

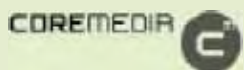


# MarketIQ

Intelligence Quarterly Q1 2008

## Enterprise 2.0: Agile, Emergent & Integrated

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## About the Research

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### About AIIM—The Enterprise Content Management Association

For more than 60 years, AIIM—The ECM Association has been a neutral and unbiased source for helping individuals and organizations understand the challenges associated with managing documents, content, records, and business processes. AIIM is international in scope, independent and implementation-focused. As the representative of the entire ECM industry—including users, suppliers, and the channel—it acts as the industry's intermediary.

The AIIM community has grown to more than 50,000 professionals from all industries and government, and has a presence in more than 150 countries and all levels of management, including senior executives, line-of-business, and IT. With every organization in the world handling some type of paper or electronic content, the ECM industry will continue to expand. As the industry grows, AIIM can be counted on to provide market education, peer networking, professional development and industry advocacy. Visit AIIM on the Web at [www.aiim.org](http://www.aiim.org).

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The authors thank the members of the advisory panel, who provided opinion and guidance on issues such as the construction of the market survey and general frameworks for the publication.

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# Introduction

This AIIM *Market IQ* focuses on a genre of new technologies and related business models that enable rapid and agile collaboration, information sharing, emergence and integration capabilities in the extended enterprise known as Enterprise 2.0.

AIIM used two basic sources of input in constructing this report: the accumulated experience and ongoing market analysis work performed by the AIIM Market Intelligence group and a survey that the group developed and administered. The survey was taken by 441 individuals between January 5 and January 19, 2008. It should be noted that the survey results are reported in aggregate (i.e. AIIM members and nonmembers). Survey demographics can be found in the appendix.

In addition, the AIIM Market Intelligence group received guidance and input from a panel of advisors in developing both the survey and this report. AIIM deeply appreciates the work of the panel, which consisted of: Patti Anklam, Stowe Boyd, Steven Mandzik, Andrew McAfee, Eric Tsui, and David Weinberger. (For brief bios on these advisors refer to the *About The Authors* page in this *Market IQ*.)

This *Market IQ* covers the concept of Enterprise 2.0 from multiple perspectives, providing a thorough education on the topic. In order to achieve a balanced understanding of Enterprise 2.0, the reader is encouraged to read the report in its entirety, in the order presented. It has been structured into eight sections, each providing a specific perspective on Enterprise 2.0. They are:

## Section 1 Defining Enterprise 2.0

This section introduces the subject, provides a definition, and compares it with older approaches to collaboration and integration.

## Section 2 Technology Complements and Alternatives

This section traces the evolution of Enterprise 2.0 technical functionality across three distinct periods. Specific point technologies are identified in each period, culminating with the identification and definition of a family of point solutions that collectively comprise Enterprise 2.0.

## Section 3 Why Enterprise 2.0 Now

This section looks at the business and technology trends that have led to the emergence and adoption of Enterprise 2.0, including insight into new worker models enabled through Enterprise 2.0.

## Section 4 The State of the Market

This section provides insight into the current reality of Enterprise 2.0 in the workforce. It identifies and quantifies obstacles, funding models, staffing models, deployment models, overall attitudes and adoption rates of technologies in organizations.

## Section 5 Generational and Cultural Impacts

This section provides insight into how the age of personnel and the particularities of different corporate cultures change the way Enterprise 2.0 is perceived, managed, and implemented.

## Section 6 Conclusions and Developing an Enterprise 2.0 Model

This section offers a framework for assessing corporate culture as it relates to collaboration, as well as evaluating and mapping your organization's needs to define the most suitable Enterprise 2.0 implementation strategy.

## Appendix A Survey Demographics

This appendix provides an explanation of the methodology used in developing the market research, along with survey population demographics.

## Appendix B Glossary of Terms

This appendix provides a glossary of terms and phrases associated with Enterprise 2.0.





Although Enterprise 2.0 has now become a recognizable term, few people can succinctly describe what it is.

## Section 1

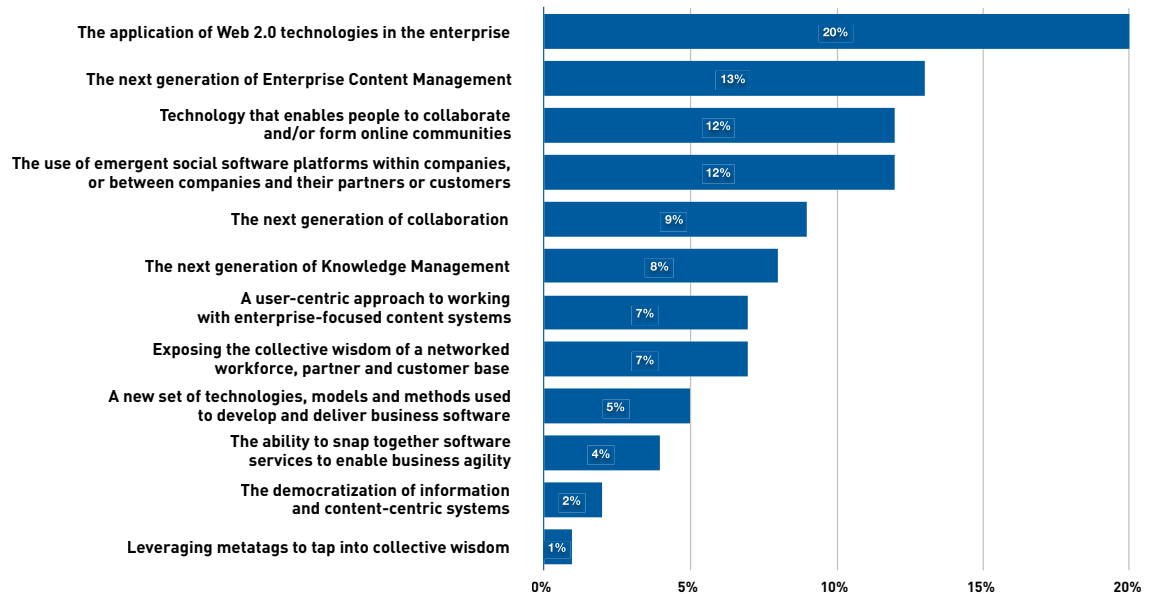
### Defining Enterprise 2.0

Periodically terms emerge on the business-technology front that create a stir of activity, promising great technological advances and radical change to business. One recent arrival to the industry lexicon is Enterprise 2.0. Characteristic to such terms, it is surrounded by great confusion in the market.

Talk of Enterprise 2.0 has been building since the spring of 2006, when Harvard Professor Andrew McAfee first coined the term in an *MIT Sloan Management Review* article entitled “Enterprise 2.0: The Dawn of Emergent Collaboration,” as a parallel (but distinct) term from Web 2.0 (popularized by Tim O’Reilly in 2004).

Although Enterprise 2.0 has now become a recognizable term, few people can succinctly describe what it is. Indeed, when we asked our survey respondents to select the definition that most closely matched their own from a list of popular versions, no single answer won a clear majority. (See Figure 1.) This result clearly suggests confusion in the marketplace over the meaning of Enterprise 2.0.

Figure 1. Which of the Following Definitions of Enterprise 2.0 Most Closely Aligns with Your Definition?



AIIM therefore, concluded that a new definition, an encompassing definition is warranted. First, here is a closer look at the top four responses to this survey question, and why each fails to adequately define Enterprise 2.0, and perhaps, therefore to lack popular support.

### The Application of Web 2.0 Technologies in the Enterprise (20%)

Given the strength and awareness of Web 2.0 as a buzzword in the broader realm of the commercial Web, it is understandable that this was the most popular choice.

But even if “Web 2.0 in the enterprise” had garnered a majority of responses, the definition would not be sufficient because it assumes there is a clear definition of Web 2.0. More importantly, it treats far too lightly the qualification that the technology is used “within the enterprise.” Web 2.0 is focused on consumer and public-facing Web sites although that distinction was not explicitly made in the original definition. Enterprise 2.0 is much more about businesses’ adoption of “2.0 mindsets” than with the consumer-facing side of the coin.

### The Next Generation of Enterprise Content Management (13%)

This definition may have been the second most popular choice because the survey was administered by AIIM, “The *Enterprise Content Management* Association.” It is most encouraging to see that users can view this burgeoning set of technologies as the next phase of ECM, but this definition is a bit too far-reaching. ECM includes virtually every process, technique, technology and approach to creating, storing, managing, and publishing all forms of content. Under this broad definition, ECM can indeed encompass Enterprise 2.0. But the latter is an enhancement to the former, not a next-generation replacement for it. For example, Enterprise 2.0 does not, by definition, include functionality such as records management, security, business process management, or taxonomies, all of which are part of an ECM system.

## Technology that Enables People to Collaborate and/or Form Online Communities (12%)

This definition clearly offers a value statement (i.e. to collaborate and/or form online communities). But it does not go far enough. It fails to incorporate the integration and collective intelligence capabilities of Enterprise 2.0. The popularity of this perspective, however, is indicative of how many people and organizations pursuing Enterprise 2.0 strategies today initially take a narrow view and focus exclusively on collaboration. (See *Section 2: Why Enterprise 2.0 Now* for more detail.)

“...we looked at the definitions and weightings from the survey, coupled them with our own understanding of Enterprise 2.0 and came up with a ‘new definition’ which we passed by our advisory panel.”

This definition also places all the emphasis on technology as the only enabler (similar to stating that Enterprise 2.0 is only about deploying Web 2.0 *technologies* in the enterprise.) This definition does not differentiate collaboration and communities within the firewall from general purpose collaboration and social environments (such as Facebook). Furthermore, while Enterprise 2.0 technology may facilitate collaboration and accelerate the formation of communities, the technology alone is not enough. In summary, this definition fails to include the ecosystem required to enable and sustain Enterprise 2.0.

## The Use of Emergent Social Software Platforms Within Companies, or Between Companies and Their Partners or Customers (12%)

This definition, coined by Professor McAfee ranked fourth, (when calculated percentages were carried out to hundredths of a percent) below more explicit technology definitions, around ECM and collaboration, both of which have been around and well-defined for 10 years or more. Enterprise 2.0 has been building in awareness since 2006, when Professor McAfee first coined the term, but according to our market study, there is still much confusion over this original definition. Essentially, it lacks a value statement and its description of the technology component as “emergent social software” may be too vague.

Professor McAfee’s framework for adopting Enterprise 2.0 (SLATES, described later in this section of the *Market IQ*), is far more powerful and exact in defining the technical parameters. The use of the word “platform” is key, as it indicates the need to go beyond targeted pointed technology silos and towards a more broad enterprise capability. It falls short of recognizing, however, the need for an ecosystem to enable and sustain Enterprise 2.0.

So where does that leave us? The survey data did not indicate a clear industry definition. Moreover, none of the more popular definitions constituted a full explanation, denoting all the major components of Enterprise 2.0 as well as a value statement.

As part of this research endeavor, we looked at the definitions and weightings from the survey, coupled them with our own understanding of Enterprise 2.0 and came up with a “new definition” which we passed by our advisory panel. A great deal of debate and discussion then occurred as the panel traded opinions and rendered strong insights. In the spirit of open and transparent collaboration, we have included the dialogue with the advisory panel that led to this definition. It is important to note that the advisory panel saw this definition not as a panacea, but as a compromise. (See sidebar on page 12.)

Enterprise 2.0 is:

**A system of Web-based technologies that provide rapid and agile collaboration, information sharing, emergence, and integration capabilities in the extended enterprise.**

The first clause indicates that Enterprise 2.0 is a collection, not a single entity or tool, the fact that it leverages Web-based technologies, and its need for an (eco)system to thrive.

The second clause provides the value statement or purpose. “Rapid and agile” implies the low barrier and dynamic nature of Enterprise 2.0. The last clause positions the functionality within an enterprise setting (not Web 2.0), but the phrase “extended enterprise” encompasses the “companies, or between companies and their partners or customers” parameters in Professor McAfee’s definition.

## Defining Enterprise 2.0

From Carl and Dan

Andrew, David, Eric, Patti and Stowe:

As we're heading forth in the market research report and training, would like some feedback on aspects of the work that could benefit the most from more eyes and brainpower.

We can't discuss Enterprise 2.0 without defining it, and in understanding if and how people are currently thinking about it.

From the survey (which we're closing down this week), we did a pulse-check to see what people thought Enterprise 2.0 stood for, including Andrew's current definition.

The top 4 responses were:

- Technology that enables people to collaborate and/or form online communities
- The application of Web 2.0 to the enterprise
- [Andrew's] The use of emergent social software platforms within companies, or between companies and their partners or customers
- The next generation of enterprise content management (ECM)

The good news is that the majority of people are swimming in the right direction at the least, although it's still early days.

But, that said, the point of our doing the research is to continue to refine and spread awareness of the core concepts of Enterprise 2.0.

