



Platforms of Engagement

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BroadVision



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Introduction

In the first half of 2011, there has been increasing interest in the evolution of **systems of record** into **systems of engagement**. This transition was first written about by Geoffrey Moore in his 2006 book, *Dealing With Darwin*¹. However, the idea has only recently received wider attention, coupled with the growing maturity of Enterprise Social Networking, or Enterprise 2.0.

In this paper, we will consider the benefits of systems of engagement, and examples of what this means in practice. We will also introduce the concept of a **platform of engagement** – a cross-system social backbone for an enterprise.

¹ <http://bit.ly/qhib3L>

Systems of record, systems of engagement

In his book *Dealing With Darwin*, Geoffrey Moore suggests that most enterprise IT effort over the last decade has concerned **systems of record** which may represent an authoritative source of an organization's data, but do little to enable employee interaction to create and use this data. Therefore, these need to evolve into **systems of engagement** to enable enterprises to communicate and collaborate better and use this data to make more effective, more timely business decisions.

These concepts are also discussed in his white paper from January 2011, *Systems of Engagement and The Future of Enterprise IT*².

The growth of enterprise social networking has led to several thought-leaders articulating the same vision.

JP Rangaswami, writing in February 2011³ says:

Businesses are morphing from customer-product hierarchies to relationship-capability networks. This is placing intense pressure on enterprise systems bases, which have traditionally kept the Fort Knox-like "systems of record" distinct and separate from the somewhat more promiscuous "systems of engagement".

Dion Hinchcliffe, writing in June 2011⁴ notes:

Systems of record have matured to the point where there's only a little strategic advantage to having your own unique capability. Instead, the discussion on strategic technology has shifted to the other 40% of what businesses in industrialized nations do: Knowledge work.

² <http://bit.ly/r2HPxf>

³ <http://bit.ly/oobLWI>

⁴ <http://bit.ly/pMBuLb>

Mark MacDonald of Gartner describes this “knowledge work” in a series of blog posts⁵ as “mid-office processes”:

Mid-office processes are decision centric, semi-structured and require bringing experience and tacit information together to assess the situation make decisions and mobilize the organization. These processes are not formally recognized or even overtly managed, but they are critical because the decisions they produce and the actions that determine the company's direction and cost structure.

He provides examples of such mid-office processes:

- New product development / launch
- Task force based assignments
- Performance reporting
- Complex customer service
- Case management
- Strategy formation and execution
- Supplier strategy and contract negotiation
- Meeting

A system of engagement provides an environment for knowledge work and mid-office processes to be carried out. It enables users of the systems of record to connect with both data from the system of record, and other users of the system. This enables business decisions to be made efficiently by bringing together both the data and people required to make these decisions.

Whereas the system of record is data- or process-centric, the system of engagement is people-centric. It is architected around the relationships between people, with the data from the systems of record providing context for the collaboration between the people. The systems of engagement can be seen as a “social layer” for the system of record.

⁵ <http://bit.ly/o4DAES>, <http://bit.ly/pqRUcP>, <http://bit.ly/qpiojS>



Social silos

Of course, many vendors of these systems of record will claim they are adding social features to their products. But can these claim to be true systems of engagement if they are tied to one particular system? Can a CRM system really provide collaboration capability for the whole company, not just users of the CRM?

We have been here before. When portal software came to prominence in the early 2000s, many ERP, CRM and even business intelligence vendors claimed they had added portal capabilities to their products. But the very nature of a portal is to provide access to a wide range of systems through a single interface. If a portal only provides access to a single vendor's system, it probably isn't really a portal.

And so it is with social layers on systems of record. If all this does is connect existing users of that system, it is not a true enterprise social network; it merely perpetuates the data- and process-centric nature of these systems, whereas our aim is a people-centric system.

In an organization of 1,000 people, it may be that just 50 of these regularly use the CRM system. Yet CRM data may well be very useful to many of the other 950 people, and the knowledge of the 950 may be invaluable in helping the 50 CRM users resolve issues they are working on in the system of record.

