An Introduction to the Steps to Social Business
Version 1.0

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This document is extracted from the *CTO's Guide to Social Business,* which is a collaborative effort from the W3C Social Business Community Group[3] (SBCG). The SBCG brought together diverse business focused experiences and perspectives into a single guide for IT and business leaders who want to know more about social business. The following participants have provided their expertise and time to this effort.

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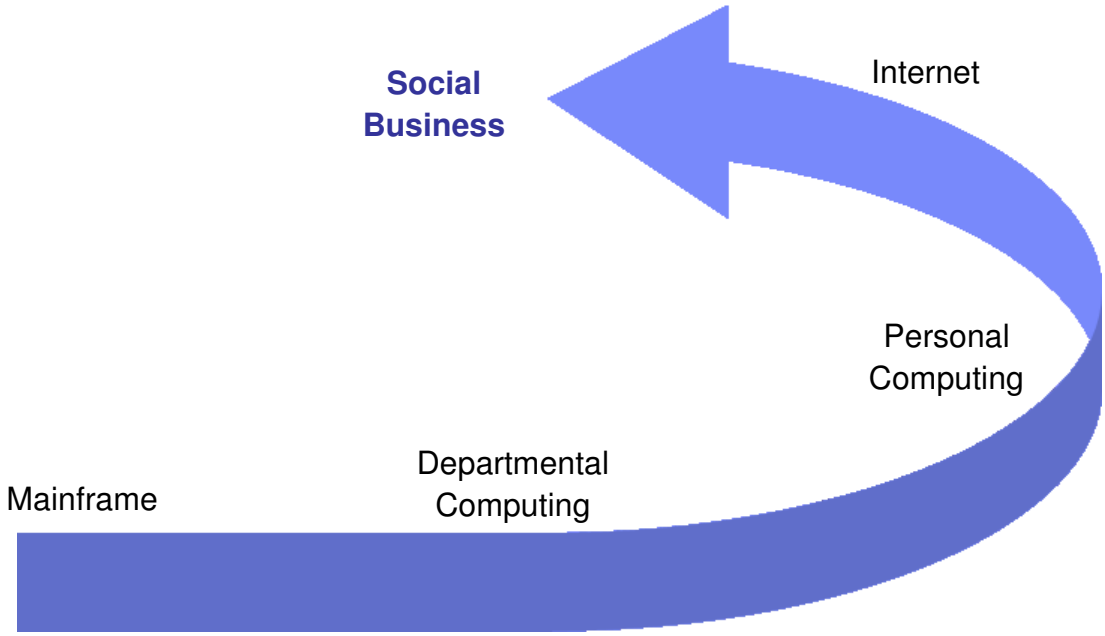
Introduction

The primary target audience for this paper is a technical audience looking to get a better understanding of technical components required to enable social business. According to Forrester Research, 65% of Line of Business buyers will buy IT solutions without involving their IT staff. Technical professionals need to be aware of social business trends and technology so that they can lead their organizations' technical strategy as they become social businesses. Social business is an emerging area, as is the technology that enables it.

We are still early into the **Fifth Shift** in Business Technology



Source: Rawn Shah, 2/1/2011, Blogs.Forbes.com, *The Fifth Shift in Business Technology*, http://blogs.forbes.com/rawnshah/2011/02/01/the-fifth-shift-in-business-technology/

Adopting patterns from social networking into business settings is yielding new use cases that will drive new technology needs and the need for flexibility realized via open standards. Social business is quickly expanding beyond social media campaigns and employee blog sites. Social business intersects with other important IT trends. Forbes observes that "businesses faces a dynamic landscape where both customer and employee demands are changing. The world is changing, and there are three market shifts that are driving this change – mobile, social, and cloud. These trends change what we connect, how we connect and how we transact. "[1]

What is a Social Business

What is a social business? A social business is an organization that applies social networking tools and culture to business roles, processes and outcomes. A social business enables people to engage productively in a business context through collaboration and interconnecting business activities with social content. The scope of a social business spans across internal organizational boundaries and can extend to partners and customers. A social business monitors and analyzes social data to discover new insights that, when acted on, can drive business advantage, for example faster problem solving, improved customer relations, predicting market opportunities, and improving processes both internal and external. A social business recognizes that people do business with people and optimizes how people interact to accomplish organizational goals:

- Connecting individuals in productive, efficient ways
- Expediting identification of expertise
- Capturing and sharing knowledge
- Providing line-of-sight across traditional boundaries and better aligning actions to needs
- Speeding up business with insight to anticipate and address evolving opportunities
- Encouraging a collaborative atmosphere

The following diagram illustrates the range and categories of Social Enterprise Processes.

