ENGAGE FOR SUCCESS

A GUIDE TO ENTERPRISE SOCIAL NETWORKS/ ORGANISATIONAL SOCIAL MEDIA FOR LEADERS

This guide is published by the UK's Engage for Success movement on its website engageforsuccess.org

It was produced by a sub group called 'the more social than media group' whose purpose is to make the world of corporate media (enterprise social networks) accessible to leaders and their advisers so that they can make informed choices about investing in technology.

Current chair of the 'more social than media' group (John Smythe) comments:

- We hope to get the point across that organisations need to develop a commercial and cultural plan for their enterprise social network before they review technology solutions, and avoid the trap of seeing it just as an IT investment
- You can't bolt an ESN onto the side of a Kremlin and expect behaviour change to follow – the social outcomes required and the corollary behavioural changes need to be articulated as part of the commercial and cultural plan
- On the other hand you can't plan for everything – there will be unexpected outcomes, some good and some not so good.
- A command and control approach to planning an ESN is to miss the nuance that this technology will disrupt old assumptions about top down leadership. Old models of leadership will need new, more mutual approaches to leading change / adopting new behaviour
- The executive suite needs to be involved in the plan as do the people it's intended for
- It will also change old assumptions about top down internal communication as ultimately many people will be able to pull the content relevant to them for themselves and collaborate with far fewer permissions required from old style middle management.

This is a start. We hope to add more cases and advice, so please let us have your ideas for improvement. Thank you:

- David High
- Rob Catalano (and Achievers for content including the case studies)
- Emma Bridger
- Hazel Stewart
- Rob Bridges
- Sally Longstaff
- Marc Wright
- Charelle Wigley
- Faith Forster
- Helena Krawitz
- Chris Holloman
- Nina Pattinson
- Jo Dodds
- Richard Mortimer from the Ministry of Justice/Engage for Success for excellent editing
- Sequel group for the design www.sequelgroup.co.uk

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01 How social media is transforming business

GOAL: INTRODUCE THE GUIDE, WHO IT IS AIMED AT, AND WHAT READERS WILL FIND BY READING THIS GUIDE…

There are currently about two million people in the UK living with a cancer diagnosis and an additional six million family, friends, carers and employers. Macmillan Cancer Support has calculated that number will double over the next 20 years, and so rather than doubling the size of its organisation to cope, it has put social media at the heart of its strategy to provide increased and more effective support. About 25% of Macmillan people now use Twitter professionally and personally, helping to spread Macmillan's messages to about 12 million tweeters.

Southeastern Railways trialled 'WorkMate' in late 2011, a social media platform that provides functionality similar to Twitter, Facebook and Wikipedia. Employees can have conversations, ask questions, express opinions and set up private groups. Southeastern Railways can talk to its employees, communicate new initiatives, and collect staff views on changes to services. During the 1st three months their intranet had 550 visits (about the norm) whereas WorkMate had over 52,000. Two years later, 80% of employees had registered with 2,200 visiting each week, and about 500 posting. Approximately 60 business questions are asked each week, while over 90,000 conversations have taken place. There are 160 active private groups – 65% work related, the rest private. Southeastern had created a new set of company values and produced a 'values in 60 seconds' video which has had over 6,000 views. WorkMate has now replaced their intranet, and Southeastern attribute to its use their best ever performance and customer satisfaction scores, best ever people scores on a range of metrics from formal grievances to sickness absence, a 12% increase in response rate to the employee survey to 80%, and a ten percent increase in their engagement metric to 70%.

Household appliance group Electrolux is passionate about innovation and wanted to involve its employees across the globe in an ideas 'crowdsourcing' event. It ran a global 72 hour online idea generation session called the 'Electrolux innovation jam', and encouraged its staff to register with a dedicated website where they could submit ideas, and comment and vote on other people's ideas. 41% of the target audience of 18,000 white-collar employees signed up to participate. More than 3,500 ideas were submitted, 12,000 comments made, and 20,000 votes for and against ideas. Innovation coaches spent a week looking at the ideas that had received top ratings and created a short list of 20 ideas. These were then entered into a game on which participants invested points they had gained during the 72 hour session and at the end of the week, the list was reduced to a top ten. The ideas owners and teams had to submit a video presentation two weeks later to the

Electrolux top team panel who selected three winners.

Many local medical centres and hospitals are now reducing wasted appointments and waiting lists by sending text messages to patients reminding them of upcoming appointment dates and times, with an option to cancel or rearrange if these are no longer practical for them.

Recruitment and talent sourcing by organisations has been revolutionised by LinkedIn and other social media platforms. Social media now connects prospective companies and managers and potential candidates, enabling organisations to tap into a massive and hitherto passive candidate pool, and candidates to tap into a much wider range of opportunities tailored to their specifications. Both parties can find out much more about each other than ever before.

Could social media revolutionise how you reach potential customers, how you talk to and involve your people in the delivery and development of your business, how you grow your organisation? Enterprise Social Networks (ESNs) are transforming how we collaborate, communicate and succeed in the marketplace.

This **Guide to Social Engagement** aims to help CEOs and top teams understand the power of social media and the positive impact it can have on companies and employees and why and how social media should be at the heart of their organisation's strategy.

It looks at the barriers, the journey to success and real-life examples of how companies have leveraged the power of social media.

It guides you through the process of integrating social media into all aspects of your organisation – internally and externally. And if you're not ready for the journey quite yet, it's meant to eliminate doubts around new approaches and technologies. It has been put together by passionate people, practitioners, educators and analysts with the same belief that started the Engage For Success community in the first place – that engaged employees can positively impact organisational success, however measured.

Many employees are already using social media; adopting the right approach to it allows you and your organisations to be part of their conversations and to draw easily on their insight and innovation to create solutions.

02 Underpinning principles

Successful deployment of social media in an organisation to support its growth and organisational health relies on building on the right principles, and on an effective partnership between you and your people. Engage for Success has identified four enablers of engagement that are key to securing and maintaining the commitment and engagement of its people to the organisation in all stages of its life. They are a particularly helpful template to measure your organisation against when wanting to land any change in an organisation and to make sure the people aspects are thought through thoroughly and any risks that you might not take your people with you are mitigated.

Introducing and using social media is no different from any other change, and you should think through how you measure up against all four principles when considering what benefits social media could bring to your organisation.

1. Visible, empowering leadership providing a **strong strategic narrative** about the organisation, where it's come from and where it's going is important in increasing alignment and engagement of employees.

   Social media is vital in today's world not only to communicate, but amplify the strategic narrative. It allows everyone to participate so the narrative becomes a two-way conversation rather than a one-way monologue. You and your team can use social media to reach many more of your people with the messages you want them to hear, and to spread.

2. **Engaging managers** who focus their people and give them scope, treat their people as individuals and coach and stretch their people.

   Managers are a key stakeholder group: if they grasp the potential and the practical detail of what social media can do, you can transform your culture quickly, so everyone is thinking through how their team can use this new tool to maximum effect.

3. **Employee voice** throughout the organisation, for reinforcing and challenging views, between functions and externally. Your people are central to the solution. Involve them, listen to them, invite them to contribute their experience, expertise and ideas.

   Social media provides an excellent opportunity for two-way communications, asking questions, gathering data, enabling your people to see they are being listened to and involved, so everyone is involved in growing your organisation's reach.

4. **Organisational integrity** – the values on the wall are reflected in day to day behaviours. There is no 'say – do' gap.

   A social media platform provides transparency to a company's culture and how much of a 'say-do' gap exists or not, creating a real sense of authenticity and values-driven purpose.

03 The Business Case for integrating social media into your organisation

> **GOAL: BUILD THE BUSINESS CASE, INCLUDING THE RISKS OF NOT DOING SOMETHING IN THIS AREA (REPUTATION, ATTRACTIVENESS TO NEW RECRUITS ETC)**

The changing way people work and communicate in and outside work, and the growing realisation of the power and reach of social media, are convincing many organisations of the need to integrate social media into their business model, in order to keep pace with the competition.

How is your business responding to:

- The **need to stay competitive**. Multi-channel practices to communicate internally and externally are becoming a priority for organisations in order to stay competitive.

- The **changing employee demographic** – in 2016 PwC is predicting that almost 80% of their workforce will be made up of millennials – a changing world where social media is known and expected by the majority (PwC, 2013).

- The **changing attitude of the workforce**. Command and control is no longer appropriate. Employees don't ask 'how high', they ask 'why'. They want more meaning in the workplace, a career or a calling that aligns to an organisational purpose. As a result, companies are looking to create ways to share their strategic narrative and meaning with employees while ensuring they are involved in the conversation, and to have daily conversations and use storytelling to align behaviours to company goals and purpose.

- The **changing make-up of organisations**. Better communication tools are needed as the workforce becomes more flexible – 30-45% of employees are virtual/contract/freelancers – and to work across department and locations as organisations adopt flatter structures (forbes.com, 2014).

- The **changing habits of your people**. 25% of the world owns a smartphone – it's just easier now for people to access social tools especially as the workforce gets more global.

> *"As social media continues to break down the barriers between personal and professional lives, more and more of our employees have a role to play here. We don't seek to limit them or prohibit them in any way, but we do issue clear guidelines and training, so that they understand their responsibilities to the company in social media."*
>
> *Jackie Nixon, Head of Marketing for the UK and Ireland at Cisco, highlighted this point well in an interview with the Guardian,*

Integrating social media into your business model brings a number of benefits:

- **Employee voice** – your people are social by nature, and are already having conversations about your company – you're just not privy to them. Giving your people voice can positively impact their trust in, and engagement with, your organisation, and can generate great ideas to help performance and growth.

- **Data analysis and insight** – social media communication can enable organisations to gather insight and data in real time about products and services. When customers are communicating their satisfaction with what they have received in terms of quality, value and outcomes, you can find demand for the goods or services you supply suddenly dramatically increasing.