It is clearly not practical for the 950 non-users to join a social layer tied to the CRM system. Would the finance department similarly demand that everyone joins their social network? And the HR department demand everyone joins their network? No, in order for the social layer to be effective, it needs to span all these systems, all these departments.

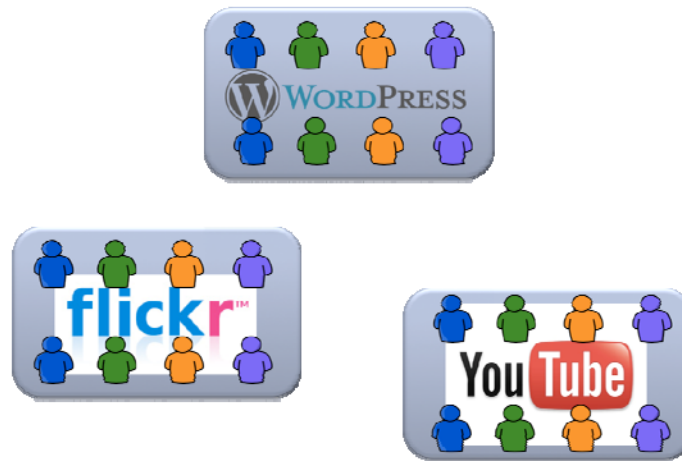
So what is required is not merely a system of engagement, but a **platform of engagement** that enables interaction between users of many different systems of record.



Platform of Engagement

The concept of a platform of engagement is perhaps best illustrated with an example from the world of consumer social networking.

If someone posts a photo on Flickr, their friends can go to Flickr and post comments. Similarly, a video on YouTube, or a blog on WordPress. Each site hosts the content; users have to go to each site to view and discuss the content, and need to establish networks of friends on each. While each has social features, it is still fundamentally a content-centric model.



Contrast this with Facebook. Users can post links to their Flickr photos, YouTube videos and WordPress blogs, but the discussion all takes place on Facebook with the same network of friends. This is a people-centric model – it really doesn't matter where the content is, as long as it can be discussed in the place where the people are.



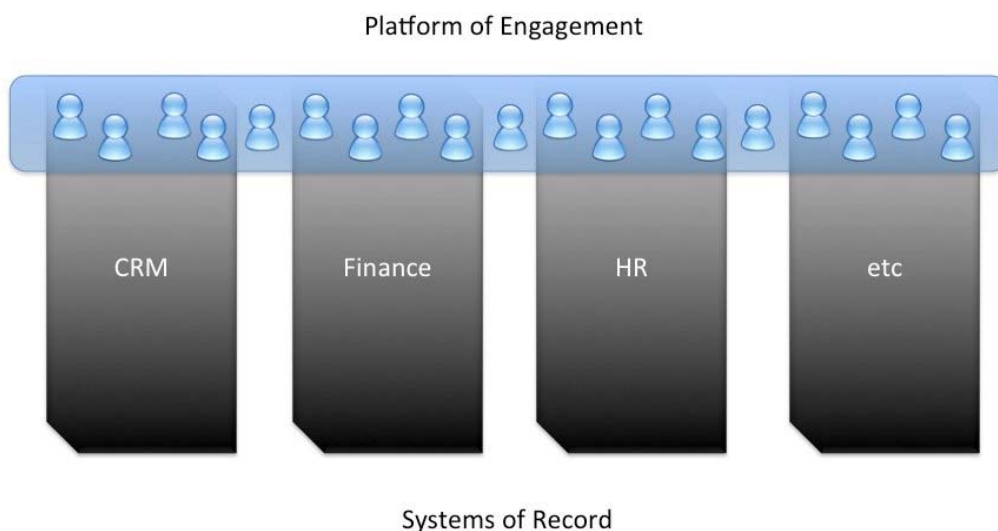
Social backbone

Edd Dumbill, writing in July 2011⁶ about the long-term impact of the new Google+ service suggests that:

Google+ is the rapidly growing seed of a web-wide social backbone, and the catalyst for the ultimate uniting of the social graph.