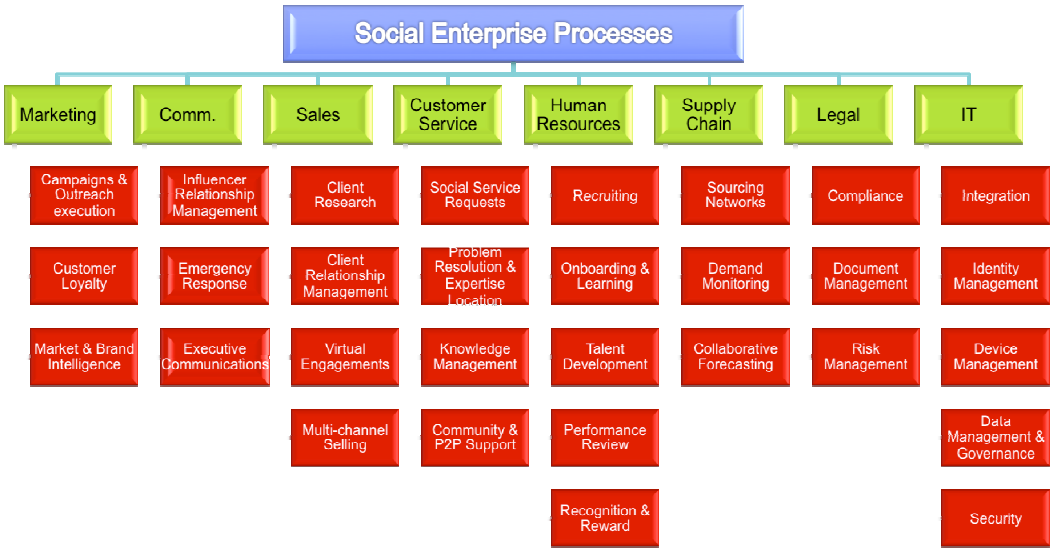


Chart Courtesy…..

Examples of social capabilities applied in businesses today:

- *Marketing and Communications.* Focused on use of social networking for marketing purposes. Emerging into more sophisticated customer relationship management scenarios that employ analytics capabilities; for example, brand monitoring via parsing and analyzing unstructured social content such as customer comments.
- Human Resources. Optimizing the workforce via collaboration software deployed to remove silos within an organization, improve information sharing and teaming, to achieve new innovation and more effective project teams.
- *Project Management (IT)*. Providing a more fluid approach to commenting, documenting, updating and advancing a project through participatory methodologies such as blogging about meetings, commenting on documents.
- *Cross-department* collaboration. Facilitating awareness of activities and informal sharing of knowledge and resources across departmental boundaries with activity streams, blogs, and discussion forums.

Social business scenarios are emerging that are central to how work is accomplished in an organization. These will increasingly impact core systems within an enterprise. Consider, for example, supply chain business processes where social interaction is introduced to achieve more effective handling of business process exceptions, business process adoption and process improvement. These trends will increasingly reach deeper into an organization's core systems and impact enterprise architecture. Social business is not disjoint from enterprise IT strategy and execution, but rather an integral component.

