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EMC|ONE:
A Journey in Social Media

Abstract

This white paper examines the process of establishing and executing a social media proficiency strategy at EMC Corporation.

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Executive summary

Many corporations are wrestling with how to best capitalize on a group of trends and technologies often referred to as "web 2.0" – social networking, social media, blogs, wikis, forums, communities and so on.

This white paper describes how one large corporation – EMC – identified an emerging internal need, established a cohesive strategic approach, and saw substantial and compelling results throughout our business.

Although every situation is different, we believe that EMC's experience can provide useful lessons to other organizations considering a similar transformational journey. Most importantly, we wish to share the key decisions we had to make, why we made those decisions, and the results.

Our adoption and exploitation of these technologies and techniques are far from finished, but it is clearly obvious to many involved that we have begun to fundamentally transform our company – and our ecosystem of stakeholders – into a "2.0" world.

This white paper is targeted at business leaders with a conversational familiarity of relevant terms and concepts in this domain. It will not provide the required depth for a thorough definition of strategy, nor a rigorous execution plan on either a business or technical level.

That being said, we have found great interest from many organizations in our experiences so far.

As part of this effort, the author of this document kept a public blog of the experience (found at http://chucksblog.emc.com/a_journey_in_social_media) which has become moderately popular in corporate social media circles.

Introduction

The characteristics of EMC itself make it a fertile ground for adoption of social media.

EMC competes in extremely aggressive portions of the IT marketplace. The vast majority of EMC employees can be categorized as knowledge workers, many of who are technically proficient. Portions of EMC's product portfolio (e.g. Documentum, RSA) can directly support social media applications.

Like most large organizations (35,000+ employees), we have many diverse business units and functions that conduct operations around the globe. Due to the nature of our business, we have an extended ecosystem of partners, customers and other stakeholders that are an integral part of our overall business strategy.

However, certain aspects of EMC's situation presented fundamental challenges.

From a pure IT perspective, EMC tends to be on the conservative end of the spectrum when adopting new productivity technologies. As much of EMC's business stems from unique intellectual capital, risks associated with security and unauthorized information access are taken quite seriously. Many aspects of our traditional corporate culture can be described as "command and control". And, finally, certain audiences within EMC's management team tended to be more comfortable with highly controlled internal flows of information.

The 2.0 Groundswell

During 2004 to 2006, it was clear that something transformational was happening in our culture and our economy:

- Social sites and tools such as LinkedIn, MySpace and Facebook were exploding in popularity. These platforms were increasingly finding their way into business discussions.

- A few companies had discovered that communicating through blogging and discussion forums could be far more effective than traditional mechanisms.

- A new generation of internet-literate employees was entering the workforce, expecting the same kind of open access to information and conversation that they had become accustomed to outside of the workplace.

- More and more businesses were establishing online communities of aligned parties; these were proving to be incredibly effective engagement tools.

Internally to EMC, there was rising frustration as well:

- As our company had grown in complexity, simple processes such as communication, interaction and collaboration across many dozens of business units was becoming increasingly difficult. As a result, most people in the organization didn't exactly know what the rest of the business was doing. A sense of isolation and frustration was growing quickly within the company.

- Information access and sharing was becoming problematic – it was getting more and more difficult to find the information you wanted in a timely fashion. Our centralized intranet portal was becoming unworkable for its intended purposes.

- Most people's calendars were filling up with meetings, concalls, remote presentations and inordinate amounts of email traffic. More and more important business activities required large teams to participate, and getting everyone to synchronize was slowing business progress.

- More progressive users of external social platforms were frustrated that EMC didn't understand what these new tools and capabilities could offer in a business setting.

Responding To The Challenge

EMC senior management decided that these trends needed to be better understood and addressed. Although the initial thinking was to categorize the problem as belonging to a single function (e.g. IT, marketing, HR, etc.), it became clear that social media proficiency had unique aspects as a business challenge:

- The phenomenon affected most aspects of EMC business, and wasn't isolated to a single set of business functions. Clear use cases could be seen in marketing, customer service, engineering, HR, IT, sales and more.

- Although social media appeared to offer business value in some circumstances, it was also apparent that many initiatives could easily to deliver on expected results.

- Culturally, much our company was uncomfortable with the idea of open and transparent sharing of information and conversation.

- There was a perception of unique risks associated with broadly encouraging open engagement without careful thought regarding governance.

In short, there appeared to be no obvious path forward.

As a result, they appointed a member of the management team (the author of this document) to study the problem and propose a strategic approach. This individual was given several weeks to study the opportunity and challenges, and suggest a framework forward.

> ***Key point:*** *the framing of the problem (and the proposed solution) was seen as a matter of business strategy, and not the domain of a single function, such as IT or Marketing.*

Building The Initial Community

How does one go about building a social media strategy for a large company? That topic alone required some careful thought. Although there was much in the popular press about the power of blogs, wikis, etc. – there was preciously little that was prescriptive on the "how" rather than the "why". A few initial phone calls with external consultants and advisors confirmed our suspicion that we were in relatively new territory.

We believed we had to resist the temptation to run this project like any other project: small teams, regular meeting, action item lists, decisions made behind closed doors and similar.

Early on, we decided that our process of designing and implementing our social media strategy should reflect the ethos of 2.0: open, inclusive and transparent. We would engage people internally who were interested in the topic, get their views and enlist their help.

To get the process started, we built a temporary and disposable discussion forum site to engage other members of the EMC community who were passionate and knowledgeable regarding these topics. It was freeware from the internet – not very serviceable, but it did what we needed it to do.

In effect, we were creating a very specific community to help us build our strategy. We did not use 1.0 nomenclature and terms such as teams, meetings, schedules and task forces. As a result, we discovered and engaged several dozen employees from around the globe who contributed significantly to our initial thinking.

> ***Key point:*** *the use of social media techniques (e.g. the establishment of a community of passionate stakeholders) to address matters of policy and general strategy is a recurring theme. Simply put: we used social media techniques to solve social media problems whenever possible.*

Initially, the community discussion and the resulting list of topics that people felt we should initially address was quite long and involved. As we started keeping notes, the requested list of "must haves" ran for several pages, far outstripping any reasonable investment we could make to accomplish a short set of business objectives.

Perhaps the most interesting and useful part of the discussion was around "what should we do first?". The examination of the relationships between different social media concepts led to an understanding of priorities and a logical order of execution, along the lines of "if we want to do Y, we have to get good at X first".

This refinement of the discussion eventually led to a reasonably short set of concepts and ideas that became the basis for an overall strategy that was manageable in size and scope, could be communicated in a few minutes, and could form the basis for a straightforward execution path.

> ***Key point****: like any new topic, the natural tendency was to over-complicate key thoughts and activities. The team spent great time to simplify the expression and communication of ideas at every opportunity. Better to communicate a few ideas effectively than fail at communicating several dozens.*

Key Principles

As part of the initial exercise, we came up with a handful of key guiding principles that have served us well to this day. These principles, while not rigorously complete, expressed the key thoughts and concepts in a simple and straightforward manner. As we encountered various problems and challenges, we kept returning to the core principles we had established early on.

Rationale

The rationale for investing in social media proficiency was simplified to "exploiting the potential of transforming a wide range of business processes at EMC". Social media was a business tool that we had to learn to get good at – nothing more, and nothing less. Just like we had learned to get good at email and web 1.0, we had to invest in becoming proficient.

It was easy to see this as set of competencies that could significantly re-engineer many aspects of how we would do business in the future. As a company we could great potential to do many things better, faster and cheaper. Much in the way techniques such as Six Sigma can address many different business processes, we positioned "SMP" (social media proficiency) along the same lines.

> ***Key point:*** *note the focus on proficiency vs. tools or platform. As with most productivity initiatives, the tools are of relatively low value unless people know how to apply them to the business.*

We spent a few weeks collecting dozens of potential examples from across EMC's business – spanning from engineering, to marketing, to customer support, to sales – even examples from support functions such as HR, IT and Legal.

> ***Key point:*** *early on, we recognized that the only effective strategy would be a single platform for all internal aspects of the business – much like we had a single email environment, a single corporate intranet, and so on. We needed to resist the natural tendency to build our platform along organizational lines.*

Before long, it was apparent that there were no shortage of substantial potential "big wins" across the business – when we learned how to spot them, they became relatively obvious and apparent. We found enough of these examples to convince ourselves, and then moved on.

Thinking About Justification

Every company considering an investment in social media proficiency will at some point have to justify the investment to the business. This mandatory rite of passage was a key inflection point in our own thinking, and is turning out to be important to other organizations making similar investments.