So, to that end, the refined/redefined definition of Enterprise 2.0 that we're working with is:

"Leveraging low barrier social software within an organizational setting to provide emergent wisdom in support of defined goals and objectives"

Our thinking is:

- It flips the definition from focusing on emergent social software, and puts the emergence into the outcome (wisdom) rather than the software end;
- rather than specifically call out "within companies, or between companies and their partners or customers" as a refinement to the original definition, we can suffice to say that it occurs in an organizational setting and that there needs to be defined goals and objectives (even loosely defined, not "from on high"), and call out the specific use cases via examples;
- "low barrier" speaks to many things, such as cost, usability, adoptability, etc. and speaks to emergence again;
- "Leveraging" is about embracing and making change, rather than it's simply another solution that "users" just nonchalantly use.

Your thoughts on the definition, and our reasoning?

Carl and Dan

Eric Tsui Wed, 23 Jan at 7:57 PM

I agree with the overall theme of the definition but suggest the word "collaborative" or at least "collective" appear somewhere as this is central to the whole of Enterprise 2.0—collective filtering of search results, collective/social bookmarking, nomination of preferences etc. "Emergent wisdom", to be, tends to be a fairly abstract term and may require further definition. Why "emergent" only? Such collective wisdom may always be there but just untapped within the enterprise.

David Weinberger, 23 Jan at 8:57 PM

Some comments, including nitpicks:

1. Why not just use Andrew's? It's got the advantage of being the actual definition of the term. You can make all the points you want by explaining the definition, instead of trying to come up with a new definition that encapsulates everything all at once.
2. I think of Enterprise 2.0 as being about more than social software, but I have no reason to think anyone else thinks of it that way. I think it also has to do with being smarter about metadata and pulling together information from across all boundaries.
3. "within an organizational setting" sounds like you're trying to rule in the use of social software by off-hour clubs. Why not just say "by the enterprise" or "by organizations"?
4. May I please answer the survey question "On a scale from 1 to awful, how much do you hate the phrase 'emergent wisdom'?" But, then, I'm not even comfortable talking about knowledge management, so don't go by me. In any case, I think wisdom is not the only goal of E2.
5. The phrase "in support of defined goals and objectives" sounds to me like you were afraid that people would see the "emergent wisdom" phrase and think that E2 is too soft and vague. Fix the "emergent wisdom" phrase and you won't have to add anything about defined objectives.
6. I agree with Eric that it'd be nice to get collaboration into the statement.

So, if you're going to create your own def—which I think you ought not to do—I think I'd rewrite what you have as something like this:

"Leveraging low barrier social software within an enterprise to enable collaboration and information sharing in pursuit of emergent benefits."

Yeah, it sucks, and you should feel free to kick the bejeebus out of it, in which case I fall back on my original position: Cite Andrew's, and then spend as many paragraphs as you want explaining what you think is important about it.

Stowe Boyd Thu, 24 Jan at 5:12 PM

I am not sure you have to define something concretely: the ostentative definition—examples of enterprise 2.0, implying a fragmentary or difficult to pin down boundary around the concepts—works fine in a lot of cases (see [http://en.wikipedia.org/wiki/Ostensive\\_definition](http://en.wikipedia.org/wiki/Ostensive_definition)).

I think 'the application of Web 2.0 technologies, practices, and conventions in the enterprise context' is fine. This begs the question 'what is Web 2.0?' but that is a rich and fertile discussion.

I dislike 'emergent' in this case. I really dislike "leveraging low barrier social software within an organizational setting to provide emergent wisdom in support of defined goals and objectives": I don't like 'leveraging', 'low barrier software', 'emergent', 'wisdom', and the thing altogether. [David's email]

Wow—great feedback everybody. Many issues and opinions have been raised, that we should respond to. Why not just use Andrew's definition? Yeah, Dan and I wrestled with that for quite some time—between that and then coming up with a definition, days. If the definition were more popularly understood and recognized we would have left it alone. Moreover there was evidence that enough people did not get it from the definition, or felt that it was more. Ah—more, yes David we agree with you that E20 is more than social software and we're trying to convey that in the definition (guess not).

I like the idea of putting collaboration right in the definition, but feel we need to qualify it or expand it—E20 is more than just collaboration, especially the way most people view collaboration—to Dan's point we don't want folks to think "OK so this is just a new way to socialize and work together". It is more than that also.

OK Organizational setting sucks—we were a bit uncomfortable with it ourselves, "within an enterprise"—yes maybe better.

Not a big fan of emergent wisdom—but wanted to preserve the "spirit" of Andrew's definition—and there is a large emergent component to much of this. So maybe the wisdom side has to go, and if we can fix it then yes, in support of objectives and goals can go. But we do want to convey that it has to be done with a purpose—this is not purely social so to speak, needs to convey business value.

"Leveraging low barrier social software within an enterprise to enable collaboration and information sharing in pursuit of emergent benefits."—I would not say it sucks—any worse than ours does. We will work with this, tweak based on this feedback and hopefully come up with something a bit more pithy and clear.

Patti Anklam

For what it's worth, when I talk to people and try to explain E2.0, I say that it is Web 2.0 brought into the corporation. What Web 2.0 is, I say, is the collection of technologies that enable interaction, collaboration, and content development with a human (social network) overlay—that is, that the relationships matter. If necessary, I refer to the distinction between Web 1.0 and 2.0 as the difference between publishing and interaction. When you know who it is that is speaking, that is an element both of content and credibility.

David Weinberger

First, I really like Patti's explanation. In any case, trying to get it all into one simple sentence that will say everything anyone ever needs to know about E2 is impossible because it's a squishy phenomenon.

Second, I'd like to go off-topic just a bit to express one bit of concern about Patti's explanation and with Web 2.0 positioning in general. Patti, I do indeed like the way you put it, but the distinction between publishing and interaction seems to imply that before Web 2.0, the Web was all about publishers (including businesses) sticking things on Web sites. Ever since Tim O'Reilly came up with Web 2.0, I feel like I've been fighting the same perception the Cluetrain site was created to fight in 1999. Back then, the media talked about the Web primarily as a publishing platform, but that seemed to us (the Cluetrain authors) to miss the real reason so many people were rushing onto the Web: the ability for the former-audience to talk amongst itself, conversationally, about what matters to it. Web 2.0 absolutely lowered the hurdles for participating in this conversation, but I worry that the success of the Web 2.0 meme is re-writing history so that we think (once again) that the Web started out as a publishing platform, rather than as a conversational one.

End o' concern.

Best,

David W.

Stowe Boyd:

Patty

I am relatively dogmatic in my belief that the social dimension is the most important, but once again, Web 2.0 technologies, practices, and conventions applied to the enterprise seems to fit. It is worth playing up the fact that these are overwhelmingly social.

ALL

It's not just conversations that people are involved in: it's a wide range of things. You can say it's just a network of conversations, but that's like saying everything is made of atoms, so ingesting creme caramel or ground glass is—at some level—the same sort of activity. Often, that is not the best level to look at things.

Still, that's a quibble, and I agree totally with your point that we should not view this through a publishing lens—which AIIM might naturally do—but instead through the context of sociality: people interacting through the agency of web applications and services.

Thank you all for your input—hopefully in reading it you appreciate the struggle we have been going through. So what is this all leading to:

To quote David—“It is a squishy phenomenon”. Indeed, which is why we felt we must take a stab at a more definitive “self evident” definition. Survey data is showing that the biggest impediment to adoption is lack of clear understanding. In an effort to help lessen the height of the hurdle, we really want to offer a definition—again not a panacea to the issue—perhaps not perfect—but a bit more descriptive than many out there—including Web 2.0 in the enterprise—which of course as we all stated leads to the question, what is Web 2.0?

Dan and I are filtering all your comments and are going to take another crack at putting a newer—hopefully improved—definition together that reflects the comment—or at least the more common comments.

No one of us (Dan and I included) may find the definition “perfect”—but we believe it will move the market a step closer to understanding and therefore easier adoption.

Stay tuned and THANKS.

Carl Frappaolo

#### David Weinberger

1. I agree with Stowe on sociality v. conversation v. publishing.
2. Somewhere in Everything Is Miscellaneous I talk about why definitions sometimes reduce understanding rather than increase it. E2 is a pretty good example of this. But, having said that, I hereby surrender, and wish you godspeed in coming up with something : ) I don't envy you, and I'm sure you'll come up with something worthwhile if necessarily imperfect.

Again—thank you all for giving your feedback on the proposed definition for Enterprise 2.0. We have synthesized everyone's input and have come up with a new version. Unless anyone strongly objects and thinks it is crap, we would like to run with it, realizing it still may need some explanation—but we are not trying to find the perfect definition (it does not exist in 25 words or less).

“A system of web-based technologies that provide rapid and agile collaboration, information sharing, emergence and integration capabilities in the extended enterprise”

To recap:

1. we wanted to offer a definition beyond Andrew's as the survey shows not many have yet latched on and there is still much confusion—what is this really
2. first clause includes Patti's (and others) feeling that this is a collection of things—not a single entity/tool, and the fact that it is based in web-based technologies (tie to web 2.0)
3. second clause provides the value statement or purpose—the list (collaboration, information sharing, emergence and integration) encompasses the end results we collectively were identifying. Rapid and agile implies the low barrier and dynamic nature. Capabilities was inserted to imply it does not deliver it out of the box, it provides capabilities that an enterprise can choose to leverage.
4. the last clause positions the functionality within an enterprise setting (not web 2.0), but by stating extended enterprise encompasses the “companies, or between companies and their partners or customers” parameters in Andrew's definition.

Again, many thanks for the input. We believe this definition is much improved, and yet not too verbose. Again, unless anyone really objects, and thinks it does the market a disservice or sees a blatant misleading in it, we will go forward with this for now.

#### David Weinberger:

Carl and Dan, since I didn't know about this def before I sent out my surrender, I will allow myself one last comment:

This new def is better, but it actually doesn't define E2 in a way that anyone who doesn't know what it is would now know what it is. OTOH, I assume that this will be followed by an extensive explanation. All the value will be in the explanation.

And after you've written that explanation, brilliantly no doubt, I hope you'll consider going back and deleting the definition.



## Frameworks for Enterprise 2.0

As stated previously, Professor McAfee offers a framework, which goes by the mnemonic SLATES, that outlines the key characteristics of Enterprise 2.0 and provides a finer-grained definition of Enterprise 2.0.

### SLATES

SLATES stands for Search, Links, Authorship, Tags, Extensions, and Signals.

**Search** denotes that Enterprise 2.0 content should be subject to discoverability. Search technology must be provided to enable both facilitated and automated location of content, so that it can be reused and leveraged. This aspect stresses therefore not only the ability to find content, but also to collaborate around it and incorporate it into other work processes and intellectual endeavors.

“...SLATES outlines the key characteristics...and provides a finer-grained definition of Enterprise 2.0.”

**Links** refers to the ability to create interconnections between content. This functionality ranges from content integration (e.g., mashups, described in more detail in *Section 3: Technology Complements and Alternatives*) to pointers, such as hypertext links. Links make it easier to repurpose content and garner greater value from it, as well as create navigation paths through content.

**Authorship** is largely focused on usability. The premise of authorship, as defined by McAfee, is that every worker should have access to Enterprise 2.0 platforms, without any required training. Interaction with the system should be low-barrier.

**Tags** refers to the use of metatags in dynamic fashion to identify the relevancy of tagged content. Tags create a taxonomy, or several taxonomies, and can be combined to create a Folksonomy (See *Section 3: Technology Complements and Alternatives* for more detail.) Tags can be used to capture individual and collective opinions on the value of content, a form of knowledge in itself, which can also be used as a navigational path through content in a manner similar to links.

**Extensions** leverage technology to uncover patterns of user activity. These patterns are then provided as

further insight into the knowledge base. Extensions can extend a search into other areas based on similar searches and user behavior, (e.g., “Users who have searched on this topic, have also looked at this.”)

**Signals** represents the use of technology to push content to interested parties. Signals makes the Enterprise 2.0 system proactively collaborative. For example, users can subscribe to a particular Web site and as changes are made to the site, the new content is pushed to the subscribers automatically, keeping them in the know.

### FLATNESSES

The SLATES framework was expanded upon by Dion Hinchcliffe in 2007. Hinchcliffe’s framework by definition fully encompasses SLATES, but adds four additional key characteristics to Enterprise 2.0. Like McAfee, Hinchcliffe developed a mnemonic, FLATNESSES, to illustrate his framework.

FLATNESSES stands for Freeform, Links, Authorship, Tagging, Network-oriented, Extensions, Search, Social, Emergence and Signals. Thus, the four characteristics added by this framework are Freeform, Network-oriented, Social, and Emergence.

**Freeform** stresses that authorship, described as low-barrier in SLATES, should be “no barrier”, i.e. free from a learning curve or restrictions. It also includes open, low-barrier approaches to signals and integration (modular programming) and stresses the need for freeform interfaces to functionality.

**Network-oriented** states that not only must the technology platform be Web-based, but that all content must be Web-addressable. Thus, network-oriented provides additional rules on authorship and links and proposes the potential development of a blogosphere within the enterprise.

**Social** stresses transparency (to access), diversity (in content and community members) and openness (to structure) need to be core values of the Enterprise 2.0 environment. It is interesting to note that in this facet, the cultural side of Enterprise 2.0 is stressed as much as the technical.

**Emergence** stresses that the platform must provide approaches that detect and leverage the collective wisdom of the community. This is perhaps a bit redundant, as SLATES does identify functionality that includes emergence.