What are the technical considerations of these emerging social business scenarios? The W3C (World Wide Web Consortium), a community that drives open web standards, led an online 3 day collaboration event (a "JAM"), on the subject of social business use cases and the standards required to support them. Over 1000 people participated, representing 20 industries, and including executives and thought leaders with varied backgrounds and specialties[2]. One recommendation from the JAM was the need to sustain the focus on open standards for social business. The result was the launch of the **W3C Social Business Community Group**, with a mission to "gather practical, business oriented, use cases focused on high-value transactions to influence and improve existing social standards in order to foster the growth and adoption of social standards in enterprise solutions. "[3]

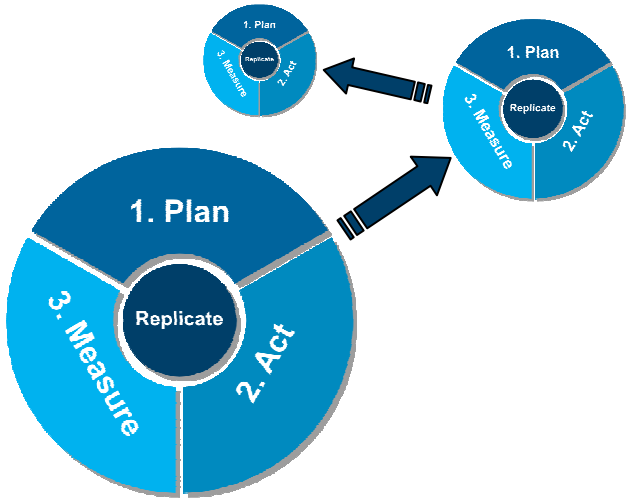
The building blocks of social business start from two points of origin. On one hand there are a wide variety of consumer-driven technologies and patterns that foster collaboration and new approaches to engaging the user and communities. On the other hand there are a broad set of technologies, standards, and services that drive existing line of business applications and systems. This point of convergence is where we start to drive new value and visibility to existing processes, applications and data. It's important to note that this transformation does not require a one-size-fits-all approach. An effective approach is to start small and incrementally add capabilities over time as illustrated in the following figure.

- **Plan** – Identify your social business advocates and form a cross-functional team to develop your business case and articulate the expected returns from empowering processes with social capability

- **Act** – Develop a proof of concept by leveraging a social platform to extend existing solution investments

- **Measure** – Obtain stakeholder agreement for the proof of concept and establish the metrics of success by which social enablement for the project will be measured

Evaluate each implementation, replicate successes & build upon consecutive social investments to grow a comprehensive social business program



Getting Started

In this section we provide guidance on getting started with social business.

Step 1: Establish Strategic Vision

In the beginning, an organization may not be able to fully articulate how they will become a social business, or realize that becoming one can address deep-seated problems with communication and collaboration. They may need to explore possibilities via proof of concept and pilot projects. However it is important to have executive leaders establish that social is important for the company. During this strategic phase, the CEO and the senior management team (including Line of Business Executives and the CIO) lead the organization to establish the vision. Social business is often a grassroots initiative, rather than led by IT or executives. In fact, businesses should embrace the ability of these new tools to provide significant business value. The development of a social business is more effective if IT and executives are directly involved from the start and lead in the IT transformations required. Social businesses realize fundamental changes in many of their key processes and these changes have IT implications. Some initial projects may be silo efforts that have little impact on existing systems, however expansion into higher value capabilities will inevitably carry IT implications. Even silo projects may carry IT implications in terms of enterprise policy regarding mobile devices, security, and data access for example. Having a solid executive understanding, and endorsement, and participation from executive leadership is critical for success. Even silo projects may carry IT implications in terms of enterprise policy regarding mobile devices, security, and data access for example. Having solid understanding, endorsement, and participation from executive leadership is critical to success.

Step 2: Identify Initial Use Cases

Forbes notes that social and mobile will:

"change how businesses engage with its customers and employees. Social is changing the way firms market and deliver customer service. But social isn't something that is reserved for consumers. Social software is changing our enterprise collaboration tools and its changing engagement within business apps such as Customer Relationship Management (CRM). Game mechanics are being used in retail for Business to Consumer (B2C) but also in business environments for rewards."[1]

Initial use cases may come from line-of-business teams, or could be initiated by technical teams. One approach to categorization of use cases is:

> *Enterprise:* use cases whose scope is "intra-enterprise", focused on improving operations, such as our procurement business process example, or establishing new software for project collaboration and content sharing.
>
> *Business to Consumer (B2C):* B2C examples include marketing via social media, customer service and brand monitoring via monitoring consumer social applications.
>
> *Business to Business (B2B):* B2B can include marketing scenarios as well as operational scenarios, for example when partners are part of a supply chain process.

