

# Case Study: Evolving Employee Social Networks to Support Strategic Communities at Deloitte

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In the United States, Deloitte is evolving its employee social network to support internal strategic communities. Managers of collaboration, portal and knowledge management initiatives will find it useful to know how it was achieved, and in particular Deloitte's approach to mixing formal and informal communities and information.

## Key Findings

- Social networking can help to navigate, explore and comment on authoritative community content; conversely, communities can add structure to social networking.
- Activity streams and e-mail integration empower users to keep up with information relevant to them – without having to leave their in-box.

## Recommendations

- Recognize that there are different kinds of communities that must be treated differently in terms of governance, content and structure.
- Pay attention to user profiles: make them dynamic and link into them “wherever a name appears.”

## WHAT YOU NEED TO KNOW

Deloitte U.S. already had an established employee networking environment, a newly migrated enterprise portal to manage important document repositories, and established employee communities around practice areas, global clients and other business activities. The objective behind the initiative described in this report is to link the three in a way that makes them all more valuable:

- To make communities more engaging and relevant by supplementing authoritative content with user-generated comments and social filtering.
- To provide structure, persistence and work context to less formal networking interactions.
- To connect formal authoritative content managed in the portal to community-related activities and individual interests.

To deal with information management issues, Deloitte is being careful to distinguish between three kinds of communities (practice, sponsored and special interest), and, within those communities, two kinds of content (authoritative and user-generated).

Important reasons for the popularity of the system are the extensive use of links to dynamic profiles; the empowerment of users to manage their own activity streams according to their interests; and, optionally, to do so from within their e-mail client. Deloitte believes that the resulting combined system is a richer, more vibrant and more relevant environment to engage and support its global workforce.

## CASE STUDY

### Introduction

Deloitte member firms operate in 140 countries and employ 169,000 people globally who provide audit, consulting, financial, advisory, risk management and tax services. The activities described in this report are primarily those of the Deloitte U.S. organization, with 45,000 people.

A U.S.-based social networking initiative, started in 2006, was already operational in 2007, enabling users to connect, share their experiences and “make the organization feel smaller.” Employees were encouraged to create personal profiles on “D Street,” highlighting their areas of interest and activities; and to use blogs and personal publishing tools to create a “personal brand” within the organization to draw attention to their skills and expertise, and to create awareness about work that was carried out at different parts of the organization.

### The Challenge

After the initial success of D Street as an employee business networking tool, the challenge for Deloitte was:

- To integrate it with its new portal platform, which was used to manage formal processes and related documents.
- To move beyond connecting people on an individual basis to creating more permanent structures that mirrored typical business activities.

The general idea was to create another layer of emergent structure that would channel the enthusiasm and energy of the social networking interactions and user-generated content into the permanent strategic communities, while at the same time providing more visibility to information managed formally within Deloitte’s enterprise portal.

### Approach

Deloitte had already made investments in employee communities and networks of excellence, aiming to capture and diffuse

knowledge throughout the organization. Such communities existed for large client accounts, for different vertical industries, for service areas, for operational activities, for research and for regional activities. The challenge and opportunity was to enhance the attractiveness and engagement of these communities and to mesh them both with the formal repositories managed within Deloitte’s portal, and with the informal interactions and user-generated content bubbling up from their internal social network. In this way individual activities (for example, a comment on the status of an initiative) could be surfaced as relevant information in one or more communities, and, vice versa, content created formally as part of a business activity or a community could be associated with the profile of one or more individuals.

An additional challenge is the environment in which Deloitte operates. Its audit and tax businesses are heavily regulated businesses where authoritative content – such as methods, tools and solutions – cannot be confused with, or compromised by, user-generated content. The focal point had to be on encouraging community development and individual contributions in ways that would not compromise Deloitte’s risk and regulatory profile. A simple process was created for setting up a new community. First, a community request must originate with a partner, principal or director (PPD). That PPD then identifies a community manager, decides whether the community is private or public, decides whether it will be local or global, evaluates whether it fits the scope of an existing company initiative, picks a name, and identifies the benefits. The community manager plays a critical role with responsibilities in understanding Deloitte policies and how they apply to social media usage, organizing the community’s look and feel, pointing to content from elsewhere (for example, content managed in the enterprise portal), identifying relevant external content feeds, moderating discussions, and generally facilitating community activities. Once a community is approved, each community manager is required to attend a two-hour training course on content organization, moderation and facilitation, as well as an introduction to the capabilities of the system, such as reporting. A special community for community managers was also set up to help them with their role. The social networking, community environment and portal are all based on Microsoft Office SharePoint Server 2007 with NewsGator Social Sites.

### Not All Communities Are Created Equal: Three Community Tiers

Deloitte recognized early on that not all communities are the same. It identified three kinds:

- *Practice communities* – The are aligned with Deloitte’s established practice and service areas, and are created centrally with individuals (including community managers) with assigned roles.
- *Sponsored communities* – These are aligned with specific investment programs or affinity groups, such as those covering

different research topics sponsored by the R&D organization; or groups handling large client accounts; or groups involved with other operational programs or initiatives. These are not practice communities per se, but represent important investment areas for the firm.

- *Special interest communities* – Self-organized communities such as the alumni community, or the women’s network. Usually grass-roots, with limited or no funding provided by Deloitte.

### Not All Content Is Created Equal: Authoritative vs. User-Contributed Content

Another important distinction is made between “official,” authoritative and systematically managed content and user-generated content. Both kinds of content are considered valuable but they have different life cycles and different uses. For example, rules and policies that have been formally adopted must be easy to distinguish from user comments and conjecture. Both are important, but they need to be treated and used differently. Provided there is enough contextual information to distinguish between the two, it is possible to mix authoritative and user-generated content in most communities (but not all). This distinction reduces the risk that individuals will be misled by non-authoritative comments.