- **Transparency** – social media tools can help your organisation give your people greater access to information, draw them into conversation about topics that help them to deliver, develop and grow your business, and thereby make a positive impact on their engagement.

- **Talent is more likely to be attracted to you** – some graduates select employers based on whether they have progressive social engagement technologies and policies.

- **Promoting the company's strategic narrative** – social media can create opportunities for your organisation to spread its compelling narrative to all your people so they own it and can pass it on to others. It also provides a platform for enhancing your organisation's reputation internally and externally through great stories of customer service and innovation.

- **Social selling** – sales and marketing colleagues often have prolific networks. Social media can give an organisation great power to get information about its products or services to the right audiences, to build relationships to grow business, and even to lower customer support costs.

- **Content Marketing** – An integrated social media campaign across internal and external channels can bring your people and customers together to augment content and add legitimacy to the company story.

Where do you want to extend your reach? What do you most need to improve – internal communication and conversation with your people, or external communication and conversation with your customers and clients? How and where could social media most help you?

What struck you most about the changes Macmillan Cancer Support, Southeastern Railways and Electrolux made? You can read their full case studies in chapter 9.

But first, who should be considering these questions for your business?

To integrate the use of social media effectively in your organisation, you need the whole Executive team to be involved in the decision. The team may well need help to really understand the potential impact of social media. You may well want to set-up a cross-functional group tasked with a quick project to research and present the potential benefits and risks to the organisation, and how others have transformed service delivery through social media. Why not involve your younger people, already well attuned to social media to help develop proposals about what could give you the competitive edge?

From the 'More social than media' group's research into the impact of Enterprise Social Networks/corporate social media we know that many ESNs are installed without a commercial or cultural plan for it (register an interest in accessing or participating in this research with johnsmythe@engageforchange.com).

In these cases an ESN arrives often without a clearly stated purpose, clear sponsorship or induction and employees are left to experiment. An initial spike in use is often then followed by falling participation and quite often failure of a platform.

Contrastingly ESNs that are introduced with a clearly articulated commercial and cultural purpose, with top level sponsorship and some sensible ground rules enjoy high levels of participation and satisfaction. Thus the need to construct a commercial and cultural plan before any tech solutions are looked at. Whilst it makes sense to have wide representation in the planning process, top management must take an active part and see the project as a red thread running through the organisation's strategy, rather than making the mistake of seeing it as 'just a tech investment'.

Perhaps you are already thinking of the risks. Of course, as with any new initiative, there are risks. But there are also mitigating actions.

- **Your people may say 'the wrong thing'** – yes, your people will occasionally say 'the wrong thing', and the immediacy and reach of social media can amplify their voice. But 99% of your people won't 'break the rules'. You can therefore have a high level of trust that your people won't use these social tools to 'say the wrong thing'. Clear guidelines, policies and training are crucial to help people not to make mistakes and to make sure that everyone knows that if someone does go over the line, or against policy, then it will be dealt with.

- **Information security** – there is a risk that an employee might inadvertently use social media to release company or client information, but this is true of all forms of communication. The risk of this will be mitigated by effective information assurance policies, practices and training.

- **Cost** – Implementing a new practice or technology includes an investment, and there may be competing priorities on investments within the company. New technology comes with a price-tag; it depends on what you want to do and what type of platform.

- **Time and resources** – if your organisation wants to integrate social media effectively, it will take time and resources to manage the process.

04 Common Barriers and Overcoming the Challenges

GOAL: WHAT ARE THE COMMON DIFFICULTIES OR CHALLENGES? HOW DO YOU TACKLE THEM?

The barriers to social media adoption by organisations are similar to those that prevent any new ideas taking hold in a company. Many organisations are risk-averse and become focused on "doing things the way we've always done them" because that's what they know. This applies as much to your people as well as to you and your top team.

The first factor that impacts on successful adoption of technology is the extent to which people see the benefit for themselves – **what problem is it solving?** Is it being rolled out because it's the latest fad and, if your staff sit tight, they know it will all be forgotten in six months, or can your team show them how successful use elsewhere has direct parallels in your field of business.

Secondly, '**What's in it for me?**' This will vary from person to person. What is the incentive for them to use it? Will it just be another task to do, or can your team give concrete examples of how this will be a new and better way of working?

The third factor that impacts upon successful technology adoption is **how easy it is to use**. Give someone the best 'tech' in the world, but if it is too hard to figure out, or if it takes too long to do something then it will just get left on the shelf (or in the cloud).

Your answers to those questions need to form the basis of your compelling narrative for this change.

There are some common barriers to adopting social media. You might want to think about addressing them in your narrative too. Here are three:
1. Misunderstanding of the medium and its capabilities.
2. Command and control.
3. Previous adverse experience.

You may be thinking about these issues yourself. Your team might be. Your people might be. So are they valid concerns and what will you say when they are raised that answers the concern in the context of your own business and makes the person raising the issue feel listened to, valued for their contribution, and won over by your argument?

Misunderstanding of the medium and its capabilities
"It's just for kids isn't it?"

Mark Zuckerberg, along with a group of his friends, created Facebook as a means for students on his campus to communicate with each other. Teenagers in the first half of 2016 use Instagram and Snapchat to share what they are up to at any given moment.

It's therefore inevitable that younger people who have grown up with this technology (the so-called "digital natives") have different expectations to those who remember push-button TVs with only three channels (that closed down at night!). However, to say that social media is only for "the kids" is a complete myth. Many grandparents are enjoying keeping in weekly contact with grandchildren via Skype or looking at photos of newborns on their tablets. By whichever metric you care to measure, people of all ages are using social media.

When it's done well, social media provides organisations with not just a steady stream of customer interaction and feedback, brand awareness and a unique marketing channel, but also a direct route to engage with colleagues. That's certainly more than your average 12 or 75 year old wants from their social media.

Why not commission your team to do some research about the use of social media by your people, and by your customers?

"It's too complicated"

The pace of technological change can be bewildering, even for people with an interest in it. If you have no interest in technology, you don't care about the latest update to iOS or whether there's a new Twitter app. You might think your Nokia 3310 represents the pinnacle of mobile phone development but the shift from a mobile phone to the smartphone and its capabilities is like the shift from a horse-drawn carriage to a Toyota Prius.

If you still think of "going on the Internet" as sitting down at a PC and launching Internet Explorer then your entire view of social media will be completely informed by that perception. You'll have no understanding of how people can possibly keep up with their messages, mentions, likes and pokes. You won't get concepts like "checking in", "live tweeting", online collaboration, hacks or "hangouts".

If this is you or your colleagues running your company, you will have quite a learning curve ahead. But you can ask people to help you understand, learn and use this new technology, maybe people already in your own organisation. Get them involved, helping others to become more confident and innovative users. How far ahead of you on that learning curve are your competitors?

"It's not relevant to our industry/sector/organisation"

Some people are up to date on the capabilities of technology and understand how social media works, but they are convinced it isn't right or not needed for their organisation. This can range from "who wants to read about what we sell?" to "we couldn't possibly use social media as what we do is far too confidential". Well, unless you work for MI5 – although even they have a Twitter account these days – there will be some angle you can use to talk about what you do. And if you think something is too obscure for the Internet... well, you have obviously never got any further than the first page of a Google search.

Organisations of all different sectors, shapes and sizes are using social media. If your staff, customers, clients or service users are on social media (and you can bet at least some of them are, either professionally or personally), you need to be too, otherwise you're missing out on at least part of the conversation. If your people are talking about their work on their Facebook pages, which you can't see, wouldn't it be better to hear their feedback – and be able to act on it – by giving them an "official" platform and mandate?

Commission your team to explore how other businesses in your sector are using social media. Ask your people for ideas about how it can be used, particularly colleagues who have joined recently.

Command and control
"We have no control over what people say – what if they do or say something stupid?"

This is one of the most telling statements about a company's management culture. People will do or say stupid things. It happens in and out of offices up and down the land. As a manager you can no more control what people do or say on social media than you can what they say at the water cooler, in the kitchen or down at the pub.

If you want genuine, unfiltered feedback about what people think about your company, that is precisely what you will get through an open social network in your company. You will find out how the latest corporate communication was received, how people have reacted to Joe in Sales leaving and where everyone is meeting for the next social event. But don't just eavesdrop, be a part of the conversation. Use it to help your people get to know you and what matters to you.

"I/we don't have time"

Probably the most common objection to social media use. We are all undeniably busy. In this alleged "Information Age" we have to manage multiple channels of communication throughout our working day and somehow find time to get our day jobs done. Isn't social media just another channel to add into that mix?

Yes, it is another channel. But used well, it can replace or reduce dependency on others and actually enhance communication within organisations. It has the capability to connect people across wide distances, enabling them to share knowledge and experience and to promote collaboration.

Do you have time to respond to text messages? A standard SMS text message has 160 characters. A tweet has 140. A tweet is more efficient at reaching a much larger audience.

Previous adverse experience

There are numerous scary tales of how social media has gone wrong for organisations, for example, where a customer's complaint has 'gone viral' and resulted in negative media coverage. Everyone has a concern that their organisation could be next. But in truth, these complete social media meltdowns are rare, and they tend to result from a misunderstanding of the medium, and from a failure to handle the complaint effectively.

Direct past experience can also be a barrier: "We used to let everyone use Facebook but it was taking up 90% of our bandwidth".

When social media first boomed, organisations weren't prepared to deal with the ability for people to "mess about". Many organisations reacted by blocking access to Facebook. But your people then moved to MySpace, and when that was blocked, they moved to Twitter. And this was all while people relied on their company hardware to access the Internet during the working day.

