. It has to be as simple and easy as email. One common planning mistake is to underestimate the importance of ease of use, particularly for new users. In fact, many users are more willing to use a product with limited features that is very easy to use than a product that has every possible feature but is difficult to navigate. If adoption suffers because of a poor user experience, all those features are wasted.

Clearly the responsibility for ease of use at the core product level lies with the provider. However, no matter how easy it is for IT and business units to customize an ESN with added management priorities, it is important not to compromise the product's ease of use when doing so. For example, don't overburden an ESN with a lot of corporate messages that can distract users from the actual purpose of the ESN.

### **Business App And Content Integration**

People collaborate around content, and real-time access to content is crucial for roles such as sales. However, just making content available is not enough. The content has to be in the right context to ensure its relevance, and it has to be easy to get to. One barrier to this is the need to switch from one application to another to get content and return to where it will be used. Yes, people use multiple applications during the day, but application-hopping reduces productivity. An interface that offers seamless, in-context access to content during collaborative interactions can speed those interactions and increase their business value.

Sharing content is what ESNs are for, and making it easy to find the right content is critical. If content cannot be accessed inside an ESN, productivity suffers and adoption can fade. Just as with any site or portal, the ESN must be kept updated and current. Lack of perceived usefulness is a primary reason many ESNs fail.

### 3. Make it Mobile

Mobile access is key, and can be done in two ways. First, mobile apps offer fast, secure, dedicated access to the ESN. Look for a provider with a full-featured mobile app that is easy to use. Providers need to be committed to mobile and offer frequent updates to their mobile apps. The other way to connect on the go is via email.

#### Mobile Email and the ESN

It may seem basic, but despite possibly more complex security needs, *DO connect the ESN with your email!* Most workers still live in their email even on the go, so mobile email integration is crucial. One of the biggest reasons for lack of adoption is lack of experience. For new users, or those who don't feel comfortable with the ESN interface, replying to a post via email is an easy and familiar way to connect with others in the ESN. Knowing they can reply by email will make new users feel relaxed and confident, and therefore more productive.

### 4. Develop a Deployment Plan

Having a plan to roll out your ESN is critical. Setting objectives is key. The deployment plan should focus on people and how they work, including the IT infrastructure associated with their core business processes. For example, deploying an ESN to Sales means integrating it with the enterprise CRM application, which today is the de facto home base where salespeople live. Similarly, deployment plans should also take into account all the external collaboration and interactions that people engage in with partners and customers, and integrate with the collaboration infrastructure that they use.

#### Training and Onboarding with How-To Videos

A video tutorial is the fastest way to get people onboarded into an ESN. Screen shots showing the steps to log in, create a profile, join groups and share content will help people quickly become successful and feel confident in using the network. Video has become pervasive in enterprises in both consumption and creation. Mobile devices have made it easy to do video. Ensure that your video tutorials are clear, crisp and tell a story.

Another best practice is to have an overall onboarding plan to get either associates or customers into the social network. Some products have onboarding modules, but regardless, have a

success plan as part of your rollout and use multiple approaches, including self-service and group sessions. Celebrate success and make sure you have someone who is designated as a community manager.

## 5. Provide Governance – But Not Too Much

In most cases, the ESN is designed to facilitate collaboration. Sometimes corporate communications or IT can overburden the ESN with too many messages. Avoid this, since it can turn people off and drive users away. There has to be a mix of people and self-governance in the ESN. One best practice is to assign a community manager role that includes moderation responsibilities (see Note 2).

Planners should create a “terms of use” agreement that users must acknowledge before they join the ESN, and enterprises should make compliance with it a part of their overall governance plan. A terms-of-use document does not have to be very long; it can be short and to the point and still hold users accountable for being “good citizens” on the network. It should conform to the overall policies that govern employee behavior in the workplace, and include terms specific to the network environment, such as not sharing sensitive content in a customer community.

## 6. Balance Control versus Policy

An ESN needs governing policies that define acceptable behavior for users and also protect enterprise content. Make sure that HR signs off on the behavior terms, and that the content terms align with existing acceptable-use policies that govern the privacy and security of electronic communications and content.

However, keep the policies tight: don’t overdo them. Users should feel free to operate within their terms of use, without invasive scrutiny or excessive micro-management that could make the ESN an uncomfortable place to work and reduce its value as a business process enabler.

### Note 2:

#### The Role of the Community Manager

Community managers help keep an internal or external ESN moving. They are cheerleaders and moderators at the same time. Successful ESNs have community managers, and if an ESN includes a customer community, the role of the community manager becomes critical.

### **Aragon Advisory**

- Start with a plan for success aimed at business outcomes that matter to people.
- Focus on ease of use when selecting an ESN product or service.
- Develop an ESN governance plan with user and content-sharing policies that allow freedom but also ensure proper behavior and protect enterprise content and IP.
- Designate someone as the community manager.

### **Bottom Line**

An ESN can improve many business processes in an enterprise. To be successful, it should be easy to use, speed access to content, and focus on specific goals that empower people and optimize their work.