Social Business

Patterns in achieving social business success by leading and pioneering organizations



Change is the new constant. Organizations are being buffeted simultaneously by a number of macro-economic trends, such as compressed and highly volatile economic cycles, a shift of power in commercial relationships from sellers to buyers and the continued development of an increasingly global, distributed workforce.

Fortunately, there are new trends and capabilities in technology and business practices that can help organizations adapt to, even take advantage of, these macro-economic changes. Cloud, mobile and social computing, when deployed together, can enable organizations to innovate and execute faster, better understand and serve their customers, and build and empower a more-engaged workforce. This paper will focus on how organizations can use social business practices and capabilities to transform themselves, and create competitive advantage and substantial new value.

A social business is an organization whose culture and systems encourage networks of people to create business value. Social businesses connect individuals, so they can rapidly share information, knowledge and ideas by having conversations and publishing informal content. They analyze social content from multiple channels and sources, in addition to structured data, to gain insights from both external and internal stakeholders. When those things happen, innovation and business execution rates increase, better decisions are made, and customers and employees are more engaged and satisfied. Social businesses enjoy lower operating costs, faster speed-to-market, improved customer and employee engagement, and increased profitability.

Many organizations don't get it. They do not fully appreciate the magnitude of the value creation potential of social business. One study estimates that as much as \$1.3 trillion of potential value could be created by social business—in just four industry sectors!³ In other words, social business is likely to spawn a level of business value creation similar to that of the adoption of online commerce capabilities (ebusiness) a decade ago. However, the same study found that, as of last year, just three percent of all organizations surveyed are deriving substantial benefit from social across all stakeholders.

There are leaders across specific industries who do understand that social business represents an enormous opportunity to transform their organization and fuel substantial value creation. Those companies are applying their own social capabilities—not just Facebook and other public social networks—to business processes that connect external and internal stakeholders, including customers, partners and employees. They are transforming key business processes by enabling the human interactions necessary to produce results when the effectiveness of automated process activities has been exhausted.

Which socially-enabled business processes are producing meaningful value now? By socially transforming Customer Service, organizations have reduced their customer defection rate by as much as five percent, increasing profits by up to 68 percent. Being social has helped businesses cut as much as two-thirds off their new Product Development times. Human Resources functions have reduced by two days New Hire On-Boarding time. Marketing departments have achieved a 100 percent increase in market exposure via social. And some organizations have jump-started their Sales processes, increasing sales manager revenue by 40 percent and improving sales efficiency by up to 50 percent, by better connecting sales people and customers.

Exactly how are organizations transforming these processes and becoming social businesses? What best practices have emerged? Those questions are addressed by the Social Business Patterns on the following pages.



54%

of companies expect to support their Customer Service processes with social capabilities within two years, up from 38% at present¹



60%

will socially-enable their Sales processes in the next two years, up from **46% now**² Social Business Patterns are similar in concept to business process flows, in that each represents a repeatable, proven set of value-producing actions.

"I've had more than 30 conversations with IBM customers who have not only implemented and benefited from social business IT implementation, but have quantified the results...the ROI is real."4

Social Business Patterns

Organizations that are relatively experienced with social business perspectives and techniques are seeing opportunities to improve specific business processes and their execution through the application of Social Business Patterns. These patterns are similar in concept to business process flows, in that each represents a repeatable, proven set of value-producing actions. Some organizations begin by applying just one pattern, but know they can realize compound benefits by implementing multiple patterns over time.

Table 1 summarizes six Social Business Patterns that organizations can apply to quickly realize business results. More detail on each Social Business Pattern is described following the table.