These days, smartphones allow your people to use the Internet independently via 3G or, increasingly, the faster 4G. They don't need a company connection to the Internet, and if they want to mess about on Facebook they can do it without touching the company's facilities. Other than confiscating people's personal devices, there really isn't much organisations can do. So why not embrace it and use it as a force for good?

05 Making the decision to invest in using social media as part of the way your organisation does business

GOAL: DO YOU WANT OR NEED TO MAKE THE JOURNEY? IF SO, HOW WOULD YOU GO ABOUT IT? WHAT CONVERSATIONS DO YOU NEED TO HAVE AND WITH WHOM

So you now have a clearer idea about how social media could benefit your business or at least how you might explore further how it might be a benefit, some of the likely challenges that you might face and how you could overcome them. The next thing to do is to make the decision about whether to go ahead, or not.

The likelihood is that this will have a significant cost associated with it, that it could mean sweeping changes to your policies, ways of working and the culture that exists in your organisation. That means that this decision needs some thinking about.

Some things you might want to think about as you plan the next steps

- What creates the compelling case for you? Look at the case studies that are included in this guide and on other websites. What parallels are there between your organisation and those who have adopted a social media approach? Who do you need to convince that this is worth trying?

- What are the investment costs and how long are you prepared to trial this? What have others done? How can you benefit from their journey? What benefits and savings might you see?

- What does success look like, and what do you need to do to make this a success? What policies, ways of working and aspects of your culture need to change to make that a success? Who can help you make those changes?

- How will you manage success? Can your organisation handle increased demand?

- What do you need to do for your people to come on board? Who are your key influencers? How are you going to engage them in your plan? What support will your people need to make this a success?

You'll need the right people in the room at the right time to help you answer these questions.

- ✓ Who can best help you to construct the narrative you want to give your senior managers, your shareholders, your customers, and your people? What is the core narrative and where does it need tailoring for different groups?

- ✓ Who can help map out our stakeholders, and tell us the best way of talking to them about this?

- ✓ Who is best placed, and best at carrying out the research you need?

- ✓ Who would be great at identifying business opportunities where use of social media may really help?

- ✓ Who can help with the culture change you need?

- ✓ Who would be great at managing the change you need and introducing the new approach?

- ✓ Who is great at thinking through all the support your people might need?

- ✓ Who is good at identifying enthusiastic champions and will influence others? Who can best introduce the topic and get the cautious, the disinterested, the perhaps hostile, soon thinking about the possibilities and how to make this work?

- ✓ Who can advise you and your team on how to choose the right medium and platform for your organisation?

- ✓ Who do you need to keep in the loop, especially if not involved, as a result of thinking about the questions above, e.g. finance, communications, IT colleagues?

Give yourselves enough time to make the decision

- ✓ Where possible you'll want to circulate information as a pre-read for those who will be attending the kick-off meeting, including any research you have already done.

- ✓ Set out clearly how the decision making process will work, and what is and isn't going to be discussed as part of the decision making session.

- ✓ Get new inputs, questions and queries added to the agenda in advance so that attendees can shape their thoughts ready for the decision.

✓ Prepare well – get on the front foot and make sure they can see that for most of the likely issues that may arise you've got a plan in place to mitigate them.

✓ Get real commitment from everyone that they will stick to the decision. There is nothing worse than someone agreeing in the room but undermining or backtracking on the decision once they're back to their regular job. The meeting and decision making process need to be robust enough that no-one can say that they didn't get to make their point. It might feel like hard work but a future that people have co-created generates ownership. Ownership means that success isn't reliant on one person or team to make the initiative a success.

✓ Set out your thinking on how the team will select the medium and platform right for your organisation's business needs. As part of the decision making process, you will want to define how you will use social media so that you can plan who could be your provider.

✓ If you decide to go ahead, what do you need to do next? What is the overall timeline? What is the right order of conversations to have, and preparations to make, in support of those conversations?

✓ What could go wrong, and who is holding the team to account so the risk of something going awry is mitigated as much as possible?

06 Measuring success and the impact of change

Benchmarking your current business activity, and establishing how you will measure progress, is important to see the impact of your social engagement strategy. What are your success measures? What are the activities you would expect to correlate to improved business outcomes and what are reasonable targets you would expect to see over what timeframe? How will you evaluate whether it has been worth it?

Your team will need to do work upfront to answer:

• What business outcomes do you measure now?

• What baseline data do you have, and how will you set that baseline?

• What business outcomes can you correlate with existing interactions with your customers or your people?

• What business outcomes will you want to correlate with social media interactions with customers or your people?

• What gaps do you need to fix before you get started?

Often, companies end up a year into a programme or new investment and realise they didn't conduct the right steps early on to ensure they can measure and track metrics (good or bad) and impact on the company. It's important to identify those early on. Examples of what you may want to track:

✓ Current business interactions with your customers or your people, and correlation with business outcomes.

✓ Percentage of employee-base adoption of social media.

✓ Participation/usage, e.g. number of posts, visits, conversations.

✓ Increase in number of innovative ideas, suggestions, referrals, etc, based on specific uses for the programme internally.

✓ Business results – what business results can you benchmark that may have a positive impact from the initiative.
  - Examples include sales figures, customer satisfaction levels, safety, churn – is there a correlation to how social is impacting the relevant business results?

✓ Employee engagement levels.

  - Overall scores.
  - Scores on communication, cross-functional communication, understanding the company's purpose, for example.

✓ Your own programme benchmarks
  - Satisfaction rate with existing programme – ask your people 6-12 months in and track accordingly.

After you launch, it is important to help your people to be part of the continuing improvement. Share these metrics over-time and ask your people for their ideas as to how to improve certain metrics and adoption rates. The balance of qualitative and quantitative data is important. Talk to them individually or in groups, perhaps laying on some refreshments and making it a social event. Help to make talking about improving work normal. And of course have the conversation via social media as well, to model it and encourage usage.

Analysing via the 'ART' of Data

Too often, when it comes to building the business case and then establishing baseline data and marking progress, remembering the ART of data is a helpful tool – Absolute, Relative & Trend.

• Absolute – having an absolute number is great, but alone it really doesn't stand for much.

• Relative – what is that absolute number relative to something else? To the competition, to other departments or geographic locations in your company, for example. Seeing data that is relative adds a lot more insight.

• Trend – where were we in the past, where are we today, and where we predict to be in the future? Having data showing trends is important to capture an idea of predicting what's next. If engagement scores about communication have been dropping dramatically five years in a row, something should be done about it.

Where does your company sit amongst other companies? SMiLE (Social Media inside the Large Enterprise) created the SMiLE Index – a survey that you can take to benchmark your company versus others. It only takes 10 minutes. Find it on 'The more social than media' section of the Engage for success website or contact Marc Wright at Simply Communicate.

07 Planning out the Journey

> **GOAL:**
> **A JOURNEY THAT EVERYONE WANTS TO BE PART OF**

You've got the business case for introducing social to your organisation, you've considered the challenges you may face and how you can overcome them. You know who you need to be involved to make this a success, and you've made the decision to go. Great! You know where you're starting from but now you need to plan for implementation. This chapter covers the key points to consider in planning the journey:

Objectives

- It's important to align your social media strategy with your organisation's goals. Are you primarily focussing on your customers and growing your business or do you intend to use it as a communication tool to drive engagement, or is your focus more on how it will support collaboration to drive innovation? Or all three and more?

- Being clear about why you're introducing social will also help you define specific objectives for implementation. A good understanding about how your people, managers, and leaders feel about social and your organisation culture will help you set realistic objectives for your organisation. And remember that every employee base will include early adopters through to laggards, and your plan needs to consider the different starting points/journeys for each of these groups.

- Linked to objectives you'll need to establish evaluation milestones – what, how and when you'll evaluate and make decisions accordingly.

Governance

- Like any project you'll need clear governance. Define the people/teams that will support implementation and be accountable. These may be different people but it's important that the project team has cross-business representation and isn't viewed as being solely owned or driven by one department. Key groups to include are IT, Internal Communications and HR.

- Task the team with making sure everything is documented.

- Make sure they define the guidelines/policies you want to apply to social in your organisation. Existing policies may be fine rather than creating new ones.

- How will you be kept informed about issues, risks and evaluation?

- When will it be important to demonstrate organisational integrity?

Barriers

- Task them with identifying the specific barriers in your organisation and make sure your plan has interventions to address those. Whether it's enabling technology, or breaking down barriers put up by process, social media needs to flow, and not be burdened by process, or approvals – instead to flourish through employee trust.

The key leaders and managers in your organisation

- The buy-in of your key leaders and managers is critical for the success of your social media strategy including their unique role and their level of understanding of their role.

- Which leaders and managers are natural advocates or detractors? Task your team with developing strategies for harnessing/addressing each.

- Which ones will you speak to personally?

- What will you emphasise in your compelling narrative?

- How ready are they to adopt and use social media?

- Will they need specific support/training.

Champions/advocates

- While leaders are important, successful social implementations aren't solely dependent on a top-down cascade. Who are the key influencers in your organisation (may not always be the most obvious people) and how do they feel about social – will they be champions or detractors? If detractors, how can you get them on board? Consider using a demographics research tool to understand who the influencers are (for example 'Informal Networks' contact peter.westbrook@informalnetworks.co.uk).

- The role of champion/advocates can be formal or informal and different organisations have used champions in different ways

Communications

- Having a communication plan is critical but there are different ways of launching social media – some organisations have gone for the traditional launch campaign while others have adopted a viral approach relying on word of mouth. A combination of both is also possible.

- Regardless of your launch style you'll need a communications plan to engage key stakeholders in the change, covering the standard who, what, where, why, when and how elements.

- What early opportunities will you give for employee voice?

- How will you communicate and celebrate success?