This becomes a strategic topic for several reasons:

- Productivity investments are notoriously difficult to justify. Social productivity investments are perhaps even more difficult in this regard. This particular topic can bring out a natural skepticism in many individuals as well.

- Justification frameworks can become self-fulfilling prophecies. For example, if much of the justification is premised on "reducing email traffic", a majority of effort and focus will go into explicitly reducing email traffic above all else, perhaps neglecting other more important aspects in the process.

- Few tools exist for measuring qualitative value: it's difficult to assess the value of a well-written document, or a productive discussion with someone you didn't know existed, or an open discussion that avoids an expensive mistake. Traditional measurement and justification frameworks turned out to be woefully inadequate for measuring what we thought was ultimately important – improved interaction and conversation.

It appeared early on in the process that we faced an important decision; either "go with our gut" and do a minimal amount of traditional justification, or invest heavily to fully understand exactly what the expected benefits might be.

We briefly turned to external consultants, hoping that we might be able to shortcut this process by using external expertise. At the time we looked, there was very little available in this regard. Indeed, it appeared that the price tag for creating a reasonable justification case would exceed the proposed expenditures of the entire project!

As a result, we went with positioning our proposed investment as analogous to other productivity investments the company had already made: email, file shares, conference calls, webex, conference rooms with multimedia support, and so on.

Using this approach, all we had to do is to point out a few shortcomings with traditional collaboration tools to justify what we wanted to do.

> *Key point: many people are trained to produce business case justifications as found in traditional business school curricula. These tools and thinking processes are difficult to apply to these types of projects.*

> *Key point: as required investments in this area appeared to be quite modest, we quickly realized that we could have ended up spending more time and effort justifying the initiative rather than just moving forward.*

> *Key point: when faced with a new proposition, many people will respond by demanding to understand the "ROI". We learned to treat this as an understandable defensive reaction in response to a new situation, rather than a de-facto demand for a business case. On a more practical note, the actual investment we were considering was extremely moderate as such things go, greatly lessening the need for a traditional business case.*

One of our most effective justification techniques tended to be slightly manipulative given our corporate culture. We frequently pointed out to people that – due to the extremely competitive nature of EMC and our business -- we would not want to be in a situation where our competitors had a significant competitive advantage through social media proficiency that we did not have. People tended to understand that concept in a very visceral manner.

Strategy Elements

It was clear that we needed an overall strategic approach to how we thought about doing this. The key elements can be summarized succinctly in a few areas, as noted below.

- Focus on **proficiency, skills and behaviors** – rather than tools, process and measurement. Put simply, focus on the "social" in "social media".

- **Recruit and identify volunteers** who demonstrated proficiency throughout the organization, and have them recruit and support others in turn.

- Build proficiency from the **inside out**: start inside the firewall, practice a bit, and then venture outside the firewall once we had established internal proficiency.

- Create **separate non-IT functions** for both internal and external proficiency. To be sure, we needed assistance from IT in many regards, but we did not see this as an "IT challenge" per se.

  Along the way, we learned that the priorities, skills and models for developing both internal and external proficiency were quite different, making a single group responsible for internal and external activities unappealing.

- Create a **lightweight governance model** and use it sparingly. No governance would be dangerous in many regards; heavy governance would hamper progress and spontaneity.

- Resist our natural corporate tendency to **organize, control, measure and monitor** each and every aspect of this initiative.

- Assume that if **people know how to behave** in the real world, they'll figure out how to behave in the online world as well.

  This belief simplified a wide range of seemingly difficult decisions around anonymity (not allowed in either world), accountability for your actions (true in both worlds), handling of sensitive material (important in both worlds), and other general conduct issues. Put differently: if there was going to be a "problem" on the platform, we had existing mechanisms to deal with them, such as HR and Legal.

- **Invest enough to learn**, and use those experiences to guide future investments. We did not propose, nor ever considered, a big-bang, end-to-end comprehensive roadmap. Instead, we positioned a series of incremental investment scenarios over time, based on what we learned as we went along.

- **Small team vs. large, centralized function.** We wanted a core of people who understood how these tools and processes worked, and could show others, but we felt it imperative that the organization adopt the tools (and the associated skills and behaviors) organically.

  Large, centralized organizations give people an excuse to view challenges as someone else's problem, in addition to tending to create an excess of process and workflow. By comparison, small and passionate groups are forced to recruit evangelists from across the organization. This is what we wanted.

- **Give people enough time** to get comfortable with new ways of doing things. Patience is a hard thing to practice for many of us. Attempting to push people too fast may risk in an organizational backlash.

- **Resist the temptation to over-structure, over-organize, over-process and over-categorize.** Many people associated with effort have been taught to work in a linear, structured fashion. While some of this is desirable, taken to excess it can lead to environments and efforts that are self-defeating, especially in a social media context. This turned out to be a very difficult mindset for some.

- **Provide centralized funding for the required resources.** The matter of funding can provoke heated discussion in corporate environments. Proposals were made to charge individuals for use, or charge back to larger departments and business units. We believed that this sort of arrangement would hamper adoption across the business, and add significant complication to our governance model.

We were able to prevail in convincing the business to provide centralized funding by pointing to other shared resources that weren't provided on a charge-back basis: email, conference rooms, the corporate intranet portal and related investments.

- **Make it fun,** rather than making it look like work. People tend to give their best efforts when they're enjoying the experience.

Timing And Sense Of Urgency

We felt a certain sense of urgency developing as we started to study these issues, resulting in a plan that was biased towards accelerating investments and results.

Some of our concerns:

- It was evident early on that widespread social media proficiency could be worth potentially hundreds of millions of dollars to EMC's various businesses – we didn't want to delay that benefit.

- Social media use was spreading across the company in a very viral and unorganized manner – the longer we waited to get started with an official and centralized capability, the harder it would be to align and coordinate existing efforts.

- Existing informal use of social media inside and outside of the firewall was being done without governance and oversight – potentially exposing the company to unknown risks.

- Several large traditional business process investments were being considered that could be done much more cost-effectively and efficiently with social media tools and techniques – we didn't want to waste money on the old way of doing things.

- As EMC does business in a notoriously competitive market, we could see early signs of our competitors showing an interest in these tools and techniques, which raised additional concerns.

    Key point: within a limited range, there are tradeoffs that can be made, balancing level of investment against speed of execution. We had a very explicit discussion regarding these tradeoffs early on, and selected a more aggressive level of investment to accelerate proficiency.

Execution of Internal Strategy

As mentioned above, we decided that there was great value to starting with an internal platform to build internal proficiency.

We actually had two goals regarding this effort: (1) provide a platform for re-engineering candidate internal processes, and (2) learn some of the core skills and behaviors required for eventual external proficiency.

An example of an internal business process might be launching a new product, or collaborating on topics of mutual interest, such as the latest moves by competitors.

Examples of core skills and behaviors include blogging internally and externally, contributing to a discussion or wiki, freely sharing knowledge and experience, disagreeing with people without being disagreeable, or starting a community.

    Key point: over time, we all fell into a conversational shorthand around "skills and behaviors" and "candidate business processes". This turned out to be the most natural descriptive

framework for discussing the various aspects of the initiative – especially with senior management.

Finally, we felt that we could accomplish this best in an environment that was safe, fun and friendly. However, there were many decisions that were discussed and decided before we moved forward.

What Kind Of Collaboration?

There are many forms of collaboration in the workspace: from concalls to email to document repositories. Indeed, many of these are in use at EMC and other large organizations.

A frequently asked question was *"why do we need yet another collaboration tool?"*

We had to be precise in our answer as to why a different construct might be needed in addition to existing collaboration capabilities, which turned out to be an interesting discussion in itself.

Synchronous vs. Asynchronous

Many forms of collaboration can be described as "synchronous": collaboration only occurs if everyone is doing it at approximately the same time.

This would include meetings, concalls, IM, videoconferencing – anything you'd have to schedule. Miss the meeting or concall, you'd be at a disadvantage, as would the team.

We believed that our over-reliance on synchronous collaboration was sapping much of the organization's productivity. Thus, we were not interested in newer forms of synchronous collaboration such as instant messaging, or virtual realities.

In addition, asynchronous collaboration models meant that people could freely join and participate when they had the time and the interest – there was no need to calendar or schedule defined interaction periods.

Text vs. Rich Media

Many discussions in the social media world point to the effective use of video or audio formats for collaboration. While we felt that these had their uses in some cases, we primarily were interested in text-base communication.

Text is an amazingly efficient communication medium: it's easy to compose, easy to read, easy to share, easy to search, etc. It also is more amenable to international audiences where English may not be the native language.