Social Business Pattern	Value Producers			
Finding Expertise (See Page 5 for details)	quickly locate the right people, or published content containing, the expertise needed to solve a problem			
	connect the best possible resources to effectively respond to customer needs			
	document and share reusable solutions to common issues			
	create highly-engaged and productive employees			
Gaining External Customer Insights	quickly learn customers' opinions and preferences related to existing and potential products and services			
(Page 6)	identify and connect with key customer influencers to aid marketing efforts			
Increasing Knowledge Sharing	more efficiently and effectively capture, share and access knowledge			
(Page 7)	• increase innovation through wider reach of ideas			
	reduce excessive, unproductive time spent searching and exchanging information			
Improving Recruiting and On-Boarding	collaboratively find and connect the right candidate to the right position			
(Page 8)	streamline assessment and hiring processes			
	better connect, engage and retain new hires			
	contextually recommend expertise to increase new hires' productivity			
Managing Mergers and Acquisitions	increase overall success rate of merger and acquisition activities			
(Page 9)	raise effectiveness of vision setting and communication before, during and after merger or acquisition			
	accelerate creation of "one company" community and culture			
Enabling and Improving Workplace Safety	speed communication of new or changed safety regulations, policies and procedures			
(Page 10)	minimize or eliminate project execution delays arising from actual or potential safety issues			
	improve innovation in safety procedures by increasing dialog between safety experts and workers			

Table 1: Social Business Patterns and how they produce value

Finding Expertise

It is difficult for most people to locate the best expertise needed to quickly resolve problems or best address a business opportunity, whether that expertise resides inside another person or within published content. Employee engagement, effectiveness, and productivity suffer as a result. Externally, this lack of readily-available expertise leads to failures in closing sales opportunities, as well as lower satisfaction among existing customers requiring service and support. This Social Business Pattern shows how relevant expertise can be captured, discovered and shared in support of both internally- and externally-facing business processes.

Business challenges

Common challenges faced by organizations that could benefit from applying this Social Business Pattern include:

- Employees do not proactively share expertise or knowledge with each other
- Employees and business partners can't locate the expertise needed to help them support customers and resolve internal process issues
- Profitability drops because the same solution is 'invented' many times by different employees and business partners
- Sales efforts fail, or drag on with no conclusion, because the organization does not convince the prospect with relevant information and expertise
- Research and Development efforts do not delight customers or produce desired products quickly
- Expertise of workers approaching retirement has not been captured before those expert have left the workforce

Recommended Actions

This Social Business Pattern features these distinguishing actions:

- Use analytics on social interactions, files and other assets to discover hidden expertise across your company
- Recommend human and digital sources of expertise to employees and business partners in the context of their work
- Provide social tools that enable internal and external stakeholders to communicate and collaborate with experts
- Document and share innovative solutions to internal and customer problems with others
- Reward or recognize employees for proactively sharing expertise so that it can be located by others and for collaborating to solve challenges and documenting the solutions

Observed Benefits

Organizations that have applied the practices that constitute this Social Business Pattern have observed the following business benefits:

- 30% improvement in speed of accessing experts⁶
- 55% increase in visibility of company's subject matter experts on its public website⁷

IBM Experience

By any measure, the cumulative expertise of IBM employees is staggering. To better tap into that wisdom, IBM has developed analytics, expert recommendation and other expertise location capabilities for internal use. Employee profiles, blogs, emails (by permission), as well as content repositories and other information sources, are automatically crawled and manually searched to find expertise.

Lowes built internal communities to share best practices and see deeper into their human capital across stores. Clarissa Felts, Lowes VP of Collaboration, presented at Connect 2013 and mentioned how using IBM Connections has improved their recruitment process within headquarters in finding proven talent that knows the store environment from first-hand experience.

Asian Paints sales staff members found it difficult to share best practices and innovative ways of supporting dealers, and they had no way to post issues of concern to the entire sales team. IBM Connections software is heavily used [now] in the sales department, which finds it an excellent tool for solving challenges by sharing innovations, expertise and best practices.

"adding social features and mobile access to CRM applications increased the productivity of sales people by 26.4 percent"⁵ [Ricoh] resolved these problems by reengineering the work process so that staff can publish documents in rough form using the SmartCloud Engage Connections capabilities that also allow global sales companies to collaborate on revisions. This change was partly motivated by a desire for a more proactive method of assimilating market and customer information available to the global sales companies to more effectively provide products tailored to local needs.

The solution was a selfservice portal called Lifeline, [which] delivers services to all of Reliance's key stakeholder groups, from customers and prospects to the company's employees and agents. The portal provides customers with a one-stop experience through which they can research and purchase insurance plans, manage their portfolios and pay their premiums. Storing all... customer and transaction information within a consolidated data warehouse enables [Reliance] to see the big picture as to which product offerings are successful and which are not.