### More than Collaboration, Integration, and Emergence

Thus far, we have defined Enterprise 2.0 and its value proposition from a high-level perspective. Defined at this degree, Enterprise 2.0 sounds somewhat redundant to preceding movements within business and information technology (e.g., Knowledge Management). Collaboration within a business setting is not a new concept. Similarly, neither is open access or collective wisdom. So one must ask, “What is the difference with Enterprise 2.0? Couldn’t all of this have been accomplished before?” The answer is yes and no.

“Aligning culture with technology is a significant challenge to introducing Enterprise 2.0 into an organization.”

Yes, the ability to build online platforms to drive collective wisdom and team-based collaboration predates Enterprise 2.0. Collaboration, searchable content, and collaborative content development have all been possible in the past.

But Enterprise 2.0 enables those things to happen in a far more rapid and agile fashion. Collaborative environments and projects, which once took a high degree of technical know-how and effort (to both create and participate in) can be created in hours or minutes. This particular feature of Enterprise 2.0 is stressed in the SLATES and FLATNESSES frameworks and is a key value proposition for Enterprise 2.0.

On the other hand, while Enterprise 2.0 lowers the technical barrier to collaboration and innovation, it must be stressed that there is also a cultural side to Enterprise 2.0. Like its predecessors, (e.g Knowledge Management and Innovation Management), the members of the community and the community as a whole must be inclined to open and agile sharing, cooperative thinking and development. If not, Enterprise 2.0 may simply result in faster development of ineffective platforms. Aligning culture with technology is a significant challenge to introducing Enterprise 2.0 into an organization. This aspect of Enterprise 2.0 implementation is discussed in further detail in *Section 5: Cultural and Generational Definitions and Impact*.

“While it must be continuously stressed that Enterprise 2.0 is more strategy and supporting culture than it is about a given tool or application, it is nonetheless prudent to have a working knowledge of the technology landscape before embarking on an Enterprise 2.0 strategy.”

## Section 2 Technology Complements and Alternatives

Defining Enterprise 2.0 is not complete without a discussion of the specific advantages it provides through technology, which requires an understanding of those technologies.

While it must be continuously stressed that Enterprise 2.0 is more strategy and supporting culture, than it is about a given tool or application, it is nonetheless prudent to have a working knowledge of the technology landscape before embarking on an Enterprise 2.0 strategy. As the previous section of this report pointed out, Enterprise 2.0 technologies provide an accelerated, low-barrier low-cost approach to building platforms that support this culture and business strategy. Therefore, in order to maximize the return and effectiveness of such a culture and strategy, Enterprise 2.0 technologies should be deployed tactically and deliberately.

The primary point technologies that can comprise an Enterprise 2.0 technology strategy are briefly described and positioned within the context and framework of Enterprise 2.0. They are preceded by an introduction to earlier generations of technology, labeled here as 1.0 technologies and 1.5 technologies. This is done for two reasons. First, an understanding of these earlier approaches to collaboration and integration provide a better appreciation for the unique offerings of Enterprise 2.0 technologies. Second, it is likely that an organization embarking on Enterprise 2.0 will have a legacy investment in these technologies, which may augment an Enterprise 2.0 environment and/or provide stop-gap functionality until the full extent of an Enterprise 2.0 system is achieved.

## 1.0 Technologies

This class of technologies is basically synonymous with the advent of the Internet. They include:

Bulletin boards

E-mail

Instant messaging

Discussion forums

Chat rooms

Web/tele/videoconferencing

Static Web pages

Collectively these technologies represent a one-way channel approach to broad communication. With the exception of bulletin boards, they are still widely used. They are not, however, considered part of Enterprise 2.0 because they are focused on one-way channels, have little to no visibility and commonality—meaning that they are not easily discoverable, especially outside those individuals specifically being channeled—and offer little to no support for extensions (as defined in the SLATES model in Section 1).

These technologies are mentioned in this report, however, due to their prevalence, and, while they fall short of meeting the functional criteria of SLATES and FLATNESSES, they do offer popular, easy-to-access (i.e. already installed) approaches to providing some of the criteria. Thus, they can be positioned as stop-gap approaches to functionality, and/or used to augment Enterprise 2.0 platforms. For example, instant messaging, a 1.0 technology, can be used simultaneously with a wiki (a 2.0 technology defined later in this report), as a way for the collaborative wiki authors, to “discuss” proposed changes and other related issues. E-mail, (a 1.0 technology) might be used as a notification mechanism for changes in a wiki or new posts to a blog, (a 2.0 technology defined later in this section).

## 1.5 Technologies

This class of technologies provides platform-based approaches to creating and supporting communities and sharing content and processes. These tools include:

Web services

Collaborative filtering

Social networking

Social network analysis

Agents

Portals/Intranets

Dynamic Web

(Note: A definition of each of these technologies is provided in the glossary of this report.)

While 1.0 technologies are stop-gap substitutes for Enterprise 2.0, 1.5 technologies can be fully functional solutions. These technologies are not considered part of Enterprise 2.0 because in some cases the barrier to involvement is moderate to high (i.e. requires technical know-how and proprietary tools). While some provide emergence and extensions, (e.g., collaborative filtering social networking and social network analysis) they fail to simultaneously provide the other criteria of SLATES and FLATNESSES (as described in Section 1). The 1.5 technologies are mentioned in this report because they provide some of the criteria of SLATES and FLATNESSES. They can provide platforms on which Enterprise 2.0 systems are integrated (e.g., wikis and blogs positioned on a corporate intranet/portal), and/or serve as partial solutions and augmentation to Enterprise 2.0.

## 2.0 Technologies

These are the primary technical focus of this *Market IQ*. They represent a new breed of Web-based technologies that provide platform-based approaches to creating and supporting communities, along with sharing content and processes. Implementation of the technology is rapid and agile. All provide some ability to garner collective intelligence (also known as emergence). They fully support the SLATES and FLATNESSES frameworks, but each provides a different type of functionality. These tools include:

**Mashups**

**Blogs**

**Wikis**

**Really Simple Syndication (RSS)**

**Podcasting**

**Social voting/ranking**

**Social bookmarking**

### Mashups

Mashups are composite applications typically employing broadly accepted standards such as XML, HTML REST-style Web services, and JavaScript. They enable rapid, low-cost content integration with customizable, agile user interfaces. The content aggregation can occur in real time, on the server, or on the client. RSS (See RSS definition in this section of the *Market IQ*) is one way to push content into a mashup. More specific mashup standards are expected to emerge.

Mashups provide business value by integrating or overlaying “standalone” applications and data sources into an aggregated offering. The programming style can also be used to create executive dashboards or single views into multiple data systems and applications.

Mashups can be configured to display different but related content side-by-side or to combine the content in any manner. Mashup technology is hierarchical. It is possible to embed a mashup inside another mashup, resulting in applications known as a “monster mashups.”

Although mashups partially support all the facets of SLATES and FLATNESSES, their primary focus is on links and network-orientation.

### Blogs

The term blog is short for Weblog. Blogs are Web-based journals that enable users to quickly communicate with a mass audience. Blogs typically have a single author, but additional content can come in the form of appended comments from the community of readers. Thus, a blog is semi-collaborative (in contrast to wikis).

Blogs typically deliver content in a single thread of posts (individual entries), listed in reverse chronological order. Most blogs have a focus, such as a particular subject or a project. Blogs can combine text, images, and links to other blogs, Web pages, and/or other forms of online media. They typically provide the ability to add functionality, such as search, taxonomies, and tagging, through 1.5 technology (i.e. widgets). Blogs are specifically built for the Web with native features such as permalinks, hyperlinks, and trackbacks.

Blogs support all the facets of SLATES and FLATNESSES, with only partial support for search, signals, and emergence.

### Wikis

A wiki is a collaborative authoring (content development) Web site. Each wiki should have a defined domain (e.g., creation of a contract, a policy and procedures manual, a reference guide.) Anyone can enter information, or change or comment on anyone else’s contributions. A wiki site allows anyone to edit, delete, or modify the content on the Web. In a wiki, the content develops organically. Collective wisdom can emerge as multiple participants add their opinions, comments and expertise. Thus, the wiki is a quick, low-cost approach to gathering enterprise knowledge into a single area.

In its purest implementation, a wiki would impose no rules or roles, but in practice some measures are often taken. For example, sections of the wiki can be hidden from the view of certain collaborators due to the proprietary nature of certain sections of the content. Wikis typically provide integrated version control and audit trails.

Workflow could be integrated into a wiki environment in order to stage how updates are posted. In this type of scenario, an editor would likely be introduced into the process, “approving” content before it is posted, blending writing styles to streamline the wiki’s “voice,” and monitoring quality.

Wikis support all the facets of SLATES and FLATNESSES with only partial support for freeform expression and participation (some style rules are typically imposed) and extensions.

## Really Simple Syndication (RSS)

RSS is a family of Web feed formats used to syndicate content to other sites. An RSS channel or feed provides either a summary of targeted Web content or the full text. RSS dynamically and automatically keeps subscribers aware of content changes (additions and edits) to targeted Websites (e.g., a blog or wiki).

RSS content is read using software known as a reader, or aggregator. Users subscribe to a feed by entering the feed's link into the reader or by clicking an RSS icon in a browser initiating the subscription process. The reader checks the user's subscribed feeds regularly for new content, downloading any updates it finds.

RSS is the most popular form of signal functionality in Enterprise 2.0. It is standards-based, and formatted as XML for easy consumption and transformation by feed readers, aggregators, dashboards, or mashups. RSS (and ATOM, another type of feed) are pull-based, rather than push-based communication streams, such as e-mail.

RSS feeds can be used to provide emergence by monitoring the popularity of subscriptions (i.e. most popular sites). They can also be "nested," meaning an RSS feed can serve as a trigger to another signal.

RSS support all the facets of SLATES and FLATNESSES with only partial support for social (users do not necessarily interact within RSS) and no direct support for extensions.

## Podcasting

Short for "iPod Broadcasting," podcasting is the method of distributing multimedia files (e.g., audio and video) on the Web using syndication feeds. (It is important to stress that despite its tie to Apple iPod in name, podcasting is not platform-dependent.)

Similar to a blog, a podcast typically has one author, and provides a mass communication channel. The greatest difference is that podcasting provides a simple and agile way to capture and share multimedia-based knowledge. For that reason, it is sometimes also referred to as "The Multimedia blog" format.

True "podcasts" are separated from simple embedded audio/video clips because users can subscribe to podcast channels through a feed, such as RSS or ATOM. Users are therefore "pulling" the content, rather than passively receiving it from a broadcaster.

Podcasting supports all the facets of SLATES and FLATNESSES with only partial support for search (because this is a multimedia format, only tags are searched, or a multimedia search tool must be deployed), social and emergence. The format is not highly interactive.

## Social Voting/Ranking

Social voting/ranking is a group-based approach to capturing a collective opinion, and another form of emergence. It is a form of tagging, which allows users of content to rate the quality or usefulness of a particular piece of content. As more users participate, a range of popularity emerges.

Social voting and ranking tools use proprietary algorithms to calculate the overall rank or value of the content based on user-supplied input. In some cases, the algorithms do not rely on explicit input (e.g., tags), but imply popularity based on users' interaction with the content.

Social voting/ranking typically manifests itself as a feature of search and/or navigation tools, ranking content sources within a defined collection.

Although social voting/ranking focuses on tagging and emergence, it supports all the facets of SLATES and FLATNESSES with partial support for links (linking is limited to the tags or rankings linking to respective content), network-oriented (although the ranking can be executed on Web content, this is not a requirement), extensions (the rankings do not innately provide extensions, but can serve as input to extension type functionality) and search (this is an augmentation to search).

## Social Bookmarking

Social bookmarking is a form of tagging, executed by individuals and typically shared publicly or collectively, which results in emergence. Users save links to content (Web pages) they want to remember and/or share. Most social bookmarking systems have users label their tags, thus providing organization of content by similar tags (e.g., related topic categories).

By sharing and viewing bookmarks a "folksonomy" emerges. (See the Glossary in this *Market IQ* for more details on folksonomy.) This communicates context and categorization, which may not have been seen through a more formalized taxonomy-driven viewpoint, or any single perspective.

Users can also navigate content by selecting everything associated with a particular tag. By tracking the number of users who have bookmarked the same content in similar fashion, a form of social voting/ranking, emerges.

Some social-bookmarking systems provide signaling functionality, which alerts users to the occurrence of new bookmarks (tag type) as the system is being used.

Although social voting/ranking focuses on tagging and emergence, it supports all the facets of SLATES and FLATNESSES, with partial support for links (linking is limited to the tags linking to respective content).

## Other Related Technologies

No discussion of Enterprise 2.0 technology from a platform solution perspective is complete without mention of a few other technologies, which are not characterized as Enterprise 2.0 or as earlier evolutions of such functionality. These technologies, however, round out an Enterprise 2.0 platform by providing complementary functionality in the realms of:

Findability

Control/distribution

Content security

Tools that address these areas of functionality include:

Search

Taxonomy

Web Content Management (WCM)

Business Process Management (BPM)

Identity management/User authentication

Content security

Records management

*Search* and *Taxonomy* collectively address findability. Search is of course, not only a technology, but also a key criteria as defined in SLATES and FLATNESSES. Yet, search as a standalone technology is not categorized as an Enterprise 2.0 technology. It is “assumed” to be a feature in the Enterprise 2.0 technologies, and in many cases, it is. But a well-defined strategy may include the need to have highly specialized search capabilities integrated into the solution platform.

