



Case Study: Using TheCR Engagement Framework to Measure Adoption & Engagement



SNAPSHOT

SPEAKERS

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COMPETENCIES

Metrics & Measurement

MATURITY PHASES

CMM2



TOP THREE TAKEAWAYS

It is important to point out upfront that Shepley Bulfinch already had a strong culture of sharing ahead of the implementation of their Employee Social Network (ESN). The sharing stage was already prevalent in the culture. Where they needed work was to help the executives understand that validation was a critical component of the Engagement Framework.

1. **Validation stage.** For Shepley the value lies in the ability to pull the best people together at any given time to work on client projects. The validation stage helped to identify connections between the three offices of Shepley and link people together on various business projects. Now, the CEO of Shepley models the validation behavior for others to follow.
2. **Rules for asking questions.** Participants on the call loved the best practice of rules for the asking of questions, particularly the rule for closing the loop on questions. At Shepley, it is the responsibility of the asker of the question to close the loop and follow up to tell others which solution was used.
3. **Increased engagement signifies increased value.** Jim is particularly proud of this one statistic: 63% of answers were answered by people who were not top of mind for having an answer to a particular question. That statistic alone represents more engagement than has ever been experienced before and signifies that more value is being added by a much larger pool of people.

CASE STUDY

1. **Background:** Jim is the CIO at Shepley Bulfinch, a professional services organization for architects.
 - a. Shepley Bulfinch has been in business for 140 years. They have offices in Boston, Phoenix and Houston employing approximately 210 people. Knowledge is very important for Shepley Bulfinch because they need to be able to supply the best information possible – the knowledge of all the experts in the organization collectively across the three offices – to client problems. In order to fulfill these needs, they launched an ESN in September of 2014. It is built on the Knowledge Architecture Platform, but any best practices brought forward in this case study can be used on any platform, as long as it is able to generate a hashtag.
 - b. Jim shared this case study to show how they use the Engagement Framework within Shepley.
2. **Engagement Framework:** The framework consists of four stages – Validate Out Loud (Comfort), Share Out Loud (Connection), Ask & Answer Out Loud (Trust) and Explore Out Loud (Partnership)
 - a. ***Validate Out Loud:*** The first stage in the framework is the Validate Out Loud stage, which is essentially becoming comfortable with knowledge contribution.
 - i. Within Shepley Bulfinch, they researched their staff to find their strongest validator. That person was Julie from their Houston office. She is the champion of liking and commenting. Therefore, Jim worked to establish a value for this type of contribution. Julie's contributions proved to be one of the engines of their social intranet. She helps strengthen the ties between people across the company. She actually creates chemistry and connects the offices together. With the goal of being able to pull together the best possible people at any given time to work on client projects, Julie's contributions have great value to the organization's bottom line.
 - ii. The message for the value of the validation stage is getting through to executives. Their CEO now models the validation behavior. She does not like everything, but when she does it makes people feel good.
 - A. ***Value:*** The value of this stage is that it helps leaders of the firm to model the behavior, it helps them to communicate the business value of liking and commenting and it celebrates the connectors in the company.
 - B. ***Results for Q1 (January 2016 to March 2016):*** Jim shared that 70% of staff were commenting on posts and 80% are liking.

CASE STUDY, CONT.

- b. **Share Out Loud:** The content creators within Shepley are particularly interested in this stage. The idea is for the architects to create digital artifacts that outline what they are working on while also affecting their personal brand. In other words, people will become known for the kinds of things that they post.
 - i. For instance, Kyle is known for his design technology skills. He has 75 posts to his name and is in 8th place. He has liked 350 comments, posted 74 comments and has three answers. That is important to note.
 - ii. Approximately 70% of all Kyle's posts are about Dynamo, a very complicated piece of software. Kyle has made a name for himself due to his knowledge with this software. Although he has only been an architect for five years, he has a very high personal brand for design technology. People bring him problems; he solves them and, as a result, is able to connect to people and the firm. It has given Kyle the opportunity to provide value to the firm, an opportunity that did not exist a couple of years ago
 - A. **Value:** The value in this stage is that people can own their personal brand in the office, it helps to build a persistent, searchable knowledge base, it mirrors and reinforces the culture within Shepley, people feel more connected to the firm through their contributions and it acts as a creative outlet for staff.
 - B. **Results for Q1 (January 2016 to March 2016):** Approximately 58% of staff are sharing, which is a metric that pleases Jim. Of course, he would like it to be higher and will focus on new hires to raise the number.
 - 1) Generally, they have had 471 total posts in those three months.
 - 2) They know how many people are working at the firm every quarter, but they do not have the technology to tie individual posts to individual people. Therefore, they apply the number of people to the number of people who have posted, but they do not know which people are which, meaning that if someone left in the middle of the quarter they do not have useful information about that in this data set.

CASE STUDY, CONT.

