THECR NETWORK

Removing the One-Way Mirror: Transparency & Engagement in Social Business

SNAPSHOT

SPEAKERS

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COMPETENCIES
Culture

MATURITY PHASES
CMM1, CMM2, CMM3, CMM4

TOP THREE TAKEAWAYS

1. **"Let social be the solution, not the task."** If the tool is difficult to use or if the user does not see any value add for themselves, the tool will become a task; something else that they have to do. Therefore, ensure that the tool offers a solution.

2. **Branding the internal community is a great way to increase usage and adoption, particularly if the external brand is more formal.** Internally, the tone can be less formal, creating a more fun and engaging atmosphere for users. Fidelity has branded their internal site with Ribbit the Frog.

3. **Use logical hierarchies vs. organizational structures when they create sites and sub-sites**. A logical hierarchy is the way to go because the organization is constantly changing. The logical hierarchy can be changed because it does not matter to the front end. It simply involves a new way of thinking in terms of how the system can be flexible to move through these liquid changes. Logical hierarchies allow for liquid change, which is a huge part of these social platforms.

OVERVIEW

Kirsten was the Community Manager for Fidelity's internal community. However, she prefaced the discussion by stating that all the best practices can be translated to any social platform.

The highlights of the discussion are noted below:

Kirsten's Background: Kirsten started with Fidelity approximately three years ago, plus a prior internship. She has been in the role of Community Manager for the past year and a half.

- The Fidelity internal community consists of approximately 40,000 people worldwide.
- They have had success with a recent upgrade that also included a re-branding initiative. About 80% of the company showed up in the first week after the re-branding project and subsequent launch. Fortunately, they have sustained that and continue to slowly grow.
- Kirsten is happy with this success, particularly since they are in a highly regulated environment.

Remember – You Cannot See Your Audience:
Kirsten stated that the premise behind her "one-way mirror" talk was to remind others that when they are communicating on a social platform, the audience cannot be seen. You can know who they are, you can identify with them, analysis can help discover their ages, genders, etc., but you cannot see them. As a result, it is important to discover ways to use these social platforms to engage with the audience by creating an open door instead of a glass wall or a mirror. For those on the call, it goes without saying that online interaction is much different than an in-person interaction.

Communications Today Vs. Social Communications:
This slide looks at one-way communication vs. two-way communications:

Figure 1 - The One-Way Mirror: How HR and Communications Work Today - Slide 3

- Communications today consist of emails, newsletters, paper marketing, even websites. It involves pushing information out and is not very interactive. It is often siloed or hidden or placed in communication avenues that are not easy to find unless people know exactly where to go. People read the information and talk about it because that is how people take in information. It happens without being able to see it, i.e. there is no visibility into it. However, no matter what information is being pushed outwards, if it is put on a social platform in such a way that there is a venue for feedback, there is visibility. There is sentiment and there is also a venue for communication back and forth.

- Clarification in this instance is very important. If information is put forth and someone has a question about it and there is no easy way for them to ask the question, they will likely walk away. Therefore, it is much better to give them an easy way to interact with the information.

The Honest Truth and More Analogies:
There is no magic pill or one size fits all. In order to change the way you work you need to believe in social business and lead by example.

Kirsten shared that she read a study that stated that only 10% of the population needs to fervently believe in something for everyone else to believe in it, too. Therefore, you only need to get 10% of your consumer base, whether it is internal or external, to believe in what you are trying to accomplish. That speaks to focusing on those people who do get it so that they can pull others into that 10% of fervent believers. That way, the ripples spread much further and faster.

Gardening Analogy:

Kirsten compared starting a community from scratch to a garden. It is a process that takes constant care and feeding. Plant the seed (get the idea out there regarding what social can be and how it might be a value add to people), create nutrient-rich soil (a positive view) and spread the word through positive branding (fertilize). As mentioned above, turn people into advocates where possible; pick those who get it and who are enthused. Kirsten shared that not all of their champions are subject matter experts or are they all great at using the tool. However, everyone one of them is a strong believer and a strong advocate.

- **Water Your Seeds:** This refers to responsiveness and transparency. If there is a venue for feedback, you have to reply.
- **Weed and Prune:** Once there has been a pilot or a launch, it requires regular weeding and pruning. Take out the things that are not working well by tweaking the processes and the design. It can always be iterative, which is the nice thing about these social tools. They are very customizable and they do not have to be perfect the first time around. That is part of transparency, as well.

