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Aligning Social Collaboration with Business Objectives

Our new social collaboration platform embodies the principles of crowdsourcing and knowledge sharing in more business-friendly ways than ever, enabling employees to work more productively.

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Executive Summary

Intel IT has provided a number of social collaboration tools to the enterprise over the years. Until recently, those tools lacked the integration and security required for social collaboration to reach its potential in a business context. We realized that we needed a platform that was easier to integrate with our core business tools and processes. We also needed to support content at higher security classification levels and make it easier to collaborate on that content. To help Intel meet its objectives, we needed a platform that could provide more advanced ways of encouraging business-critical participation.

In 2013 we launched a new social collaboration platform that combined professional networking and social capabilities with content coauthoring for business-focused collaboration. The new platform improves user experience, allows increased security levels, integrates with core business processes, and encourages employee participation.

To increase employee adoption, we developed use cases and focused on improving the user experience in these four areas:

- **Integration.** We integrated the platform with business systems—such as those used for customer relationship management, email, and content creation—enabling employees to discover, consume, and contribute content within the tools and processes they were already using.
- **Security.** By encrypting data in transit and at rest, along with assigning a security classification level to each community, we increased the levels of security available for collaborative activities beyond “confidential” to include “restricted secret” and “top secret.”
- **Engagement.** We enabled employees to see not just the comments on their posts but also the number of people who read, liked,

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Acronyms

- CRM** customer relationship management

bookmarked, and shared each post. We also employed gamification features that awarded points and badges for participating in certain activities or completing “missions.”

- **Mobility.** We made it easier to find and contribute content from a wider variety of mobile devices.

Pilot tests have shown that employees like the new platform and are using it in increasing numbers. Work communities and interest-based communities have reported value gains as employees use this platform to seek and share information related to their geographic location, product focus, role, and interests.

This new social collaboration platform has embodied the principles of crowdsourcing and knowledge sharing in more business-friendly ways than ever, enabling employees to work more productively and arrive at solutions more quickly.

Background

Over the years, Intel IT has provided the enterprise with a variety of social collaboration tools, always with the goal of supporting the business in increasingly meaningful ways. Until recently, those tools lacked support for the security levels that many of the business groups required, and they were not integrated with other business tools and processes.

Therefore, many employees used the previous social collaboration tools more to discuss nonbusiness issues than to conduct business conversations. Because employees couldn't see how many people read their posts or how people used the information, they had no way to measure their contributions' value. Those social collaboration tools were often difficult and inconvenient to use with mobile devices. And the notification controls lacked the appropriate level of granularity, resulting in unnecessary information, or “noise.” The noise tempted employees to turn off notifications altogether, eliminating opportunities to join important conversations.

In updating Intel's social platform to make it more relevant to our business, we identified the following objectives:

- **Higher levels of security.** Teams working on restricted and top secret projects had to be able to use the collaboration platform from inception through delivery.
- **Tighter integration with business processes.** To use social collaboration in the context of business processes, the tool needed to be more intuitive and better aligned with business unit strategies and goals.



- **Better content filters.** Eliminating noise and providing more relevant information in the activity stream required more granular controls for notifications, including the ability to set up streams for different topics, to subscribe to content changes only, and to receive email notification on just the activities that matter most.
- **A more engaging user experience.** Encouraging contributors meant instituting recognition and feedback about who is reading, bookmarking, liking, and sharing their content.
- **An improved mobile experience.** To make the most of the social collaboration platform, the mobile experience needed to support access from any device.
- **Executive involvement.** We wanted the social collaboration platform to encourage executives to interact more with employees by focusing on the topics that employees wanted to discuss.

Solution

In 2013 we launched a new social collaboration platform that combines professional networking and discussion capabilities with content coauthoring for business-focused collaboration.

Custom activity streams enable employees to filter out less-important content and focus on what they need. By integrating the social collaboration platform with core business tools, we provided employees with a single place to find and update information while continuing to work within the established processes. We engaged employees through an improved user experience and the addition of gamification features, and we expanded mobile functionality.

Integrating with Enterprise Tools and Processes

By integrating our new social collaboration platform with core business systems—such as office productivity applications, our customer relationship management (CRM) system, and email—we enabled employees to discover, consume, and contribute content within the tools and processes they were already using. We identified communities and their security needs within each organization that could benefit from social collaboration. We also involved executive communication through question-and-answer sessions, using the collaboration platform itself to illustrate its value.

Community Types

The Sales and Marketing organization is now using the social collaboration platform to identify collaboration communities based on the type of group and its focus. These communities use social collaboration to contribute to business goals by encouraging high-value, bidirectional communication across the organization.