Communities Vs. Email

Ours, like many, is an email culture. For many people, it was hard to conceptualize the inherent limitations of email in support of cross-functional collaboration.

While email is a great tool for sending short messages and static information to known recipients, it does not easily support wide-ranging conversations, reusability of information, nor exposing discussions and content to unintended recipients.

Certain individuals who were heavy email users did see this sort of proposed collaboration model as a way out of their "email jails". While there is still plenty of email traffic at EMC, more and more important information is finding its way to the corporate social media platform, reducing the need to save important emails.

Trust Boundaries

In any social setting, it helps to know who you're talking to.

When on the internet, many forms of collaboration and communication can be difficult simply because it's hard to ascertain who you're talking to, and what their motivations might be.

We came up with the notion of a "trust boundary": a pre-defined statement to all participants on the platform as to who's allowed to participate, and who isn't. For our internal platform, this was "badged EMC employees, and selected badged contractors who have been vetted to have access to our internal systems."

One could argue whether this was the right trust boundary or not, but it was simple and easy to understand: treat everyone you met on the internal platform as you would any other employee of EMC.

If you felt a topic or a document was suitable for sharing with the general EMC community, fine. However, if you thought a certain topic or document was too sensitive for the general community, you should use another mechanism.

Indeed, the value of defining a clearly-understood trust boundary became apparent as we got into the implementation. People would routinely ask "who has access to this platform?" and we could give them a simple, logical answer.

Not surprisingly, other people wanted special handling for participants who were outside the defined boundary. We deferred these requirements to the external community platform, discussed later.

Open vs. Closed

This was an important and very controversial strategic issue, and deserves extended discussion.

The natural tendency was for people to want their own private communities, specifically where the community owner could control who could view or participate in the community. This innate need to control access, commentary or participation was much more widespread and ingrained than we first thought.

We had two serious concerns with this approach.

First, the administrative requirements associated with managing this sort of environment is nontrivial. Maintaining detailed lists of who can see what, and doing so with reasonable speed and efficiency, is a major investment of time and effort, besides being frequently ineffective.

More importantly, "building tools for the efficient *hiding* of information and discussions" was not our core goal – we wanted to expose as many people as possible to as many sources of information and as many discussions as possible.

We ended up using the term "*the big conversation*" to signify what we wanted to.

Interestingly enough, EMC had already established a robust self-service document sharing capability using EMC's eRoom, a popular document sharing portal. Anyone could at EMC could request an eRoom, invite people to participate, and control the contents and the visibility of all information within an individual space.

As a result, we ended up creating many thousands of eRooms across the company, each with a small group of people sharing documents. A few were effective, but most had just become dumping grounds for someone's files. Despite this significant investment in eRoom infrastructure, the results were generally perceived as poor.

We firmly established a clear "no private spaces" policy early on. This decision was very controversial at the time, but ended up being an extremely key decision. In many respects, we believe that this decision – above all others – defined the essential nature of our internal collaboration efforts.

Initially, there was concern from member of the team that this policy would dissuade people from participating – the need of individuals to control information was so strong. But, since we had established the key principles of our strategy early on (e.g. learning social media skills and behaviors), I could make a strong case that we didn't want to do a lot of work to simply reinforce old and unproductive behaviors.

We would tell people who felt they needed to restrict access to information were free to use existing EMC platforms such as email, eRoom, or potentially Microsoft's SharePoint. In most cases, they thought about the pros and cons, and ended up using the internal platform despite their misgivings.

Once we had clearly established the default "open" behavior on the internal platform, we ended up considering more private communities on an exception basis. Even though we have been supporting this type of request for some time, there is now very little interest in closed or gated communities behind the firewall.

Conversation-centric vs. Document-centric

Many people tend to think in terms of collaboration and information sharing in terms of documents and files.

While it's clear that document-centric collaboration has its role within most organizations, we felt that there was a higher-order (and higher-value) collaboration model that focused on people: their interests and their dialogue.

We ended up using the term "*conversational collaboration*" to describe what we were after. We believed that documents support conversations, but were not the end goal.

The focus on *conversational collaboration* was perhaps the second most important decision we made in retrospect. Had we decided to focus primarily on documents and content, we would have (re)created a large document repository, and not fundamentally changed our collaboration model.

We frequently entered into long discussions on this particular topic, and had to exercise considerable focus to move the discussion away from document-centric collaboration, and towards conversational-centric collaboration.

Along the way, we came up with some useful examples – imagine you went to a professional social gathering, and all you did was push documents at other people, asking for the comments? You'll have to admit – it's pretty hard to start a discussion that way.

We also believed that starting discussions led to the formation of communities of interest, which in turn would lead to very effective document collaboration if needed.

Keeping It Fun and Friendly

The majority of business platforms at EMC are run as impersonal entities, surrounded by daunting formal processes to request access, request a modification or otherwise engage.

Given ours was an effort on social collaboration, we felt it important that we made every effort to make the user experience as fun and as friendly as possible. This resulted in an investment model, for example, that didn't require users to fill out any forms to use the platform. Or have to call the IT support desk if they had an issue.

We also thought it important that we had people with real names and personalities visibly behind the platform initiative.

Style and tone was important to us as well. We decided that we wanted an informal and loose environment that was business-oriented, but not overly stiff and inflexible. We wanted to make sure that all users understood that we were there to serve them and make their experience enjoyable – and not to serve an abstract corporate mandate.

What Kind Of Platform?

With a desired conceptual framework in hand, we could turn our attention to the software platform to support our requirements.

Ease Of Use, Integrated Experience

Absolutely paramount for us was the ability for new users to jump on the platform, and figure out how to use it, and do so without any sort of formal training or familiarization. We argued that training wasn't needed for Facebook, or Google, or LinkedIn – why should we need it on our internal platform?

Additionally, we wanted a platform that supported basic activities (blogging, wiki, discussion, community, tagging) in a single paradigm. Many platforms were very good at one thing or another; we opted for a product that did most functions reasonably well, but did so with a consistent user experience.

Most of all, we wanted the platform to be fun and engaging. We wanted an absolute minimum of process around viewing content or engaging in discussion.

Commercial Software vs. Open Source

We ended up preferring a relationship with a commercial software vendor instead of implementing an open source stack. We wanted a stable platform that worked out of the box, and wanted to invest an absolute minimum in qualification, integration, customization, etc.

SSO Integration

We had already established a centralized authentication mechanism for network resource access at EMC. It was important that whatever internal platform we implemented had "hooks" into this mechanism to avoid the hassle of registering people separately.

We also thought it important that we knew who we were talking to (no anonymity), that you'd authenticate once at network login and then be free to roam without re-entering credentials.

Scalable and Extensible

We did not envision the platform growing excessively large and complex, nor were we enamored with the idea of extensively modifying and customizing our internal platform. However, we wanted to make sure that – from an architectural perspective – we could see clear pathways to both scale and/or modify should the need present itself.

Language Support

Most of our discussions are conducted in English as a standard business language around the globe. However, certain communities prefer to discuss in local language. We felt it important that our platform be able to support non-English dialogue and content should the need arise.

Lurking Is Free, Registration Is Easy

In social media parlance, a "lurker" is someone who watches a conversation, or surfs content, but never shares their identity or interacts. We wanted to make sure that anyone in the company could "lurk" if they wanted to.

However, we needed to identify people once they decided to converse on a topic. We wanted to make it a "one-click" experience, with no forms to fill out, no cost centers to provide and no manager approval required. Simply click on a field, and you're ready to engage.

Inside and Outside

We knew that – eventually – we would be building communities outside of EMC's firewall with external participants. We saw value in being able to use the same software environment for both purposes, even though they would be distinct and separate implementations.

Fun And Engaging

It's hard to describe business software as "fun", but we believe it was important to have a user experience that – while initially simple and inviting --- would encourage people to explore and investigate the richer functionality of the environment.

Our Final Choice

We ended up selecting Clearspace, from Jive Software, as our primary internal platform. Although no experience with a large-scale software implementation is problem-free, we have been very pleased with our choice to date. Other than SSO modifications detailed above, ours is a standard implementation with no modifications whatsoever.

We believe we saw significant value in selecting off-the-shelf software. We could focus our investments and efforts on getting people to use the platform effectively, rather than the platform itself. Indeed, we were willing to compromise specific advanced features to gain this ability to accelerate adoption quickly.

As our needs mature, we are in the process of selecting and integrating additional tools that augment this base capability.

What Kind Of Organization?

Early on, we came to see our efforts at social media proficiency being far more about people and process rather than simply providing a platform.

