TAKE IT INSIDE

Seven steps to creating vibrant

online collaborative communities

by Kay Corry Aubrey

At Microsoft, a sales engineer creates a video podcast in which he explains how he solved a difficult customer issue, and then posts it to the company's online community, The Academy. That gives other engineers dealing with similar problems instant access to a solution. They start to follow the sales engineer's posts and tag the video with their own keywords—which allows other Microsoft employees to find it through searching and browsing. Through his contributions to the online community, the sales engineer develops a reputation as a subject matter expert, which opens up exciting career opportunities as managers seek him out for key positions.

A growing number of organizations have caught on to the value of employee-led online communities and are using them to solve a wide range

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of business problems. As with this example, employees who have a common interest or job function might form a "community of interest" so they can share best practices and discuss developments within their discipline. Geographically dispersed employees can set up informal "watercooler" communities to help them feel more connected to one another and to the organization. A project team can move its work to a social software platform, virtually eliminating email and centralizing communication and knowledge.

The results of a recent IABC Research Foundation study sponsored by Marketwire on online collaboration within the work environment show that while online collaborative communities can bring significant benefits to an organization, they can be quite challenging to launch and even more challenging to see through to success. The study, *Creating Vibrant Online Collaborative Communities Within an Organization,* found that many fail, in spite of large investments, usually due to the human element—they require attitudinal, behavioral and cultural changes among users. Those that succeed help solve concrete business problems and use strategies to secure the support of both senior management and employees.

The study research included five in-depth interviews with internationally known experts in online mass collaboration, followed by a multi-day online bulletin board with 10 hands-on community managers of large-scale, employee-led online communities. We asked our respondents how they leveraged online mass collaboration within their organizations, what tools they use, what steps they used to plan and execute the community, and how they align the community to the needs of the business. (For a list of participants, see page 29.)

Business drives demand

There is a natural pairing between online communities and the role of the business communicator. Business communicators know how to effect change management strategies, create awareness,

and develop successful governance, educational and communication policies. Shel Holtz, principal of Holtz Communications + Technology (who was not part of the study but provided perspective on the findings), sees online employee communities as "one more tool in the communicator's toolbox, like print media." As with print, the communicator needs to understand the medium to use it effectively. One must grasp the power of social technology as well as "the organization's culture and dynamics, which groups to tap, when, and for what purpose," he says.

You can begin to develop online collaborative communities in your organization by following these seven steps, as determined by the study.

1. Evaluate your organization's capacity for online collaboration.

Online communities work in a flexible and democratic organizational culture, in situations where individuals are encouraged to speak their minds. Megan Murray, director of collaboration strategy for Moxie Software, a Mountain View, California, developer of enterprise social software for employee and customer engagement, also provided perspective on the study. She suggests evaluating an organization's readiness by asking how employees handle their offline collaboration. Do they look to one another for conversation and solutions, or is the organization a hierarchical and bureaucratic kind of environment where everyone has a fixed job? If the culture does not support collaboration in the first place, then creating an online community will not change that.

Developers need to understand the trade-off they are making by setting up an environment that supports more open communication. Michael Wilson, CEO of Small World Labs, in Austin, Texas, a software developer who commented on the findings, gave this advice: "You need to let go of control at one level to empower people, but the benefits far outweigh the risks. With online communities you are able to connect a bigger set of

people to a greater set of information in a discoverable, engaging, yet nonintrusive manner."

Fear and resistance can be gigantic obstacles, so the groundwork for a collaborative community must also include an analysis of who will be affected. Those invested in the status quo will likely worry about losing their status or even their jobs. Consider how to address people's anxieties and show them how they will benefit.

2. Secure top-down executive support.

Company leadership must visibly back the effort and provide enough people, money and time to get the community off the ground. Our panel of community managers advised gaining executive-level support by framing the project as a solution to a specific business problem. Those spearheading the effort need to demonstrate in a tangible way why the community is needed and the benefit it will bring to the company.