- **Type 1—Sales account and opportunity communities.** These collaborative communities are generated automatically based on account and opportunity names, hierarchy, and permissions in the CRM system.
- **Type 2—Work communities.** These may be formal groups assembled to work on specific issues or informal groups that need to have discussions and make decisions collaboratively. These are self-forming based on need.
- **Type 3—Interest-based communities.** These groups share common interests, such as geographic location, market segments, technologies, products, or peer roles. They can benefit from understanding what is happening in their area of interest worldwide.

To provide relevant content to the communities, we integrated the social collaboration platform with existing business information and workflows that reside in the CRM system. Type 1 communities (see Figure 1) use and update content in the CRM system; communities of type 2 and 3 typically do not. The integrated design allows employees to use a single platform regardless of the office productivity tool used or the content location.

As with the CRM system, we continue to develop web services that will allow a content repository and additional business tools to integrate with the social collaboration platform. We have integrated the social collaboration platform with Circuit News, Intel's online daily worldwide employee newsletter. Corporate and local news is being enhanced with social capabilities, such as the ability to comment, like, and share. This new capability will enable employees to engage with messages from the Human Resources Employee Communications organization.

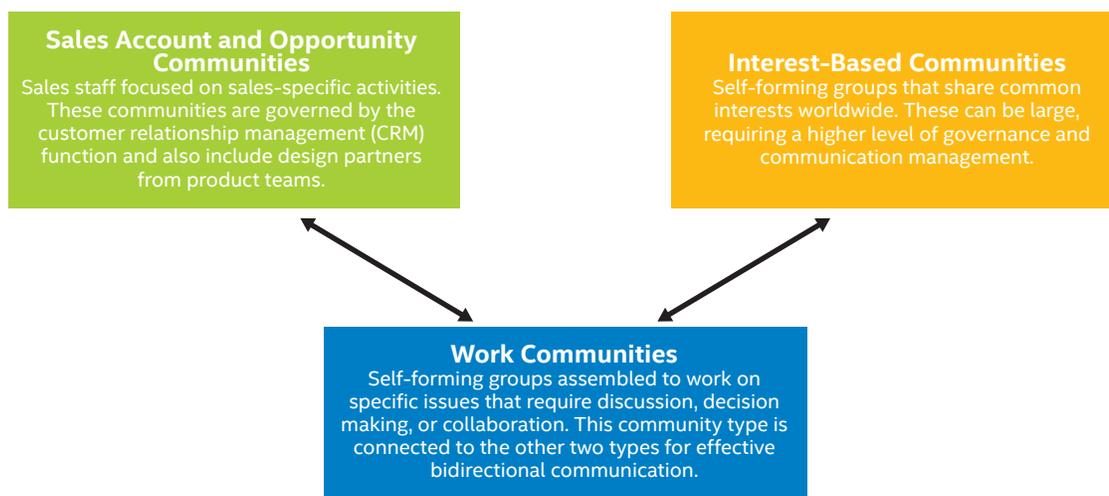


Figure 1. The Sales and Marketing organization's collaboration communities, which were created for the new social collaboration platform, encourage high-value, effective communication.

Security

The social collaboration platform needed to support a higher level of content security, assurance of confidentiality, and consistent availability. Encryption of data in transit and at rest was added to all content to improve security, and we included the ability to indicate a community's security classification level and gateway controls to filter out highly classified content from non-Intel-managed devices.

To address confidentiality, in part, we provided employees with a way to designate visual themes for their groups to indicate the security level, such as "restricted secret" or "top secret." Whereas email is not supported by the information security team as a means of sharing classified content, the social collaboration platform provides the ability to share content easily without worrying about how the content is being distributed and stored.

Performance

We conducted performance tests to ensure that the social collaboration platform functioned within acceptable usability and reliability limits, including time to load a page, peak load for concurrent users, network bandwidth, profile loading (using our entire directory of 100,000 users), and performance feedback.

Executive Engagement

Engaging employees in organizational goals and strategies can best be accomplished through dialog and transparent updates. IT's ask-vote-answer forum, entitled "Take It to the Top" (as shown in Figure 2), has enabled a new kind of online engagement between Intel's global workforce and its senior executives. These monthly forums allow employees to ask executives anything from business strategy to their favorite color. Employees can also comment on and vote for their peers' questions. During one-hour live sessions, the featured executives give candid answers to the questions that attendees have given the most votes.

"The ability to reach so many people and answer so many interesting and pertinent questions in a single hour is amazing," Hudnell said.

