

Collaboration and Enterprise Social Media with Wikis

A Case Study on How Wiki Technology Can Be Leveraged to Create a Powerful Enterprise Social Media Collaborative Site

Fabien Sanglier and Rachel Sondag
Project Performance Corporation

October 2011

Introduction

With today's omnipresence of social technologies such as Facebook, Twitter, and LinkedIn, it is incredibly easy for people all over the world to instantly share thoughts, experiences, opinions; to instantly share "likes" or "dislikes"; to instantly rate and comment on resources; to "connect" to and "follow" others wherever they might be. In short, it is incredibly easy for people all over the world to virtually stay in touch, independent of each other's respective location.

Harnessing this collaborative power in a work-related setting – which gave birth to the term *Enterprise Social Media* – has gained a lot of momentum for the past couple of years with many firms and government agencies alike. This case study shows how Project Performance Corporation (PPC) harnessed the power of the Atlassian Confluence wiki platform to help a government agency create a secure and powerful online collaborative space for research communities located across the United States.

"Make It Facebook!"

As part of an ongoing effort to promote collaboration of expert communities around topics of interests, we needed to create a secure, online, collaborative platform that would not only enable multiple communities (government funded research projects in the field of health information technology (HIT)) to privately collaborate on ongoing ideas and research studies, but also enable global collaboration and sharing/dissemination across all communities, located across the country. The main idea was to break the geographic and institutions barriers to foster better discussions, provide a platform for peer-reviews, and—overall—reach a better outcome for the agency's goal.

In terms of features, the collaborative space needed to be secure, flexible, and easy to use for the thousands of Health IT researchers and clinical practitioners using this system every day. The requirement was often summarized in these terms: "Make it Facebook!"

Such a short yet powerful statement summarizes well what features this collaborative space needs to have, including, but not limited to:

- User friendly editing capabilities (upload documents of all file formats, easily create and organize web content)
- Various user-to-user social interactions channels (chat, forums, comments, resource ratings)
- Flexible taxonomy capabilities (content tagging and organizing)
- Performant search features
- Strong sharing and disseminations capabilities
- Versatile personalization features
- Secure communities and focus groups

The Solution: A Wiki "On Steroids"

There are many options to choose from in the collaborative and enterprise social media space; we researched which one would offer the best capabilities and best possible fit within budget, technology, and timing constraints. We considered enterprise portals such as *Oracle Web Center User Interaction* and *LifeRay*, open-source collaboration and wiki products such as *Drupal*, *MediaWiki*, and *Atlassian Confluence*, and social media and collaborative platforms such as *Jive*, *Microsoft SharePoint*, and *Alfresco*.



Although all of these platforms offer some or all of the capabilities we were looking for, we found that they mostly fell into three categories:

- Provide all needed capabilities (and much more) at a considerable cost (*Jive, Microsoft SharePoint, Oracle Web Center User Interaction*);
- Provide an affordable solution lacking some of the needed capabilities (*Mediawiki, Alfresco Share*); or
- Provide all needed capabilities at an affordable price, but require a technology change from our client's JAVA existing skillset (*Drupal*)

Based on our research (which is highly condensed and summarized above), **Atlassian Confluence** was the product that stood out by providing the exact balance between capabilities, price, simplicity, and extensibility, and was also within our client's technology JAVA skillset¹. Confluence started as a wiki product and moved progressively into the collaborative and enterprise social media space, which enabled it to best fulfill our client's needs.

Another non-negligible factor is that the Atlassian Confluence's worldwide development community provides a wide array of "plugins" that can be installed for free (or almost free) to extend capabilities and tailor the product even closer to our client's needs (right in line with Facebook's "apps" that are created every day by worldwide third parties). This extensibility feature enforced our product decision, since this solution does not only support existing needs, but offers a powerful adaptability to future needs as well.

What About Governance?

Most of us know how to drive, but how useful is it to own a Ferrari if you do not know the specifics of how to drive and enjoy such a powerful car? Very similarly, Atlassian Confluence offers a wide variety of features capable of creating a useful and viable "Facebook for the Enterprise." But how would we ensure that it will be well received and properly used by the thousands of users that represent this user community? This is when governance comes into play and how PPC helped make this project a success. Governance fosters and moderates the growth of community to help ensure that as the wiki evolves, it remains aligned with the vision it was intended to serve.

Here are some of the actions that we took in order to ensure success from the start:

- First, to ensure the collaborative site was well received by users on day one, we provided detailed **training**. We created and posted video demonstrations that users could access on demand from the site's home page. For users who prefer to follow along as they go, we offered interactive sessions and step-by-step guides illustrated with screenshots to maximize the reach of our training strategy.
- Secondly, we **grouped** wiki spaces or communities into top categories and **tagged** using keywords and labels in accordance to each community's respective goals and mission statements. Each user's "favorite" communities was accessible easily from the home page for easy access to most relevant spaces. This guaranteed that users would easily find the information they were looking for.
- Because users lose face-to-face interaction by using online collaboration platform such as this wiki, **user profiles** serve as a space for users to provide their contact information, expertise and skills, their pictures (optional), and whom they "follow" (optional). We incited users to provide as many details as possible to enrich their profiles, thus making user interactions more "real" and "friendly." Additionally, user profiles aggregated users' actions across the wiki into a user-specific "Activity Stream" showing the user's activities to the rest of the community. More voluntarily, users could also provide (from their own profile page) short status updates about projects they are working on or questions they may have.
- Moreover, the site encouraged **cross community discussions** by exposing wiki page commenting capabilities for everyone, as well as creating specific forums around certain relevant