This idea of a “social backbone” is a very good way of thinking about the objective of a platform of engagement. Facebook provides this to some extent in the consumer social networking world; Google+ may, as Edd suggests, do it more effectively. But what does an enterprise “social backbone” look like?

A platform of engagement is a pervasive social layer that spans many different systems of record and departments within an organization. Rather than being tied to one system, it enables collaboration between users and non-users of each system of record.



⁶ <http://oreil.ly/qX9YLc>



Characteristics and features

To realize the vision of a platform of engagement, the first requirement is an enterprise social network or “Enterprise 2.0” system to provide the social backbone and connect all the users in an organization.

Typical functionality of such a platform includes:

- Activity streams and status updates
- Member profiles
- Blogs, discussion forums and wikis
- File sharing
- Communities, allowing a subset of members to work together, either in public or in private

Additionally, the platform needs to be sufficiently open to enable integration with each of the systems of record. It needs to:

- allow the systems of record to request social data (discussions, blogs, user profiles & social graph)
- allow the system of record to report events to the social network, as these may form the basis of discussion.

Examples

Let us consider a CRM system, in which a customer raises a service request. This is automatically posted to the social network's community of interest for the specific customer, and appears in the community activity stream. This gives visibility of the issue to non-users of the CRM system, and enables discussion to start immediately.

The screenshot shows a social network interface for a community named "PowerMaker". On the left, there is a sidebar with a red header containing the text "POWER MAKER". Below this, there are navigation links: "Follow", "Manage Members", "Edit Settings", "Delete", and "Leave Community". Under "Community Admins", the name "Phil Atly" is listed. A "Community Directory" section includes links for "Members", "Blog Posts", "Files", and "Forums". The main content area is titled "PowerMaker" and includes a sub-header "(This community is visible to all Network Members.)" and "Community for all things relating to the PowerMaker account". Below this is a "Community Activities" section with a text input field "What's on your mind?" and a "Post" button. The activity stream shows a comment by "Jim Smith" on a note from "Customer Service" titled "Integration with ERPCO failing". A reply from "Phil Atly" says, "We need to fix this quickly as we don't get paid if it doesn't work!". Another reply from "Jim Smith" says, "I've had a look, and I think I know what's wrong. I'll post some notes shortly". At the bottom of the activity stream is another "What do you think?" input field.

Similarly an alert from a finance system brings immediate attention to an overdue invoice.

The screenshot shows a social network profile page for "Carmen Hudson". On the left, there is a profile picture of a woman. Below it are links for "Edit Settings", "Profile Information", "Connections" (Following: 2, Followers: 1), "Recognition", and "Activity Points" (This week: 2, This month: 2, Lifetime: 2). The main content area is titled "Carmen Hudson" and includes a text input field "What's on your mind?" and a "Post" button. Below this are tabs for "Activity", "Action Items", and "Messages". A "Streams" dropdown menu is set to "All Activity". The activity stream shows a comment by "Susan Bentley" on a note from "Accounts System" titled "ALERT - invoice #39801 (PowerMaker consultancy) overdue". A reply from "Carmen Hudson" says, "I have contacted PowerMaker via our extranet social network, and they claim it is because the work is not complete". A reply from "Phil Atly" says, "The problem is already resolved. Customer Service have the details". A reply from "Susan Bentley" says, "Correct. This is resolved, and I have acknowledgement from PowerMaker." At the bottom of the activity stream is another "What do you think?" input field.

In both these cases, the system of record is delivering information to the social network. But there are also advantages in enabling the reverse of this, displaying social data into the system of record interface.

Let us consider an HR system. This typically holds definitive data on employees, performance reviews, training classes attended, vacancies, benefits, etc. However, it provides little opportunity for discussion and collaboration around these records.