It's important to identify the community's success indicators and how they will be communicated. For example, community managers may demonstrate success by producing videos of employees describing how collaboration through the platform has transformed their work. Others may track membership (retention, gain and loss) and participation (log-ins and replies), or report on "social equity" ratings that compare log-ins, postings and replies to "value measurements" such as "likes" and accepted solutions to questions.

In most cases it's going to take time for the community to catch on. "You can't force something human," notes Murray. "If the community is successful, it eventually merges into the organizational landscape, becoming part of the way people naturally interact as they do their work."

The panel identified executive "FUD" (fear, uncertainty and doubt) as a major barrier. Managers often worry about employees using such platforms to waste time, post inappropriate or confidential content, or give bad advice. Panelists recommended addressing these fears directly and involving key stakeholders (IT, HR, legal, corporate security) in the community's early planning and the development of policies and procedures.

3. Secure employee support.

In the long run, the most compelling reasons for employee participation in the community need to be personal. The community should provide opportunities for recognition, visibility, connecting with others, learning and sharing knowledge. Powerful enticements might include the chance to talk one-on-one with executives and innovators within the company, or access to curated, high-quality content not available elsewhere. "Make it about them," advised one community manager from an international organization of speech therapists. "Provide content or access or other benefits they could not otherwise get."

"Go low, slow and in the flow," Murray says. "Start small. Offer something that is valuable, addresses a real user pain point and makes life easier. Focus on work that people are already doing. Don't ask them to do anything extra." People need to feel comfortable using the selected social software platform, so start with the social media tools they already use. If you find that many employees are unfamiliar with common tools such as LinkedIn, Twitter and Facebook, develop a realistic strategy for training and adoption.

The community managers as a group advised finding employee "ambassadors" to help grow and manage the community. These people serve as "multipliers," welcoming new members, providing informal training, modeling appropriate behavior and reporting abuse. Ambassadors are easy to spot—they are the ones who gravitate to the community without prodding. They understand social media, often use it in their private lives and can envision its potential for the organization.

Another way to attract interest in the community is to offer material incentives such as reward points or entry into a contest to win a prize. Some organizations move project work to the platform so that employees have no choice but to use the

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about the author

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community, but this approach could backfire if employees are resistant and unprepared.

4. Run a pilot program.

A pilot program offers an opportunity to engage senior-level leaders in the planning process and to address their concerns. Such programs give everyone the opportunity to see the benefits and potential of the new channel and how it will work in their environment.

The panelists recommended selecting an existing group of employees (for example, members of a listserv). A pilot team might include a project leader, a project manager, technical and IT support, and a community manager. Other start-up costs include training and building awareness.

Having good community management in place from the start is critical. Community managers can be recruited from the ranks of ambassadors. Their job is to recruit people to the community, encourage their participation and gently guide the group's interaction so it stays productive and on topic. Ideally, an online community should become self-sustaining, though communities that are critical to the organization may require a full-time person in this role.

One community manager who works for a large health care system described how she runs an online community pilot for each new group of employees. Part of her pre-work with people from each potential new online community is to have at least two face-to-face meetings, several trainings and a great deal of communication to create awareness, understanding and buy-in.

5. Create awareness for the community.

Guerrilla marketing techniques, which rely on creativity and passion versus a big marketing budget, generate excitement and build awareness. Study participants described promoting their communities through email, contests, giveaways, flyers, etc. Word of mouth and the personal approach are highly effective.

Meghan Mehrens noted that Yum! Brands used a variety of fun and intriguing approaches to build awareness, such as pasting large chat bubbles on restroom mirrors to call employees' attention to its iChing community. Yum! also held informal brown-bag training sessions, systematically enlisting ambassadors to help

their co-workers get on the system.

Even in the most successful communities, continuous marketing is necessary to maintain awareness. Jono Bacon, founder of the Ubuntu open source community, which has more than 150,000 members, spends half of his time promoting his community. "A lot of my work is just banging the drum and getting people excited," he says, "giving exciting presentations to international audiences and writing passionately about the community."