- c. **Ask Out Loud:** Architects are knowledge workers. It stands to reason that when it comes to asking a question, it feels risky to people. They do not want to be judged for asking a question and do not want to come across as unknowledgeable. This is where Maria helps. Maria is the Co-Head of the Technical Advisory Group (TAG), as well as the Technical Community Champion.
 - i. Maria has 52 posts, 36 likes and 253 comments to her name. That is the most comments of anyone on Finch. She also has 46 answers to her name, which is also the most from any single individual. A couple of days after a post, Maria will see if the person who asked the question received an answer. This is how she prompts people to close the loop. Once the loop is closed, Maria will use a hashtag to identify that the loop has actually been closed.
 - ii. If the person who asked the question does not receive an answer after 20 days, Maria will tag the question with some type of close-out statement and then close the loop with #closed. Shepley studied the outliers of the posts that did not receive an answer. Many times it was because an answer does not yet exist.
 - A. **Value:** People get answers more quickly, people are able to showcase their knowledge, there is more diversity of experience brought to the question, new hires are able to contribute sooner, trends are identifiable in terms of the kinds of questions being asked, it creates “Just-in-Time” content in response to a need and answers are captured for future use in the flow of the work.
 - B. **Results for Q1 (January 2016 to March 2016):** Jim shared that only 7% of the firm has actually asked a question, which is a little low. However, 20% of the firm is answering, which is good, especially since not every question is going to be answered by a portion of the office, i.e. the administrative staff. They are also missing a couple of questions because they are not using the “#AskFinch” hashtag, which is what is used to identify a question.
 - 1) If you look at historical KPIs, people are usually busy with the holidays because generally, they do much better. About a quarter of the office asks questions. They have 136 questions asked and answered so far. Furthermore, 54% of Shepley has actually answered something. They generated 466 total answers. That does not include comments. An answer is a comment that adds substantially to solving the question that was asked. All in all, Jim is pleased.

CASE STUDY, CONT.

- d. **Explore Out Loud:** This stage invites people to help solve problems together. It may start as an “Ask and Answer” and then morph into the Explore Stage. It is harder to identify and Shepley does not currently have a process for it.
 - i. Jim pulled a couple of examples from their intranet. For instance, “*What do new people who start at Shepley need to know in their first two weeks?*” Jim asked that question of all new staff who have been in their position for six months. He received 18 great comments. He was then able to use those answers to build a new resource for the firm and a new wiki on their intranet.
 - ii. Jim used this process again to source nearby restaurants for these new hires. People responded with 66 different places that people could get lunch in three different states by 21 people. Jim then linked that previous page to this post. Therefore, anyone who wants to know can just follow the content of this post.
 - A. **Value:** The value at this stage is that the best minds are applied to the problem, documentation is part of the process, there is a shared sense of ownership/pride of authorship, there are diverse perspectives on a problem and the process is highly visible
 - B. **Results for Q1 (January 2016 to March 2016):** Jeff cautioned that the metrics are a little wonky for this stage because they really do not have phenomenal examples of it yet. To get there, they hope to encourage public curiosity and manufacture opportunities where many people can contribute. They make sure that it is a safe environment for people to engage and expressly include who they want to hear from in the question. They also used other media channels to kick start the conversation through back channeling.

What’s Next? Jim shared what he hopes to accomplish in the future:

Finch is not homogenous and is ever changing. Therefore, they plan to review the hashtags quarterly. The hope is to move more communities toward Stage 3. They plan to grow slowly to avoid the fear of missing out. They plan to experiment with more Explore Out Loud opportunities and they plan to curate more #AskFinch content to create just-in-time documentation.

BEST PRACTICES

1. Eliminate Competing Communication Channels

Jim believes that one of the best practices that helped them move to the Sharing Out Loud stage was that they eliminated the competing communication channels. They turned off large distribution lists to all in the firm, except for scheduling meetings. For situations that still require an email, they have developed a sub email process. They send an email with a subject line and one line of context and then a link to the post that has all the rest of the information in it. They are then redirected back to #AskFinch.

- a. As well as the above, they focus on reinforcing the behaviors that they want to see for validation. This means that they celebrate when people create posts that have value to the firm. Every Friday they have an email that gets sent out by the system outlining the top posts.

2. Offer Training for How to Create a Good Post

In order to help staff create a good post for the early stages of the Engagement Framework, they offered training with the following key training points:

- a. Post early in the morning in order to get the attention of readers.
- b. Do not post before leaving at the end of the day.
- c. Make sure that the important information is at the top of the post.
- d. In order to use personal networks inside the office, have multiple people post vs. just one person. Certain individuals pay attention to certain individuals.
- e. Keep the post short. About 330 words is the max that anyone has the capacity to read.
- f. Use images, especially for architects who are visually stimulated.
- a. Use "Q:" in front of a question. That is a visual queue that feedback is requested.

3. Consider Implementing Rules for the Asking of Questions

Jim shared that between the second and third stage of the framework, they started asking questions:

- a. *Is the quality of the answers that people are getting dependent on who they know and where they sit?*
- b. *Are we answering the same questions over and over?*
- c. *Are we learning from the experience of others?*

BEST PRACTICES, CONT.