For example, the HR system holds details of training providers. A social layer allows employees to discuss their experiences of these providers. When the HR manager accesses the HR system to retrieve details of the training providers, they are also shown the latest discussion about that provider in the same context, as illustrated in the picture below. This enables the HR manager to make better-informed decisions about which training providers to continue using, and which to replace.

Your HR System

Welcome admin [Change Password](#) [Logout](#)

ADMIN PIM LEAVE TIME BENEFITS RECRUITMENT PERFORMANCE REPORTS BUG TRACKER HELP

Qualification : Education

Search By: Search For:

Education ID	Course	Institute
<input type="checkbox"/> EDU001	Clearvale Guru	BroadVision University
<input type="checkbox"/> EDU002	Clearvale Beginner	BroadVision University

From Clearvale

Activity

- Carol Higgins commented on Feedback on September 16th class
- Pam Inez created a discussion Feedback on September 16th class
- Carol Higgins commented on October class
- Pam Inez created a discussion October class

Discussions

- Clearvale Beginner / Feedback on September 16th class
- Clearvale Guru / October class

Files

[Go to community](#)

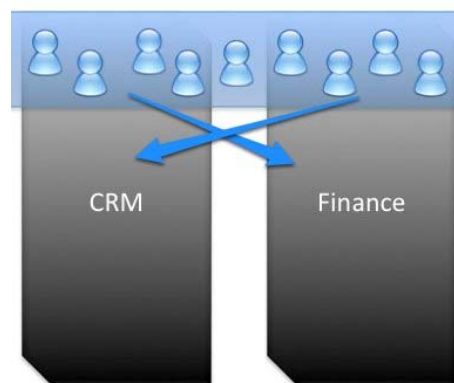
These examples demonstrate how the integration between the systems of record and platform of engagement is two-way; system of record users see social data inside the system of record, and non-users see system of record data in the platform of engagement. The system of record is responsible for core business data; the platform of engagement is responsible for the social connections between members of the organisation, and the discussion around the core business data.

Establishing the Platform of Engagement

The prospect of implementing a pervasive social platform that connects everyone in an organisation with every system of record can appear a little daunting. Of course, to try and do this in a single project would be foolish. Instead, the platform should be built up gradually. But where should you start?

First, establish the social network that will form the basis of the platform of engagement. Even without any integration to systems of record, this can enable better communication between employees. In large organisations, it is generally accepted that the best practice is to establish the network amongst a small subset of employees, and then open it to a wider audience gradually.

Once the network is established, consider the sequence in which systems of record should be integrated. It is important to remember that the primary beneficiaries of integrating a system of record to the platform of engagement are not those employees who are already using that system. For example, if a finance system is integrated to the platform of engagement, this is likely to be most useful to employees who don't already have access to the finance system. Therefore, if a social networking pilot project only includes the finance department, the finance system would probably be the wrong choice as the first integration.



Therefore, the sequencing of integration projects should follow the needs of the members of the social network. However, it may be that the prospect of cross-departmental access to data is one of the driving factors to decide in which order to introduce departments to the social network. So clearly the order of user adoption and system integration is related.



Conclusion

Over the last decade, the vast majority of corporate IT spending has been on **systems of record**, the ERP, CRM, finance, and HR systems that contain the data and processes you use to manage your business. But these do little to support the interaction between people who use these systems, and support the exception handling that they need to do on a daily basis.

For companies to become more efficient, these systems of record therefore need to evolve into **systems of engagement** that enable interaction and collaboration between the people using these systems. So many system of record vendors are adding social functionality to their products to enable this. This is useful, but really only connects the people who are using that system.

Instead, what every enterprise needs is a **platform of engagement** that can provide a social layer across a wide range of enterprise systems. A platform of engagement integrates with each of the systems, without being tied to any one of them. It breaks down data silos and enables cross-department collaboration around corporate data and processes.