BEST PRACTICES

The following is a summary of the various best practices that emerged from the discussion with members:

Consider Branding the Community:

Kirsten explained how Fidelity branded their internal community, which truly helped to increase usage and adoption. Kirsten feels that it is a huge benefit for any community to have a strong brand. Creating brand identity is a great way to pull people into the community. Furthermore, when they do show up on the page, they easily identify with the brand.

Figure 2 - Opening the Conversation: Engaging a Social Business Model

- Kirsten shared that she is a big fan of the way Fidelity has branded their community with a mascot, Ribbit the Frog. The name "Ribbit" came from Fidelity's first mutual fund founded in 1974. It was called "FDIT – Fidelity Daily Income Trust." "FDIT" sounds like "Ribbit". Accordingly, the Frog has been their unofficial mascot for almost 40 years and is built into the Fidelity identity.

- The Frog actually has a profile on Fidelity's social site. No one knows who the Frog is because it adds to the air of mystery and intrigue. Thankfully, the voice of the Frog is created by a person who is completely fine with staying behind the scenes. In the meantime, the portrayal of the Frog is that of a sassy, flippant little guy who acts totally outside of the Fidelity norm. This is fun for people.

- The nice thing about using a mascot is that this Frog can respond to people and give tips and tricks. As the community manager, Kirsten is the formal relationship to the organization. The Frog is more informal and people actually enjoy when he comments on their content. It is a fun, extra branding aspect of the community that has brought Fidelity great success.

- Kirsten shared that they are working on turning the Frog's handprint (seen in the slide above) into a recognizable logo like the Twitter bird to further assist with brand identity.

Ensure that the User Sees Value in Using the Community:

Kirsten stated that a phrase she has been using quite a bit lately is "Let the tool be the solution, not the task." That phrase applies both internally and externally. If the tool is difficult to use or if the user does not see any value add for themselves, the tool will become a task; something else that they have to do. Therefore, ensure that it is a solution. Clearly provide the user with a solid reason as to why they should be using the tool and its benefit to them.

- With an external community, the benefits could be faster answers, to connect with the brand, etc.

- With an internal community, give the user examples of specific use cases. As was mentioned in previous calls, an easy benefit to convey to the user is how they can reduce their email volume, save time and communicate more effectively in the process.

- Kirsten also advocates the use of stories to share successes and benefits. It is a huge benefit to demonstrate the solution and prove that it is not just another task.

- Personalization and purpose is really important, as well. The idea behind community is to have many different people coming together, but social is often a personal choice for how they want to interact. Explain the benefits of personalization and individual purpose and individual value add. When marketing and communicating the usefulness of this tool, it is important to show a variety of benefits so that if something does not apply to one person, they do not discount it because they cannot relate to what is being said. Offering several benefits increases the chances of something being relatable. Solicit feedback for how people are using the tool so that that can also be shared.

Provide Your Own Self-Analysis to Encourage People to Provide Feedback:

Kirsten shared that when soliciting feedback, one of the best ways to get people to post feedback transparently and openly is to start by providing your own self analysis. Therefore, let the users know that it is okay to say something constructive. Not necessarily negative, but constructive.

Offer an Incentive:

An important aspect of engagement and adoption for communities is to provide the "carrot", i.e. an incentive. As Kirsten has been stressing to this point, there has to be some value for the user. Therefore, create channels that always point back to the platform. When communicating in another venue, link back to the information on this site so that the user can then interact with it. Adding in venues for comments, questions, clarification, etc., is also important as long as the user sees value and has a reason to come back.

- Constantly providing fresh content is one way to create an incentive to return to the site. Users need to know that there is always a reason to return, such as updates, prizes, etc.

- Kirsten believes that it is important to know your audience because that will help you decide what incentive will be needed to pull people into the community.

Follow These Top Three Best Practices:

Kirsten believes that the process of removing the one-way mirror can be boiled down to three best practices:

Provide Transparency:
Kirsten feels that the best way to encourage engagement and trust is to be open. That means admitting mistakes.

- *Lead by example*. You cannot ask customers, team members, users, etc. to use the site if you do not also use it. You must lead by example and be transparent if you want them to be transparent. Again, the open communication model is a two-way street.
- *Be very clear about the rules and guidelines.* Oftentimes, the hesitation to post is due to the fact that the user does not know what can and cannot be posted; what they can talk about and what they should not talk about on the site. Kirsten shared that Fidelity has their official policy, which is very much in legalese and not easy to read. That is posted and made very public, but they also have their guidelines. The guidelines are written in very plain English. The user can either read the plain English version, or they can read the official policy.

Offer Personalization: Kirsten shared the following as it relates to ensuring a high degree of personalization:

- One size fits all in different ways.
- High-touch personalization for executives.
- Cater to regional and global cultures.

