

MAKING THE BUSINESS CASE FOR



In the second of three articles on the subject of social media and learning, Barry Sampson considers how we go about building a business case.

Less than ten years ago, organisations would happily spend large amounts of money on face-to-face training, rarely questioning the value of that investment. E-learning on the other hand, being perceived as the new and untested option, was subject to all manner of scrutiny and anyone trying to introduce it was expected to provide a much more robust business case than for more traditional approaches.

Fast forward to today, and e-learning has joined face-to-face training in being accepted as something that just works, while social media has taken its place as the new technology that is subject to extra scrutiny.

This is not necessarily a bad thing. An accusation often levelled at social media is that it's a fad and that people only want to use it because it's the current buzz topic. I don't agree with that, but I do think it's true that some people feel they should be using social media without really knowing why, or what benefits they can expect to see. If you start out with no clear focus or expectation, you will more than likely end up disappointed. Of course the same could be said of e-learning or training in general, with far too much often being invested with no

clear idea of the expected or achievable results. We should expect to present a sound business case for any project, irrespective of whether it uses technology or what the technology is.

THE NEED FOR BUY-IN

For someone working in the field of L&D there are few things more terrifying than being told that you need to get 'senior management buy-in', but with a solid business case behind you it shouldn't be that difficult. Irrespective of their level within the organisation, every manager has the same two priorities: to see that things are done on time and on budget. The best way to address this is by producing a robust business case that defines exactly what is to be done, what it will cost and what the expected benefits are. Managers are far more likely to buy into the potential results than the activity necessary to get there.

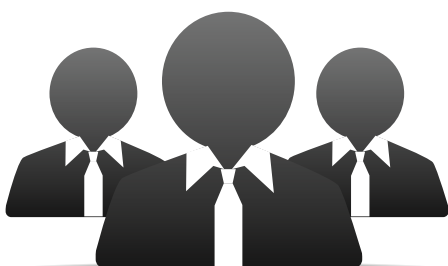
Think carefully about what you'll offer as a potential measure of success. There may be some limited justification for measuring learner activity and completion rates when you're dealing with compliance training, but when using social media keep the focus on the business results.

DEALING WITH OBJECTIONS

Introducing social media is a change management activity like any other and we should expect people to have concerns and objections. We should identify, acknowledge and address those concerns as soon as we can. There may be issues specific to each organisation, but we can pre-empt some of the more common ones:

- *All of our information will become public:* in many people's minds social media is synonymous with Facebook or Twitter, and they therefore assume that all activity will be published across the internet. This of course, does not have to be the case. If you are using public social networks for any activity, then further reassurance may be necessary.
- *Security, confidentiality and accuracy:* a related concern is that either accidentally or deliberately, people will post information that should not be widely circulated, or that is inaccurate in some way. There is no evidence to suggest that people behave any less responsibly when using social media than they would using any other communication tool, and the risks should be managed in the same way, which is usually through policy.
- *Time wasting:* some managers have a fear that people will use the tools to waste time, chatting to their friends and suchlike, instead of working. Hopefully this won't come as too much of a shock, but your workforce are already using business tools, such as their phone and email, for personal or social activity. Some level of social activity needs to be accepted and if people are wasting time it's more likely to be a general performance issue than something specific to the use of social media.

The difference with social media is that this social activity is open to public view, and the concern is usually that management will see this and conclude that it's just a big waste of time. Don't be concerned if there is some degree of social use of these tools, particularly at the start. People may be more comfortable using it that way and it will help them adapt to the new technology.



When Deloitte Australia introduced the private micro-blogging service Yammer, they found that this quickly changed. Deloitte Australia is the world's largest user of Yammer, with over half of its 4,600 employees using it, having sent over 24,000 messages. The pattern of use quickly shifted from social to business. People are looking to communicate with each other and the organisation.

TYPES OF PROJECT

There are some big decisions to make right at the start as you select the right strategy for launch.

To pilot or not to pilot? Whether you run a formal pilot or not may largely be decided by the way things are normally managed within your organisation. However, if you do decide to go ahead with a pilot, be cautious not to launch to too small a group. It's not impossible for social media initiatives to work with small groups, but if there are too few people it may be difficult to get them started and difficult to get any real benefits. Remember that this is about connecting and sharing, and so size matters.

You can use social media to support all kinds of projects, but you'll need to decide on the scale of the project you want to start with.

Do you start with a smaller, low profile project that will get less attention and perhaps give you the freedom to do things and take risks that you couldn't with a bigger project? Or do you aim for a bigger project, something that will address key organisational challenges? One of the strengths of social media is that it can be relatively low cost to trial. You can use free or low cost services for small groups, and move to a larger solution later if that better suits your needs.