Training

- Approaches to training for social media vary. Some people argue that social is/should be intuitive, while others feel that training is required. Remember Macmillan's approach.

- Skills and attitudes of your people (including leaders) will vary; early adopters probably won't need much training (although they could be your champions/advocates so could have a different kind of training) while the laggards may need lots (although some of their resistance may be more attitudinal rather than skills based).

- Training can include a range of interventions including user guides, drop in sessions, webinars.

08 Making it happen

Your organisation will need to learn a new a mind-set that doesn't just recreate what you already have, but delights in thinking about reaching out to new customers in new ways, enabled by social media.

Which comes first – the mindset or tech?

The 'how to' dilemma experienced when implementing social technologies is that people are given shiny new buttons to press, but unless they are being encouraged to develop the 'social media' mindset to go with those shiny new buttons, organisations recreate what they already have, just in different places and then people say that they don't get it, and this change isn't working. Sharepoint becomes just another place to file stuff. Colleagues ask 'how do I turn off my email alerts for Yammer?'

"Focus on how to be social, not how to do social" Jay Baer

So how do you create that culture? Get your implementation team to BE social. Their starting point should not be the tech, but your people. They should get out and about, virtually or in real life, and listen and have conversations, finding out what social media platforms people are using and what they are talking about in them. It can be really valuable to find out if there is a 'digital divide' in your workforce. The team can then survey people on what social media they prefer to use. It will give you a steer for workplace solutions.

To get your people engaged with this new initiative, the team will need to help them see what's in it for them – the 'why'. You can't get to the 'why' without listening and having conversations.

The team shouldn't be afraid of offline solutions. This is sometimes the best way to develop the mind-set and get over 'I'm rubbish with computers'. #kitchenfacebook or paper twitter can help people flip the switch so that they 'get it' – Google it and you'll get the point.

Grow your tribe

Grow your tribe and encourage others to grow their tribe. It's as important to be the first follower as much as the leader. Find the people leading the way, whether it is your top team or your newest apprentices. Both are invaluable in spreading awareness and confidence ('know, like, trust') in using social media easily and effectively. Publicising role models 'gives permission' that these practices are encouraged.

Train people and help them with the terminology, practicalities and boundaries. Make it easy for colleagues to ask the 'stupid' question. They won't be the only one who wants to know the answer.

Create curiosity by making it interesting. When you build a key base of people you'll generate a 'fear of missing out'. Generate competition through rewards and prizes.

Share successes and recognise involvement. Be clear about the success stories and highlight the people that are making the impact. Get some ambassadors from your early adopters to talk about their experiences and their innovation.

"We wanted to channel all our employees' brainpower towards a defined strategic challenge, send a clear message about where we should focus our attention and resources, create a transparent way to track and report progress on innovation throughout the company."
Li Zhen, innovation marketing manager, Electrolux

09 The complete case studies

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Case Study 1
Embedding Social Media Literacy Across Departments at Macmillan

By Christer Holloman, a corporate technology advisor and author of Amazon bestselling business books, The Social Media MBA series, published by Wiley.

"Your audience decides how it wants to communicate with you and what it wants to talk about. So, to be effective, social media cannot be the exclusive domain of one department. It needs to be a core competency for all staff, especially those who are public facing."

Executive summary

Key findings
Embedding social media within an organisation means addressing a lot of preconceptions held by staff and working to change how people think about their organisation, their responsibilities to their audience and their own professional reputations.

Social media needs to be a business-as-usual activity not a campaign-specific one. Employees know their audiences best, they just need the tools to engage with them. Staff needs to know what success should look like but for many employees this is a new medium and their apprehension is a natural response. Demonstrate best practices but also be patient and supportive.

Be holistic. Staff use the same social media channels privately as well as professionally and all of an employee's activity can reflect on your organisation. So do not confine training to purely work-related issues. Address concerns about the personal/private question and present your social media training as a personal development opportunity as well as a professional one.

Recommendations
i.   Be flexible – technologies are changing constantly and you cannot anticipate everything. Make sure you keep ahead of what your staff members are learning but use their experiences to shape your policies and planning.

ii. Remember that there is strength and safety in numbers. Giving your organisation many voices online will not dilute a message but spread it more widely. It will also allow you to engage more deeply on specific topics with target audiences.

iii. Don't be too prescriptive. Give employees guidelines to keep them safe but treat them as professionals not children.

Background

Interviewee
Carol Naylor (@popplestone) and her team are responsible for maintaining Macmillan Cancer Support's online communities including 65,000 members of Macmillan's own online community and over 130,000 followers on Facebook. They also support the staff behind Macmillan's 30 regional and fundraising Facebook pages as well as over 50 Twitter accounts. Carol has been involved in medical communications and online communities for over 20 years.

About Macmillan
Macmillan Cancer Support is one of the largest British charities, providing specialist healthcare, information and financial support to people affected by cancer. As well as helping with the medical needs of people affected by cancer, Macmillan also looks at the social, emotional and practical impact cancer can have, and campaigns for better cancer care. Macmillan's goal is to reach and improve the lives of everyone living with cancer in the UK.

The case

The problem
There are currently about two million people in the UK living with a cancer diagnosis and an additional six million family, friends, carers and employers. Macmillan has calculated that number will double over the next 20 years.

So how can you support four million people? That was the question facing Macmillan's executive in 2010. Doubling the size of the organisation was not the answer; they had to find ways to work differently, be more effective and inspire others to help. Reaching out via social media was an obvious option: but what was the best way to use it?

Background

Macmillan looked at what other charities were doing. They found that even two years ago many organisations only regarded social media as a broadcast channel. Social media was generally handled by the PR departments via single accounts on each of the main social media networks. But with so much to accomplish, that wasn't enough for Macmillan. They needed it to do more to meet their interconnected needs – to inform, support, inspire, campaign, raise funds, etc. – and that wouldn't be possible through a single department or channel.

The solution

Their logo reads "We are Macmillan Cancer Support" and they realised this meant they needed to speak out with many voices, not just one. So Macmillan adopted a much broader approach. They'd treat social media communication like email or the telephone – EVERYONE needed to understand how to use it – from the newest intern right up to its CEO.

Looking ahead, they thought it was likely that within five years, many organisations including Macmillan would be recruiting for social media skills as a core competency in much the same way an understanding of MS Office is expected today. However, they needed those skills now, not in five years. So they had to equip staff with those skills themselves.

Planting the first seeds

At the heart of their strategy was an ambassador programme. Macmillan worked with social media consultants to interview staff and identify those with a natural aptitude for using social media. Together with other staff who needed to use social media strategically, this group totalled just over 100; about 10 per cent of Macmillan's workforce at the time.

Together with the consultants, Macmillan's community and social media team arranged a series of one-day workshops for employees, breaking them into groups

of five to eight people with common interests, e.g. marketing or fundraising. Each participant completed a survey beforehand to establish their specific interests and ability.

The workshops were customised accordingly but broadly they all covered the same key topics:
- What is Macmillan's social media strategy and where do the ambassadors fit in?
- An overview of the main channels and how Macmillan wants to use them.
- How to use social media professionally to influence and inspire others.
- Building your own networks.
- Best practice tips and examples of how other organisations are using social media.

On a broader scale Macmillan introduced an internal structure, which gave individuals, teams, departments and regions some autonomy to use social media in the way that worked best for them. However, strategy and support were managed centrally through the social media team providing information and insight, keeping everyone moving in the same direction and ensuring that cross-departmental projects could be handled efficiently.

Carol Naylor found herself describing her team's role as being: "like a social media security blanket... with attitude. We had to do a lot of reassurance but we also had to drive and inspire staff to use the channels effectively".

All managers were encouraged to make social media part of their business-as-usual plans rather than a project-specific activity. There was no point building a new network every time Macmillan launched an event or a campaign. So, they aimed to build networks of supporters who could be kept engaged on a regular basis and really mobilised when needed.

Some staff and teams who didn't work directly with Macmillan supporters

were unsure how useful they could be in this area. But the social media team weren't just thinking about connecting with established Macmillan audiences online – they wanted to raise awareness in new ones as well. Macmillan's staff and supporters include a huge range of professional specialists from programmers to lawyers and designers to statisticians. Many are well known in their own professional fields. What Macmillan was asking them to do was extend that engagement online and, where appropriate, help raise awareness of Macmillan's work among audiences who otherwise might never hear of the charity.

In common with many charity workers, a lot of Macmillan's staff members are recent graduates who already use social media in their private lives. The social media team figured they just had to show staff how to apply that skill professionally.

In practice they found that most people fell into one of three groups:
- Staff who'd already worked out they could use social media to develop their careers.
- Staff who'd never used social media before.
- Staff who were using it personally and were very uncomfortable at the prospect of having their "private" lives invaded by a load of professional contacts.

The first two groups were the easiest to train. Those who were already using social media professionally were obviously very keen to learn more and improve their performance. They embraced the programme enthusiastically. The second group were naturally wary but willing to try once they'd grasped the advantages of what they would be doing. Macmillan had to spend more time teaching them the mechanics of the various channels but they benefited from being "clean sheets" with no preconceptions or any worries regarding their prior use of the medium.

They also appreciated that Macmillan was investing in their personal development by giving them a very portable new skill.

The final group presented the most interesting challenges. In truth, none of them really had skeletons in their online closets but there wasn't a single workshop where the private/professional question wasn't raised.

The 140-character solution
To answer this, Macmillan looked at the various platforms. Everyone agreed pretty quickly that Facebook wasn't the best place to develop a professional network. The transmission of messages was too reliant on the cooperation of others and, without a large existing network, reaching new people was too labour intensive. Strategically they decided Facebook was best used by "official" pages run at a national and regional level and by various fundraising teams. LinkedIn was a professional network from the outset so that only left the question of how to balance professional and personal lives on Twitter.