Processes are executed by teams of people, and as a result, we put considerable thought into how we would organize the internal function, what kinds of roles we would establish and how we would build a long-lasting organizational capability, rather than the more traditional "project team" that moves on after implementation.

Business Function vs. IT Function

While it was true that we needed the assistance of our internal IT organization to accomplish our goals, we thought it important that we structure the internal proficiency function as a business-oriented group, rather than an IT-oriented group.

Our belief was that our primary organizational challenge was *changing behaviors and perceptions*, rather than implementing a specific technology platform. As such, we needed people who thought in terms of evangelism, influence networks and other corporate social skills.

Key point: social media proficiency has very little to do with technology, and almost everything to do with organizational change. Please consider this seriously as you evaluate how and where you build your own proficiency effort.

Alignment With Existing Organizations

We gave careful thought to where the new internal function would be positioned on the organizational chart. We wanted to leverage existing organizational competencies where possible, yet wanted to make sure that the "brand" of the sponsoring organization didn't get in the way of the larger mission.

For example, if engineering supports the platform, it will be widely perceived as built for engineering, and unlikely to attract users from outside the engineering community.

The EMC marketing group was already responsible for multiple internal and external web platforms, including the default corporate intranet. This met our goal of leveraging internal competencies.

Additionally, EMC marketing organization frequently takes on activities, projects and events on behalf of the entire company, addressing our "internal organizational brand" concern.

Key point: if you do decide to create a free-standing social media team, it will need to be part of some larger organization. We were quite surprised to discover how this "organizational branding" affected people's initial perspectives of the initiative and the offering

Sponsorship From Other Functions

When considering internal behavioral change, it is useful to give some thought to other internal functions and sponsors who are willing to help.

In addition to internal sponsorship from multiple marketing functions, we found a willing and enthusiastic sponsor in our HR organization. From senior management to individual contributors, EMC's HR organization saw this initiative as extremely beneficial for EMC, and very much aligned with HR's goals and initiatives.

Other functions (product engineering, services, etc.) saw value and were willing to participate in the internal initiative – in particular, no one formally objected – but a much higher degree of enthusiasm and willingness to "drive" came out of the marketing and HR functions.

Key point: internal organizational sponsorship turned out to be key to our success. While we didn't need each and every organization function to be enthusiastic, we did need a few. More importantly, we needed to make sure that no organizational function strenuously objected to what we were doing.

Roles and Responsibilities

Initially, we defined four key roles for our internal proficiency effort. Other people and functions helped and contributed considerably, so the total level-of-effort was well beyond these three roles.

The first important role was "platform manager".

This person was a mid-level individual contributor with some preliminary management experience. Her roles were to (1) ensure the platform was available and usable, and continually evolving to meet the needs of the internal community, (2) drive discussions regarding platform policy and guidelines as we encountered new situations, and (3) support some of the basic workflows required for the platform. This turned out to be a full-time role.

The second important role was "user evangelist".

This was a more junior person (actually a contractor), who engaged interested users on how to use the platform, producing and sharing tips and techniques for how embed videos (as an example), and was generally the first line of response when someone had a platform question or problem. This too turned out to be a full-time role.

> *Key point: most internal IT platforms do not have a "friendly face" associated with them – support and assistance is obtained through a traditional IT workflow. As we wanted to accelerate adoption, we decided to invest in this "user evangelist" role.*

The third important role was "management outreach".

We believed that the battle for social media proficiency would be won or lost largely dependent on the sponsorship of first, second or third level managers. It became apparent early on that – while these people could appreciate the power of these tools and techniques – they were also extremely concerned about fitting in with expectations from their more senior management.

We established a dedicated role with a more senior person who was generally known and trusted throughout EMC. This person would identify key "high value" internal business processes, and work with the management team to (a) get comfortable with the whole idea, and (b) make a few initial steps forward to leveraging the platform.

> *Key point: we were quite surprised at how important – and how reluctant – middle management was to our overall initiative. Individual contributors will only go so far in embracing new ways of doing things unless their management team is "on board". And middle managers can be categorically risk-adverse.*

The fourth important role was "executive sponsor" – a senior and passionately enthusiastic individual who could (a) provide a role model for others, (b) work to overcome organizational obstacles, and (c) provide a recognizable voice and face on the effort.

Other important roles included overall e-business strategy integration – ensuring that our internal efforts lined up reasonable with other platforms provided by the business – and IT team leaders to help up get the technology up and running, perform the required integrations, and help us resolve technical issues as they arose.

> *Key point: the expected level of fit-and-finish for these social productivity platforms is perhaps less so than other, more mature enterprise offerings. Proficient and tolerant power users may be able to tolerate odd behaviors; newer users are completely put off by the simplest of bugs. We invested considerable effort early on in identifying and resolving a host of annoying behaviors – none of which really impacted the platform, but each of which detracted from user adoption.*

What Kind Of Governance?

The question of governance often comes up during the discussion of any social media project.

Many corporate stakeholders are unfamiliar with the dynamics of these social environments, and are sincerely and justifiably concerned about potential negative consequences of an "open" environment.

These concerns include:

- Ensuring that sensitive information is properly protected

- Content and focus is consistent with corporate goals.

- Conduct is managed consistent with normal corporate standards.

- The social environment becomes a productivity tool, and not perceived as a time-waster.

As part of this project, we formed a lightweight governance team that had representation from the business sponsor, IT, Legal and HR.

As part of this process, we established a few guiding principles.

- Conduct should not be overly proscribed – think in terms of "guidelines" rather than "policies".

- We should use existing interaction models (email, conference calls, physical meetings) to help us think about the new environment – put differently, the collaboration hasn't really changed, just how and where it happens.

- Proper handling of sensitive information is an employee responsibility regardless of forum or mechanism.

- Proper conduct in a business setting is an employee responsibility regardless of medium.

Early on, we agreed that – in essence – the only potential risks came from people not understanding that – while the platform was different – the rules really weren't all that different. As a result, we enlisted an informal group of people to help monitor early interaction, and gently remind people if guidelines weren't being followed.

After the first few meetings, there appeared to be almost no need for an ongoing meeting.

After 12 months of operation, only very minor issues have surfaced regarding conduct, inappropriate use, or inappropriate information appearing – no more (and perhaps less) than any other interaction mechanism.

We believe that the open nature of the platform provides an incentive for people to moderate their behaviors somewhat.

> **Key point:** *while we believe that some form of cross-functional governance is essential to success, it is important that as many issues as possible are "worked out" outside the governance framework. We felt that it was important to develop collaborative behaviors to identify and resolve issues as they came up, rather than over-relying on a higher authority.*

What Kind Of Rollout?

Naming And Branding

Names can be powerful things. Since we were dealing with something new and potentially powerful, we put significant thought into how we would brand and name our platform.

We thought it important that the name tie into a corporate priority. At the time, EMC's executive management was emphasizing the importance of acting like "one EMC", rather than disparate functions. We chose the name "EMC|ONE – the online network of EMCers" to reflect that corporate priority.

We have heard of other organizations naming their internal platform the "swimming pool", the "development network" and similar. Regardless of what you call your platform, we would strongly suggest putting a little effort into the naming and visual identity: logo, color schemes, etc.

Launching Your Platform

The initial tendency of project teams is to think in terms of large, official and formal announcements.

We resisted this temptation, and instead chose a progressive, "viral" launch.

- We positioned the early availability as a "pilot", rather than production.

  Part of this was setting appropriate expectations regarding stability, bugs and other related issues. Also, had we moved directly to production, we would have had to acquire significant IT infrastructure and overhead that, in retrospect, we wouldn't have really needed.

- We recruited early enthusiasts to jump on, look around, and tell us what they thought.

  Enlisting people to help with different aspects of the platform continues to be an important part of our resource model to this day.

- As people liked what they saw, they told other people about it.

  We learned that word-of-mouth was perhaps the most important way to communicate the platform to others. Over time, though, it became apparent that insufficient cross-organizational links existed to inform all potential users, so we started adding communications in newsletters, web sites and the like.

This sort of progressive availability approach proved to have significant benefits in retrospect:

- We had an extended period to get comfortable with the platform and related processes. A lot of new issues came up in the first few weeks and months that we hadn't really expected, and we had the time and patience to work through the best approach rather than just react.

- We were able to build up sufficient content and engagement from our initial enthusiasts that provided an engagement point for later users. We were able to avoid the "empty site" problem that plagues so many online community efforts.

- We create a perception of an unstructured and open environment, rather than a formal corporate program. We were very open and honest about where we were in the process, the problems we were having, and asking everyone's patience. This set the tone for the environment, which continues to this day.