In practice communities, the authoritative content which is created as part of a formal process or drawn from the portal repositories makes up about 80% of the total. The other 20% is user-generated through blogs, comments and discussions. In sponsored communities, authoritative and user-generated content is mixed equally, while the content in special interest communities is primarily user-generated.

The distinction between authoritative and user-generated content is carried through into other services. For example, the search engine (which is based on Autonomy technology) indexes and makes searchable all kinds of content, wherever it lives and irrespective of how it was created. However, the search engine results are displayed in two different “tabs” – one for authoritative content and the other for user-generated content. Deloitte believes that it is important for employees to have access to both but also that it is important to make users aware of its provenance and reliability.

### The Importance of Linking Back to a Person’s Profile

In the new platform, wherever an employee name appears in relation to a document, a post, or anywhere else, there is also a pop-up with a picture, a presence indicator, and a link back to that person’s D Street profile. This simple mechanism makes it easier to understand the provenance and context in which a comment or other user-contributed information was provided. Also, widespread use of links to profiles acts as an incentive for individuals to contribute to the system as these contributions are automatically linked to their profiles and drive attention and recognition. Links from content into people profiles can also bring up related information, related activities or related people.

In this sense, the social context (expressed as links, tags or people connections in individual profiles) is providing a mechanism for navigation, exploration and discovery, both for user-contributed and authoritative content. Another engine also uses information about tag usage, community membership and people connections to make personalized recommendations of relevant content or people (the recommendation engine has actually been tuned to promote “new” members to increase their exposure to other community members).

### The Importance of Linking to E-Mail: How Activity Streams Drive Acceptance

Notwithstanding the advances in community capabilities, Deloitte continues to be primarily an e-mail-oriented organization. Given that, Deloitte believes that the single most important capability of the social network system, driving acceptance and participation, is the implementation of activity streams across communities, and the integration of those activity streams into e-mail.

The key benefit is that individuals can decide for themselves which other people, communities or activities they need to “follow.” More importantly, it is possible to keep track of events, comments and conversations “without having to go there.” Alerts are received via e-mail, and response and participation can happen in a familiar way directly from the in-box. Changes to what is “followed” can be made at any time by each individual depending on their interests, which keeps activity streams relevant and personalized, without any administrative bottlenecks. Contributors can contribute via the community, via their profile, or via e-mail, knowing that any recipient can choose to “unfollow” them if they wish to. Recipients need only “follow” very relevant streams knowing that everything they don’t subscribe to directly is still searchable and navigable.

### The Importance of Training

In preparing for its expanded use of social media and community capabilities, Deloitte conducted an extensive examination of its existing policies to see whether new policy was needed to guide social media behaviors. Given Deloitte’s extensive set of pre-existing policies on the topics of external communications, electronic communications, professional conduct and ethics, among others, the conclusion was that new policy was not needed. However, what was needed was an improvement in employees’ understanding of how the existing policies applied in a new, social-media-enabled world. As it is impractical to review all user-generated comment prior to publishing, Deloitte’s communities must “tend their own garden,” and ensure that all conduct and contribution is within Deloitte policy.

As such, Deloitte U.S. is deploying an extensive, and required, training course on social media. Using a series of scenarios (such as a staff member’s personal blog critiquing the product of a key client; or the use of a Deloitte e-mail address on a staff member’s personal Facebook page), Deloitte intends to highlight the nuances inherent in this whole area of distributed publishing and community building.

## Results

Deloitte communities are increasingly active and very popular with about 100 different communities operating so far. The nature of the work, the decentralized structure of the organization, the global distribution of employees, and the need to leverage talent wherever it is located has persuaded Deloitte that employee social networking and community support are essential workplace capabilities.

Like e-mail, and the telephone before that, Deloitte doesn't feel the need to quantify the overall impact using a single metric. Deloitte believes that measuring the impact of this kind of platform on general productivity metrics (such as project completion times or client satisfaction) would not be reliable or believable. Instead it relies on discrete evidence from users and managers that social networking and communities help to carry out tasks around specific business activities, which is collected and publicized as testimonials.

In the future, Deloitte U.S. has plans for personal portals and further embedding of profiles and activity streams in calendar, conferencing and instant messaging applications.

In addition, Deloitte now looks to deploy profile, community and social media capabilities on a global scale.

## Critical Success Factors

- **Simple sells.** Using a simple process for community creation with emphasis on the role of a community manager, and training.
- **Tie in people, not just content.** Driving attention and interest in user profiles by linking to them from within, as well as from outside the system.
- **As simple as e-mail.** Using activity streams and e-mail integration to empower users to personalize information access and to cope with the need to keep up with relevant information.
- **Community and content tiers.** Treating different kinds of community (practice, sponsored and special interest communities) and different kinds of content (authoritative versus user-generated) appropriately.
- **Training and education.**

## Lessons Learned

- Communities are a natural way to air formal authoritative content that may exist elsewhere and to blend it with user-contributed content and commentary.
- Employee social networking and internal community support can complement and add value to an enterprise portal by providing a social layer through which to navigate, explore and comment on authoritative content.
- An enterprise portal can provide authoritative content and a work context which individuals can link to and organize from their personal or community perspectives.
- Focusing on existing communities with known needs, purpose, committed participants and established governance principles lessens the need to manage change and motivate participants.