Along with a taxonomy, (a formal centralized arrangement of content by topic—as opposed to the folksonomy described above), search is an enhancement feature within an Enterprise 2.0 platform. The integration of search and taxonomy as a knowledge-mining tool is the subject of our next *Market IQ*. Their potential role in an Enterprise 2.0 strategy, however, necessitates mention here. This is especially true in the case of search, as it can be the foundation to signals.

Given that Enterprise 2.0 is likely to result in faster creation of more types of content, it is prudent to include a distinct, yet related, strategy for how search and taxonomy might be positioned to increase the rate of findability and reuse of that content.

As introduced earlier, both FLATNESSES and SLATES stress the low barrier, free-form approach to authoring and publishing. Indeed, low-barrier is a key-differentiating characteristic of Enterprise 2.0 platforms. It is reasonable to foresee some *business* situations, however, in which total openness and flexibility is not desirable. The integration of Web content management (to manage complex version, revision, and rendition control) and business process management, to control and orchestrate a many-step business process, can provide a layer of oversight and guidance otherwise unachievable in Enterprise 2.0.

While Enterprise 2.0 may stress multiple authors, the inclusion of WCM and BPM can impose the concept of a single publisher. Quality control and standardized writing styles/templates can be introduced to help achieve a higher level of control necessary for certain business mandates (e.g., compliance) and applications (e.g., contracts).

Individually or collectively, *identity management/user authentication*, *content security*, and *records management* can be integrated into an Enterprise 2.0 platform strategy to provide an otherwise unattainable level of control. While this level of command and control seems to defy the very essence of Enterprise 2.0 (e.g., transparency, openness, low-barrier), users need to remember that Enterprise 2.0 creates enterprise content/business content. For that simple reason, the prudent Enterprise 2.0 strategist will consider the need for this level of control over user rights/permissions and record declaration/dispensation for each and every instance of Enterprise 2.0 content. It may not be needed in every situation, but every instance warrants consideration.

## The Integrated Approach; Defining an Enterprise 2.0 Technology Strategy

In summation, it should be stressed that the advent of Enterprise 2.0 technologies does not necessarily obviate other types of technologies. Functionality across all three generations (i.e. 1.0, 1.5, 2.0) as well as other related technologies can be used in support of an Enterprise 2.0 strategy.

## Market Awareness and Positioning

Our survey measured the state of the market in many ways. The bulk of these findings and insights are the focus of *Section 4: State of the Market* of this *Market IQ*. But two of the survey's findings are discussed here so that the current reality of technology awareness and how this affects Enterprise 2.0 strategy development can be appreciated.

While survey answers showed a lack of agreement over the definition of Enterprise 2.0 (See Figure 1, and the accompanying analysis in *Section 1: Defining Enterprise 2.0*), from a technology component perspective, respondents showed great consistency.

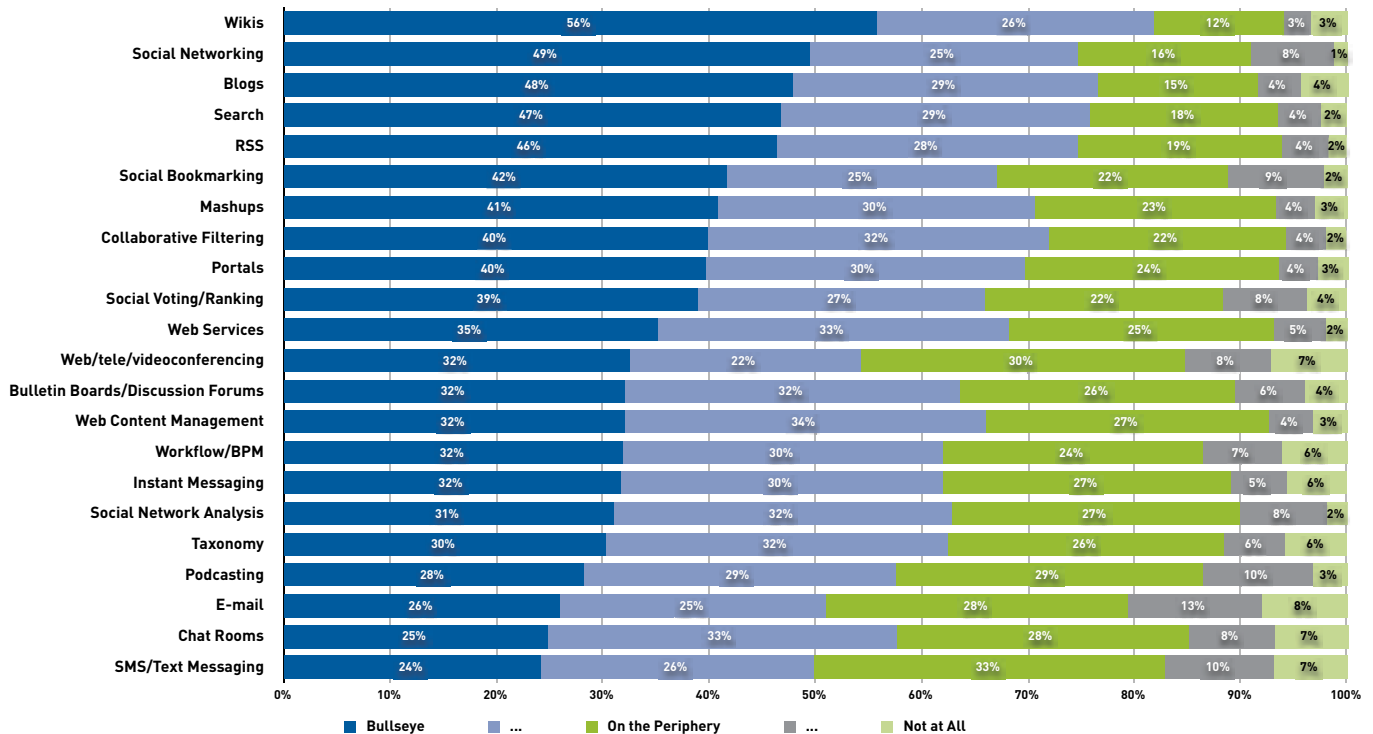
When asked to identify the component technologies that fall into their definition of an Enterprise 2.0 platform, survey responses honed in on Enterprise 2.0 technologies (e.g., wikis, social networking, blogs, search, RSS, social bookmarking, and mashups) as those most aligned (e.g., a “bullseye fit”) with an Enterprise 2.0 platform.

But perhaps just as telling is the fact that no technology was predominately identified as “not needed.” Also, related technologies, 1.0 technologies and 1.5 technologies fared well ranking as being of peripheral value to the platform or listed between peripheral and “bullseye.” Search scored very highly as a bullseye component (which is perhaps explained by the commentary on search made earlier in the report).

There were some exceptions. The Enterprise 2.0 technology, social voting/ranking did not fare as well, with 39% indicating it is a bullseye fit, and 27% listing it somewhere between a bullseye fit and peripheral. It ranked below non-core technologies such as collaborative filtering and portals.

More dramatically, respondents singled out podcasting as the one Enterprise 2.0 technology that has not yet been embraced as a “standard” part of an Enterprise 2.0 platform. Only 28% saw it as a bullseye fit. This is likely because podcasting creates multimedia content. Many organizations may be inclined to first get a handle on text and images before embracing multimedia in a full-scale manner.

Figure 2. Technology Components in an Enterprise 2.0 Platform



Survey participants were asked to identify those technologies that fit within their definition of an Enterprise 2.0 platform. Wikis, social networking tagging, and blogs were most often identified as key (i.e. Bullseye). RSS, social bookmarking, and mashups rated slightly lower, but fared much better than podcasting and rating/voting. The perceived need to include non-Enterprise 2.0 technologies within an Enterprise 2.0 platform is evident but not compelling.



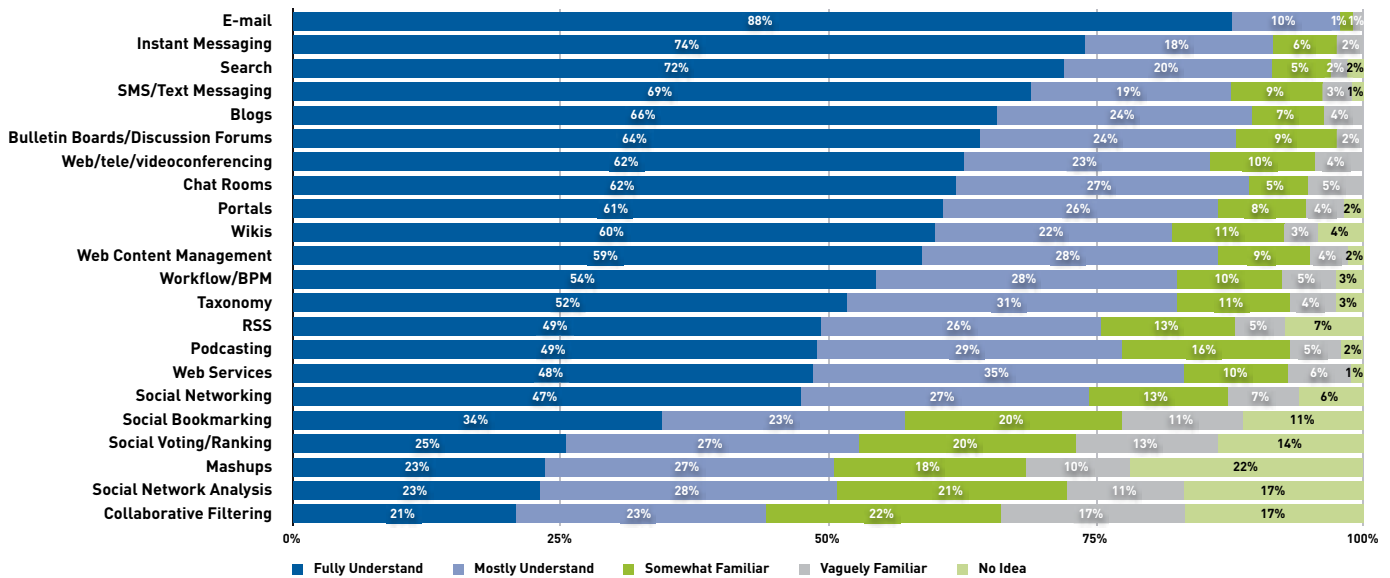
Viewed in aggregate, it is interesting to note that no single technology received more than 7% ranking as “not needed.” There seems to be a general appreciation in the market that a well-rounded Enterprise 2.0 strategy requires the integration and staging of many different types of technologies. Whether individual technologies outside the heart of Enterprise 2.0 point technologies are viewed as “in the domain” or on the periphery, in the end it may not matter. What is important is that the market appears to appreciate the blending of several types of technologies, to various degrees of integration, in order to achieve an Enterprise 2.0 system.

The survey population was likely able to clearly define and rank the components comprising their definition of an Enterprise 2.0 platform due to the relatively high awareness level of both core and peripheral Enterprise 2.0 technologies. Survey respondents were asked to assess their level of understanding of a range of technologies, including 1.0 and 1.5 technologies. As shown in Figure 3, while some of the “older” and more ingrained tools, such as e-mail, search, and instant messaging, were identified as those users are most familiar with, no technology component is characterized as “unknown.”

With few exceptions at least 75% of respondents stated that they fully or mostly understood the various technologies (1.0 as well as 2.0). This high awareness level early into the adoption timeframe is typically not seen. (Contrast these results to similar data in our Content Security Market IQ, where the majority of respondents did not know of newer technology components.)

The high awareness level is probably linked to the low-barrier character of Enterprise 2.0 technologies. Many organizations have to some degree brought them in-house despite the lack of a wide-scale deployment. (See Section 4: *State of the Market* for more detail.) It is interesting to note that among the Enterprise 2.0 technologies, mashups scored relatively low in terms of user familiarity. In fact, 22% of users said they had “no idea” what they are, the most of any technology. This is perhaps due to the fact that mashups are concerned with application and data-level integration, which are not the primary focus of current implementations of Enterprise 2.0 solutions. Most survey respondents indicated that interpersonal communication was their primary focus. (See Section 3: *Why Enterprise 2.0 Now*, for more details.)

Figure 3. Awareness Levels Regarding Enterprise 2.0 & Related Technologies



Survey respondents were asked to rate their level of understanding of individual technologies. This was done to determine the degree of ignorance or enlightenment in the market. Unlike many other emerging technologies, Enterprise 2.0 technologies are predominately well understood.



What clearly differentiates Enterprise 2.0 from Web 2.0 is its context. In order to fully appreciate the impact and value statements for Enterprise 2.0, the primary business drivers must be first understood and appreciated.

