

You won't find many Enterprise 2.0 experts on the planet who don't recommend running a pilot before you go organization-wide with your E2.0 platform solution. And you won't find one here. Many people talk about the benefits of Enterprise 2.0 and how to build support for an effort, but not enough people will tell you how best to tactically run the pilot.

At NewsGator, nine out of ten of our customers start out with a pilot before they deploy enterprise-wide. And for two good reasons: to test the technology in their environment and to learn valuable lessons they can apply in a broader deployment. This white paper offers concrete suggestions on how to run a successful pilot and maximize the results.

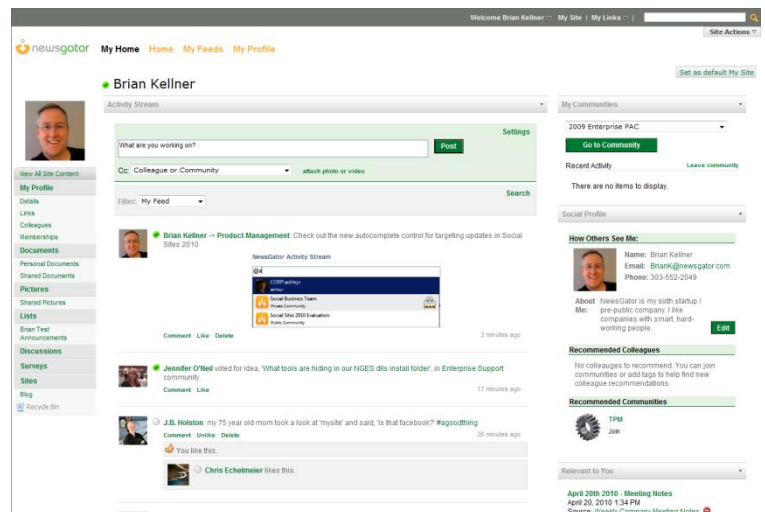
Having worked on dozens of large-enterprise pilots I have a pretty good idea what works and what doesn't. The typical pilot at NewsGator has 100-250 users and runs about 30 days. The steps I outline here are specific to a full-fledged internal Enterprise 2.0 platform solution consisting of communities, expertise discovery, innovation management, profiles, microblogging, activity streams, social networking, social bookmarking, wikis, blogs, RSS, and document management. If you're doing just one or two pieces you can scale back accordingly.

Here are the steps I take my pilot customers through; they are tried-and-true and they work:

1. Understanding the business drivers.

Why are you evaluating E2.0 internally? Which business problems are you trying to solve? Improved collaboration? Expertise location? Faster, better access to information? Increased employee engagement? Have this conversation early on with business sponsors and the project team. There are many purposes for this conversation:

- ▶ The first is so that everyone on the core team is on the same page. I can't tell you how often I work with a project team and they don't really understand why they are doing what they are doing. They are just doing what they are told and it makes them less efficient at their jobs, plus they are less motivated to make it a successful project. If the business sponsors share the purpose the project team will be much more likely to drive the project with passion.
- ▶ While most E2.0 solutions are easily configurable out-of-the-box it still helps to understand the business goals in order to start with a vision of what you want the pilot intranet / portal to look like. Are you focusing on collaboration? Then communities should be prominent. If microblogging isn't important to your organization then don't enable it yet. Always start as simple and clean as possible so you can accomplish what you are shooting for without overwhelming the users.
- ▶ Understanding what you want to prove in the pilot will help you set your success criteria. Make sure to set realistic criteria for the numbers of people and time period in which you are running your pilot.
- ▶ Lastly, in order to have the right pilot participants you need to know the business goals. If the main goal is expertise location you want to invite participants who don't know each other but need to find each other. Think through what you are trying to prove and then invite participants that are the right people to help you prove your theory.



2. Define top user scenarios and seed those areas with content

Okay, you've configured your platform but at this point it's still an empty house. You need to paint the walls, bring in some furniture, and add some bookshelves. Make sure there is value the first time a user hits your pilot site. Plan out content for

landing pages, communities, profiles, anywhere a user might go. I always recommend a “Help and Feedback” community containing FAQs, best practices, and ready-to-go discussion threads soliciting questions and comments.

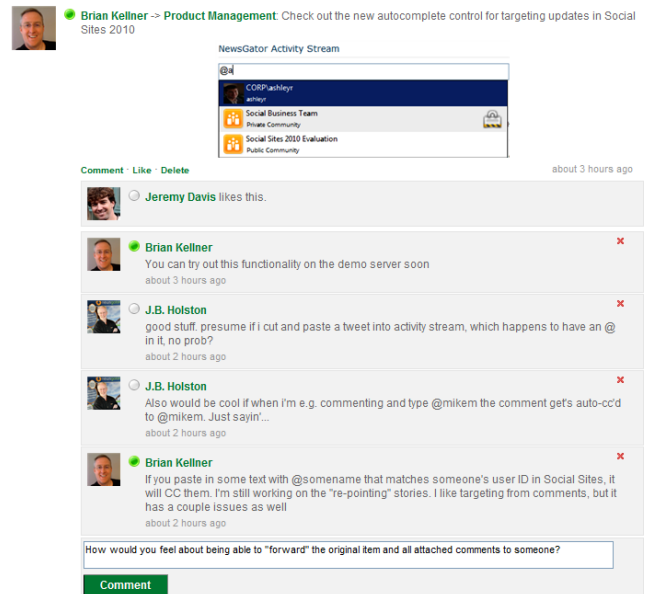
3. Identify communities and community managers

In addition to your Help and Feedback community identify at least a handful of additional communities to start when your end-users enter the pilot. What types of communities make sense for your pilot participants? Typical types of E2.0 communities include *practice / expertise* (e.g., clinical research), *projects* (e.g., planning the next annual meeting), *customers* (by major account or category), and *employee engagement* (e.g., on-boarding new hires). In which areas can you find the most interested and passionate community managers for the pilot? A community without a good community manager won't be successful and you won't have time to play catch-up.

