



(Roundtable) Designing and Defining a Tool Ecosystem

 **SNAPSHOT**

SPEAKERS

Thomas Vander Wal & Kelly Schott (TheCR)

COMPETENCIES

Tools

MATURITY PHASES

CMM1, CMM2, CMM3

HIGHLIGHTS

1. **Interested in an overview of social scale, fit and value?** Thomas shared 5 components of what he believes this means.
2. **Want to know the stages of a social scale framework?** Thomas has a 4-step analogy that vividly creates a picture of this framework.
3. **Looking for further analogies to help put all these definitions into perspective?** Another 5 relatable analogies were shared.

OVERVIEW

- **Background Thomas Vander Wal.** Thomas is a Contractor/Consultant at United Technologies. His role is multi-dimensional. One is for planning and strategy to build a Dev Ops platform for 50,000-60,000 engineers. Another part of his role advises on social community platforms. He also wears the hat for a new group formed to conduct enterprise architecture. As well, he supports Cloud Team as they shift to a Cloud-first strategy.
 - Thomas’ main focus for many years has been social and community platforms, particularly internal communities.
 - Thomas has a master’s degree in public policy. Therefore, he can’t help but see the world through this lens.
 - Scaling is a big part of this discussion. Different tools have different uses. It is important to use the organization’s vocabulary for the different axes.
 - Thomas built this presentation deck with common social scale trend lines for the different axes and what they are, etc. This is the foundation for problem solving.



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OVERVIEW, CONT.

- **Social scale, fit and value.** Thomas divided scale into the following components. Thomas focuses on the community component and downwards on the list:
 - **Team.** At the ground level in most organizations, most work is done at the team level, i.e. very small groups of 2 people up to 12 and even as high as 25. Usually they are very small groups, they are high capacity and they work in tools that are familiar to them, yet may be different from the rest of the organization.
 - **Groups.** The next aspect of social scaling is groups, both small and large. A small group is about 75 people and smaller. A large group is from about 350 to 800 people and smaller. These fit the lines of community practice as a model.
 - **Community.** This is everyone inside the firewalls, i.e. everyone inside an organization. It could be 400 people to over 1000. The social dynamics of that scale is drastically different than teams and groups.
 - **Network.** This is inside and outside of the company, i.e. being able to connect with the company's contractors, consultants, vendors and customers. Interacting with them can be on a smaller or larger scale. It is necessary to be able to connect with groups and with teams. It's a very different model.
 - **Communication/chat.** This is the glue layer. It consists of one-to-one, small teams, targeted groups and communication. It usually consists of pulling it in from one group and sharing it with another group. It can be your chat platform where you are changing boundaries and networking across different groups. It is a highly, highly valuable form of communication.

- **Stages of the social scale framework.** Thomas likes to start his discussions using a metaphorical framework. He calls it the "social progression of fire".
 - **Sparks.** Essentially, you start off with sparks. That can involve 8-12 people chatting about a topic who then come to the realization that they might have a solution to a problem. In order to move to the next level, they have to move from the spark to the campfire phase.
 - **Campfire.** This is a small group who brainstorm the idea to decide if it's worth moving forward. If it's worth moving forward, more fuel must be added to the fire.
 - **Bonfire.** Next is a bonfire. Everyone in the organization – legal, compliance, manufacturing, etc. – try to figure out how to close the gaps to make the solution work. With the realization that it can be done, the progression actually moves backwards in size to a torch.



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OVERVIEW, CONT.

- **Torch.** At this stage, you are trying to take the fire (i.e. the idea) and turn it into something that is repeatable, reliable and safe and be able to ship that out to others.

➤ **¹Social scale: volume, velocity and reach.** The different tools and scales must deal with velocity and calmness. Looking at tools, categories, technologies and information sharing as having high velocity – such as Slack – it can be very high volume and high velocity. It is difficult to keep up and follow the thread. A tool that helps with Q&A and content structure, such as StackOverflow, Yammer/Jive, etc., makes content easier to find. The pace is also slower.

- This moves across from Wikis and blogs up to a formal journal. It may include a printed book, which is very calm and very permanent. It doesn't shift.

Looking across the continuum, it's a good idea to think about how to get across the velocity of information – likely high volume – and get it to a point where it is more cohesive, easier to work with and move around.

- The next step involves pulling these together into a matrix and looking at the volume and velocity within that matrix in order to break things down for the various social scales.
- The various pieces are tool use. Velocity is essentially how fast things are moving and what impact that has on value and what value can be derived at different velocities. If the velocity gets too high, does that help or inhibit the value of what is happening in that platform? Also, as volume increases, is it still easy to manage and find content? Does it lead to success for that type of platform or not?
- This also takes into account reach and the number of people, i.e. whether or not it can reach the whole organization or teams or one-to-one, etc.