"Many corporate technology companies have social media or analytics products... But IBM has the early lead in marrying the two"¹⁴

Gaining External Customer Insights

A recent survey found that "96% of respondents indicated there was no meaning-ful integration between what the company was doing externally (e.g. social media outreach, customer and supplier communities) and internally with their social collaboration platforms." Social businesses can take advantage of market opportunities because they use listening and analytics technologies to uncover insights, gleaned from multiple channels and sources, about their customers. They then feed those insights into internal social systems and processes, enabling employees to collaboratively respond to customers with appropriate solutions. This Social Business Pattern reveals how organizations can better serve their customers, speed new revenue gains and cut cost out of the product and service development process.

Business challenges

Common challenges faced by organizations that could benefit from applying this Social Business Pattern include:

- Inability to understand the evolving needs of existing and potential new customers and markets, and to meet them with relevant offerings
- Struggling to begin or accelerate a shift from mass marketing to targeting key individuals whose influence reaches large numbers of potential customers

Recommended Actions

This Social Business Pattern features these distinguishing actions:

- Deploy social monitoring tools to 'listen' to and understand customer sentiment
- Use data and social analysis tools to gain insight into existing and potential customers' needs, wants and preferences
- Leverage social communication tools to dialog with influential individual customers and key influencers
- Discuss insights about customers in internally-facing social systems to collaboratively identify, prioritize and develop new product and service capabilities.

Observed Benefits

Organizations that have applied the practices that constitute this Social Business Pattern have observed the following business benefits:

- Nearly 50% reduction in customer/agent service costs⁹
- >50% decrease in time required to develop new services and features¹⁰
- 20% reduction in man hours needed to create new product release information¹¹
- 100% year-over-year average growth in new business premiums¹²

IBM Experience

IBM has supplied its expertise and analysis capabilities to some of the premiere sporting events in the world, including the US Open tennis and Masters golf tournaments. IBM works with event sponsors to help them quickly harness insights to improve their understanding of the event's operations. Event sponsors can also learn, in real-time, from customer interaction with the event's website.

IBM has even run its own digital events, called Jams, during which insights are gained from online discussions involving its employees, business partners, customers and other stakeholders. IBM also plans and conducts Jams on behalf of customers seeking to learn more about their employees and external constituents.¹³

Increasing Knowledge Sharing

Pioneering social businesses are shifting their focus from discrete knowledge transactions to on-going knowledge relationships. These companies are creating value by sharing knowledge across internal barriers created by organizational structure and systems, and traditional borders between themselves and their partners and customers. They are also integrating gamification elements to reward individuals who openly share their knowledge. This Social Business Pattern demonstrates how to use social practices and capabilities to locate, share and use collective knowledge for competitive advantage in today's fast-paced environment.

Business challenges

Common challenges faced by organizations that could benefit from applying this Social Business Pattern include:

- Excessive cost attributable to "not knowing what we know," which leads to rework and solution duplication
- Delays in revenue recognition and creation of unnecessary cost due to inability to execute quickly
- Losing market share because the current rate of innovation is insufficient to produce and maintain competitive advantage

Recommended Actions

This Social Business Pattern features these distinguishing actions:

- Add social communication functionality to other, existing enterprise applications to foster open conversations
- Make people-based knowledge as accessible as document-based knowledge through expert recommendation and always-available social communication tools
- Use gamification elements to provide social recognition to those who freely and openly share their knowledge

Observed Benefits

Organizations that have applied the practices that constitute this Social Business Pattern have observed the following business benefits:

- 30% improvement in speed of accessing experts16
- Productivity increases of 20-25% attributable to reduced need for status meetings¹⁷
- Accelerated problem resolution due to more effective use of communication tools
- Improved employee engagement and satisfaction

IBM Experience

The research and professional services organizations within IBM are excellent examples of knowledge-driven businesses. IBM Research employees possess deep knowledge in specific areas of investigation; they include Nobel Laureates and winners of other prestigious awards. Many of the researchers at the IBM Center for Social Business have been at the forefront of exploring how knowledge is shared within organizations and what can be done to improve those methods and tools. They actively participate in IBM client engagements across all industries.¹⁸

Blue IQ is a program that helps IBMers adopt social business practices, including sharing knowledge. Since 2007, Blue IQ Ambassadors have volunteered their time and expertise to help their peers collaborate more successfully. Ambassadors help their colleagues understand why knowledge sharing and other social practices are important to their work, as well as to the collective business results of IBM.