  As an example, a user might complain bitterly about a particular bug. The response would be along the lines of "yes, it really bothers us too, we're trying to find a solution, did you see the wiki of other bugs and potential workarounds, does anyone have any ideas on other workarounds, and thank you for your comments".

Several non-obvious elements became evident during this rollout:

- We had many people visit the site to investigate, but initially very few participated actively. Upon investigation, the reasons were either (a) they weren't sure whether participation was an 'approved' activity by their manager, (b) they didn't find anything interesting to them, or (c) it looked more like a pilot, so why invest any time?

  Would we be doing this again, we could have taken a few relatively simple steps to mitigate some of these issues. However, a certain amount of patience is required to build critical mass, and become a destination site.

- People were extremely confused how this new social platform related to other portals within the corporate environment. Many questions came up about where to go for what kinds of information could be found on different platforms. We spent a lot of time comparing and contrasting the different tools available, and the different types of information available, e.g. dynamic vs. static, conversations vs. formal documents, and so on.

  The most frequent cry was "why can't we have everything that I need in one place?". Unfortunately, we knew that a key social media skill was the ability to seek out new information and resources in relatively unstructured environments – like searching for something with Google.

- People didn't know how to register for the site.

  This was particularly frustrating, since we had spent a lot of effort reducing the registration effort to a "single click" with no need to enter any information. But, since most platforms at EMC require some sort of formal registration process, the expectation was that this one would be the same.

  This was resolved via the creation of a humorous "formal training video", which tongue-in-cheek showed someone laboriously positioning the cursor on the "login" field, and clicking once.

- Many ambitious individuals set up shop by establishing a "community" on topics primarily of interest to them alone, rather than the community.

  They'd have an idea, dump a bunch of content into a space, and wonder why no one came by to discuss all of their work. As a result, the vast majority of early communities failed, simply because we did not yet collectively understand the dynamics of community formation.

  Later on, we were able to use our vast collection of failed communities as leverage to encourage people to think more seriously about the effort and mindset required to build a successful community.

- The importance of "early voices" became very apparent during our initial rollout. We had recruited a small number of vocal participants, and asked them to stay actively engaged during the first few months. This was important to keep the discussions going on the platform while other became more comfortable with the idea of open and public conversation.

  As an example, when people would create their very first blog post, our extended team would leave comments such as "welcome!" and "glad to see you here!". Even a short "thanks for sharing" went a long way towards encouraging initial participation.

Despite these issues, we consistently garnered active users and communities through word-of-mouth for the first three months. We then experienced a dramatic spike in activity and user adoption, which continues unabated to this day.

Starting The Conversation

If you've ever been at a large social gathering where most people don't know each other, you're often thankful for those few individuals who walk up and start an interesting conversation.

We felt we had to do some of the same at the beginning. We'd pick a slightly controversial topic that has no right answer (*Is EMC doing enough for telecommuters? How are you managing your work/life balance? Should we be supporting Apple Macs for our users?),* put it out there and asked people what they thought.

We considered this seeding the conversation – and it proved to be very effective in drawing out participation from all parts of the company.

Promoting Initial Successes

We spent significant effort over-communicating what sort of conversations and successes we had initially – both on the platform itself, and through a variety of informal mechanisms.

Even though the number of registered users isn't perhaps the most useful metric, it became one of the tracking numbers that people could easily relate to. Similar visible (but not really relevant) metrics included amount of content, discussions, page views and so on.

Adoption significantly accelerated when a widely visible team enthusiastically embraced the new platform, and stopped using previous tools to communicate. One of our first big ones was EMC's competitive analysis function. Their visible adoption encouraged other business functions to take a hard look at doing the same.

> **Key point:** *we suggest creating a "heat map" of a handful of potential big-win visible functions, and focusing your initial recruitment efforts on these teams, rather than a broad-based effort with little specific focus.*

Other Design Issues

Structured vs. Unstructured Organization

One of the most controversial issues we dealt with was an unstructured vs. structured environment.

A significant number of the project team – and user community – passionately argued for a pre-defined structure: categories, topics, taxonomies, ontologies, etc.

And, just as passionately, others argued persuasively for the dynamic evolution of the platform space – allowing spaces and topics to evolve, and organize as they become emergent.

In retrospect, we spend far too much time debating this topic.

As the senior executive involved, I made a judgment call that we would bias towards an unstructured environment. My primary reason was simple: learning how to navigate an unstructured environment was a key social media skill – nobody really organizes the world-wide web, for example.

We ended up with a hybrid approach:

- A first top level hierarchy that was about the platform itself – what the platform was all about, how to use it effectively, suggestions for future improvement. New users would see a certain level of "getting started" structure.

- A second top level hierarchy with all active communities – in alphabetical order. No naming schema was proposed or enforced, nor was there any effort to minimize topic overlap. It was expected that people could find the topics that interested them.

  Interesting side note – more than a few people tried to game the system by naming their community with the letter "A", such as "All About XYZ" or "Another ABC Community" or "Aaadvanced Topics" .

  We weren't too concerned about all of this – people were having a bit of fun.

- A third top level hierarchy of inactive communities – archived. Many communities existed for a short while, and then moved on for one reason or another. We decided that archiving (read only, no commentary) was a good way to deal with this behavior.

- Users would be expected to use search, tags or popular content windows to find what they were interested in. No attempt whatsoever would be made to neatly organize everything. People were free to create their own taxonomies, however, and post them for others to use. There would never be an "official" hierarchy, though.

In retrospect, this approach has served us well:

- The amount of time and effort spent on endlessly debating taxonomies and categorization schemes was reduced considerably.

- Communities and topics were free to come and go without changing the user experience.

- Users were encouraged to learn to find information and topics of interest to them, rather than expecting things to be neatly served up to them.

    Key point: unless you have a very structured (or very simple) business, we would strongly recommend you take the same approach we did. It will likely be a very heated and passionate discussion that will be impossible to resolve to everyone's satisfaction. In retrospect, even the most avid fans of highly structured environments are coming to appreciate the benefits of the approach we chose – even though they still don't like it.

Managing Conflict

In large organizations, there is an inherent bias to appeal to a higher authority when conflict arises. And conflict does arise in online social environments, much as it does in the real world.

Examples might be harsh words in an online message, or someone posting content that others disagree with, or community champions worried about other communities encroaching on "their" territory. Even matters of platform policy can become quite contentious.

An occasional example might revolve around a strongly-worded post. The natural reaction from the aggrieved individual would be to tell their manager, who would call that person's manager, and complain about the posting, with the expectation that the other manager would "fix" the situation. We thought this sort of up-and-down behavior was a complete waste of everyone's time, and – besides – completely ineffective outside of a corporate environment.

We worked hard to explicitly redirect that behavior towards direct (and open) engagement between the parties involved. We ended up calling this "learning how to disagree without being disagreeable".

Another example would be a group that wanted to start a community on a topic that "belonged" to another part of the organization. We encouraged the complaining parties to either discuss their concerns directly, join forces, or start their own community.

Initially, there was much anxiety around our approach. People were stunned that we wouldn't intervene on their behalf – that we encouraged them to work their own problems out. Occasionally, specific concerns escalated to relatively senior levels at the company, and we had to formally and firmly restate our position.

As of this date, we have not directly intervened in any of these concerns. We consider the ability to identify and resolve conflict – without appealing to authority – a key social media skill. Put differently, if someone does something you don't like on the internet, your options are limited in terms of response.

We also believe that this sort of "work it out yourself" mandate is a useful attribute for any corporate culture.

    Key point: the social media platform will expose many forms of conflict in the organization. There may be a natural temptation for the social media team to play a role in conflict resolution.

We would strongly recommend that encouraging people to work out their own issues (peer-to-peer and in an open environment vs. through management chains behind closed doors) is a valuable corporate behavior.

Creating A Social Outlet

Not all topics fit neatly in a category, nor is it the case that all useful conversations are strictly work-related.

Rather than prohibit off-topic conversations, we created a "water cooler" space for spontaneous conversation on any topic of interest to any employee.

This "water cooler" turned out to have some interesting properties:

- If there was a new hot topic in the broader community, it would show up in the water cooler first. Recent examples include green initiatives, reactions to corporate news, discussions of industry events, unhappiness with various corporate policy practices, and so on.

- If there was a place where inappropriate behaviors were going to show up, it'd be in this area.

   One interesting example was during a recent global soccer competition, this board unfortunately turned into a sports discussion board, which flooded the corporate "front page" with all sorts of non-work banter.