Social Scale: Volume, Velocity, and Reach

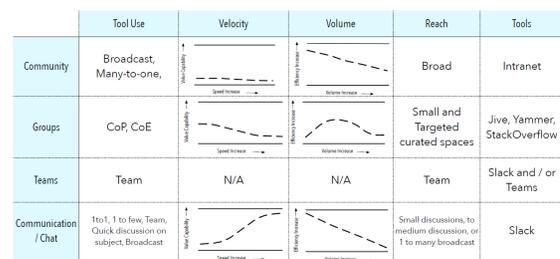


Figure 1 - Social Scale: Volume, Velocity and Reach – Page 3¹

¹ All slides used with permission from Thomas Vander Wal in his presentation to TheCR on September 12/19 entitled: "Social Scaling Tools to Meet Needs and Close Gaps".



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OVERVIEW, CONT.

- **Community.** This is everything inside the firewall.
 - **Tool use.** It is a broadcast mode. It is a many-to-one platform.
 - **Velocity.** The most value available at most speeds which is fairly consistent. As the speed increases, the value is still relatively low. A high speed isn't really attainable.
 - **Volume.** It is a lower volume of information. You can search and find content. The efficiency decreases with the more information available at that scale.
 - **Reach.** The reach for community is very broad. It should be able to reach everybody in the organization.
- **Groups.**
 - **Tool use.** Communities of Practice (CoP) or Communities of Expertise (CoE).
 - **Velocity.** The value is fairly high at lower rates. Higher speed doesn't necessarily help. In fact, the value actually decreases a little bit. For example, using Yammer or Jive as a discussion board; it isn't the proper use. It is difficult to have high velocity.
 - **Volume.** The more information you have up to a point will increase the value. It comes down to curation and being able to easily provide and find information. You can have a wealth of information, but too much information begins to inhibit efficiency.
 - **Reach.** This is smaller, curated and targeted spaces.
 - **Common tools.** Jive, Yammer, StackOverflow.
- **Teams.**
 - **Tool use.** Team.
 - **Velocity.** If you have a lot of velocity, you may not get a lot done. How teams use these models can vary. Quite often the team models and tools are small use. They are more of a constant within teams.
 - **Volume.** You don't usually find a team with a high volume of information. It is usually a constant. Oftentimes, the information is curated or shared with groups that can handle that subject matter's deeper information.
 - **Reach.** Team size.
 - **Common tools.** Slack or Teams. Skype for Business and WebEx can work passably.



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OVERVIEW, CONT.

- **Communication and chat.**
 - **Tool use.** One-to-one, one-to-a-few, teams. It's the ability to have quick interaction on a subject and sometimes being able to use this as a broadcast channel. Most often it is used for discussions.
 - **Velocity.** As the speed increases, value increases.
 - **Volume.** The more the information volume increases, the more the efficiency decreases.
 - **Reach.** Small discussions and medium-sized discussions. The searchability is tricky, which leads to curation difficulties.
 - **Common tools.** Slack.
- **Community: velocity and volume.** Thomas shared his definition of community volume and velocity. The size is usually the company size inside the boundaries.
 - **Velocity.** The value of increasing speed is low. As the speed increases, it gets even lower. The value capability is dollars at speed.
 - Community scale is best with curated top picks for information that has a broad reach.
 - **Volume.** A good amount of volume is helpful to begin to draw people in, but as the volume increases it often creates problems. Therefore, the ability to search, archive and curate is needed.
- **Group: velocity and volume.** Thomas shared his definition of group volume and velocity. The size is usually small groups up to 75 people and large groups up to 350 to 500 people (even 700 in some cases).
 - **Velocity.** In the beginning, a group can handle a fair amount of velocity. However, often the number of people is small. As speed increases, the increasing speed become makes it less valuable.
 - **Volume.** Initially, the amount of information is limited. Increasing the amount through contribution increases the helpfulness of the group. The ability to curate the volume will help keep volume increases manageable.

- There does come a point where a group's volume becomes less helpful when more is added. This is often an indication of the need to split a group or archive some materials and content.



OVERVIEW, CONT.

- **Team: velocity and volume.** Thomas shared his definition of team volume and velocity. The size of a team is, optimally, 2 to 12 people. The upper limit can be around 25 people.
 - **Velocity.** Teams run at their own velocity and pace when there is a good rhythm or cadence. Organization standards for teams inhibit the team to work at its best. Teams often select tools that best fit their needs for their regular work (other than highly regulated industries), but those integrate into the groups for learning and sharing as well as collectively integrating their work with other teams.
 - As velocity outpaces the capabilities of a team, another team is added or the team is split.
 - **Volume.** This can vary based on what the team is working on and their capabilities. Often as the volume outpaces a team's capability, the team is split or another added.
- **Chat/Communication velocity and volume.** Thomas shared his definition of chat/communication velocity and volume. The size is one-to-one or one-to-few. Teams broadcast one-to-many.
 - **Velocity.** It's helpful to have more conversations and feedback for chat and communication. However, there are limits to the speed. It increases when the value of the increasing speed becomes steady.
 - The focus of chat and communication tools is quick feedback, pointers or assistance, particularly across the various departments of an organization. Most of the information isn't valuable in the long-term.
 - **Volume.** Chat and communication tools don't focus or perform well for curation and/or helping people to find something that already exists. Their focus is on the relative speed and focus of now or recent.
- **Helpful analogy.** Thomas shared his favorite analogies to help put these definitions into perspective:
 - Chat/communication is the highway system that is focused on speed. Finding your location and direction to keep moving forward is key. However, the infrastructure doesn't allow you to find a