Russell's Convenience needed an easy way to connect and share knowledge among its 25 stores and with its licensees, vendors and partners to quickly identify and resolve operational issues. The company adopted the IBM SmartCloud Engage services to enable staff members to communicate more seamlessly and transparently across stores and with external stakeholders.

TD Bank Group needed to improve internal communications and collaboration, standardize business processes and capitalize on its employees' collective knowledge and experience. The company deployed IBM Connections social business software to provide... better business processes through knowledge and expertise uncovered by the network and more confident decisions that are vetted by experts and reflect past experiences.

"Knowledge has become the key economic resource and the dominant—and perhaps even the only —source of competitive advantage."15 Working with Kenexa to use contextual targeting to find scientists in print and online, Regeneron found 400-600 scarce, highly skilled scientists per year, without sacrificing on quality. In a few short years, Regeneron has risen from being unranked, to #2 in the 2011 edition of Science magazine's Top Employers Survey.

[A new] applicant tracking system helped AMC Theaters find candidates who could thrive in its culture. As a result, theaters led by managers who most closely aligned with the "fit" strategy increased profits per customer by 1.2 percent, which translated into millions of extra dollars of net income. AMC increased candidate leads from 250,000 in 2006 to 1.4 million in a two-year period. AMC's "fit" strategy matched the right people to the right jobs, resulting in 11 percent lower employee turnover rates.

Executive search firm ZurickDavis uses a portfolio of IBM technologies to support their work placing candidates with clients. After socially-enabling their key processes, ZurickDavis completes 30% more searches annually and fills positions in 25% less time. Their profitability has increased by 100%.

Improving Recruiting and On-Boarding

It is increasingly important for organizations to identify, hire and retain the best available talent, in order to gain and maintain competitive advantage. Businesses must also increase the effectiveness of their on-boarding activities to quickly get new hires acclimated and productive. This Social Business Pattern shows how to meet those objectives by harnessing communities and social networks that connect external candidates with HR staff and hiring managers, as well as new hires with direct supervisors, team members and other sources of expertise.

Business challenges

Common challenges faced by organizations that could benefit from applying this Social Business Pattern include:

- Identifying and attracting the best possible candidates
- Accessing candidates in relation to corporate culture and matching their talents to specific, best-fit job openings
- Getting new hires started and making them productive contributors as quickly as possible

Recommended Actions

This Social Business Pattern features these distinguishing actions:

- Use externally- and internally-facing social capabilities to connect HR staff, hiring managers and candidates in the recruiting process
- Employ social capabilities to connect new hires with HR staff, direct supervisors and other new hires in the on-boarding process
- Leverage internal social capabilities to connect new hires with team members and needed expertise to quickly develop productivity

Observed Benefits

Organizations that have applied the practices that constitute this Social Business Pattern have observed the following business benefits:

- 30% more candidate searches completed annually¹⁹
- 25% reduction in time needed to fill open positions²⁰
- Two-day reduction in time to on-boarding new employees²¹
- 30% faster new hire time-to-value²²
- At least 20% increase in employee retention²³

IBM Experience

With a global headcount over 430,000, IBM has large-scale experience in recruiting, hiring and on-boarding new employees. Its Human Capital Management (HCM) processes are frequently optimized and have become socially-enabled in recent years.

IBM uses LinkedIn, Facebook, Twitter and YouTube to support its external-facing recruiting processes. Potential candidates can be made aware of country- and role-specific positions for which IBM is hiring, as well as interact with IBM recruiters through these channels. IBM recruiters and hiring managers can learn about the candidate by conversing online with them and by visiting their social profiles on the Web.

During the IBM on-boarding process, new hires establish their internal social profile and connect with their supervisor and team members. New employees are also instructed on ways to find the information and expertise they will need to quickly become a productive contributor at IBM, including the use of social capabilities.