Initial use cases should be selected with a consideration for scope that will:

- Be measurable and have a business impact.
- Exercise key technical considerations. Initial use cases should inform the IT leadership on implications and adjustments to technical strategy, for example in the areas of mobile device usage policies, security, application integration, computing infrastructure, data implications.
- Be a starting point. Can stand on- their-own and deliver business value yet also be expanded upon to provide additional value incrementally.
- Start small. Learn and adapt as you go. Accept that many small fires will fizzle out before some will come ablaze.

Our procurement business process example is an example of an initial use case with sufficient scope to meet the above criteria.

Step 3: Develop a Social Business Technical Strategy

A social business technical strategy needs to be an integral part of an organization's enterprise architecture. Gartner defines enterprise architecture as "the process of translating business vision and strategy into effective enterprise change by creating, communicating and improving the key requirements, principles and models that describe the enterprise's future state and enable its evolution." [6]

The Open Group has defined an enterprise architecture framework, one of the most widely adopted in industry, to illustrate. TOGAF (The Open Group Architecture Framework) [7] defines four types of architecture that are commonly accepted as subsets of overall enterprise architecture:

- *A Business (or Business Process) Architecture* - this defines the business strategy, governance, organization, and key business processes.
- *A Data Architecture* - this describes the structure of an organization's logical and physical data assets and data management resources.
- *An Applications Architecture* - this kind of architecture provides a blueprint for the individual application systems to be deployed, their interactions, and their relationships to the core business processes of the organization.
- *A Technology Architecture* - this describes the logical software and hardware capabilities that are required to support the deployment of business, data, and application services. This includes IT infrastructure, middleware, networks, communications, processing, standards, etc.

A social business technical strategy will intersect with the enterprise architecture:

Business Process

Social business may drive changes in key business processes, for example in customer relationship management, supply chain management, and enterprise resource planning, where social patterns are applied to improve those processes.

Data Architecture and Social Analytics

Social analytics are concerned with the data representing the interactions between people, and between people and objects. Data architecture may be affected by a combination of:

- New data sources, for example, external data sources such as brand monitoring of consumer social applications
- New data types, for example identity, profile, and social graphs.
- Requirement to manage and query unstructured content produced by employees, customers, and partners
- Enable analysis against combinations of social data (e.g. customer comments) and other enterprise data (e.g. order history)
- Master data management capabilities to uniquely and consistently identify and describe people and objects across systems.

Application Architecture and SOA

Service Oriented Architecture (SOA) encapsulates application functionality and exposes that function via standardized services, typically for integration and reuse purposes. This approach can be highly effective when it is desirable to utilize core enterprise software in new ways and with new technologies.

Technology Architecture and Mobile Devices

Mobile devices bring an entirely new dimension to social business. Mobile devices are different from other portable devices such as laptops or even net books because they are almost always on. There is something more personal about mobile devices than any other type of device, and people are more willing to be interrupted and respond to information that arrives to their mobile device than to other devices. This always-on, always-available characteristic of mobile is frequently called "presence". That many mobile devices 'know' their own location (via GPS or cell tower triangulation) augments the concept of presence.

- The concepts of presence and location ("where I am now" and "am I available") enables many unique social scenarios.
- Certain social technologies, in particular, activity streams, SMS messages (i.e. texting), Instant Messaging (IM) and e-mail lend themselves readily to use on mobile devices. Employees can interact with their business from their mobile device in a format that is comfortable in a mobile, small-screen size format.
- Businesses now have to adapt to the "Bring Your Own Device" (BYOD) mindset that is now prevalent world wide.
- Mobile devices present some specific security challenges. The capability to remotely wipe a device of confidential information in the event the device is stolen or an employee leaves the company is a very important aspect to mobile device management. Likewise, finding lost devices using secure presence information is increasingly a need expressed by business people (especially those in charge of corporate security management).
- Social business applications for mobile devices can range from native applications specific to that device's operating system, to hybrid applications that leverage both the browser and the native operating system, to solely browser based applications.