Carol found herself regularly saying to people: "You need to start thinking about your online activity in terms of your own reputation as well as Macmillan's. The security of any content is only as reliable as the people seeing it. If one of them decides to share it with others there's nothing you can do about it. So if you want to keep it private, don't post it".

And she continued: "You also need to accept that the lines between professional and personal are getting increasingly blurred online. If one of your contacts Googles your name, you're not going to be standing by the results screen to explain "Oh ignore that photo, I don't drink that much any more… and I don't use language like that either, not really". The only way you can deal with any older, negative content is by making sure you produce far more recent, positive content to counteract it (and appear higher in the search rankings)".

All of the groups also had some shared apprehensions, the most common being "What if I make a mistake and post something I shouldn't?"

There were two responses Carol would give to this: "Most of the time you won't make a mistake, but if you do there's safety in numbers. If you slip up on the sole account of a multinational corporation you can expect trouble but here you're one voice in a chorus of many other well-respected voices. Your followers aren't looking to trip you up. Own up, fix the mistake and they'll see human error for what it is and nothing more. "

If that didn't work, this never failed: "Hands up, who has ever accidentally posted a private message on a work account? ".

Invariably, Carol explains, hers was the only hand raised. After pointing out that she had not been struck by the wrath of God or the CEO as a result, everyone relaxed a bit.

After the workshops, the ambassadors discussed with their line managers which social media activity would be most useful to try and reported to the social media team the objectives they'd set. This was then followed up with practical support and suggestions.

Fostering the uptake
Updated information and insights are vital since trends and platforms change so quickly. Even while running the workshops (over a period of four months) Macmillan noticed the channels they'd focussed on at the beginning – Facebook, Twitter and LinkedIn – were being sidelined by questions from ambassadors about Pinterest, Instagram and Storify by the end. It was vital to keep up to date.

Keeping everyone supported and motivated was one of their biggest challenges and they tried several different approaches before they found one that worked. Peer-to-peer support on a secure message board was not really popular; neither was posting

updates on their intranet. They blogged, they Storified, they Scoop.it'd, they Paper.li'd but eventually they found that good old-fashioned weekly newsletters worked for them.

However, Macmillan maintained the content curation sites and the blogs. They have wider uses – Carol says, "My team have their own professional networks to nourish after all".

They let the ambassadors practice and experiment for about three months before reviewing what everyone had learned. These lessons were then fed into social media guidelines for the entire organisation. One of the most valuable lessons was that Macmillan could trust staff to show common sense online, so the guidelines did not have to be too prescriptive or complicated. A lot of behaviour was already covered in employment contracts so the social media guidelines came down to process descriptions and eight guiding principles for staff:

- Remember what it says in your contract – do not bring Macmillan into disrepute.
- Be sensible – if you think your post sounds foolish, it probably is.
- Be interesting – social media is an opt-in activity; supporters won't stick around if they're bored.
- Be human – you are not an official spokesperson or making a speech. Other people are interested in you because you're like them. So it's okay to talk and act like a human being.
- Be transparent – when it's relevant to a discussion, admit that you work for Macmillan from the outset.
- Remember your mother can read it all – if you wouldn't say it in front of her, then don't say it online.
- "Google has a long memory" – if it was ever visible to another person, then subsequently hiding, deleting or protecting it will make no difference. The only way to keep something private is to not post it in the first place.
- When in doubt, ASK.

Any individual was welcome to use their own Twitter accounts but Macmillan were more strict about Facebook pages and Twitter for branded or "official" accounts. Teams who wanted to start these needed to produce a rough content plan to cover the first six months and demonstrate they had allocated resources to manage the account. It was a practical way of giving them a reality check and helped to filter out any unrealistic plans.

Wherever possible, processes such as customer management, handling complaints and even crisis management were tied into existing processes already laid down within Macmillan. The only difference emphasised was timeframe. People contacting Macmillan online expected a faster response than they would to an offline enquiry. Apart from that, the aim was to make the Macmillan experience as seamless as possible for everyone who contacted them. Therefore, it would be counterproductive to run parallel systems. Ultimately Macmillan is aiming to integrate its social media monitoring with its CRM system.

What it should look like

For Macmillan this should be the ideal customer experience: someone contacts their support line via Facebook for information about their cancer type, the support line realises this person could also benefit from talking to other people affected by cancer and so directs them to Macmillan's online community. Their details have been added to the CRM so administrators are able to help them set up a community account immediately and recommend some suitable peer support groups in the community. Finally, Macmillan's single sign-on system allows them to engage more easily with other Macmillan services, take online courses in managing their condition and even sign up for fundraising events.

Spreading Macmillan's voice widely has proved unexpectedly useful. Not long after they started the ambassador training, Macmillan got caught in some political crossfire. Figures in a report on welfare reform produced by its policy team were used by the opposition to attack the government. Unable to rebut their argument, several Tory bloggers were forced to try discrediting the source (chiefly Macmillan) with the result that Macmillan had to deal with several emailed complaints, some irate phone calls, a few dozen negative tweets and a lot of enquiries from political journalists.

If Macmillan's main Twitter account had been its only voice, this could have been a problem. At the time they had over 12,000 Twitter followers, all of whom were far more occupied by the issue of welfare reform than any political sniping. Macmillan needed to respond to journalists asking about the criticisms but didn't want to distract its supporters from the real issue. However, since the journalists all followed their contacts on Macmillan's PR team via Twitter, this wasn't a problem. The PR team used its own networks to handle enquiries without forcing Macmillan to split the attention on its main channel. By the following morning one in four of the population had heard or read about Macmillan's campaign on welfare reform. Considerably fewer were swayed by the negative blog comments.

Despite their obvious value, Macmillan isn't possessive about personal networks. If a member of staff leaves and their network goes with them, then Macmillan will recruit someone who can build an equally useful network. If a staff member attracts a network of followers it's probably because that individual offers them value.

Carol says: "We hope, through that staff member, those followers find Macmillan also offers them value and they'll follow us too".

Similarly Macmillan isn't too prescriptive about where conversations between staff can take place. Its values include "We are open", so there is very little talk of internal and external networks. Macmillan only stipulates that everyone behaves professionally, discloses where they work from the outset and doesn't get too cliquey. So occasionally tweeting about the cute window cleaners in the office is fine but bitching about your co-workers is not. In fact Macmillan staff members are relentlessly enthusiastic and often funny; it's second nature for them to welcome everyone to "#teammacmillan". As a result its supporters get to see a bit of Macmillan's world sometimes, and they generally enjoy it. Macmillan counts it as a win whenever anyone comments on a post "I wish I worked for Macmillan" – and it happens often.

One of the advantages of equipping many staff with social media skills is that you can put the right people in the right place when you need them. Macmillan's social media ambassadors include several staff from HR. They discovered those staff members were already using LinkedIn as a recruitment channel, so after the workshops the social media team asked them to take over the supervision of Macmillan's LinkedIn group, since they were the ones using it most often.

Results

About 25 per cent of Macmillan employees now use Twitter professionally and personally, helping to spread Macmillan's messages to about 12 million tweeters a month. Macmillan's fundraising departments support their teams (cyclists, runners, hikers, swimmers) on dedicated Facebook pages and get high levels of commitment from them as a result.

Carol explained: "It's been especially rewarding to watch departments and staff develop their own voices online. The creative team love to share the amazing design ideas they find on the internet and their work is respected by other organisations' design teams who follow them because of it".

Case Study 2
Digital Voice – Social Media at SOUTHEASTERN

This article was initially posted on the IPA website and it can be found here.

Written by Andy Bindon who is Human Resources Director at Southeastern.

Despite the exponential growth in social media, employers are only just beginning to understand and exploit its potential to support employee voice and engagement. In this article, Andy Bindon, Human Resources Director at London & South Eastern Railways, explains how their social media platform WorkMate has helped them connect with employees, build community and transform engagement.

In 2008 we started to develop our engagement programme at Southeastern, building it around the milestones of the launch of the UK's first high speed service in 2009 and the role our services would play in the 2012 Olympics and Paralympics.

We involved our employees in a range of initiatives. Together we set a new vision and objectives and produced a 'big picture' to capture the strategic narrative. We established company level and local focus groups across the business and devolved the running of our employee recognition scheme. We improved people management skills of our leaders and managers achieved IiP Silver status (since achieved Champion status). During this time we saw improvements in our key business and people results, but we wanted to find ways to involve more than the 15% or so of employees regularly being involved in business issues. Social media seemed a way we could harness technology to accelerate momentum.

We're probably atypical of companies you would expect to see at the forefront of using social media. The rail industry

being perceived perhaps as having a fairly 'traditional' approach to people management. But we recognise it could make an impact and so it has proved. In late 2011 we trialled a platform called Socialtext which we branded as WorkMate. We felt this platform best met our needs to communicate, learn and share more widely. It provides functionality similar to Twitter, Facebook and Wikipedia. Everyone has a home page which they can customise.

We placed all our key company information on it and tools that would help people do their jobs better. We encouraged staff to log on and try it. There would be minimal regulation (other than our standard code of conduct) and no constant monitoring/moderation of content. People would be able to use it as they wanted – have conversations, ask questions, express opinions, set up private groups.

We ran it for three months alongside our static intranet and the results were phenomenal! During the three months our static intranet had about 550 visits (about the norm) whereas WorkMate had over 52,000.

After further evaluation and feedback from employees, we decided to scrap our traditional intranet and formally launch WorkMate in April 2012, just a few months before the Olympics. We used our special Olympic engagement events – attended by over 1,000 of our employees – to promote WorkMate. It proved an extremely popular and valuable tool over the Olympics, not only carrying the latest company information but enabling employees to exchange stories, pictures and just keep in touch.