   This required a simple note to remind people that everyone at the company was watching their trash-talking public behavior: their boss, their boss' boss, their boss' boss' boss – all the way up to the CEO. Just a friendly reminder.

- Users that wanted to keep it strictly work-focused and didn't want to see the off-topic discussions could easily disable this feed. However, most people haven't done this.

As a result, we would fully recommend the establishment of a "formal space for informal conversation".

Technology Infrastructure

In retrospect, our technology investment was quite modest as far as IT projects go.

Currently, we run on a pair of virtualized x64 servers against an Oracle database. This clustered approach is targeted to give us higher performance and availability; however, many of the bugs we've found are a direct artifact of this clustering. Had we been doing it over, I would have gone with a single instance initially.

Storage use is relative modest – currently, we're at 500GB, with modest growth rates.

Browser performance became an issue – especially for more remote locations. Firefox is now the preferred browser for our environment. The performance difference (given our platform) as compared with Internet Explorer is quite substantial.

Many of our proficient users depend on RSS, which can be difficult to implement behind the firewall. At some point, we will be looking at an enterprise solutions that address proficient 2.0 knowledge workers, with special emphasis on EMC's newer CenterStage product.

Positioning Against Other Resources

Like most companies, EMC had several centralized intranet portals, as well as a variety of other collaboration tools available for our users. We had to clearly position and differentiate between the

information found on the internal portal (official, approved, fully vetted, etc.) vs. the information available on the social platform (dynamic, fluid, conversational, not in final form).

We also found much value in cross-linking the two platforms. For example, a discussion on the social platform might include links to official documents on the intranet portal. Or an official document on the intranet portal might include a "discuss this" link to the social platform.

Naturally, there was a concern that unofficial or unapproved information would appear on the social platform. We were able to convince people that this was simply a matter of setting expectations with our user community.

Dealing With "Pirates"

As all sorts of social media tools are widely available to everyone, it is quite easy for anyone to set up their own social space, whether it be inside the firewall, or outside. Indeed, as we began this project, we were aware of many dozens of internal wikis, blogs and discussion forums – and more than a few initiatives that had made it outside the firewall.

Collectively, we began to refer to these informal efforts as "pirates" – not in a negative sense, but that they were flying their own flag, so to speak. We learned to treat them with courtesy and respect. After all, they believed in many of the same things we did, and had the potential to be valuable contributors to our overall effort.

On one hand, many of these people felt that becoming part of an overall corporate initiative stifles their flexibility, creativity and self-identity. On the other hand, any corporation has a vested interest in the net effect of the sum total of all these activities. Bridging these two points of view takes a steady and measured approach to finding "win-win" solutions.

The natural reaction of the central project team was to take a very dim view of these activities as unauthorized and/or undermining the "official" effort. We learned early on to take a more balanced and patient view of these activities.

First, we encouraged our team to focus on matters of business impact. The fact that a few engineers decided to put up an informal wiki to share code behind the firewall wasn't a big deal in the scheme of things, for example. If these people want to use the central platform, fine; if not, that was OK as well.

More challenging were business units that wanted to put up "their" internal platform for "their" people. These situations had to be argued logically and patiently at multiple levels in the company.

The good news is that certain people were passionate about investing in social media productivity; the unfortunate aspect that having multiple, independent internal social platforms would have the net effect of dividing our company, rather than bringing us together – in addition to making redundant investments.

External initiatives proved to be more difficult to manage. There are many platforms available (Ning, for example) that make it extremely easy for anyone to set up an official-looking presence outside the firewall.

As we discovered these enthusiastic efforts, we found ourselves engaging people with a "carrot and stick" approach.

The "carrot" was the existence of a centralized group chartered to build external communities – empowered with a slick platform, people who were proficient at launching external communities, and a portfolio of demonstrated results – and was available at no cost to the sponsoring group.

The "stick" was a clearly stated policy that no external community could use EMC's name or brand, or share EMC-owned information, without the approval of the social media governance committee.

Despite this, we routinely have between three and five unofficial external sites at any one time that we're working through.

There seems to be some innate human characteristic that encourages people to go off on their own path, despite a plethora of logical arguments not to do so.

> **Key point:** *part of the value of the governance function was to help people understand that EMC was taking the matter of social media proficiency quite seriously. It was not a free-for-all; there was a vested corporate interest in attempting to do things right.*

The Perception Of Goofing Off

Many people perceive these social environments as places where people go to kill time. Or, conversely, someone who might want to use the platform is concerned that others will perceive them in that light.

We believed that using a social platform – like any other corporate resource – can be used unproductively if people want to. We are all aware of how people sometimes use the internet, email and phones for unproductive behavior.

We made sure that we sent a clear message that the management of the corporation saw using the social platform as "leadership behavior" – a new way of doing things. We repeatedly sent multiple messages using different levels of authority to encourage people to experiment and engage.

We should point out, though, that due to the open nature of the platform, unproductive behavior can be readily seen by everyone, which tends to limit unproductive behavior on the social platform more than, say, email or the internet.

Impact and Measurements

The Importance of Establishing A "Measurement Philosophy"

The entire topic of measuring business impact is very controversial for these types of projects. There is no consensus regarding generally accepted metrics for social media proficiency. Furthermore, this inherent lack of useful measurements and metrics can be used as an excused to not undertake an investment in social media proficiency.

A key part of any initiative is establishing a general agreement regarding success factors. We ended up talking in terms of our "measurement philosophy" rather than concrete measurements.

This is especially an important and difficult topic when considering an investment in social media for several inherent reasons:

- Internal social media proficiency is largely about productivity; a notoriously difficult concept to quantify and measure, especially when the focus is "social productivity".

- It is often true that projects end up delivering what they're measuring. The corollary means that if you choose the wrong targets, you'll likely end up undesirable results.

- In certain settings, people may resist this sort of initiative, and use "lack of justification" as a means of slowing or derailing an initiative.

- Typical and obvious metrics that might make sense in a traditional web 1.0 world (e.g. page hits, unique visitors) fail to capture the unique value of expanded interaction and conversation.

We convinced the business that our measurement would be anecdotal – we would turn to the community for examples of how the platform is adding value, improving productivity, etc. While some may reject this approach as lacking precision or rigor, it turned out to be very effective for us.

Our goal was to make users of the social platform more productive in how they did their job – who better to judge our success or failure than our users? If you had built a community to solve a business problem, how did it go? Or, if you turned to the social platform to find answers, how has it helped?

As an example, after three months of operation, we conducted an informal survey (using the platform, of course) where we asked users to share how the platform had improved their productivity, brought value to their work, or some other benefit.

Dozens and dozens of anecdotes were submitted by the user community. These turned out to be far more impactful than any chart or formal analysis could be.

When people questioned us on justification, we would send them the link to the discussion area where the responses were posted. This turned out to be an extremely effective technique – illustrating the broader principle of 'using social media techniques to solve social media problems' – in this case, providing justification.

After six months of the platform being in production, it was overtly clear to any impartial observer that the platform created substantial unique and differentiated value – and, as a result, the demand for "justification" and "measurement" subsided.

> ***Key point:*** *like most investments in productivity, the value of social media proficiency becomes apparent – once it's working. Although every corporate situation is different, the costs associated with an internal social platform that it may be possible to view the investment as an "experiment".*

Examples Of Specific Impacts

That being said, it is useful to share some examples of how the platform created value. Some were expected, some were pleasant surprises.

Broadly speaking, these impacts arrived in distinct categories:

- Acceleration of time-to-value through better information dissemination and engagement: product launches, customer campaigns, and so on.

- More efficient mechanisms for communication and certain forms of collaboration (e.g. replacement for concalls, emails, etc.)

- The ability to substantially re-engineer certain business processes that required widespread engagement from multiple groups.

- Establishment of a new – and influential – set of exteral "voices" through blogging

- The ability to tap an efficient corporate "social computer" to answer questions, find resources, etc.

- The ability to more effectively create and drive corporate initiatives with broader participation

- The ability to rapidly form "volunteer" efforts from motivated employees around topics of mutual interest.

- Employees that are more educated, engaged and satisfied with their work experience

- A subtle but profound change in EMC's corporate culture

More Efficient Collaboration

Like most corporations, most information is shared via email.

However, email has three problems regarding collaboration (vs. communication). First, email is not discoverable by individuals who might have an interest in a topic, but weren't a recipient. Second, it's very difficult to have a 'threaded discussion' with many participants. And, finally, search and tagging capabilities tend to be limited in most email environments.

Many people have pointed out it's far easier to create a wiki (a web page dynamically editable by anyone) and solicit improvements and comments, or start a discussion on a message board than blasting everyone with an email.