"Think about it: much of what it really takes to get up the learning curve doesn't come from some dusty old policy and procedure manual. It comes from what you learn from the people around you."²⁴

Managing Mergers and Acquisitions

One traditional way for organizations to create significant value is through carefully considered mergers and acquisitions (M&A). However, failure rates on M&A activities are incredibly high, often because the vision for, and culture of, the combined entity is neither adequately considered, nor clearly communicated. This Social Business Pattern demonstrates how organizations can use social networking techniques and technologies to create and communicate a compelling, shared vision, improve M&A management activities and connect experts that will positively influence both the single culture and operations of the combined entity.

Business challenges

Common challenges faced by organizations that could benefit from applying this Social Business Pattern include:

- Executives have differing visions for the combined entity
- Managers and employees do not understand the strategic intent or tactical activities of an M&A action
- The combined entity exhibits two distinct cultures
- The new company suffers low retention of employees from the acquired organization

Recommended Actions

This Social Business Pattern features these distinguishing actions:

- Create and leverage a social network comprised of senior leadership, HR and Corporate Communications of both organizations to engage on and communicate a vision for the combined company
- Use multiple social channels and tools to discuss, make decisions on and communicate specific M&A actions
- Leverage communities to connect the cultures and expertise of the two organizations being combined

Observed Benefits

Organizations that have applied the practices that constitute this Social Business Pattern have observed the following business benefits:

- Lower integration costs attributable to reduction of task duplication
- At least 20% increase in employee retention²⁶
- Higher productivity and lower costs due to increased employee retention and engagement stemming from cultural alignment

IBM Experience

IBM has completed at least 120 acquisitions since 2001.²⁷ Through those experiences, much has been learned about establishing a common vision, creating a single organizational culture, managing integration activities and retaining engaged employees.

IBM use of social capabilities has spanned the range of M&A processes. IBM employees work together, and with external partners, to assess and value potential acquisition candidates. IBM teams build business cases together to justify specific M&A action. Acquired employees participate in IBM on-boarding processes, which are infused with social practices and capabilities (see IBM Experience on Page 8).

At TD Bank, fast growth through acquisitions compounded this challenge; the bank now has more branches in the United States than in Canada. The bank's solution was to deploy IBM Connections software to create an employeedriven social network. Key employees connect to others across the far-flung enterprise; improve access to needed expertise and information that staff might not know about; and empower staff to initiate communications, collaboration

Omron Europe was split into two divisions, with separate sales and marketing teams serving many of the same customers. Better communications and collaboration across divisions would help ensure that customers recognized the company as "one Omron." "We are much more than the sum of our parts," says Michael Min, Strategic Communication and eMarketing Manager.

"companies spend more than \$2 trillion on acquisitions every year. Yet study after study puts the failure rate of mergers and acquisitions somewhere between 70 and 90%.²⁵ "We are always focused on keeping the number of accidents as low as possible, and we wanted to enlist the on-the-job expertise of our employees to find the best ways for maintaining a safe and productive work environment." says Adam Holbrook, Group European Environmental Health and Safety Manager at Doncasters Group Ltd.

Keyera employees are widely separated by geography. Roughly one-fifth of them work at headquarters. The rest are dispersed among 16 gas plants. The organization deployed IBM Connections software to provide ready access to company information and help employees share knowledge and interact with their peers in other operational areas. [Using Connections] helps Keyera ensure timely dissemination of critical safety policies and checks.

"Organizational safety culture is largely determined by the effectiveness of safety communication."³¹

Enabling and Improving Workplace Safety

The focus today on safety in the workplace spans compliance and cost issues to proactive communication and collaborative innovation. That focus is important. A study conducted by California's Division of Occupational Safety and Health (Cal/OSHA) showed a 9.4 percent drop in injury claims and a 26 percent average savings on workers' compensations costs in the four years after a Cal/OSHA inspection.²⁸ This Social Business Pattern can help organizations transform safety from a source of liability to an asset by identifying and engaging relevant expertise, and by improving real-time situational awareness, communications and decision-making.