Technology Architecture and Cloud Computing

The US National Institute for Science and Technology (NIST) defines cloud computing as follows:

"Cloud computing is a model for enabling ubiquitous, convenient, on-demand network access to a shared pool of configurable computing resources (for example, networks, servers, storage, applications, and services) that can be rapidly provisioned and released with minimal management effort or service provider interaction." [8]

Cloud computing implementations enable flexible and rapid deployment of social software. There are multiple deployment and service models for cloud computing. Software as a Service, or SaaS, is one

model particularly appealing to social business. The Cloud Standards Customer Council suggests "consider SaaS for rapidly evolving business environments where new requirements are likely to emerge, such as social business and web campaigns." [4]

Cloud-based offerings can be an effective approach to providing social solutions for business partner interactions, or to provide collaborative capabilities that bring together an enterprise where different groups use have different technology environments.

Step 4: Deliver a Proof of Concept before moving to production

Once there is agreement on initial use case(s) the next step is to assemble a Proof-of-Concept (PoC) team which includes the following:

- *Information Technology*. The team may include architects, systems administrators, development, and customer support (help desk).
- *Functional representative*. The team includes one or a few designated individual within the enterprise who can represent business user expectations.
- Leading-edge experience. Individuals who are familiar with and enthusiastic about social tools. Supporting and promoting social tools is a large culture change in most companies. Do not expect those without experience or with resistant attitudes to lead the way.

Consider PoC implications with regard to technical strategy. A PoC should:

- Validate existing strategy and/or identify gaps and concerns with existing strategy.
- Validate existing IT architectures, and/or identify gaps and concerns.
- Inform on areas where strategy and policies are being developed or need to be developed.
- Start small and be nimble. Expect some failure; be ready to learn and adjust.

Assuming that the PoC is successful and meets or exceeds expectations, a production implementation can be delivered. A production implementation will address concerns, often non-functional, that a scope limited PoC may not, such as performance, reliability, and availability.

Summary

Becoming a social business has technical and cultural implications. Social businesses adopt new technologies and patterns. To support the transformation to a social business, adoption of these technologies must be aligned with enterprise architecture. Social business technologies combine with and leverage other key technical trends such as analytics, service oriented architecture, cloud computing, and mobile. IT leaders must educate and partner with the lines of business leaders to successfully realize a strategic transformation to social business.

Appendix A: The W3C Social Business Community Group

We are in the formative stages of social business. Beyond pilots, beyond the getting started use cases, there are scores of valuable new and emerging use cases, yet to be imagined, defined, and implemented by the myriad of users challenged by their unique requirements. What we know is that whether enterprise, B2B, or B2C, an open standards-based ecosystem will most readily enable desired use cases to become reality with more flexibility of choice, with less time and cost. The real value of social business will not be realized if manifested as islands of point solutions. As social business becomes more pervasive, integration with core business systems, and across social platforms, will be desired. As we have seen with recent paradigms such as service oriented architecture (SOA) and Cloud, open standards are the enabler of this desired flexibility. The W3C Social Business Community Group is in place to define social business use cases that matter to businesses and drive the open standards based ecosystem needed to support those use cases.

The mission of the Social Business Community Group is to "gather practical, business oriented, use cases focused on high-value transactions to influence and improve existing social standards in order to foster the growth and adoption of social standards in enterprise solutions."[3]

Consider joining the W3C Social Business Community Group. There is no membership fee, even if your organization is not currently a member of W3C. The W3C Social Business Community Group is a gathering place to understand the value of applying social concepts to business, share best practices with peers and subject matter experts, and influence the evolution of social business standards. The group is also producing a diagram to represent the various components of importance to social business, and the current standards landscape overlay, in order to identify and prioritize standards requirements for social business. Join the group and contribute your ideas.

For information on the Social Business Community Group, including how to join, visit this link - http://www.w3.org/community/socbizcg/

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