## Section 3

### Why Enterprise 2.0 Now?

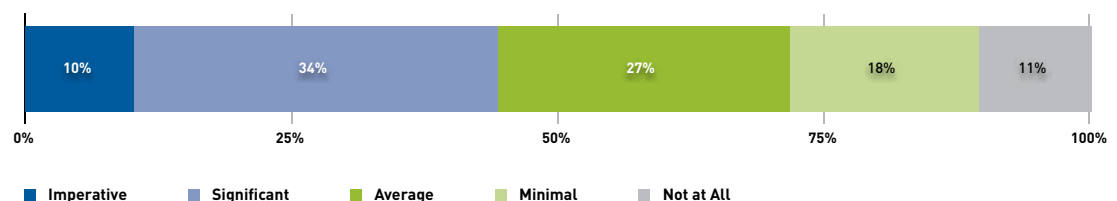
As stressed throughout this *Market IQ*, Enterprise 2.0 is not just about technology. In fact, what clearly differentiates it from Web 2.0 is its context. In order to fully appreciate the impact and value statements for Enterprise 2.0, the primary business drivers, if any exist, must be first understood and appreciated. These business drivers are the focus of this section of the *Market IQ*.

#### Enterprise 2.0 Strategically Poised, Tactically Understood

This analysis of the business drivers behind Enterprise 2.0 begins with a high-level assessment of whether the concept is strategically important within most organizations. Survey responses offer a positive and compelling picture in this regard. When asked the degree to which Enterprise 2.0 is critical to their overall business goals and success, 44% of respondents indicated that it is imperative or significant. Another 27% positioned Enterprise 2.0 as having average impact on business goals and success. Only 29% felt it had minimal or no impact on business success.

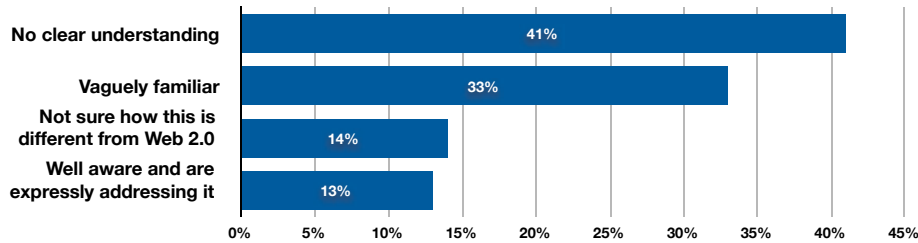
These results strongly position Enterprise 2.0 as a technology and practice that is likely to have the attention of senior management, and one that is well understood and being acted upon strategically, given its mission-critical importance.

Figure 4. How Critical Is Enterprise 2.0 to Your Organization's Overall Business Goals and Success?



But further analysis unveiled a paradox in the current market. Although Enterprise 2.0 is generally considered strategically important, most organizations (74%) claim to have, at best, only a vague familiarity with it. (41% stated there was no clear understanding.)

**Figure 5. How Well Is Enterprise 2.0 Understood in Your Organization?**



Viewed together, these two data points appear illogical. Most organizations feel that Enterprise 2.0 is significantly critical to their success, but at the same time most are not sure what it is. What is the cause of this disconnect?

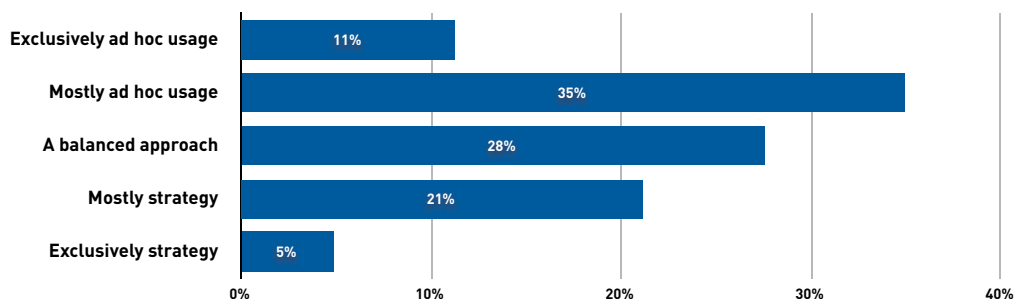
As introduced in Section 2 of this *Market IQ*, most survey respondents claimed to have high awareness concerning individual Enterprise 2.0 technologies. Yet, as we discussed in Section 1 of this *Market IQ*, there was no clear definition of Enterprise 2.0 among survey respondents. Therein may lie the answer to the puzzle.

Perhaps knowledge of and experience with Enterprise 2.0 technologies (i.e. via simple, ad hoc usage due to their low barrier and transparent nature) is enough to give insight into how fundamental this level of integration and collaboration is to business challenges. Few companies, however, have taken the time or effort to rationalize Enterprise 2.0 holistically and strategically. Thus, there is an appreciation for how it will (tactically) be critical to success, but little understanding of how it fits (strategically) across an organization.

One might argue that this is not a bad situation; Enterprise 2.0 can thrive even if viewed only at a tactical level with no clear overall strategy. But there is potential risk in allowing this level of “blind tactical adoption” to continue. Without a clearer understanding of the strategic and holistic nature of Enterprise 2.0, it is likely that implementation will be addressed in an ad hoc nature, which can potentially deter enterprise-level leverage and minimize the potential level of benefit. Centralized, strategic deployments of Enterprise 2.0, as opposed to ad hoc insular applications, will likely result in a more expedient, efficient, and maximized realization of enterprise-wide benefit.

The market reality is that most organizations are not addressing Enterprise 2.0 strategically (which leads to the chasm between perceived critical need and level of understanding). Forty-five percent of the surveyed organizations are predominately deploying Enterprise 2.0 technologies in an ad hoc manner. Only 26% of the organizations are taking a mostly, or exclusively strategic approach to Enterprise 2.0 technology deployment. (See Figure 6.)

**Figure 6. Is Implementation of Enterprise 2.0 in Your Organization Driven More by Ad Hoc Usage of a Strategy?**

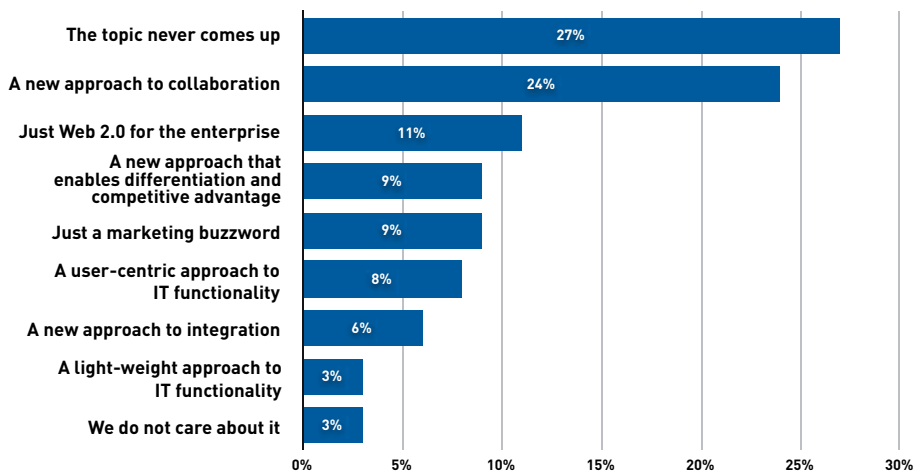


There is reason to believe, however, that this situation is starting to change for the better. As illustrated in Figure 21 What is Your Organization's Current involvement with Enterprise 2.0? (See Section 4: State of the Market), 32% of the surveyed organizations are beginning to form an Enterprise 2.0 strategy. But until more organizations make this shift from ad hoc usage to strategic deployment, it is likely that Enterprise 2.0 will remain somewhat obscure, known more as a series of siloed collaborative technologies than a unified platform.

This analysis is further supported by survey responses concerning organizational perspectives on Enterprise 2.0. Although not by a plurality, the number one response to the question "Which of the following is closest to your organization's perspective on Enterprise 2.0?" was "The Topic [Enterprise 2.0] Never Comes Up." (See Figure 7). But a close second, (24% of the responding organizations) identified with, "A New Approach to Collaboration." It then likely follows that the familiarity with individual application technologies (e.g., wikis and blogs) leads to "enough" understanding on how we are better at collaboration. But this level of comfort or complacency stymies any further discussion of what Enterprise 2.0 holistically represents, and how it can be strategically leveraged across the organization as a driver of differentiation and competitive advantage. (This perspective was selected by only 9% of the responding organizations.)

Currently, ad hoc collaboration on an as needed basis seems to be the popular mode of deployment for Enterprise 2.0.

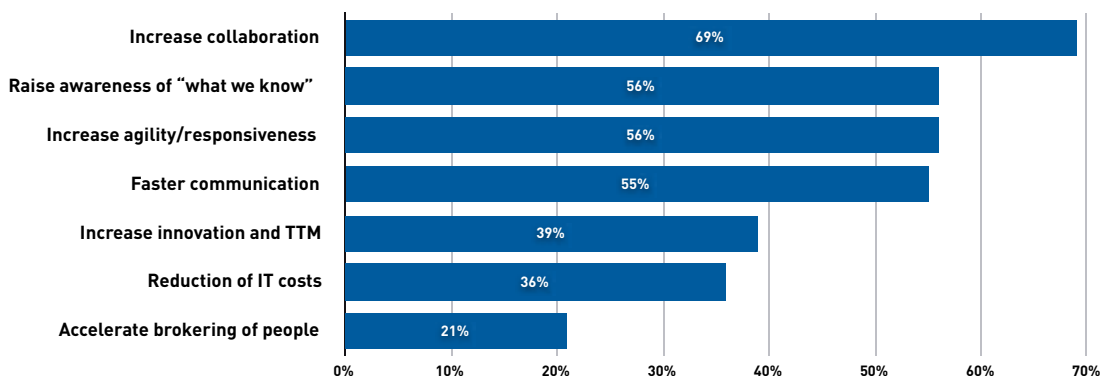
Figure 7. Which of the Following Is Closest to Your Organization's Perspective on Enterprise 2.0?



### A Focus on Increased Collaboration Driven and Obscured by Loftier Goals

This focus on collaboration is a theme that continued throughout the survey. When asked to identify the primary accomplishment targeted by Enterprise 2.0 implementations, 69% of respondents pointed to "increase collaboration." (See Figure 8.)

Figure 8. What Are You Trying to Accomplish with Enterprise 2.0?



The selection of this response over the more overarching choices (e.g., “raise awareness of what we know, increase agility/responsiveness and increase innovation) again points to a very targeted and tactical perspective, focused on collaboration itself, per se, rather than broader efforts. What makes this interesting is the fact that the focus on collaboration actually stems from firmly established initiatives.

Knowledge Management, innovation management, and business intelligence all stress the need for or value of collaborative processes and work environments. Look at sample definitions of each of these business practices.

*Knowledge Management:* “Leveraging collective wisdom and experience to increase responsiveness and innovation.” (Source: “Exec Express Knowledge Management,” Carl Frappaolo, Capstone, 2006.)

*Business Intelligence:* “Technologies, applications, and practices for the collection, integration, analysis, and presentation of business information and also sometimes to the information itself.” (Source: “A Brief History of Decision Support Systems”, D. J. Power, 1958.)

*Innovation (Management):* “ Innovation is fostered by information gathered from new connections; from insights gained by journeys into other disciplines or places; from active, collegial networks and fluid, open boundaries. Innovation arises from ongoing circles of exchange, where information is not just accumulated or stored, but created. Knowledge is generated anew from connections that weren’t there before.” (Source: Margaret J. Wheatley, 1992. *Leadership and the New Science*. San Francisco, CA: Berrett-Koehler Publishers.)

[Note: Underlining was added in each definition to stress the relationship to Enterprise 2.0 and collaboration.]

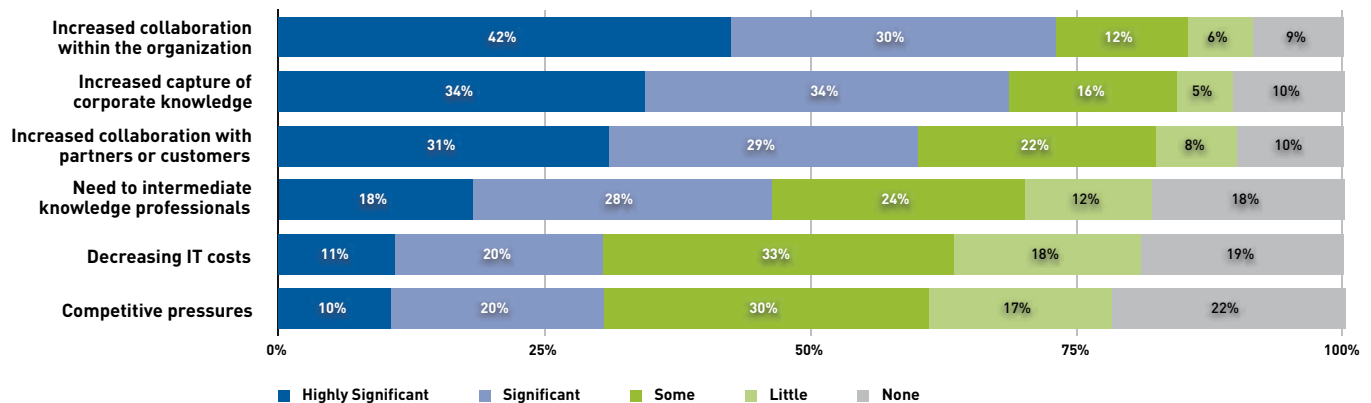
Each of these business practices positions collaboration at its core. Additionally, in an effort to streamline operations and leverage global resources, organizations are moving to virtual workforces—networks of individuals spread across geographic boundaries. This is being done at the inter-corporate level.