4. Create Participation Plan

Getting participation in your pilot can be a challenge for a number of reasons. First, a pilot is held in a “sandbox” environment outside the normal workflow. That means that in addition to the participants’ day jobs they also have to find time to dive into this completely separate pilot environment. Second, participants believe, often with reason, that content from the pilot environment won't get transferred to the production environment. In other words, they worry they're wasting their time. Third, some organizations tend to hit up the same participants time and time again for pilots and so these people get pilot burn out. Understanding these challenges and setting expectations is half the battle. To mitigate the challenges:

- ▶ Choose enthusiastic participants who are genuinely excited about the new technology and eager to help vet it for your organization.
- ▶ Offer incentives. There are studies that show financial incentives don't effect long-term behavior. That's fine; we're talking about getting short-term results for some one-off behaviors. I worked with one customer to create a “Have a coffee on us” campaign where everyone who completed his profile by a certain date received a \$5 Starbucks card. Participation spiked. The profiles were important to the customer because they were trying to prove expertise location. Based on what you decided is important for you in step 1, you can create a script for your participants to follow (make sure it's measurable) and if they do it, they either get a Starbucks card, an Amazon card, or they get entered into a drawing to win something. Just make it clear what you are expecting from the participants, when they should do it, and make it easy (scripts, videos, web sessions – whatever works for you.)
- ▶ Recognize contribution and participation. During the pilot you can do a number of things to reinforce behaviors you are looking for and to light a competitive fire under other people to drive similar behaviors. I like to recognize valuable contributions through things like “Top Rated Content” that recognize the content (and thus the author) that has been rated most highly by their peers. You can also explicitly call out great community managers, contributors, or creative profiles in a weekly email to participants (see Communication plan).



5. Assemble your education plan

Because Enterprise 2.0 is so intuitive, traditional classroom training is unnecessary. Nonetheless, you must prepare your community managers to succeed and your end-users to hit the ground running. Besides training for the core team running the pilot project, I run two different types of educational sessions:

- ▶ **Community Manager Training** – Community Managers are your front line evangelists. They are sometimes called Community Gardeners (a la Booz Allen Hamilton), Community Sherpas, or Community Leaders. For the sake of simplicity I'll stick with the term that is most often used, Community Manager. The Community Manager role is not your Intranet 1.0 site administrator. The Community Manager is not the actual hierarchical leader of a functional group. The Community Manager IS a SME (subject matter expert), a cheerleader, a connector, and a builder. The Booz Allen Hamilton "Gardener" analogy is a good one because a good community manager has to plant seeds, water them, and occasionally pull the weeds in order to nourish a community and make sure it prospers. The community manager training should cover three bases. The first will make sure they have enough technical know-how to do whatever they need to do in their community to set it up the way they want. The second is to cover best practices around when to use which tools that typically come with an E2.0 platform. For example when should they use a wiki vs. discussions vs. blogs? Lastly, give them some guidance on how to manage their communities. How do they drive participation, encourage behaviors, and involve community members?
- ▶ **End-user tour** – I don't like to spend a lot of time with the end-users on where to click and when. Rather I give them a "tour" of their pilot site. Cover the kinds of things they can do and why they might care. For example, if you talk about microblogging, use real business cases of how they might use it. Set them up with a basic understanding and then let them explore the rest on their own. Of course you already set up the Help and Feedback community with FAQs, best practices, and a place to ask questions so they aren't completely on their own if they want a deeper dive on anything.

6. Build your communication plan

Work up front to identify and schedule communications for the course of the pilot. All communications should be kept short and emphasize the benefits the users will see from an E2.0 solution. Include:

- ▶ An intro email to community managers immediately after their training session and to end users right after their tour. Include a quick recap of the benefits, a link to the pilot site, a link to the Help and Feedback community, and a reminder about any incentives.
- ▶ Weekly email – Send a weekly email with a link to the pilot site, a reminder of the incentive, a "Did you know?" tip, and a profile or community manager of the week. This email keeps the pilot front and center with participants and rewards the behaviors for which you're looking.

7. Measure and wrap up

Now it's time to gather the metrics you identified in step 1. This will probably be a combination of quantitative data you can get from your E2.0 solution as well as qualitative data from a survey. I recommend some open-ended questions that generate anecdotes to complete the picture for senior executives evaluating the pilot.

By taking these steps you dramatically increase the chances of a successful pilot. As a result you end up with a more highly optimized environment and a more meaningful experience from which to learn and thus improve your Enterprise 2.0 business results for years to come.

Learn More

To learn more about how NewsGator can enable your organization with social learning, collaboration, knowledge management tools, and more, please contact NewsGator at 800-608-4597 or at insidesales@newsgator.com.

About NewsGator

NewsGator makes SharePoint social. Our Enterprise 2.0 software suite, Social Sites, boosts any organization's performance with the power of innovation management, collaboration and knowledge-sharing both inside the enterprise and out. Customers experiencing Social Sites include Novartis, Biogen Idec, Edelman, The United States Army and The United States Air Force. Learn to be social at www.newsgator.com.