focused collection of related topics or discussions. Furthermore, the focus is not usually on learning, i.e. you don't learn on the highway. To get more in-depth information, you pull off the highway and go to a school, library, etc.



- **Teams are the small businesses and families. Information learned on the highway will be disseminated with teams. Each has their own dynamics and needs, but they participate in the whole. Therefore, they are mindful to interact with others around them. This is the comfortable space where life is lived and things get done.**

OVERVIEW, CONT.

- **Groups (Community of Practice and Community of Experts). These are the schools and neighborhood community spaces where people gather to learn, share, understand, reflect and help others. The pace will be one that will work for that group. Community of Practice is a bottom-up approach with community curation. The community is at the center of the model. On the other hand, a Community of Experts is a formal school with experts who share formalized practices and guidance.**
- **Community is the city and its communication method is through news and leadership communications that are curated and centrally distributed. There is limited interaction around the broadcast message back to the sender (but there is some). However, most of the interaction is with those who are the closest.**
- **Basically, it can start out with a question on a team, them reaching out to a Community of Practice in an enterprise social network, finding answers, working back up and then sharing at the broader community level where they can share the solution and put that in the knowledge base and learning library.**



LESSONS LEARNED

- Thomas explained that the trigger behind this topic was when organizations removed one of their platforms, i.e. Jive – for instance – because now the company also has Slack. The company will spend a great deal of money to archive content to put the new platform in place only to realize that it isn't the same platform and can't perform the same functions. Not only that, but now employees develop a lack of trust to learn the new platform in case platform change happens again down the road. It becomes a seven figure endeavor. To reduce the cost, figure out how to replace the removed steps. Velocity and volume must be considered. That will help bring clarity to the process, as will the city metaphor. That was the impetus that helped Thomas to frame things the way he did by pulling in the volume, velocity and social scaling discussions into one cohesive viewpoint.
- It's important to have one group-level tool. StackOverflow has started with an enterprise offering. It is very good for the Q&A space. Furthermore, they have been able to show companies if there are large groups with the same IP address coming to their site. That is the perfect scenario for starting a community. The curation piece still needs some work, however.
 - It's important to have an enterprise social network where you can curate content and have discussions at the entry point. If someone is new to a subject, they can go to a Jive/Yammer/Igloo type of space to see how they can get started and the available resources. Q&A and chat are extremely important pieces of an enterprise social network.
 - When you get down to the team and chat level, Teams does that well. It can be difficult to figure out which tool to use. In Thomas' opinion, Teams doesn't scale well. Slack can work as a lightweight subject matter area. Teams has some curation capability, but you still need a SharePoint or Yammer to hold larger volumes of information.
 - Different people in an organization will gravitate to different channels. There isn't a one-size fits all. However, organizations that aren't in highly regulated environments that have integration components to help them "live where they are" is highly desirable as long as the channel names line up.



- Thomas explained the difference between a learning library and a knowledge base:
 - A knowledge base is where one would find files, i.e. a document or best practices.
 - A learning library is more a place where one would go to learn how to do something, i.e. a video that shows how to set up Slack. Sometimes there will be formal learning and training modules in a learning library.
 - A valuable benefit of community platforms is that they highlight where information is stored.

ADDITIONAL INSIGHTS

- Kelly asked participants which tools they are using currently:
 - One participant stated that her company uses Slack, Microsoft Teams, Yammer and Skype to communicate internally. Skype for Business is her go-to because it's tied into their corporate directory, but Slack is her preference for other communications.
 - Another participant uses Jive for her community, which she feels people like to pretend is a chat platform. They also use Skype for Business, as well as a small Slack community used in IT. They are also looking at MS Teams in 2020.
 - As explained by another participant, they use MS Teams for chat and are in the process of moving from Jabber to Teams. This participant really likes Teams Chat for instant messaging. They also use Chatter for bulletin board types of communication. They may move to Yammer, but in this participant's opinion they are essentially interchangeable. Yet they need both.

RESOURCES

- As mentioned in the chat: More on the Power Law of Participation:
https://ross.typepad.com/blog/2006/04/power_law_of_pa.html