A colleague who works at IBM recently quipped that while IBM once stood for “I’ve Been Moved”—a reference to the need to physically shift workers around the globe to centralized teams or projects—it now refers to “I’m By Myself”, a nod to the virtual workforce the company has created in which many employees actually work from home but now meet online.

Virtual collaborative teams are also being established at the intra-corporate level, as extended-enterprise models and outsourcing/off-shoring becomes more popular. These business models place a great deal of focus on the need to support collaboration that spans time and space (i.e., the type of collaboration provided by Enterprise 2.0 platforms).

In fact, when asked which business goals and objectives would be impacted by Enterprise 2.0, Knowledge Management (i.e., “Increased capture of corporate knowledge”) ranked second only to “Increased collaboration within the organization.” (See Figure 9.)

**Figure 9. What Impact (Planned or Realized) Does Enterprise 2.0 Have on the Following Business Goals and Objectives?**



The point to be made is that the tactical perspective on Enterprise 2.0 is tied to the fact that it enables collaboration in a simple, low-barrier, ad hoc manner. The strategic value of this lies not in Enterprise 2.0 itself, but in larger more strategic views of how organizations operate (e.g., knowledge management, innovation management, business intelligence, extended enterprise).

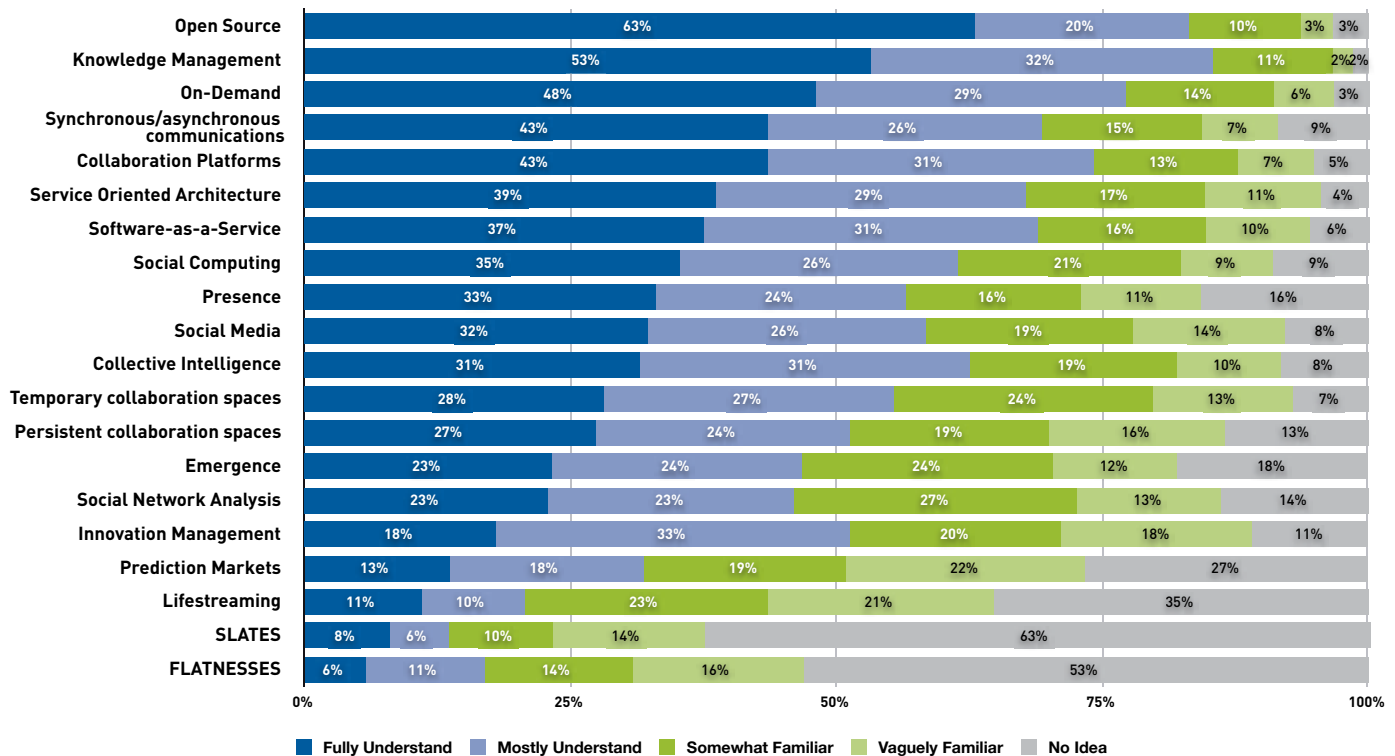
The strategic view therefore is often associated with these loftier topics that require far more thought and strategy than Enterprise 2.0 per se. But, that said, best practice indicates that Enterprise 2.0 implementations are better leveraged if viewed holistically and strategically, as opposed to tactical ad hoc implementations to support potentially fragmented collaboration.

[Note: The effect that Knowledge Management has on user and organizational perspectives of Enterprise 2.0 is discussed in greater detail in *Section 5: Generational and Cultural Impacts*.]

Goals such as brokering what we know, driving innovation, and time to market will likely become central goalposts within Enterprise 2.0 implementations, once others join the 32% who are thinking strategically about Enterprise 2.0 today. In the interim, the Enterprise 2.0 market will grow simply due to the vicarious need to collaborate (in support of loftier goals).

The lack of focus on loftier goals is not founded in a lack of understanding of these loftier goals and systems. When asked to rank their level of familiarity of a series of business and technical concepts (see Figure 10), survey respondents indicated a very high level of awareness for strategic business practices, such as Knowledge Management, and technical initiatives, such as On-Demand. Even Innovation Management, which ranked low (18%) for “fully understood,” fared well overall with 33% of respondents claiming a “mostly understood” level of awareness.

Figure 10. How Familiar Are You with the Following Terms/Phrases?



Yet business benefits that are directly related to Enterprise 2.0 (i.e., are direct outcomes of “strategic” deployment of these technologies), such as collective intelligence, emergence, predictive markets, and lifestreaming received rankings suggesting they are much more obscure.



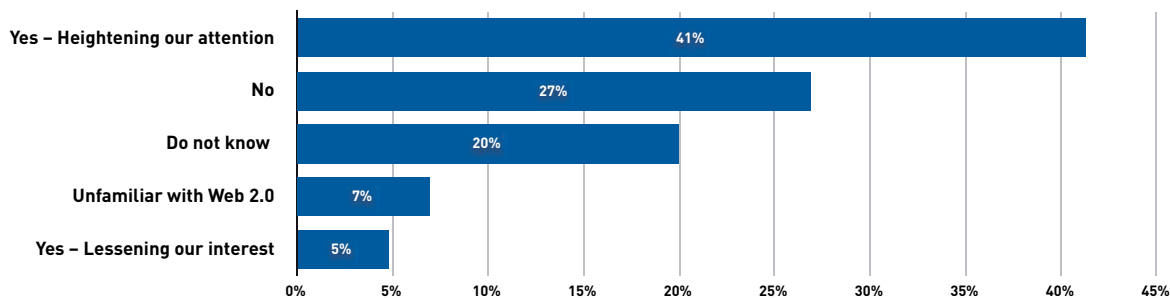
Social network analysis, a technology that provides a level of business intelligence directly related to Enterprise 2.0, leveraging social connections as a form of business intelligence is also poorly understood. But the most telling outcome from this data point is the fact that the two concepts most poorly understood are the frameworks that strategically position and differentiate Enterprise 2.0: SLATES and FLATNESSES. Indeed, more respondents said they had “No Idea: what SLATES means than any other term listed—a dubious distinction.

## Technology Matters

It is again stressed that the ease with which Enterprise 2.0 technologies can be deployed is a double-edged sword. On one hand, it is a major strength, a component of its value proposition. While collaboration in and of itself is not new, the ability to create online collaborative platforms with little to no effort or technical know-how is driving adoption and familiarity with the technology. On the other hand, this agility and speed of deployment allows many to embark on implementations without fully understanding the more strategic nature of these technologies.

In fact, the introduction of many of these technologies as part of the commercial Web is also a factor in driving the Enterprise 2.0 market. The fact that 41% of survey respondents indicated that the buzz around Web 2.0 has heightened attention to Enterprise 2.0 cannot be ignored. (See Figure 11.) Exposure to technology and tools such as Facebook, iTunes, YouTube, Google, and Wikipedia are raising the bar on user expectations concerning interfaces, collaboration and content access not only on the Web but on the intranet as well.

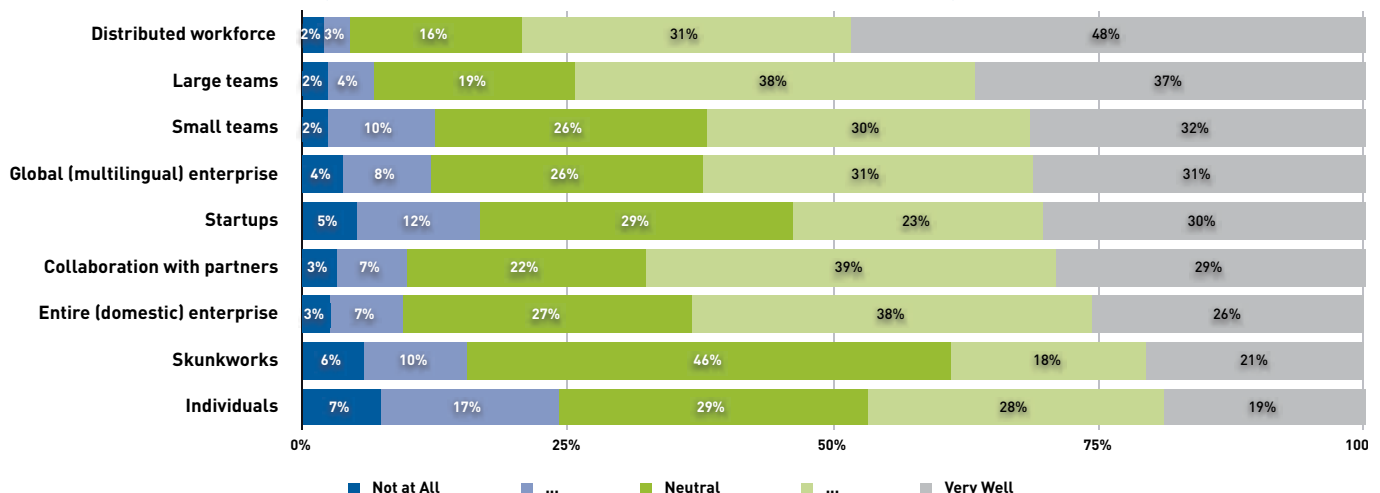
**Figure 11. Has the Buzz Regarding Web 2.0 Impacted Your Organization’s Attitudes Towards Enterprise 2.0?**



## Broad Appeal Drives Adoption

As previously stated, the Enterprise 2.0 market continues to grow simply through the vicarious need to collaborate. Collaboration is a business aspect with universal appeal. When survey respondents were asked to rank the applicability of Enterprise 2.0 to various individuals and groups, only two, skunkworks and individuals, did not garner more than a 50% response above the “neutral” state. (See Figure 12.)

**Figure 12. How Well Suited Is Enterprise 2.0 for the Following People/Groups?**



While Enterprise 2.0 was seen as best fitting distributed workforces and large teams, a significant level of responses indicated it is also applicable to small teams, global enterprises, and startups. Collaboration with partners (a somewhat newer business model that breaks down traditional walls between the respective organizations), also received a 68% ranking—very well-suited for Enterprise 2.0.

Such findings lend more insight into the potentially evolving role of Enterprise 2.0 from simple collaboration to a foundation for newer business models.