Business challenges

Common challenges faced by organizations that could benefit from applying this Social Business Pattern include:

- Requirement to stay abreast of, and comply with, rapidly changing safety regulations and procedures is costly
- Complex, distributed work environment makes it difficult to effectively communicate new safety practices
- Geographic and time differences make it difficult for safety experts to quickly connect with and coach front-line workers

Recommended Actions

This Social Business Pattern features these distinguishing actions:

- Provide line workers with the latest, relevant safety expertise, automatically and contextually, through social software on mobile devices
- Create communities to connect safety experts with workers to share new or revised safety practices
- Use real-time, social communications tools to link employees in office and front-line work environments for collaborative safety decision-making

Observed Benefits

Organizations that have applied the practices that constitute this Social Business Pattern have observed the following business benefits:

- Three times fewer accidents among most highly-engaged dealer partners²⁹
- Higher productivity attributable to shorter project execution delays and fewer hours missed by injured workers
- Better innovation in safety procedures thanks to increased dialog between experts and workers

IBM Experience

For decades, IBM has owned and operated a number of manufacturing plants, many of which routinely house hazardous chemicals and use potentially-dangerous equipment to produce products. The company formalized its commitment to workplace safety in 1967 and consistently demonstrates low workday case rates.³⁰

Developments in how IBM communicates workplace safety practices and procedures, as well as learnings from assisting customers on safety issues, inform this Social Business Pattern.

"IBM paid close attention to customer feedback, feature requests and requirements while developing the latest iteration of its social enterprise suite. While the company has many point products in the social enterprise space, its new social business software suite brings all these products under a common platform, making them easier for companies to implement." ³²

IBM and Social Business

In early 2011, IBM publicly declared that it was becoming a social business, accelerating existing initiatives to better connect the organization's employees, customers, partners and suppliers. These efforts to transform IBM culture, business processes and computing systems—and, ultimately, its business outcomes—have yielded global, first-hand experiences with, and knowledge of, social business.

Not only is IBM a social business itself, but the company has also helped others on their journey to becoming social. More than 60 percent of Fortune 100 companies have licensed IBM solutions for social business. ³³ IBM consultants work daily with organizations from all industries and geographies to help them tap the transformative power of social business. IBM Social Business Agenda workshops and Smarter Workforce Integration Services are just two examples of the kinds of tightly interwoven cultural, process and technology guidance that IBM can provide to customers.

This social business know-how has also informed the design of related IBM software and cloud-based services, as well as their implementation and use, both within the company and in customer organizations. When IBM released IBM Connections, in 2007, it was one of the first enterprise social software products in a nascent market. Since then, the IBM social platform has grown and can now be used to embed social capabilities in any business process.

IBM WebSphere Portal has proven itself as an ideal container for role- and process-specific social activity. IBM Content Manager and IBM FileNet services marry traditional enterprise content management practices with sharing of content in social channels. IBM unified messaging, analytics and web experience management technologies have also been integrated into the IBM social platform. With the recent acquisition of Kenexa and its award-winning Human Capital Management solutions, IBM is able to offer socially-enabled talent management capabilities.³⁴

Much of the IBM social platform is accessible on mobile devices such as tablets and smartphones. In fact, IBM social capabilities are available as native applications on a broader array of mobile operating systems than any of its competitors offer.

IBM social business software and in-cloud services are frequently recognized as industry leaders by the most influential analyst firms. Those acknowledgements include:

- IDC has designated IBM as the Worldwide Enterprise Social Software Market Share leader for the last four consecutive years (2009-2012)³⁵
- Gartner named IBM a "Visionary" in its most recent assessment of the Enterprise Content Management category $^{36}\,$
- Forrester Research categorized IBM among the "Leaders" in its latest Forrester WaveTM for enterprise social platforms³⁷ and its similar assessment of providers of cloud-based collaboration services³⁸
- IDC named IBM a "Leader" in its most recent market assessment of providers of HR, learning and recruiting process outsourcing services³⁹

Through the combination of its deep social expertise, deployment and adoption services and market-leading social business capabilities, IBM is uniquely positioned to help organizations capture information, create insights and generate interactions that translate into real business value.

"IBM paid close attention to customer feedback. feature requests and requirements while developing the latest iteration of its social enterprise suite. While the company has many point products in the social enterprise space, its new social business software suite brings all these products under a common platform, making them easier for companies to implement."32



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