Consider Gamification: Fidelity does not offer gamification as of yet, but it is planned for later in the year. They have found great uses for informal gamification, such as using built-in features to increase engagement by providing incentives. For example, they did a "show us your mug" campaign to cut down on the use of Styrofoam cups. People took photos of themselves with their reusable mugs and posted them onto the platform. That taught people how to upload photos, to poll, vote, like, etc. It also helped to get people engaged.

- Another way to increase engagement is through scavenger hunts, which is another great way to teach people how to use the tool. An example might be to "find the executive who has worked for the company the longest", which can be learned by searching through profiles.
- When it comes to gamification, prizes do not have to be monetary. Get creative with the prizes. Fidelity has used lunch with an executive or a personal email from the Frog, etc. Kirsten stated that everything about social is a new way of thinking. Yes, it is a new way of working, but she really believes that more than that it is a new way of thinking.

Make it Clear What Content Can be Posted and Where:

Kirsten stressed that an excellent best practice for an internal or external community is to make it clear what can be posted and where it can be posted. That is a huge question mark for a lot of the people in HR, legal, etc. who work with internal clients, but also externally if customers are involved.

> - Kirsten explained that when teams come to her stating that they want to get on the platform, she always tells them that they need to be transparent, i.e. that they need an open group as their landing page and an external-facing informational resource. It also makes sense to have an internal working group that is closed off, i.e. it is just for those people involved in the in-progress pieces of it.
> - With Jive, it is very easy to move content between sites. Therefore, Kirsten tells people to create two sites. She believes that it is acceptable to have two sites or two silos when it makes sense. As such, she encourages people to create sites for a purpose vs. an organization or a team. To have two separate sites, to know the audience of each site and to create assurances of confidentiality is extremely helpful.
> - Another topic within Fidelity is hierarchies or organizational verticals. People were creating sites and sub-sties based on HR hierarchies because that is how people are used to organizational structures. However, Kirsten is trying to move away from that type of thinking. She instead encourages the use of logical hierarchies. A logical hierarchy is the way to go because the organization is constantly changing. The logical hierarchy can be changed because it does not matter to the front end. It simply involves a new way of thinking in terms of how the system can be flexible to move through these liquid changes. Logical hierarchies allow for liquid change, which is a huge part of these social platforms.

Consider the "COPE" Methodology:

Kirsten explained this methodology as "Create Once, Play Everywhere." This refers to communication in particular. When communicating information, it is very important to pair that with information that the user can get for themselves, i.e. self-service. Have a list of known issues that they can easily search. FAQ's are helpful, but not when they have to read the whole list. Interactive and searchable is better.

LESSONS LEARNED

The following is a summary of lessons learned as shared by participants within the discussion:

• One participant asked Kirsten if Fidelity also has an external community. Kirsten replied that they do have a couple of external communities for Fidelity customers. For example, one is an investor community. It is also run on Jive, which is the same as their internal community. However, it is a version behind the internal community.

- Hillary wondered if the external community was also branded with Ribbit the Frog. Kirsten responded that the external community is highly Fidelity branded. The internal community is a little less formal, so they are able to have some fun with it.

- Interestingly, Kirsten shared that they had to fight to enable a less formal structure for their internal community. At first, some staff were against the Frog because it was such a far stretch from Fidelity's more formal side. However, they explained to staff that internally they needed more of a social aspect, which was the basis of introducing a fun, interactive, networking character to help them enjoy the site.

- To help with the adoption of Ribbit the Frog, Kirsten shared her "Hear it, Believe it, Live it" philosophy.

- When people spoke out against the mascot, she explained that they "hear" what they are saying, but they believed that adding a social aspect to the business would have a huge benefit. Then they lived it. They ensured that the Frog gained a strong presence. They interacted in a lighter manner. For example, when they answered questions, they had a different tone. This philosophy really helped them to market the tool, especially to a baby-boomer community. It meant that they had to really stand behind the brand and stand behind their message that this was a fun, open, social tool.

- This is an internal tool. Social is viral and if you get enough people moving in that direction, others will have to swim in the same direction eventually. Therefore, Kirsten's advice regarding internal communities and adoption is to stand behind it, focus on the people who are interested and then identify the gaps and successes and shape others to move along in the same way. It differs from external communities because externally it involves trying to pull people in who are not invested in using the platform.

• Building on Kirsten's comment about staff being critical of the mascot, Hillary asked if it was the executives or the general employee population that criticized the fun factor. Kirsten responded that it was the general employee base. She feels that they were so critical because they did not think that the executives would approve. However, they became more accepting of the idea when they saw executive buy-in.