Ultimately, your project is likely to fall into one of several categories that will form the core argument of your business case, such as one of these:

- A problem that you had previously identified but had been unable to solve in a timely or cost-effective manner. Using social media tools enables you to solve the problem for the first time.



- A problem that you had been able to solve in the past, but only in a difficult or costly way. Using social media provides a solution that is more cost effective or efficient.

- New opportunities that had previously gone unnoticed or simply didn't exist before. By using social media you will be able to realise previously unidentified benefits.

Of course, you should be more specific than to say 'we will use social media to...'. Instead, focus on specific aspects such as 'programme participants will use blogs to reflect upon their learning, share ideas with other learners and describe how they are applying the learning in the workplace'.

This is the most important thing – you greatly increase your chances of success when you take the time to identify the problem and then establish a solution that will address it.

In looking for suitable projects, consider the core advantages that social media can bring. It is not bound by place and time but rather it is accessible at the point of need; it can be available when someone has the time rather than them having to make the time and it can reduce time and cost if you're willing to recognise that subject matter expertise lies with the subject matter experts and they can be given responsibility for sharing that themselves.

CHOOSING THE TOOLS

Your approach to choosing technology may also be set by the norms of your organisation, but there are many different ways to source the tools for social media, and in some cases you may choose a combination of these, or use different approaches for different projects based on the size and needs of that project. Like most technology today, the fundamental choices are between buying access to software as a service (SaaS) or buying a product.

Free services

There are many free tools available, and while you may not want to discuss company activity on Facebook or Twitter you may find that there are some applications for other free services.



For example, when using Google's free Blogger service you can choose to make a blog private and only accessible to certain users. This would be a cumbersome way to manage an organisation wide blogging platform, but may be perfectly adequate for running a small scale trial or for a small cohort of learners.

Not all free services will offer the levels of privacy you may require, or be scalable enough for long term use, but they can offer a low risk, no-obligation opportunity to try out new ways of working.

Commercial services

There are many commercial services in the market, some that offer specific niche services such as micro-blogging and others that offer 'complete' social media platforms. Unlike free services, these commercial options usually provide more support options and offer secure private communities.

If you need the service levels that a commercial platform can offer, using a hosted service can be a good option as they are usually quick to set up, can often be contracted on a short term basis and require no internal IT support. Some offer their service for free while usage levels are low.

Commercial Products

There are fewer commercial products than there are services, the difference being that they follow a more traditional licensing or purchase model and are usually hosted internally. There is usually a requirement for internal IT support.

Free Products

There is a wide range of free and open source options for most types of social media tools. These can be hosted internally or externally and give you complete control over their management. However, although the products themselves may be free, you will need to budget for the hosting and technical support, whether that's a financial cost or a time cost.

Enterprise options

Most enterprise software vendors now offer some form of social collaboration platform, or a range of social features that can be layered on top of their existing products. It may be that your organisation's IT policy means that this is the only acceptable route.

On the plus side, you are dealing with an existing, trusted provider and this should help overcome many concerns about

security etc. However, not all of the enterprise platforms are as well featured and flexible as you may like, and it may be difficult to justify using them for smaller scale projects. Any solution based on enterprise software is likely to be the most expensive option you consider.

OTHER CONSIDERATIONS

Finally, in putting together your business case, don't forget to budget for some form of management. You may have the impression that social media is entirely self managing, but that is probably not appropriate within an organisation, where some supervision is essential. It is perfectly reasonable and desirable that someone should be responsible for community management, but that should always be done with a light touch and focus on guidance and support.

In the final article in this series we will explore ways of adding social media to your learning blend.

*Barry Sampson is Director of Onlignment
<http://onlignment.com>*

Inspiring and Developing Capability



Advanced Learning Environment



Orchestrated

More and more organisations are looking at new technology to assist with their OD and Talent Development initiatives, **The Working Manager** have taken huge strides in the journey needed to provide solutions which sustain leaning and personal development demanded by a business need...

The Working Manager's D2™, Advanced Learning Environment makes it possible to provide all employees access to personal development in rapid time at low cost.



Professor Christopher Bones
MA, CCIM, FRSA, FCIPD,
Non executive Director
The Working Manager Ltd

Stand 115, Learning Technologies
26th & 27th January 2011
Olympia 2, London



The Working Manager Limited

T +44 (0)1285 657978 E info@theworkingmanager.com www.theworkingmanager.com



TWM
THE WORKING MANAGER