– Rosalind Hudnell,
Intel's Vice President of
Employee Communications

Welcome to the Take It To the Top Forum.
How does it work?

	<p>Ask What questions do you want to take to the top? Post your questions up to 24 hours in advance, so that others have a chance to "vote them up."</p>		<p>Vote You and your coworkers' votes move the most popular questions up.</p>		<p>Answer See answers to the most popular questions around the world and converse with your coworkers about them.</p>
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Figure 2. In monthly "Take It to the Top" sessions, executives respond to the employee questions that attendees most want answered.

This type of social interaction is changing the conversation from one-to-one to one-to-many communication, and, more importantly, from one-way to two-way collaboration. Sharing leaders' responses to issues that interest employees through social collaboration is another step toward engaging and aligning on business goals. We plan to use the ask-vote-answer platform for ongoing "Take It to the Top" forums and other leadership-employee engagements.

Engaging Employees

Employee adoption can be one of the biggest challenges in social collaboration. As mentioned previously, some of our existing tools had a reputation for being minimally relevant for business. Changing employee perceptions required a thorough understanding of their work as well as insights into ways to motivate them.

Use Cases

We gathered information from several internal studies to map the key collaboration-related business objectives for each user segment. For example, senior and veteran sales managers provided us with a full understanding of their challenges and opportunities, particularly their need to take advantage of micromoments, brief opportunities to update information from their mobile devices while traveling. We then developed use cases that would help the groups meet these objectives, identifying what to target early based on the potential for positive business impact.

Just as we developed user stories for our Sales organization related to integrating the CRM system and our collaboration platform, we also developed other more broadly applicable user stories related to specific types of work:

- **Project collaboration.** This use case encompasses small projects and provides employees with the ability to manage calendars, track action requests, coauthor content, conduct project-related discussions, track milestones, and display project status.
- **Team collaboration.** This use case connects direct team members on non-project-related work, such as staff content sharing, meeting minutes, team discussions, and announcements. These activities often exist for longer periods than projects.
- **Communities of interest.** The purpose of a community of interest (also referred to as community of practice) is to promote cross-team, cross-geography, and cross-project information sharing related to a business topic. The focus of these communities is to share potential projects, industry news, ideas, and tips. Communities of interest are meant to be discovered and easily joined.



Enhancing Communication with Video

In a geographically dispersed enterprise, the ability to convey ideas and instructions through video improves communication because of video's immediacy. To enable this collaborative effort, we built and tested a robust platform for creating, sharing, and viewing videos that is integrated with the social collaboration platform. The platform includes capabilities like these:

- Creating a new video using a webcam
- Uploading existing videos
- Recording desktop actions for training purposes
- Making quick recordings of verbal instructions
- Adding comments to videos
- Creating personal playlists
- Promoting videos through various collaboration tools

In addition, employees can create their own channels with security controls to share or restrict content. Feedback on this capability has been positive.

- **Organizational communication.** The collaboration platform offers top-down communication from management and bottom-up communication from employees within departments, business units, and the enterprise. It helps globally dispersed employees stay connected.

Adoption

One of the ways we increased participation was to provide employees with instant feedback on their posts. With the new collaboration platform, those who post content can see how many people read it, who liked or bookmarked it, whether it was tagged or shared, and what people said about it.

Another way was to use gamification, or features of gaming, enabling employees to earn points and badges based on the level of participation. Through gamification, employees can build an online reputation for the usefulness of their content and interactions. Reputation points are awarded for activities like these:

- Posting status updates or responding to others' posts
- Providing answers or contributing to discussion questions in ways that others find useful
- Creating new documents or blog posts
- Completing project tasks
- Having others in the community like, share, or bookmark the contributions

Points are also awarded for completing predefined general missions, which are defined by the individual teams and departments. Figure 3 illustrates a few of the many opportunities employees have to earn points.