• One participant asked Kirsten if she initiated the internal community with Ribbit and if so, how the determination was made to create a brand identity. Kirsten answered that they have basically had the Jive platform since Jive first came into being. When they first got it, it was a research and development product and it just grew from there. When they decided to upgrade, that is when they discussed re-branding. The reason they talked about re-branding was first of all to start fresh. Secondly, they wanted to make sure that they gave it a face so that no matter what happened in the background (such as changing vendors at a later date), it would always have that specific branding.

• Along the lines of branding communities, Kirsten suggested that participants view the Mr. Clean Twitter account. She feels that that is one of the best Twitter accounts that she has ever seen.

• Hillary wondered who owns content management within Fidelity. Kirsten stated that it depends as there are a couple of Ribbit sites.

  - The training library holds all of their educational content and best practices, which falls under Kirsten's authority.
  - The Ribbit Community Lily Pad is their user forum. This forum and the training library, as well as the landing page, are incentivized by Kirsten and her team.
  - However, people are also allowed to create their own sites. Those sites are curated by the individual community managers. However, Kirsten is in charge of the general content.
  - There is also an intranet. Fidelity's social site is not their intranet. The intranet content is organized by corporate communications. They are beginning to use the social site more and more and they do plan to integrate it by probably moving it over to create a social intranet, but right now their internal team curates the content because corporate communications still has their news site on the corporate intranet.

• Kirsten was asked to explain the formation of her internal team. Kirsten answered that it is small, even though they have 40,000 global users. She is the only dedicated resource on this platform. They also have a product and a project manager, but they also work on other products and projects. They have a development and operations team, but this is only one of their products. They have an internal tech support call center, but they support other teams besides Kirsten's team. All in all, they have 10 or 15 people who are dedicated resources, but only one of those dedicated resources is full time.

Kirsten went on to explain that her role sits in IT, even though her role consists mostly of communication and marketing and training and strategy. Kirsten finds it fascinating and very useful to be under the IT umbrella.

• One participant asked Kirsten how involved and transparent the top executives were within Fidelity. Kirsten shared that their president is one of those rare individuals who is able to be untouchable while also very personal at the same time. That said, she does have a presence on their social platform and she does personally blog; no ghost blogging is done for her at all. That has really helped spur engagement. Other executives have also been very involved.

-Kirsten added that she does one-on-one training with executives to prepare them for their online presence. She always simplifies it as much as possible, so much so that they wonder if that is it. Taking baby steps is her strategy. She just wants them to be on the site and know that it exists. From there they can take the next step and the next step as they get more comfortable. Her philosophy is that if they are given something small to do, they will be much more likely to participate.

• Hillary stated that in listening to Kirsten, it sounds like Fidelity has a culture that allows this to work. She asked if there were any contributing factors early on that she could pinpoint that helped build this culture. Kirsten feels that it is less that they have that culture and more that they found that culture and used it to lift them up. In other words, instead of focusing on the people who did not get it right away, they focused on the people who did get it. They used those who did get it and pulled them up higher so that they could create champions, advocates and success stories. So, whenever anyone says that they are interested, those are the people that are encouraged.

- Kirsten shared that they hand-hold them and teach them how to fish so that they can be advocates for the next person. She believes that that has been the key. Her belief is that if they can get the majority of the people on board, it will make the tide so strong that others will not be able to swim against that tide any longer.

• One participant questioned the creation of multiple communities. Kirsten replied that they have spaces and groups turned on in their internal Jive community. The spaces have restrictions. People who wish to create spaces must go through Kirsten's team to request spaces and sub-spaces. However, they can create a group whenever they want. The reasoning behind this is that spaces take a huge toll on the database. They are hard to delete and move. However, due to the nature of groups and how they are more open and collaborative, easy to delete and edit, groups can be provided to users as a sub-service.

- This same participant asked if the groups consist of non worked-related content. Kirsten says that they do allow this in order to encourage people to get started who do not yet have a purpose identified. They may start a forum for food or exercise groups. They try not to be restrictive with these groups because the whole point is to be social and open.

• One participant asked Kirsten to share a story regarding her biggest convert. Kirsten shared that she had a sales executive who felt that the tool was too social for such confidential customer information. However, some of his team members were using Ribbit amongst themselves, so Kirsten built a prototype showing this executive how it could work for his group. That turned him lukewarm. From there, they did a pilot with a small team. One of the sales associates was on a site visit and with his corporate iPad asked a question on the internal Ribbit site. His answer was instantaneous vs. what usually took days. With this use case, the executive was sold.