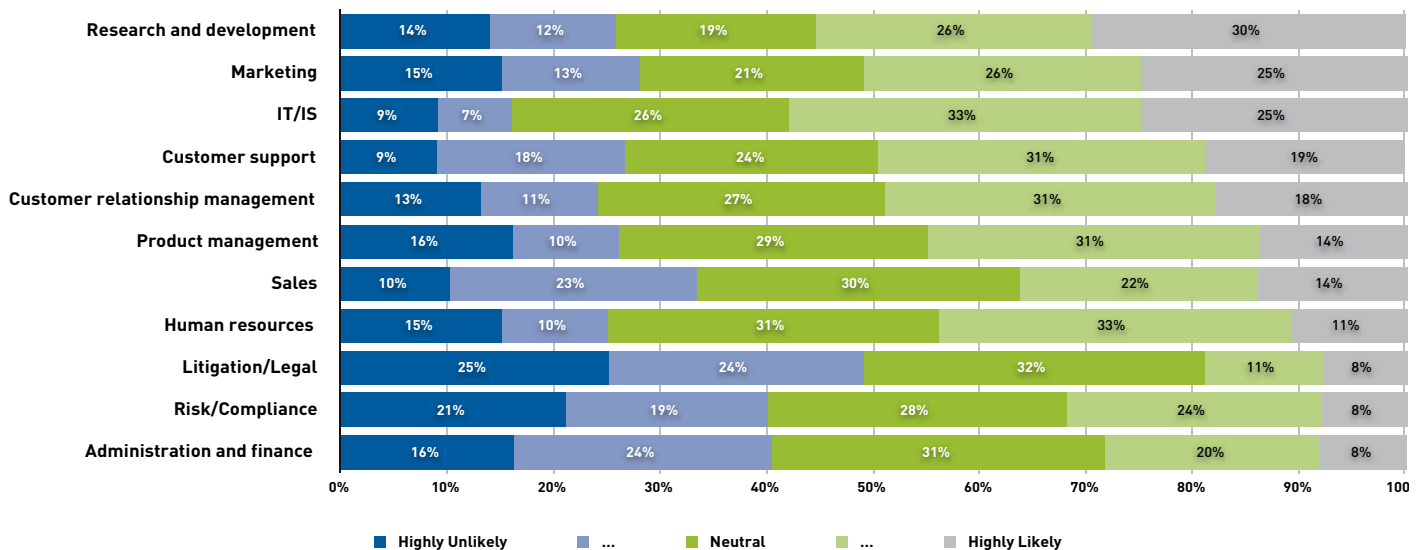
While Enterprise 2.0 is viewed as universally appealing to many groups, it is not seen as particularly aligned to any specific business processes. When asked to rank the likelihood of Enterprise 2.0 being utilized by specific business processes, survey respondents did not rank a single application higher than 30% as highly likely.

Research and Development (R&D), a business area characterized by collaboration and knowledge exchange, did achieve a 56% rating above “neutral.” Marketing, IT and customer support each ranked 50% above “neutral.”

Given the otherwise positive perspectives expressed by this survey population, these findings may indicate that best practices for Enterprise 2.0 have not yet emerged, or that the universal appeal of collaboration does not make any one business area stand out as “a obvious must-have, above the rest.”

The poorer ranking of Litigation/Legal (the highest ranked “Highly Unlikely”), may be tied to the risk often associated with “legal content.” Yet, corporate legal departments have been collaborating with private counsel with extranets for several years now.

**Figure 13. How Likely Is Your Organization to Utilize Enterprise 2.0 for the Following Business Practices?**

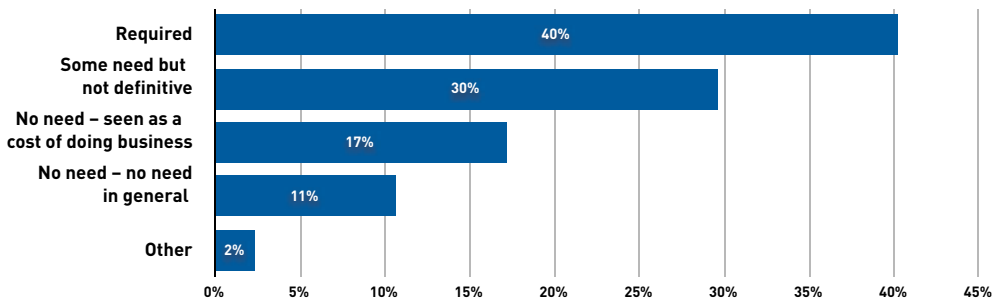


## An Elusive Business Case

The assessment of market drivers began with an assertion that Enterprise 2.0 is critical to overall business goals and objectives. Further analysis showed, however, that most organizations currently view Enterprise 2.0 tactically (i.e. non-strategic). That is perhaps why, despite its perceived critical nature, most organizations say Enterprise 2.0 implementations should be preceded by a return on investment (ROI) study.

When asked about the need for ROI justification, 40% of respondents stated that ROI is required and another 30% stated that there is some need for an ROI study.

Figure 14. Is an ROI (Return on Investment) Study Required as Part of Your Planning for Enterprise 2.0?



Among those that performed an ROI calculation, the majority (77%) were unable to find an acceptable level of return. (See Figure 15.) Among the respondents (23%) who did achieve a demonstrable ROI, nearly half (46%) required two to three years to show a return. (See Figure 16.)

Figure 15. If You Performed an ROI on Your Enterprise 2.0 Project, Were You Able to Show an Acceptable Level of Return?

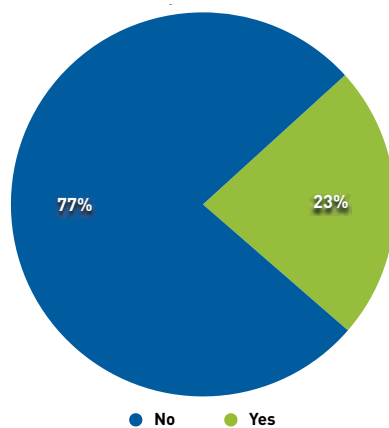
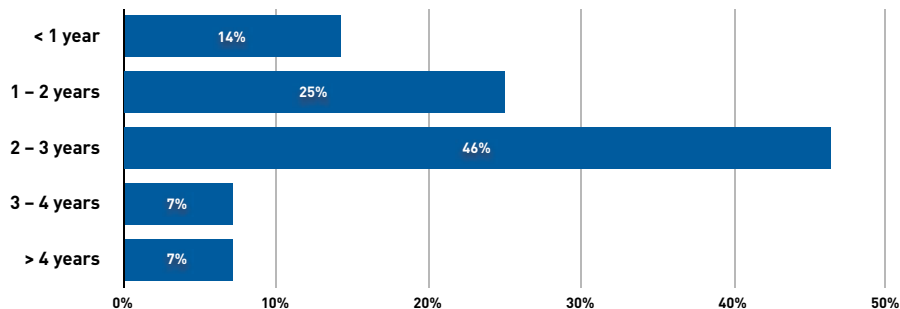


Figure 16. If You Achieved a Successful ROI, What Was the Time Frame for Showing a Return?



The problem of gauging the impact of Enterprise 2.0 applications within an organization defies a simple answer and generated much discussion with our panel of advisors. We agreed that there should be a way to not only measure ROI, but the more abstract concept of an Enterprise 2.0 application's "success."

Although there was a desire to determine if a most common approach were used in the market, the question defied being asked on the survey in any reasonable manner because the potential benefits associated with an Enterprise 2.0 application were not only viewed as vast, but situational. They are likely tied to specific goals and objectives of the sponsor.

Strategically, Enterprise 2.0 could be linked to the rate of product sales, product innovation/new product production, customer satisfaction and value derived from intellectual property, for example, but only if specifically targeted at that and in a way that could demonstrate the specific cause and effect.

Instances in which the benefits are directly aligned with Knowledge Management goals and objectives also represent a vast array of possibilities. For example, “success” could be measured in the volume of content/knowledge captured over time, the rate of commentary, the volume of participants, the speed of developing new ideas/teams, the level of participants (roles), the level of participation, and diversity of community.

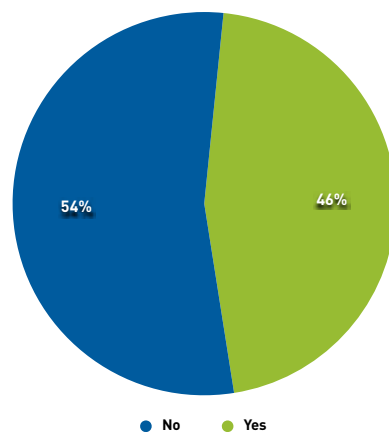
Such calibrations, however, typically do not have a hard dollar value associated with them. Associating a value with these metrics requires an agreement on their worth, or establishing a connection between these and a subsequent event (e.g., the strategic goals listed above).

Rather than attempt to pose a survey question that might capture which of these vast approaches is being used, we chose to ask a more fundamental question. Survey participants were asked if their organization measured success of Enterprise 2.0 the same way they did. More than half (54%) replied “no”. (See Figure 17.)

Therein lies a major obstacle to justifying an investment in Enterprise 2.0. This situation may very well be why 77% said they were unable to produce an acceptable ROI despite the relatively low technical and cost barriers to Enterprise 2.0. To justify an investment there needs to be sponsorship and consensus on well defined goals, or it is likely that the justification process will not be successful.

In fact, this is a primary example of where an existing Knowledge Management-inclined organizational culture had a dramatic effect on the responses to survey questions. (Survey respondents from organizations with a pre-existing bent towards Knowledge Management were twice as likely to see Enterprise 2.0 as “a cost of doing business” and therefore did not see a need to execute an ROI study. (See *Section 5: Generational and Cultural Impacts*, for more detail.)

**Figure 17. Does Your Organization Measure the Success of Enterprise 2.0 the Same Way You Do?**



### Role of Standards

A discussion of the forces shaping strategy development and adoption of Enterprise 2.0 has to include an assessment on the role or influence standards are having on this issue. In our survey, respondents were asked to rank the positioning of several standards within their organization's Enterprise 2.0 strategy.

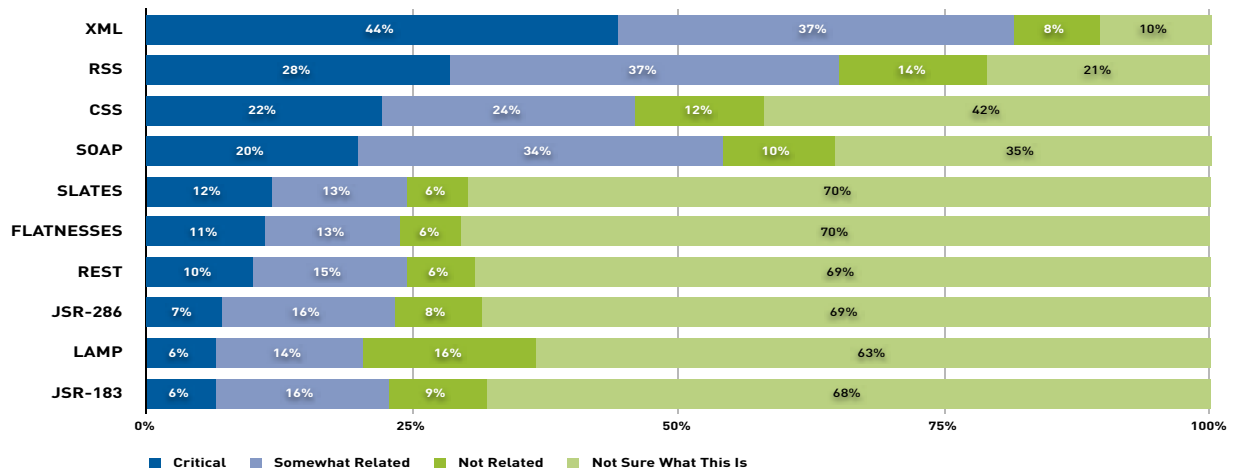
For the most part, standards have minimal effect in driving the adoption of Enterprise 2.0, according to the results. Respondents were predominately unaware of six out of the nine standards (SLATES, FLATNESSES, REST, JSR-286, LAMP, and JSR-183). Although standards may be behind the agility and low-barrier nature of Enterprise 2.0 technologies, familiarity with the standard is not a prerequisite to their adoption or use by a non-technical person (e.g., CSS, JSR183 & 286).

XML was an exception, with 85% of respondents indicating that XML was either related or critical to their Enterprise 2.0 strategy. XML, however, pre-dates Enterprise 2.0 by decades and its relevancy is tied to many ECM-like applications such as e-publishing and Web-based content. This is likely one reason it is better known and specifically leveraged.

RSS, which is actually specified in XML, also is generally recognized as relevant to an Enterprise 2.0 strategy (65% indicated that it was somewhat related or critical to the strategy). If an organization is using this Enterprise 2.0 technology to provide content syndication, then it would “have to” actively incorporate the standard into its strategy. In fact this assertion is supported by Figure 2 in which 75% indicated that RSS fits into their definition of an Enterprise 2.0 platform, and Figure 22, in which 51% indicated that they have already acquired RSS technology (with another 21% planning an acquisition).

Conversely, the fact that 70% of the surveyed individuals had no knowledge of the SLATES and FLATNESSES frameworks that govern an Enterprise 2.0 application speaks to the more tactical and less strategic approach to deployment, as discussed above. There is a need for more education and awareness-building in the market concerning fundamental principles and guidelines for Enterprise 2.0.

**Figure 18. Rank the Following Standards and Frameworks as They Relate to Your Enterprise 2.0 Strategy.**



While technology is available to build highly agile, collaborative platforms, certain market realities must be appreciated. ... Clearly, this is an early market with much work to be done in education and awareness as to the values of both point solutions and a system-oriented approach to Enterprise 2.0.

## Section 4 The State of the Market

Having established an understanding of the definition of Enterprise 2.0 and the business drivers behind it, we turn our attention to the state of the market. While technology is available to build highly agile, collaborative platforms, certain market realities must be appreciated.