Example Gamification Badges

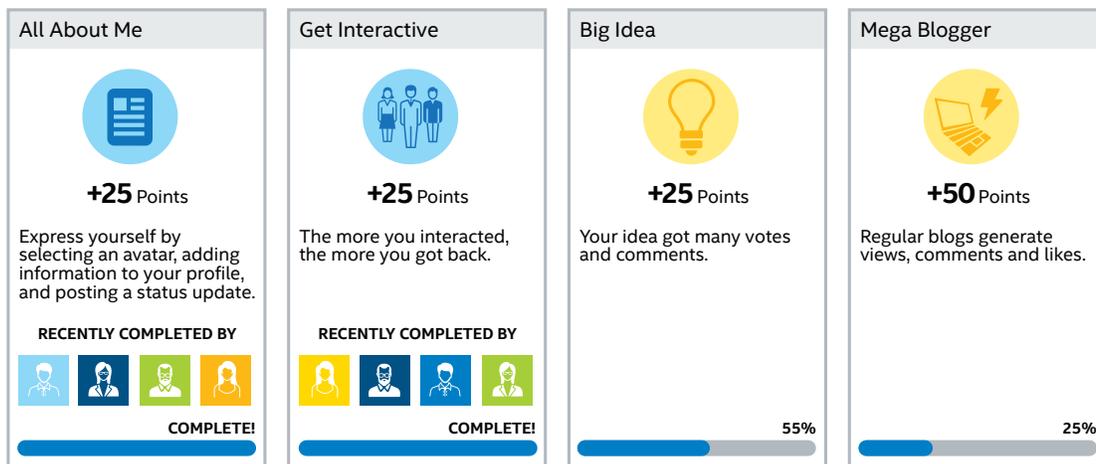


Figure 3. Example gamification badges. Employees can earn points and badges through a variety of activities on the new social collaboration platform.

Adding Mobile Functionality

Mobile functionality is a key component of social collaboration for business. Employees must be able to take advantage of micromoments and find or update content while away from their computers using a mobile device. We provided mobile web capabilities to all users at launch, piloting these capabilities with the Sales organization first. Salespeople are an example of those who can most benefit from mobile collaboration tools because they are often traveling and unable to connect on their PCs for hours at a time.

In the past, salespeople had to wait until the end of the day to update information about a customer visit once they got home or to their hotel rooms. As a result, updates were not timely, and details were sometimes lost. Now, when a client mentions something that relates to a future activity, for example, the salesperson can update the account community from a mobile device, informing fellow community members accurately and immediately.

Results

We have conducted a number of pilot projects to determine employee satisfaction and adoption of the social collaboration platform. We continue to see steady adoption and hear about value gains, especially across geographic locations. The communities of interest, in particular, have been successful with employees seeking out information directly related to the geographic location, product focus, role, and other areas.

The communities of interest have embodied the principles of crowdsourcing, sharing knowledge, and arriving at solutions more quickly.

Sales was the first group to use the social collaboration platform, and they have reported productivity improvements in the following areas:

- Consolidating emails and account documents from multiple sources into centralized community-based locations
- Sharing best-known methods based on interest or discipline
- Conducting more productive meetings and even eliminating some meetings
- Finding information about products and technology faster and understanding it more thoroughly
- Learning about teammates in geographically dispersed locations, leading to better business relationships
- Rallying the team around forecasting and revenue goals

The mobile app also saw significant improvements in ease of setup, use, and overall value. In a survey, 91 percent of participants called the mobile-app installation process okay, easy, or very easy; 88 percent rated the app's performance as satisfactory, fast, or very fast; and 90 percent said they would use it in the future.

OUR SOCIAL COLLABORATION PLATFORM



Enables people to use mobile devices in new ways to achieve business goals.



OF EMPLOYEES WOULD USE THE MOBILE APP AGAIN.

Conclusion

Because past social collaboration tools were not fully integrated with core business tools and had limited security levels, employees often avoided using them for business interactions. Opportunities for collaboration were missed.

We designed a new social collaboration platform that improves the user experience, allows increased security levels, integrates with core business processes, extends capabilities securely to mobile devices, and includes elements that encourage employee participation.

By understanding employees' work, we focused on increasing adoption through these motivating features:

- **Integration.** Integrating with core business systems provided employees with a tool to discover, consume, and contribute content where they were already working, allowing them to remain within the established processes. We enabled employees to connect to the social collaboration platform while staying in the environments where they are comfortable.
- **Security.** By adding enterprise-class security controls, we enabled employees working on "restricted secret" and "top secret" projects to trust the social collaboration platform to meet both their business needs and IT's security policies.
- **Engagement.** We gave employees the ability to see how many people read and liked their posts, whether the posts were bookmarked or shared, and what comments people made on the posts. We also incorporated gamification features that award reputation points and badges for certain activities, rewarding individuals whose content is valued by the community.
- **Mobility.** We made it easier to find and contribute content from anywhere using a variety of mobile devices.

Production rollout in Sales and other business groups has shown positive employee satisfaction and consistently rising adoption rates. Communities using the platform have reported value gains, such as increased productivity, fewer meetings, and increased seeking of information directly related to their geographic location, product focus, role, and other areas.

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