We also have been told that when looking for information on a topic, it's far easier to scan the social platform for information – and individuals – that are relevant, rather than 'asking around'.

Can we quantify this? Not scientifically, but enough people have noted this effect, and the significant level of improvement as compared to alternatives. As an example of a "back of the napkin" calculation, imagine 1,000 knowledge workers who deem themselves 10% more efficient through use of a social platform.

At $100k per knowledge worker – that's $10m.

Accelerating Of Time-To-Value

Like many companies, EMC undertakes substantial revenue-generating initiatives – the launch of a new product, or the announcement of a customer campaign, or other activity.

EMC makes a significant investment in product development and enhancement, and the process of monetizing these investments requires a "launch" of the new capabilities to an extremely large and diverse audience.

New product launches are now conducted on the social platform. Marketing messages and positioning can be refined in real-time, questions can be posed and answered in minutes, competitive responses can be tracked and responded to in minutes – it's an eye-opening experience to watch all the activity in a centralized location on "launch day".

We believe that the business value of the social platform in this use case can be best expressed as "shortening time to value" of the new capabilities being launched. Being able to provide our sales and support organizations with real-time information, as well as getting their questions answered in a timely and open fashion appears to have accelerated our time-to-value considerably.

Getting quantitative proof is difficult, but there is now a general consensus in the community that products are getting to market faster, our sales and marketing organizations are becoming more proficient more quickly, and we can engage our partner community more effectively than before.

Accelerating time-to-revenue of multiple $100m business initiatives by even a few months or even weeks results in substantial sums.

Re-Engineering Of Targeted Business Processes

Several high-value business processes became easy targets for re-engineering using the social platform.

One early and high-profile adopter was EMC's competitive group. EMC does business in a highly competitive industry, and the gathering and sharing of competitive information is an important theme in our business.

Real-time competitive information is now shared via discussion threads and wikis. Content can be dynamically updated – sometimes several times per day – as new information becomes available. Participants can add their experiences and observations to the collective pool easily and efficiently. Finding an "expert" on any competitive topic takes only seconds, and getting a response doesn't require any formal process.

The group manager of this function estimates his group is now 3x-4x more efficient and impactful by simply using the social platform. Given that EMC has roughly 10 competitive analysts, this is a considerable improvement in labor efficiency, not to mention the quality of the competitive materials.

More recently, certain product groups have moved to an "open" development process by putting all aspects of the product lifecycle online: requirements definition, engineering progress, early customer feedback, bug lists, pricing discussions – all in an open and transparent discussion.

Indeed, our first product built entirely in an open, transparent environment will be reaching the market soon. Although it is too soon to tell whether this approach will deliver substantial business value, it is clear that – even at this early juncture – the product team has developed a widespread following throughout the organization, including hundreds of field representatives who have participated in the product discussion.

Should this prove to be as successful in reality as it appears in theory, this form of "open product development" could translate into hundreds of millions of dollars in potential business value.

Another area are various councils and forums. EMC currently has an extended roster of face-to-face engagements with customers, partners, analysts and other important members of our ecosystem. These face-to-face events are expensive and time-consuming; not only for us, but for the participants.

We now are going through a process of methodically complementing and/or substituting online community interaction with meetings in the physical world. These efforts either result in cost savings (millions per year), better and more time interactions, or both.

A Powerful New Set Of External Voices

Most of EMC's business is predicated in finding new solutions to customer problems. As such, we take a serious interest in sharing and projecting our views on a variety of topics: technology, solutions, strategy, industry trends and more.

Historically, we used traditional methods to get our word out: press releases, white papers, public speaking forums and other traditional "1.0" mechanisms.

Early on, we saw substantial value in the creation of an EMC blogging community who would share our views and engage external audiences on a wide variety of topics. We used our internal platform to help recruit new voices, help them practice their blogging in a safe environment, and then promoting them to represent the company outside the firewall.

As of this writing, we now have more than two dozen individuals blogging proficiently on behalf of EMC outside the firewall, creating a substantial and formidable capability in our market segment. We can now introduce new topics easily, easily refute the claims of our competitors, and generally guide many aspects of the broader industry discussions. We continue to graduate new bloggers at a rate of roughly one per month.

The economic value of having a proficient blogging team in a highly competitive and fast-moving marketplace cannot be underestimated. EMC's blogging capability has now become a key element of our overall marketing strategy, and has transformed many aspects of how we communicate with the outside world.

A reasonable estimate of the combined value of EMC's blogging capability (in terms of alternative marketing investment) would approach 20-50 million dollars annually.

You can see our current roster here: http://www.emc.com/community/index.htm

Asking Questions And Finding Experts

EMC's offerings span an incredibly wide range of offerings and technologies. Even the simplest question can create difficulty if it's in an area that's new to the person doing the asking.

This question-asking-and-answering process underpins core business processes at EMC: driving new engagements with customers, providing advanced customer support, or performing complex system integration.

Not only can questions be easily posed and answered, experts are easily identified on certain topics, or – in some cases – gaps are quickly found in our collective expertise.

Unlike email, information shared on the social platform is available to all participants at any time – everything is searchable, tagged, roughly organized by community-of-interest, and so on.

An unexpected benefit in this regard was the vetting of all answers. Since all information is shared in an open environment, incorrect or inaccurate information will inevitably draw a heated response from "experts". And, in some cases, these experts have had to alter their official recommendations based on input from field participants.

Again, putting a number on the business value of this open interrogation is difficult, but probably runs into the tens of millions of dollars annually – given EMC's large and diverse population of knowledge workers.

Driving Corporate Initiatives

EMC officially sponsors multiple initiatives that succeed or fail depending on the level of broader employee engagement. Our internal social platform has turned out to be a substantial magnifier in accelerating the progress of multiple corporate initiatives.

A clear example was around EMC's efforts around green and sustainability. A limited grass-roots effort garnered wide and passionate participation, and – as a result – an official corporate function was established to coordinate multiple sustainability initiatives across the company.

This official function in turn benefitted greatly from the ardent and active community of participants from across the company and around the globe. As a result, EMC has established a considerable and effective focus on sustainability with a minimum of organizational investment.

Another example was around improving business efficiency in a tough economy. Corporate executives now routinely post official communications on the social platform, and invite discussion from the community. Hundreds of suggestions have been submitted and evaluated for improving business efficiency at all levels -- from the small and tactical, to the large and strategic.

A third example was enhancing EMC's formal innovation initiatives. EMC's CTO office sponsors an annual innovation competition across the company. We had an interesting opportunity to watch how this happened twice: once without the platform, and most recently using the social platform.

The first round of EMC's innovation conference had reasonable participation and engagement. By comparison, the second round had close to 1000 proposals submitted, each of which was discussed, evaluated and ranked using the social platform. The comparison was quite dramatic.

Additional examples include Six Sigma business process improvement, recruiting talent and establishing an employment brand, career development and dozens of other corporate initiatives.

Collectively, we would estimate the value of accelerating these corporate initiatives at tens of millions of dollars per year.

Grass-Roots Volunteerism

As with any large company, there are many initiatives that are important, but cannot garner official corporate support and dedicated resources.

We have seen that the corporate social platform makes it extremely easy to identify new initiatives and solicit participation with an absolute minimum of investment.

These groups include hobby clubs (photography, cooking, etc.), affinity groups (employees who share cultural or other similarities, support for charities of all sorts, teams to look at cost-saving ideas, teams to look at green initiatives at EMC – the list goes on and on.

We find it hard to measure the business value of these hundreds of informal groups, but would estimate a number in the few million dollar range.

Employee Satisfaction

Like most large companies, EMC takes the subject of employee motivation and satisfaction very seriously. We invest considerable effort in surveying our employees on a variety of issues and using the results to drive change throughout the organization.

A persistent problem area has always been around employee engagement. Questions regarding employees understanding and participating in EMC's corporate strategy have historically been relatively low. Employees routinely point to not knowing what the rest of the company might be doing, and how they can work with these other groups. Questions regarding employee's ability to discuss and feedback on various policies have also been a focus area over the years.

We have yet to run our first full employee satisfaction survey after widespread platform deployment, but the initial observations are extremely encouraging. We routinely receive unsolicited feedback from people who now tell us that they have never felt better informed about EMC's overall strategy, or that they now understand different parts of the organization much better than before, or that they feel they can openly discuss and engage in virtually any topic of interest.

Again, estimating the business value of tens of thousands of employees who are significantly and statistically more satisfied and engaged is difficult task, but probably approaches tens of million dollars per year in terms of improved attraction and retention of talent, fewer costs associated with turnover and related aspects.