On the back of this, WorkMate really took off after the Games. As of November 2013 we have:
- 80% of employees registered with 2,200 visiting each week and about 500 posting.
- Approx 60 business questions are asked every week.
- There have been nearly 90,000 conversations on WorkMate.
- 160 active private groups (about 65% are work related, the rest are social).
- We've created a new set of company values and produced a 'values in 60 seconds' video which has had over 6,000 views.

- We've used it for pulse surveys and added many more work tools and toolkits (an employee engagement toolkit, launched in July 2013, was accessed over 2,500 times in the first three months).

WorkMate runs with minimal regulation, primarily relying on users to self-regulate. We have had no major issues. People can, and do, criticise the company on it, and we welcome that! We can also sense when issues are bubbling up. Recently when we made changes to our pension scheme a lot of questions and misinformation surfaced on WorkMate which we were able to respond to quickly. I and others don't spend all day looking at what people are talking about (we are conscious of suspicions of 'Big Brother'!) but you can get a sense of things that are topical.

So what other results have we seen where we feel WorkMate has had an impact?

We have achieved our best ever performance and customer satisfaction scores and best ever people scores on a range of metrics from formal grievances to sickness absence. In only our second ever employee survey, response went up from 68% to 80%. Our engagement metric increased by 10% to 70% and other areas such as clarity of what we're trying to achieve, personal contribution, how change is managed, and understanding values improved by 3-5%

It has helped improve communications and provides an excellent mechanism for us to gauge the current mood. We have recently used it to collect staff views and opinions on how our services may change over the next 5 years as we negotiate a new contract with the Department for Transport.

Our future plans include more personalisation, more pulse surveys and toolkits, more dynamic content, integration with our HR system,

encouraging greater use by our trade unions (some have embraced it more than others).

So, what have we learnt? We're not as connected as we might think, however extensive our communications. We have extended WorkMate to mobile devices and placed it in the 'Cloud' so it can be accessed anytime, any place, anywhere.

People do want to connect, with colleagues and the business. Many of our employees are working in relative isolation, and just being able to have an online conversation has helped people feel they are not alone! It's a great tool for people to share information and ask questions.

You don't need to over regulate it, people have used it responsibly. If you have concerns, have you really considered what they are and weighed them against the benefits?

Social media is a part of every-day life, not the preserve of the under 25s! Resistance is futile!

The cost-benefit has been easily proved. The net cost, once we scrapped our intranet, means that the cost is a few £s per employee.

It provides momentum to your engagement programmes. You have to put the hard work in before you launch. If you look at the scores on some of the employee survey results, they have improved but not as much as you may expect in some areas. As the CIPD and IPA have concluded tools like WorkMate won't be a panacea. You still need to work hard at other channels. Since launching WorkMate we have strengthened things like briefings, forums and launched a monthly employee phone-in to Directors, but we try to integrate these with WorkMate.

Voice is integral to engagement. Hopefully, through WorkMate we're enabling people

to connect and voice opinions, concerns and ideas more than ever before, but also using it as part of an overall strategy of meaningful dialogue in making big decisions.

Case Study 3
Electrolux – Internal Crowdsourcing

WANT A FEW THOUSAND IDEAS? ASK EMPLOYEES

Household appliance group Electrolux engaged 40 per cent of their white-collar employees in a global, 72-hour ideation event. The result was a step forward on their journey towards becoming a world-class, market-driven consumer innovation company.

Executive Summary

Overview

The Electrolux Group's innovation ambition is to create new products consumers prefer and to do it faster than the competition. One way for a large, global company to make size a virtue instead of an obstacle to increasing speed is to create cross-regional, cross-functional connections between employees and engage them in the ideation challenge.

Key findings

- Employee passion and creativity can be effectively unleashed in the crowdsourcing environment. The benefits include accelerating the innovation pipeline of the company and creating a lasting impact on corporate culture by making it more highly engaging, inspiring, collaborative and entrepreneurial. These changes to the culture could potentially lead to innovations in all functions, not just product development.
- When an online ideation session is properly constructed, it is possible to get a high level of engagement. Electrolux inspired more than 7,200 employees (out of a target audience of 18,000) to contribute more than 3,500 ideas, 14,000 comments and 20,000 votes in its first global innovation jam.
- Visible backing by senior management is the single biggest success factor in overcoming scepticism. A single email

from the Electrolux president and CEO led to a three-fold increase in participation within a day.
- Creating a playful competition helps generate enthusiasm and underlines that the initiative was out of the ordinary for this relatively conservative corporate culture.
- A single successful internal social media exercise can overcome very strong scepticism and create momentum for more engagement via social media. The Electrolux Group's first innovation jam was so successful that they continue to plan and run more global innovation jams. Several of its business areas are also planning their own crowdsourcing projects: in total, Electrolux will run seven crowdsourcing initiatives in any one-year period, all based on the platform for the original innovation jam.

Recommendations

i. Make sure your event is well enough designed that you can get top management to personally engage in the event and support it visibly, putting their credibility on the line.

ii. Do not underestimate scepticism, lack of understanding, time conflicts or lack of interest. Plan communications months ahead and be a warrior.

iii. Anticipate that once scepticism is overcome, employees will want to contribute and participate as long as the purpose is clear – and especially if they will be recognised or there is something to win. To be seen within the organisation, to make a difference and to connect with colleagues are highly motivating. So are prizes.

iv. Use every trick you know of that you would use in a product launch. Succeed once and every similar initiative will be much easier to promote.

What you need to know

Electrolux is striving to be a market-driven consumer-oriented innovation company that creates new products, accessories, consumables and services that consumers prefer faster than its competitors do. One way it is doing that is by engaging its employees in global, cross-regional, cross-business area, cross-functional idea creation. Last year, Electrolux ran its first online innovation jam ideation session focused on a key innovation area: culinary enjoyment.

As a project, the innovation jam faced a certain amount of scepticism. Overcoming that required the services of a PR agency and a great deal of support to heads of communications in various parts of the Group. Top management backing and high-quality supporting materials such as videos and posters were instrumental in getting buy-in from communications heads within the Group's business areas. Communications emphasised the business relevance, which was reinforced by the participation of a cross-functional project team. Communications also emphasised the fun of it all, the chance to be heard and the chance to connect with others. The CEO asked employees to bring their passion and creativity.

Thorough, detailed planning for driving engagement for each stage is important. These plans should be shared at a very early stage with the people responsible for communication.

Background

Interviewees

The project is owned by the heads of the Electrolux Innovation Triangle Council – marketing, design and R&D – who are members of the Electrolux Group's senior management team:

Electrolux is a global leader in home appliances and appliances for professional use, selling more than 40 million products to customers in 150 countries every year. The company focuses on innovations that are thoughtfully designed, based on extensive insights to ensure they meet the real needs of consumers and professionals.

Electrolux products include refrigerators, dishwashers, washing machines, vacuum cleaners, cookers and air-conditioners sold under brands such as Electrolux, AEG, Eureka and Frigidaire. In 2011 Electrolux had sales of SEK 102 billion and 58,000 employees.

Their social media strategy
Electrolux have an integrated approach to social media and PR.

The Electrolux innovation jam and the communications surrounding it were largely based on the Electrolux global consumer engagement strategy. The project team verified its communications plan with Mattias Rådström, vice president of social media and PR, who is responsible for the strategy.

As in the consumer strategy, engagement is important and the first step was to determine the right engagement strategy towards employees. With consumers, social media also integrates with and amplifies traditional PR, as well as impacting shopping and 360^0 consumer experience. This thinking was adapted to an internal audience, as the team set priorities and objectives for interactions and engagement within different areas such as participating, voting on ideas, commenting on ideas, interactions per registered user, etc.

Whether it is an internal or external social media exercise, one task is to define which platforms to use and what role they will play. This means evaluating each platform in the engagement ecosystem on its own merits, since people have different uses and expectations on each and one

common metric will not fairly judge different platforms. Sharing may prove most important to you on Twitter, while commenting might be the primary goal for Facebook and simply driving views the goal for YouTube. In this case, there was one platform, the "innovation jam" platform, and the metrics were straightforward: employee participation rate per division, ideas and comments submitted, favourable and unfavourable votes recorded and, finally, expert judgement on the quality of the ideas.

The Electrolux social media strategy is global and local and Electrolux uses the word glocal. The reason for this is that brand is global and the global presence should reflect the efforts that best embody the position and vision of the brand. Social and traditional PR must be tied together. All content should be consumer based and reflect the best of the brand. But social is local and country communications (e.g. a local country Facebook page) should be in the local language providing relevant and relatable messages that engage the audience in a conversation around programming as well as supporting product news. The Electrolux innovation jam followed this pattern to a large extent, with centralised messaging and centrally produced communications assets (videos, posters, T-shirts, stickers, intranet articles, etc.) that regions and countries could translate and adapt. Regional, divisional and country organisations also adapted the communications to the channels that had proven most effective in reaching their employees. In North America, Town Meetings were effective. Elsewhere, phone calls and word of mouth were decisive.

The Electrolux vision is to have millions of conversations conducted on Electrolux channels – on key social networks in all major geographic markets. This will build brands and deliver sales opportunities. The consumer experience is enhanced through publisher-quality storytelling that delivers the right information at the right time in the right place. Another important aspect is the "always-on" approach. The old method

of having few large campaigns has now been replaced with an always-on approach. The Group strives to have an ongoing conversation with their audience every day of the year and believe they cannot afford to be silent during long periods. Their philosophy is that by being responsive to customer needs and expectations, trust and loyalty will naturally follow.

While there will not be millions of conversations, innovation is an always-on theme at Electrolux. Moreover, for the real benefits of the innovation jam to be fully realized, significant follow-up communication is planned. This will cover what is happening to the ideas, how they are being developed and how the database is being used. Related future innovation initiatives are also being tied into the original 2012 innovation jam.