¹ For a list of Atlassian Confluence's features refer to Atlassian's official feature page, <http://www.atlassian.com/software/confluence/tour/>



topics. Also, we added an in-browser “chatting” capability for everyone to use. All these are meant to foster real-time discussions and collaborations while also capturing a record of decisions. Similarly, as pages are changed, the authors comment on the changes that have been made. Each page also had a change history highlighting added or deleted content.

Also, since a wiki is created to be a collaboration environment with multiple authors, governance can be much looser than a traditional website or intranet. PPC recommends that general wiki policies be set and provided to users when they receive their account access and also communicated to all wiki users through training. These wiki policies may include:

- Review of each wiki community by a community owner who will oversee content to ensure its integrity in addition to that the content is accurate and up to date, correcting mistakes promptly.
- A wiki style and format including information on what document types should be posted and how content should be written in a concise manner. If pages are dense with information, they do little to inform readers about their main subjects.
- Accountability for each individual who is posting on the wiki including information detailing when it is appropriate to post on the wiki if not part of the person’s job description.

In addition to general wiki policies, specific procedures may be required for major actions such as community creation, removal, or archival. These procedures should include who can make the request and the roles and responsibilities involved throughout the process. PPC also recommends recording the business purpose and scope of the community; this information should also be published in the community to ensure content stays within the community’s original purpose and to make it easy for users to find the information they need. Policies for archival or removal should be time-based, as this will ensure that content is always fresh and up to date—thus keeping the wiki dynamic and ensuring users are able to find the information they need.

Conclusion

Whether your organization is geographically diverse or collocated, a “Facebook-Inspired” online collaboration site could greatly benefit your enterprise by breaking department barriers and fostering superior collaboration between employees.

We found that using “wiki” capabilities has many advantages, one of which is its ease of use since no technical expertise is required. Wikis also allow for multiple editors and reviewers, making it an efficient tool for collaboration. Due to version history in wikis, users can easily revert to a previous version if changes are no longer needed or are inaccurate. Unlike static webpages commonly found on websites and traditional intranets, wikis can be quickly and easily updated ensuring the content is always fresh and relevant to your users.

Additionally, we also found that using a product such as Atlassian Confluence that offered much more than wiki capabilities helped create an environment that was truly an enterprise social media collaboration site. That said, and as explained in this case study, many other great tools and products exist in that space and were considered in the selection process. Based on your organization’s specific requirements and constraints, these and other tools may be a better solution for your project.

Finally, as with any website, success does not depend on technology and products alone. In order to ensure your collaborative website is a success, it is important to establish a vision for your site—such as a value statement, goals, and governance policies and procedures—to ensure its evolution and sustainability.



About Project Performance Corporation

Project Performance Corporation is part of the AEA group, a 1,200-person, multi-disciplinary team of information technology and knowledge management professionals, project management experts, scientists, technologists, and regulatory specialists. With more than 20 years of experience in information management and enterprise services implementation, we specialize in delivering effective, reliable answers to the most complex challenges. At the heart of it all are our people - innovative thinkers, well versed in business processes and drivers, with unequalled focus on delivering quality products and services.

About the Authors

Mr. Fabien Sanglier is an accomplished Senior Solution Architect with more than 10 years of experience in Enterprise Portal and Content Management platforms, as well as general Web Application development using both JAVA and .NET technologies. An expert with the Oracle Web Center User Interaction product suite, Fabien architected, deployed, and developed numerous custom solutions for various commercial and government clients using this enterprise platform. Based on his growing interest of Open source technologies, Fabien has expanded his focus to architecting and building Enterprise Solutions with Open Source Content Management and Portal products such as Alfresco, Atlassian Confluence, Drupal, and LifeRay. His technical and project management skills coupled with his bilingual skills in French and English have allowed him to successfully implement numerous Enterprise IT projects in both the U.S., Canada and France. On his own time, Fabien enjoys spending time with his growing family and trains arduously to compete in triathlons across the country.

Ms. Rachel Sondag is an Analyst in PPC's internationally-known Information Management division. She specializes in the design, development, and deployment of knowledge management tools to serve users of all skill levels. She has experience in taxonomy design, metadata strategy, and enterprise content management deployment. Ms. Sondag possesses expertise in content and document management systems with a focus on user-centered design and has provided training for non-technical users. She is also a web usability expert with proficiency in information architecture, knowledge gathering, and systems design.

For more information contact:

Fabien Sanglier

Project Performance Corporation
1760 Old Meadow Rd., McLean, Virginia 22102
p: 703.748.7220
e: fsanglier@ppc.com

Rachel Sondag

Project Performance Corporation
1760 Old Meadow Rd., McLean, Virginia 22102
p: 703.748.7071
e: rsondag@ppc.com