- i. That brought them to Mark. Mark is a super-friendly encyclopedia of architectural technical information. He is a valuable resource in the firm, but that meant that Mark became overloaded with questions. The reward for a job well done was more work, which was a problem. Therefore, in 2014 Mark started writing down all the questions he was being asked from other team members and different offices and projects, as well as people outside the company. This helped to create a firm-wide system for sharing and asking questions.
- ii. Since they are on a Lean journey at Shepley, they examined the current state of how questions were being asked and answered. This showed that they had three groups:
 - A. A Technical Advisory Group (TAG), which is a group of subject matter experts (SMEs). Mark is among that group. They had an email distribution set up for that group but, unfortunately, they did not know if they had the right people in that group. Only TAG members saw the questions being asked and no one else saw the answers unless it was their question.
 - B. They had #AskFinch. It had the ability to crowdsource, but there was no expectation that individuals would get the right answer or any answer.
 - C. One-on-one conversations. However, in those conversations, the knowledge was never recorded.
 - 1) A process diagram was created to see how they could improve this process. They came up with rules for #AskFinch. Anybody can ask a question; anybody can provide feedback; at least one answer will be provided within 24 hours; there will not be any posts without an answer; it is the responsibility of the asker to close the loop.

4. Implement a Company Wiki

Jim explained that they have an optional curation process. If a question gets asked that generates a lot of interest, they create a wiki to capture the knowledge in order to curate it more, add some additional resources and then make sure that that information is searchable from either the link of the original conversation or through the curated process. Then they go back to the link where the original conversation occurred.

LESSONS LEARNED

- Jim was asked how the company recognizes and rewards those who regularly validate. Jim replied that they create opportunities. For example, Julie was recognized at the annual company meeting. The CEO also personally thanks those who validate.
- The validation numbers are high for Shepley, but Jim prefaced that by stating that the data was already impressive. It is not a new behavior. That is important to understand. Shepley put a lot of effort into the social sharing aspect of the intranet when it launched. The Engagement Framework, in turn, has helped them to understand what is working and not working.
- Jim explained that they look at the statistics on a quarterly basis so that they can spot trends and directional accuracy vs. allowing them to become distracted by looking at the numbers on a daily, weekly or monthly basis.
- A service level agreement (SLA) has been implemented for the rules that state that questions will be answered within 24 hours and questions will not be left blank. So far, 95% of the time, questions are answered. Within that, 82% of the time the question is answered within 24 hours. Jim is pleased with those statistics. The one thing that Jim hopes that they can improve upon is to get people to close the loop. Part of the reason is that people do not necessarily know the answer right away, plus there is not a way to trigger whether or not a loop has been closed.
- Jim was asked how they encourage questions and how they, in turn, encourage the closing of the loop. Jim feels that the number of asks will take care of itself as long as the SLAs are working. Once people know that the process works, the more they will come back.
- To improve the closing of the loop statistic, the main tactic is individual harassment of individual people.
- Jim was asked if there was anyone dedicated to this initiative. Maria is the person who works at this the most, particularly at follow up to ensure individuals close the loop and to use hashtags to make content searchable. Maria is not necessarily a volunteer. Instead, Maria is almost incentivized to do this because it ends up being less work for her in the long run.

LESSONS LEARNED, CONT.

- One participant asked for help understanding the difference between the Engagement Framework and a community.
 - Jim replied that they do have communities and sub-communities. The Engagement Framework has been implemented in the technical community, which is an advanced community.
 - Rachel further clarified by adding that one of the reasons TheCR built this framework and collaborated with Jim on it is because people try to jump to the “Ask and Answer” stage right away. However, when a community first gets off the ground, they do not have the trust and the connection and the comfort in the community for people to ask questions that have business value. Validation is needed first. The “Ask and Answer” behavior will follow.
- Jim was asked how he encourages people to participate in the curation of the wiki. Jim stated that it is specifically for SMEs. The idea is that if people are talking about the SME’s subject matter in the stream, he/she would want to be involved in that conversation because a lot of his/her personal worth is tied up in being an expert in that particular subject matter. Therefore, the SMEs are given an option to participate in the curation process.
- Hillary wondered if there was any formal training to help people close the loops. It did not involve training per se, but rather the creation of a process. Shepley went through the data and updated several of the older posts with hashtags so that it was more easily mined for insights. From there it evolved over time. It was not training, but experimentation. What worked stuck.

ADDITIONAL INSIGHTS

Hillary asked participants whether or not they have experience working with the Engagement Framework or if this is their first experience looking at an application of it.

- Of those that responded, three are just learning.
- One is using it as a basic framework within her community to help understand engagement.
- Two others have used the Engagement Framework, but not in their current organizations.
- Lastly, one participant's organization is using the Engagement Framework, but this participant is on the call to learn more about it.