The case

The problem
A passion for innovation has long been a core pillar of Electrolux. Today, the company is striving to be a market-driven, consumer-oriented innovation company that creates new products, features, consumables and services that 70 per cent of consumers prefer and to do it faster than their competitors. In line with that ambition, the company has formed an innovation triangle council, made up of the heads of marketing, R&D and design, and undertaken a number of initiatives within the organisation. One of these initiatives was a global, 72-hour, online ideation session called the Electrolux innovation jam, which took place in the autumn of 2012.

Before the innovation jam, the most accessible way to share an idea was an email drop box to the CEO. In this scenario, the burden of evaluation, implementation and tracking starts with one person and then is delegated outward. There was no universally accessible tool that:
- Took advantage of, and encouraged, crowdsourcing.

- Collected and categorised ideas.
- Self-evaluated ideas.

"When we started this, we did not have a way to formally harness the knowledge of our employees beyond emails, suggestion boxes, surveys and meetings", recalls Heather Hanson, head of marketing effectiveness, global marketing. "We knew there had to be a better way", she continued.

"We asked ourselves do we gain access to all of that knowledge and experience that our people have? How do we engage them, motivate and inspire them, and leverage their natural collaborative inclinations?"

The proposed solution? A crowdsourced innovation jam that was self-regulating and fully trackable and reportable. If successful, the event would not only result in a database of new ideas, it would:

- leverage untapped creativity in their employees worldwide, allowing everyone in the company to be an innovator;
- forge new connections between employees across regions and functions;
- promote cross-functional, cross-regional collaboration demonstrating to employees how much senior management values creativity;
- lead to innovations in all functions, not just product development;
- improve the strength of the company innovation pipeline with more rich ideas that cut across multiple offer types and solutions;
- cultivate an entrepreneurial mindset across the Group;
- be a step towards creating a culture of market-driven innovation throughout the company; and
- bring employee engagement to the innovation strategy.

"We wanted to channel all our employees' brainpower towards a defined strategic challenge, send a clear message about where we should focus our attention and resources and create a transparent way to track and report progress on innovation throughout the company", comments Li Zhen, innovation marketing manager.

Background

The notion of getting every employee to bring creativity to his or her work and become an innovator is not new. Electrolux has taken several initiatives to accomplish that in order to deliver on their innovation ambition, which is to deliver new products that are preferred by consumers and do it faster than competitors do. It is a tall order and requires making the whole organisation more agile and more innovation-oriented from top to bottom.

Yet, like any other large, global organisation, Electrolux faces challenges in getting people to break habits, change silo thinking and work across regions and functions. With a sustainable, solid, financial track record, the organisation does not face a crisis or existential threat that would drive people to change longstanding habits.

Against this background, Electrolux decided to launch their first ever global innovation jam session. The idea was to activate employees, "the crowd", with a combination of game mechanics (leaderboards, scores and ranking) and enterprise-wide recognition (earning points and badges along the way). The initiative would integrate social collaboration with enterprise workflow, use the crowd to create new innovations to meet business opportunities, channel participation towards areas of mutual interest and create a formal way of managing the "idea funnel".

In January 2012, Electrolux paid a visit to Volvo Technology to exchange good case practice between the two companies on innovation. "We were inspired by the innovation jam they conducted in 2011", recalls Li Zhen, "We shared the Volvo case back to the innovation team and started the sell-in process." Meanwhile, CMO MaryKay Kopf learned how Citibank approached innovation. They had also done a successful innovation jam but in a different way. By then, organisation engagement had also been identified as one of the three innovation-building blocks for Electrolux. With the inspirational external benchmark and identified internal needs, the ground was prepared to run the innovation jam on a global scale.

"I considered our first innovation jam a 'global pilot'", Kopf recalls. "I never considered doing it regionally or on a smaller scale."
"There were several reasons for that. First, our focus is to drive global innovation versus regional innovation so we can leverage our strengths and scale. Second, regionally we have different areas of excellence in innovation but we needed a better mechanism for sharing and collaborating. And I believed that the innovation jam could unleash that.

Finally, it was an opportunity to put innovation in the hands of our people. It was very much about improving the social dynamics and grass-roots idea sharing, idea building and listening to the voice of our employees through voting. In a way, that was what we were really piloting – changing the spirit and culture of how we work."

Nothing like this had ever been attempted before at Electrolux, the concept of crowdsourcing was unfamiliar to most employees and there was no obvious benefit to individual employees nor any obvious bottom-line benefit to their work groups.

It was therefore necessary to overcome this lack of understanding (and even, in some cases, outright scepticism, as if the innovation jam were an "ivory tower" initiative of no practical importance) and find ways of not just informing them about the initiative but engaging their active participation.

The solution

The innovation triangle council chose "culinary enjoyment" to be the theme of the first global Electrolux innovation jam. Culinary enjoyment is one of the company's innovation focus areas. It was chosen because it is one of the most important areas and because it is the most applicable to all Electrolux employees, whether they work on major, small or professional appliances. Innovation jam participants would be asked to submit ideas on a product, feature, accessory, consumable or service related to culinary enjoyment – the process from shopping for food to storing, cooking, eating and cleaning up. "The brief to employees was based on the importance of innovation focus areas in the portfolio globally", says Anton Lundberg, vice president of market driven innovation, global marketing. "The ambition was to improve our existing innovation portfolio to be populated based on crowdsourcing input."

After a competitive bidding process, Electrolux selected a vendor specialised in these types of initiatives. The Electrolux project team, together with the vendor, tailored the functions, chose the graphics, wrote the instructions and determined the flow of the event.

The innovation jam event took place over a 72-hour period. Participants first registered on the site and then submitted their idea(s) and commented on other people's ideas. For each idea, the idea owner had to fill in answers to questions in text boxes about who the idea would be for, what problem it would solve, how it would work, etc.

Participants added comments, made suggestions and clicked on a "thumbs up" or "thumbs down" button for each idea, gaining points for their participation. Innovation coaches from the marketing, R&D and design departments were trained for each regional time zone. These coaches looked closely at the ideas that attracted the most attention, made comments and moved some of the ideas into a second

stage of the top ideas. Because of the overwhelming response, that second stage grew to several hundred ideas.

After the 72-hours were up, innovation coaches took a week to look into the ideas that received the top ratings by participants and created a short list of 20 ideas. These ideas were then entered into a game in which participants invested the points they had gained during 72 hours into the ideas they liked best. At the end of a week, the list was reduced to the top ten ideas backed by participants and innovation coaches.

Two weeks later, these ten ideas were submitted to a panel of the Electrolux President and CEO, the heads of the six divisions and the heads of the innovation triangle council. The panel met in the boardroom in Electrolux headquarters in Stockholm and by video conference. As insurance against technical problems, the idea owners and teams were required to submit a video presenting their ideas. There were also two dress rehearsals to test communications and iron out any technical kinks. The ten videos were each followed by a live presentation and Q&A from the panelists. The panelists selected three winners.

High-stakes communication

Overall, the central communications plan was designed to create awareness that this was a game-changing initiative, not just another roll-out. The project team knew that if the initiative failed, it would be a while before a similar project would be approved again. If it succeeded, however, it would not only make a positive impact, it would lead to the demand for more innovation jams in the future, each of which would be easier to promote based on the success of the first one. The project team therefore used a variety of tools including stickers, posters, PowerPoints, intranet articles – even a jazz band "jamming" at Electrolux Group headquarters in Stockholm – to launch the three-day event.

Core messages were also developed. In a video, the Electrolux president and CEO asked all employees to "Bring your passion, bring your creativity"; a message that appeared prominently in an animated banner on the intranet. In another video, CMO MaryKay Kopf made the connection between strategy and fun, saying that the innovation jam would be "part of our journey to becoming a world-class innovation company. It's also going to be a lot of fun and a chance to share ideas with other employees throughout the company".

The CEO, the innovation triangle heads and the heads of all of the business areas also set an example by announcing the times and days they would be participating, further reinforcing the idea that everyone should take part. Other themes included empowerment and the chance to make one's voice heard, as well as the chance to be recognised by peers and managers.

Central support for local plans

Electrolux is divided into six different business areas, each with its own head of communications. It was therefore important to task the business areas' communications heads with creating and implementing communications plans that were appropriate for their resources and organisations. The central role was to provide communications assets and whatever support was requested. This approach, which was based on the Electrolux 'glocal' social media strategy outlined already, allowed the use of communications channels that were most effective at each division or location (discussed further).

It also proved to be useful to set up competition between the business areas. For this, Electrolux chose as a KPI the percentage of each business area's employees who had registered for the event. These figures were updated daily and published on the Electrolux Group's intranet. They were also presented to the CEO and the business

area heads in a senior management team meeting. When the head of one business area, who was an innovation champion in the group, saw how far behind his organisation was in the percentage of employees registering, he called in his senior management team and told them how important this initiative was – he wanted high participation. Within a day, that division became one of the leaders.

The project team commissioned an external PR agency to produce high-quality video interviews with the CEO, the CMO, the chief R&D officer and the chief design officer. These demonstrated senior management backing. To convey the idea that it was a fun and interesting challenge, the agency also produced a video of employee ambassadors urging their colleagues to register and participate. These videos were filmed in the Electrolux Group's new innovation lab in Stockholm to help tie the innovation jam into the Group's overall innovation strategy. The videos were uploaded to the intranet in the final two weeks before registration officially opened.

The intranet was also re-skinned with innovation jam-themed graphics and animated banners. This was the first time that the intranet's look and feel had ever been changed to promote any initiative or that animated banners had been used. That not only drew attention to the event, it also served to underline that something extraordinary was about to take place. The PR agency created a consistent, fun-looking graphic profile for all communications – PowerPoints, posters videos, the intranet skin, the innovation jam platform, etc.