6. Develop guidelines and governance to fit the organization.

Research respondents described a wide variety of governance models. The Ubuntu open source community, according to Bacon, follows a "benign dictatorship" model, with explicit roles, a chain of command and processes that offer governance while providing a structure for member input. Clear rules are needed in open source collaboration because community members often do not know one another, yet they are all working together to create complex software. To deal with this, work is broken down into discrete, traceable units that can be completed by a single person in a short amount of time. Each tiny work parcel must fit perfectly into the larger project, like Lego blocks. Management and the platform coordinate member activity.

Small World Labs' Michael Wilson advises, "Just because you've moved employee communication online does not mean the old rules go out the door. Any sort of community needs to have guidelines on how people can communicate [and] what is acceptable." Specifically, he adds, there need to be explicit community guidelines that spell out mores and acceptable behavior, as well as company policies regarding originality of content, quality and intellectual property. Anonymous posts should never be allowed. Technology, as well as moderators and ambassadors, may be needed to monitor the discourse in particularly sensitive environments—for example, communities where members might share information that is restricted, classified or harmful to someone's reputation.

The majority of panel members said that the initial management fears around inappropriate behavior never materialized.

Wherever possible, the communities should be self-governing. "Our most successful communities

Who's who

Participants in the IABC Research Foundation/Marketwire study included:

Jono Bacon, community manager of the Ubuntu Community and author of *The Art of Community.*

Christian Finn, director of SharePoint product management, Microsoft.

Barry Libert, author of *We Are Smarter than Me* and *Social Nation.*

Meghan Mehrens, senior manager of enterprise business social, Yum! Brands.

Giovanni Rodriguez, CMO, Broadvision.

The community manager online panel included:

Daniel Eckhart, head of community management, Swiss Re.

Brice Jewell, manager, UCern, Cerner Corp.

John Lovett Jr., manager of community programs, CA Technologies.

Maggie McGary, online community and social media manager, The American Speech-Language-Hearing Association.

Scott Moore, director of community development, Answers.com.

Marilyn Pratt, community advocate, SAP Community Network.

Vanessa Szpara, marketing communications manager, Entegris.

Karen Trewin, department of public affairs, The Mayo Clinic.

In addition, several participants who asked to remain anonymous are not listed above.

get the report

View the full IABC Research Foundation report, *Creating Vibrant Online Collaborative Communities Within an Organization,* sponsored by Marketwire, at *http://discovery.iabc.com /view.php?pid=2013.* It's free to IABC members and available to non-members for a fee.

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have come together around a common problem, looking for an innovative solution," remarked a community manager from a global retail business. "They work together to create a charter that defines their goals, responsibilities and how they will govern their community."

7. Find a platform that matches employee workflow and organizational needs.

The technology decision, while not trivial, should come last in the planning process. Aside from providing security, content management and employee workflow support, the social software platform should offer features that encourage employee adoption. These features include making it easy for members to create and administer their own communities, create and maintain their own profiles, and view the profiles of others. Members should be able to search profiles to find people with specific expertise. The platform should provide access control while making it easy to generate and evaluate ideas as well as comment, like, and share ideas, postings, documents, videos and other items. To help choose a platform, the respondents recommend mapping out the work and task flows of the groups that will use the community.

Many study respondents ran pilots using open source and other free platforms, and transitioned to a purchased product once they better understood their needs. "We tried to find something that was easy to use 'out of the box' with minimal instruction," said Karen Trewin of The Mayo Clinic. "We also worked to find something that would be compatible with our current and emerging intranet platforms." In the end, the platform should be less about technology and more about creating an environment that makes it easy for people to find one another, connect and collaborate to move the organization's work forward.

Overall, the study found that online collaborative communities within organizations will likely become more commonplace in the business world. Many forces are driving the trend, such as the globalization and virtualization of the workforce, the need for employees to share information and best practices, and the workforce's growing familiarity and reliance on social media as a primary communication channel. However, the process of setting up and running these communities requires careful planning so that they work with the organization's unique culture and politics. Business communicators need to have a thorough understanding of how they can add online communities to their toolbox. •