Accelerating Corporate Culture Evolution

Everyone associated with this initiative has frequently observed that one of the undeniable effects of our social platform is accelerating the evolution of certain desirable aspects of EMC's corporate culture.

Words like "open", "transparent" and "engaging" are now often used to describe newer aspects of how EMC does business both internally and externally.

Not every participant at EMC is entirely comfortable with these newer aspects of corporate culture. However, given the widespread popularity of the internal platform (and the social behaviors it encourages), EMC employees at all levels of management have little choice but to accept the new norm.

Cultural challenges for employees and individual contributors included:

- Becoming comfortable with the idea that spending time on a social platform wouldn't be seen as "goofing off" by managers

- Learning to express personal opinions professionally, and without fear of retaliation (other than occasionally a heated reply!)

- Learning to communicate effectively on an open and public platform

Cultural challenges for managers and executives included:

- Being comfortable with the free flow of internal information and opinions independently of "official" channels.

- Learning to be tolerant of, and resisting the urge to control, individuals expressing unique and/or unpopular opinions.

- Listening and responding to feedback – some of it constructive, some of it less so.

Within a year of general platform availability, the shift in our corporate culture and behavioral norms was profound and noticeable across most of the organization – we had accelerated our evolution into a more progressive and mature organization.

Understandably, it's hard to put a business value on this effect, but we all know it's quite significant.

Common Attributes

Although we have seen a broad range of positive impacts across the business, it's also useful to capture similar patterns.

- It has become far easier to find people to converse with on an incredibly broad range of topics.

- People are encouraged to reach out, engage and discuss on topics that interest them.

- The conversation is open and public, and can be reviewed at any time by any interested participant.

In each area of benefit we found, there was not a substitution effect – we didn't get less of one good thing to get more of another good thing. In each and every case, the benefits we saw were in addition to traditional structured work activities.

Cynically, many of us joke that we've found the perfect mechanism to get all sorts of "free" productivity from our workforce. But, in reality, all we have done is created a mechanism where people do what they already want to do – meet new people, discuss topics of interest, and help each other out.

All of this normal social interaction is very easy to do when everyone is co-located. In one sense, we've built a global "coffee room" to bridge the inherent gaps in culture, time zones and organizational focus.

The Road Ahead

We see our investment in social media proficiency as a journey. Although we've made significant progress, we believe we have much more to do in the future to fully exploit social media as a business tool.

Below is a short list of proposed additional investments we plan to make during 2009

Internal Platform Enhancements

As this is being written, we are working towards a significant upgrade in our internal platform:

- More capacity, more performance

- A better experience for very remote users (e.g. Asia, India)

- Bi-directional email bridging – emails can be sent to a pre-defined discussion area; all discussions and postings on a topic can be bridged to a predefined email distribution list.

- Better experience on newer smartphones that support a rich browser.

- More advanced social features – "following" of people or topics of interest, expanded personal spaces.

- Expanded customization of views; allowing users to create "personal portals" combining internal and external topics

It should be pointed out that, although we wanted many of these features initially, we elected to start with a more simple and manageable subset of functionality to gain experience as to what was important, and what could wait.

Additionally, making the case for additional investment in the platform is far easier – the business case for doing so is clearly obvious.

Going External

As mentioned earlier, our overall strategy was to start with internal proficiency, and leverage our experience as we moved outside the firewall.

Several months ago, we formed a separate team to create a consistent capability for taking communities of interest outside the firewall. Although we use a similar technology platform, the processes and skills required for successful external community building are very different than internal initiatives.

The team has launched several successful external communities over the last few months, and is working on an active pipeline of several dozen more. Each of these has a relatively consistent look-and-feel, a common mechanism for establishing identity, and makes it easy for users to browse other areas of interest across multiple communities.

Most importantly, we now have literally thousands of employees who are quite comfortable with social media skills, and – as a result –the task of building effective external communities is now far more straightforward.

An example of such an external community can be seen at: https://community.emc.com/community/edn

Enterprise Content Integration

Even though this particular initiative targeted social collaboration, document-oriented (or content) collaboration is still an important and relevant topic.

As EMC is an extensive user of Documentum products, most of our corporate content lives in repositories of one form or another. Over time, we wish to expose more and more of this corporate content to our "social computer" to improve the interaction and decision making of the environment.

We are also finding that our social environment is creating important content with unique business value. Understandably, we'd like that content to be managed and preserved using our existing enterprise content management capabilities.

Unfortunately, it appears at this juncture that we will have to invest significantly in our own integration between our content and social environments. Most of the investment will come in the form of creating a consistent user experience between the content world and the social world: exposing content and tags in context, providing simple mechanisms to indentify and import important content (e.g. "save this"), and so forth.

Over time, though, we fully expect vendors of both social productivity platforms and enterprise content management platforms to provide more seamless integrations between the two domains.

Industrial Strength Enterprise Wikis

Although we have basic wiki capabilities (web pages that can be edited by anyone) as part of our internal platform, certain aspects of EMC's business need a more robust solution.

If one considers the creation and maintenance of complex technical documents, it becomes obvious that an extended collaboration model would help greatly in having subject-matter experts provide source content, as well as continually refine existing content. EMC, for example, creates many thousands of these complex technical documents as a key part of its business, making this an attractive area to invest in

As of this writing, we have completed our requirements analysis for this capability via a standalone wiki package. We will be providing it to our users in early 2009 alongside our existing platforms and organizational structures.

It is important to note that – because we have clearly established internal and external platforms and teams, this is more of a minor extension to what we're doing, rather than an entirely new initiative.

Improved Analysis Tools

Currently, we have very primitive tools to discover how people are using the platform effectively. Although we have simple counters for things like document views and aggregate activity, we are effectively "flying blind" in understanding how the platform is actually used at a granular level.

Early on, there was much dissatisfaction expressed by many of our community builders in this regard, but we weren't in a position to address the problem at that time. On the other hand, we now are much more adept at understanding the types of things we'd like to know more about, and may have sidestepped a "paralysis by analysis" phase of our journey by not having the required tools.

Regardless, we realize that we need to work to provide better profiling tools to our community developers at both a content and a user level.

Improved Knowledge Worker Client

As the platform became more successful, many of us became a bit overwhelmed at the 'corporate feed'. Unless users took explicit actions, everyone got to see everything posted on the platform.

Initially, we were quite interested in corporate RSS feed managers, as most popular RSS readers don't work behind a firewall. But – as we thought about the problem – we realized that the problem wasn't limited to RSS – there was a much broader world of "attention management for knowledge workers" that would help people discover topics and individuals of interest in their world, summarize with a "personal dashboard" activities of interest, and track literally hundreds of discussions across multiple domains.

In parallel, one of EMC's divisions (Content Management and Archiving, formerly Documentum) has been investing in a web client to solve precisely this challenge, specifically EMC Documentum CenterStage, targeted for general release in 2009.

Had we had access to this CenterStage product earlier, we probably wouldn't have been seriously interested in its capabilities. Now that we live in a world with thousands of proficient "2.0" knowledge workers, and literally millions of discussions, we fully appreciate what the product can bring to our environment.

Learn more at http://www.emc.com/collateral/demos/microsites/software/centerstage/index.htm

Final Thoughts

Much as the first wave of internet technologies brought profound changes to the corporate world, the second wave will do much the same. We believed it a matter of strategic importance to invest early in understanding what these tools and skills can bring to the business world.

We believe that the very nature of work is changing to one where the preponderance of value will be created by knowledge workers. These knowledge workers will require different tools and platforms to be productive than we have seen previously. In one sense, we see our internal efforts as an investment in learning about this new world.

Understandably, there will be those organizations that see little value in these sorts of capabilities, or – unfortunately – see social media productivity as threatening to the business. Early on, though, we realized that people will use these technologies to communicate and share – whether as part of a sponsored corporate initiative, or not. Put differently, people are going to use this stuff, whether you like it or not.

In the course of our travels, we come across many organizations who are using social media tools and techniques to address one aspect or another of their business – marketing to customers, employee tackboards and the like.

While we applaud any investment in leveraging social media, we are at the same time cognizant that – just like the web 1.0 that came before it – a centralized and strategic approach across the entire business is a desirable state of affairs.

Finally, everyone associated with this initiative – whether on the central team, or a prospective community builder, or any one of our many thousands of end users – has recognized that working with social media environments is an entirely new way of working, and can be fun as well.

Our users tell us repeatedly that the social platform is intellectually stimulating, grows them personally and professionally, and can deliver impressive business value when used properly.

And anything that's fun to do -- *while making money for the company* -- is destined for ultimate success.