Building interest via guerrilla and word-of-mouth
Like a major product launch, a gradual build-up of interest leading to a big reveal was a key success factor. The vendor had recommended a registration period of between two and six weeks before the 72-hour event. The project team discussed the

benefits of each time frame. This was one of the most important decision points.

A long registration period would be the more cautious approach. It would allow more time to get sign-ups, diagnose problems and make adjustments. The downside would be a possible drop in interest over a several-week period. So the team decided to gamble, compressing the window between the official opening of registration and the start of the event to just eight working days. This would maximize the intensity of the communications spotlight on the event. With such a short window between the start of registration and the event, it was important to build buzz ahead of time. Therefore, in the weeks and days leading up to the official announcement on the Electrolux Group's global intranet, posters and stickers were also prepared and distributed to local offices. These included cryptic posters that did not refer to the event directly but were used as guerrilla marketing in the days leading up to the launch of registration.

It was clear from the beginning that informing people and raising awareness was only part of the challenge. They also had to be motivated to act. That is why the communications plan relied heavily on person-to-person communication, not just traditional media tools.

A top-down word-of-mouth campaign was also created. This operated on several levels. Communications heads distributed a PowerPoint presentation explaining the event for managers to cascade through the organisation during presentations to their teams. Communications heads and innovation coaches also appointed ambassadors to advocate for the event and answer questions. An innovation activation community previously created, with its own intranet site, was also brought into the loop.

Personal email appeals
And everyone involved in the project sent personal emails to some of their close

colleagues advocating the event and asking the recipients to pass the message along to their close colleagues. To prevent people from feeling spammed by multiple emails about the event, the advocates were asked to personalise each email, not just cc a lot of people from their address books. These pre-launch activities resulted in nearly 1,000 registrations before the official launch of registration.

Constant support throughout
A dedicated communications manager also worked full time to respond to miscellaneous requests for information and such additional help as pre-written texts for managers to email, additional PowerPoint slides, taking points, etc.

Buy-in by the business areas' communication heads was a decisive factor and they came up with some creative ways to communicate. Registration activities included:
- In São Paulo, actors playing the role of chefs (in line with the event's "culinary enjoyment" theme) walked desk to desk helping people register.
- In Singapore, jars of specially labelled "i-Jam" were given to the first 100 people to register, temporary murals were created and displayed on office walls and adhesive placemats were stuck to cafeteria tables.
- In Charlotte, North Carolina, a member of the communications team set up a registration table in the company cafeteria and asked people to register.

Activities to kick off the 72-hour event included:
- In Sydney, tea and scones were served.
- In Singapore, a "war room" was set up, where trained staff helped people with the language differences.
- In Stockholm, a jazz band was hired to "jam" in the lobby of the headquarters building and fortune cookies with customised fortunes were handed out to people as they arrived at work.
- Globally, the Electrolux president and CEO called for everyone to participate

for at least one hour.

- Globally, the Electrolux president and CEO, the division heads and the heads of the innovation triangle council all added ideas and comments and publicised their own participation in the 72-hour event.

Results

The results were easy to quantify and automatically tracked by the site's software. A total of 41 per cent of the target audience of 18,000 white-collar employees signed up to participate (against an average for other companies of about 20 per cent). More than 3,500 ideas were submitted, which would have taken months to generate via any conventional process. There were also approximately 12,000 comments and 20,000 votes for and against ideas. These easily exceeded all expectations for engagement.

As important were the qualitative results. Just as MaryKay had hoped, many employees were so enthusiastic that they said this type of ideation event should go on permanently and expressed satisfaction that they were being listened to. The event was also so successful that almost all of the business areas, even those that were initially sceptical, requested to have their own innovation jam sessions.

Electrolux, in addition to capturing more than 3,500 ideas, now has a process in place to catalogue good ideas from employees. And product development teams are now consulting the pool of ideas for general inspiration and insights into consumer preferences as well as for specific ideas to develop.

Critical success factors
The single most important success factor for creating participation was visible backing by senior management. A single email from the Electrolux Group's president and CEO, to all employees urging them to participate, tripled registration within a day. As mentioned already, when

the head of one lagging business area called in his management team and told them that iJam was a top priority to accelerate innovation, registration went up ten-fold within two days and wound up reaching the highest sign-up rate (70 per cent) of all of the business areas. Other success factors include:

1. Asking each employee for one hour for innovation. This was a reasonable request from the CEO (who pledged to do the same) and was enough time for employees to engage in the innovation jam. Many employees chose to spend more time as the event was interesting and fun.
2. A well-designed platform and IT framework. Electrolux compared vendors and took steps to modify bandwidth parameters to handle an anticipated increase in load during the event. There were no failures in access to, or operation of, the site during the 72 hours.
3. Inspiring, multi-pronged communications. Informing people is one thing. Getting them to take time from their other duties to take a desired action is much more difficult. Electrolux used professionally produced videos and posters, cascaded information through PowerPoints in meetings, had ambassadors promote the event via viral "pass-it-on" emails, put on live events and handed out promotional items such as jars of "i-Jam" and fortune cookies.
4. A well-developed rewards and recognition programme. As one executive in North America said, "We are competitive. Just give us something to win. It doesn't have to be much". In this case, a rewards and recognition programme was announced in line with the event's theme of culinary enjoyment. It gave prizes to each day's top collaborators, and to the semi-finalists, finalists and three winners. Rewards included gourmet cookware, gourmet restaurant vouchers and a high-end, catered party for each of the top three winners. Registration jumped

in all divisions where the programme was clearly communicated.

5. Trained innovation coaches to shepherd the ideas through the event. Criteria for choosing innovation coaches were prepared by the project team based on cross-function knowledge, experience and passion for innovation. In another case of senior management backing, the CMO asked each division head for nominees. The project team then consolidated the nominations from the divisions and announced the innovation coaches for each time zone. "I think they played a pivotal role in fostering meaningful conversation under each idea post", said Li Zhen.

They posted challenging questions to help the idea owners refine their ideas and other users to contribute to the ideas – they really guided the dialogue and development. Also, as a group, the innovation coaches were the only ones who read through all of the ideas. They provided important input to funnel down ideas from 3,500 to the top 20. They also played the role of ambassadors from the start and generated positive word-of-mouth throughout the divisions.

Lessons learned

Do not underestimate the complexity of a global roll-out, especially when it is a concept completely new to the organisation and one that requires people to take action, not just be informed. As in a large, external PR event, end-to-end planning is essential, with as much of the material as possible prepared and distributed well in advance.

Inform participating areas of the company at least four to six months ahead of the launch of an initiative of this magnitude in order to get it onto the agendas of major management meetings of top managers, and ideally share plans in time for them to be included in annual communications budgeting. "By the time we really got started, we were only a

few days ahead of one business area's top management conference, so we could only get a couple of slides into the communication head's presentation and maybe three minutes of discussion," said Li Zhen.

Do not underestimate obstacles. "The Asia-Pacific business unit kept pushing for more information before we had it ready", Li Zhen explained. "We really underestimated the effort involved in getting communications in English in Singapore ready to go in Chinese in Beijing, for example. We also underestimated how much information people there would want before they got started. We would add at least two extra weeks for translation and distribution next time."

Inform the other communications actors about the entire event from the beginning. "We were so highly focused on just selling the idea and getting cooperation for the sign-up phase that we neglected to fully inform the comms heads that people would need to actually participate with an idea after they signed up", said Li Zhen. "On the one hand, we had to overcome scepticism and getting people signed up was the basis for everything. There was also a lot to explain. So we wanted to keep the focus on the here and now. On the other hand, people had to scramble more than they should have to get people to take the next step."

Compress the time frame. "We were initially going to announce the event four weeks before it started", commented Li Zhen. "But then we realised that we could not keep people's enthusiasm up that long and people would be bored by the concept before we started. So we compressed all of the promotion into two weeks and finished up with eye-catching physical events where possible. On the other hand, I don't think the week between 72 hours and the final judging of the ten ideas was a disadvantage. I think it actually gave us the opportunity to build up

momentum to generate a more thorough and transformational organisation impact. However, it is actually a challenge for the project team, infrastructure and resources to keep up the momentum within the time span of the two-month innovation jam experience."

Don't count solely on the intranet and other mass communication. "Our intranet is well thought of. Still, fewer than 1,000 people watched the video with the CEO launching the event", Li Zhen reported. "On the other hand, more than 2,000 people responded within 24 hours to his email asking them to register for the event. Person-to-person communication and physical events drove a lot of the enthusiasm for the initial launch."

Clearly communicate from the beginning idea selection criteria and game rules that reward and recognise by level and quality of participation.

Enabled and easy access through portable devices would have been a big help, since people have time to participate when they are outside the office.

Implement effortless login and registration. "We did not have single sign-on, with a direct link from our intranet", Li Zhen explained. "We could not solve the technical obstacles in time. So we had an extra hurdle to participation that took time and resources to overcome."

Be prepared for success. "We underestimated how enthusiastic people would be", commented Li Zhen. "As a result, we did not have enough innovation coaches managing the flow of ideas through the event and evaluating them. They were overloaded, which led to some delays. If we had known we would get such an overwhelming response, we would have trained at least twice as many!"

10 Extra Resources

Change Management Institute:

- **Competency model (foundation): https://www. change-management-institute.com/sites/default/files/ CMFountationLevelCompetencyModel_2014%20V1.0.pdf**

- **Competency model (master): https://www.change-management-institute.com/sites/default/files/ CMMasterLevelCompetencyModel_2012%20V2.3.pdf**

- **Org change maturity model: https://www.change-management-institute.com/sites/default/files/CMI%20 White%20Paper%2C%20Change%20Agility%20-%20 Feb%202012.pdf**