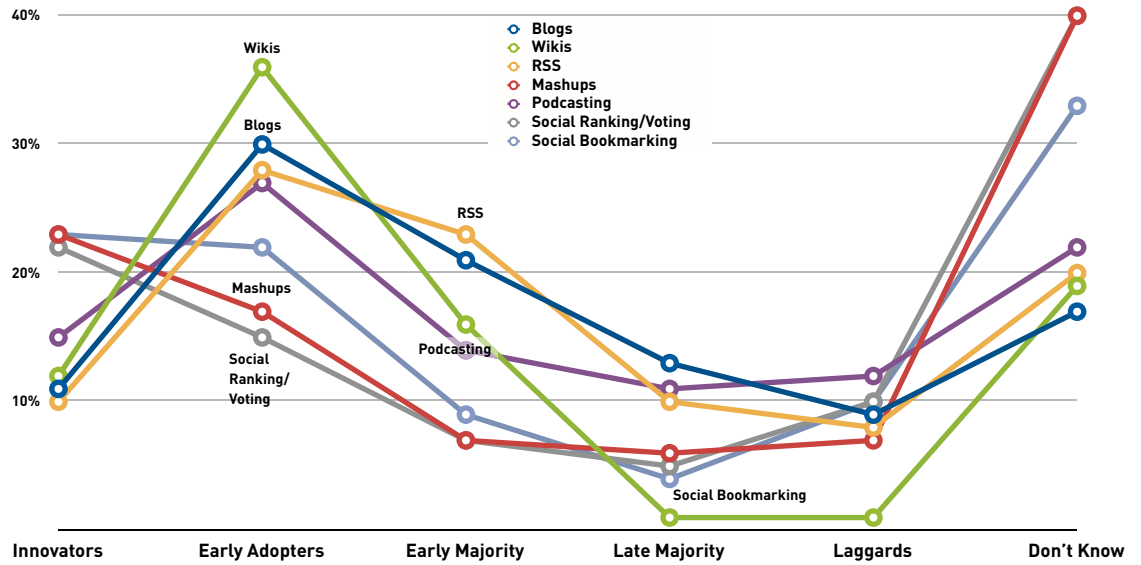
The survey provided a series of questions whose collective responses provide insight into the reality of Enterprise 2.0 deployments, including the perceived and actual adoption rate, obstacles, funding models, decision-making, and staffing models.

### The State of the Adoption Lifecycle

This analysis begins with a more positive commentary on the state of the Enterprise 2.0 market than “anti-pundits” would present. When asked to identify the adoption level of several key Enterprise 2.0-related technologies and concepts, namely wikis, blogs, and RSS, more than 50% of respondents positioned these technologies as being in the “Early Adopters” and “Early Majority” categories.

This response indicates those Enterprise 2.0 technologies were just over the edge (or chasm) of being accepted and deployed, creating a market that is a part of the corporate mainstream and poised for wide-scale uptake. Keep the word “poised” in mind, however. A perception of market adoption should also take into account the large percentage of “Don’t Know” responses for mashups, social bookmarking, and social ranking/voting. This otherwise collectively sunny response is nonetheless surprising given the general unawareness regarding these technologies and concepts as reported in Section 1 of this *Market IQ*.

Figure 19. Where Do You Feel the Overall INDUSTRY Adoption Is with Regard to the Following Terms/Phrases?

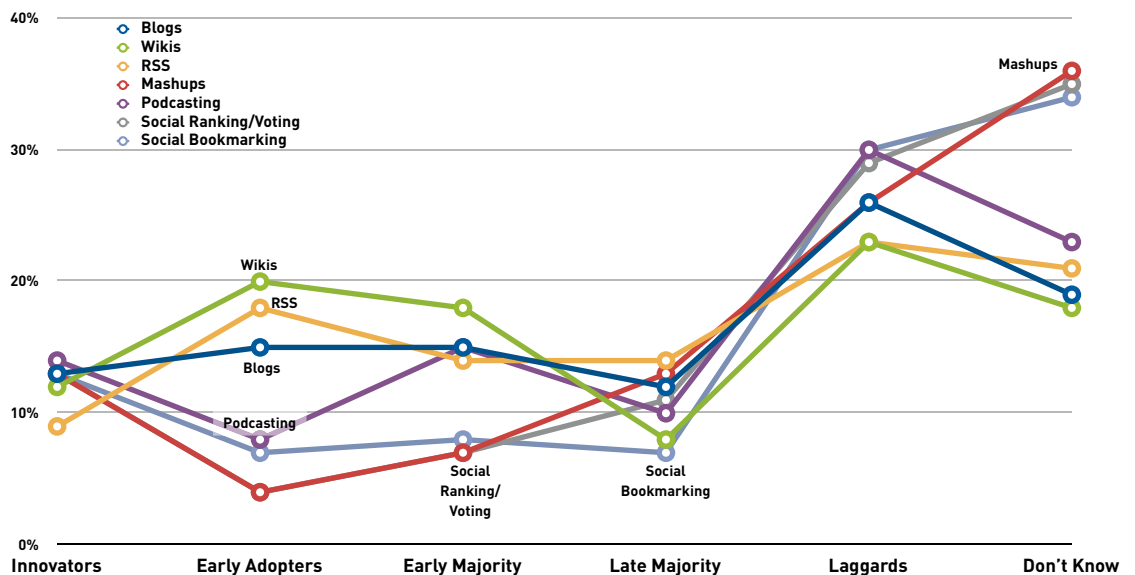


There is, of course, an explanation for the optimism.

As we have found in past research, such as the *Market IQ* on Content Security from Q4 2007, the fact that respondents are judging adoption by the industry/market at large, versus their own organization, may hint that a “grass is always greener” psychological phenomenon is at work. Specifically, optimism and uncertainty appear to color perception of the rate of adoption outside of one’s own organization, as seen in Figure 19.

On the other hand, pessimism (and realism) sways the more dramatic “true” adoption hump shown in Figure 20 into what one would more typically expect in an early market. A majority of people see this market space primarily as “Innovator” or “Early Adopter” territory (see Figure 19), and a similarly dramatic response comes from respondents who simply do not know where they stand on adoption (see Figure 20).

Figure 20. Where Do You Feel YOUR ORGANIZATION’S Adoption Is with Regard to the Following Technologies?



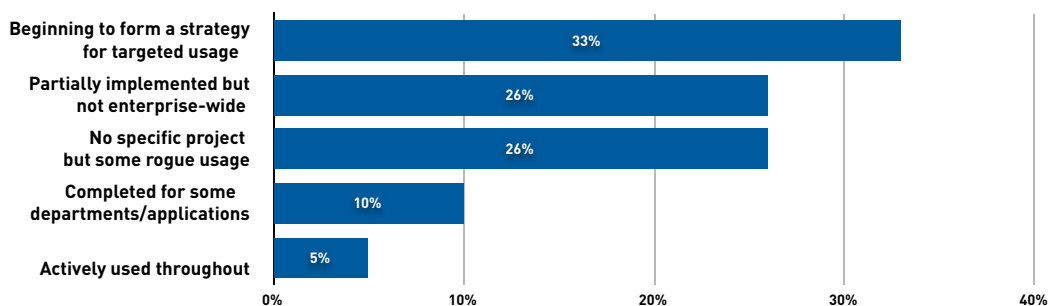


Responses indicate that while there is some “Early Adopter” pull in wikis, blogs, and RSS, the largest indicator by far is in the “Laggards” category, with a near equal pull in the “Don’t Know” response. Interestingly, mashups in particular suffer a similar fate in both the market perception and direct organizational adoption.

Deeper investigation into true adoption rates shows a recurring theme of the early days of adoption: a battle between holistic/systemic use and ad hoc/tactical application of Enterprise 2.0 as a coherent system versus the use of the individual technological components.

As discussed in Section 3, and reinforced by respondents’ opinions regarding their respective organization’s involvement with Enterprise 2.0, there is a preponderance of “ad hoc” rather than strategic usage scenarios. There is also a minimal to nonexistent spread of Enterprise 2.0 capabilities across the entirety of any organization. Essentially, the early stage is one of experimentation and exploring exactly where it makes sense to adopt the toolset and mindset.

**Figure 21. What Is Your Organization’s Current Involvement with Enterprise 2.0?**



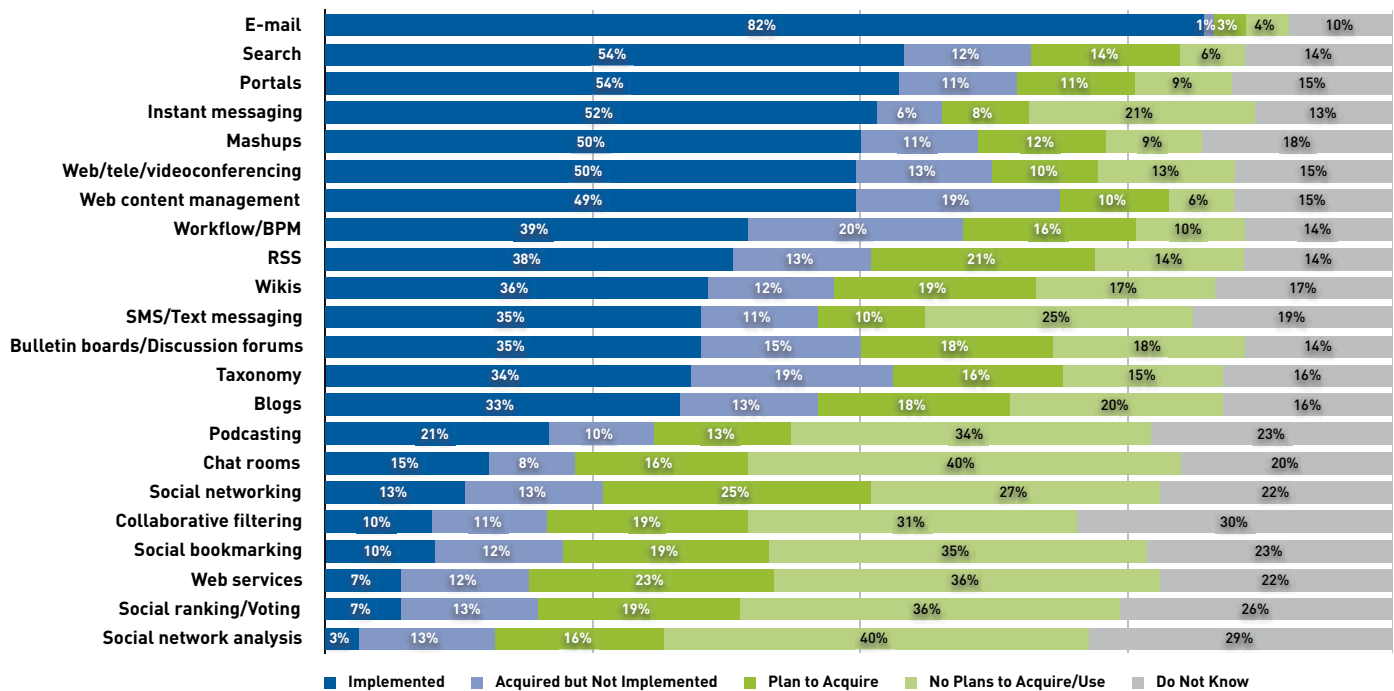
Some 33% of respondents are forming their usage strategy, while the remaining 67% indicate some amount of ad hoc implementations. In the broad respondent base, a mere 5% indicate Enterprise 2.0 being “actively used throughout” the enterprise, a result which reinforces the fact that adoption is still early in the lifecycle.

Investments made in Enterprise 2.0 technologies have been moderate and focused primarily on more traditional technologies that are the precursors and complements to Enterprise 2.0 (as discussed in Section 2 regarding Enterprise 1.0 and 1.5 technologies).

Findings for e-mail, search, portals, and instant messaging garnered responses of greater than 50% implementation — 82% in the case of e-mail. This response indicates the relative maturity and acceptance of those technologies. The e-mail percentage may slightly underestimate deployment given that the technology is the most ubiquitous of any deployed within companies. There are, however, industries such as manufacturing where a large percentage of the workforce does not have e-mail, being oriented to a “shop floor” working model, which would result in much lower than 100% adoption rates.

“Mashups” are an outlier in the group of technologies, rating at 50% or greater response of being implemented, particularly as compared with “Web Services,” shown at 7%. When you consider Enterprise 2.0’s focus on lowering barriers, as well as the overall evolution of Web services into Service Oriented Architecture (SOA), this response makes sense. The lowered barrier of cost and complexity, and being based on standards (such as XML) in the data, information, and API levels makes it easier to implement a mashup versus a “traditional” Web service. Combining these trends puts enterprises in a “Mashup-Ready” state where the “costs” to experiment and find value are such that “getting involved” is quite simple, while true “adoption” (and strategic implementation) is a bit more difficult to accomplish.

Figure 22. What Is Your Current Level of Involvement with the Following Technologies?



For the seven Enterprise 2.0-specific technologies in Figure 22 (i.e. RSS, mashups, wikis, blogs, podcasting, social bookmarking and social ranking/voting), RSS, wikis, and blogs group together in a tight band of responses, indicating a combined 46-51% likelihood of being implemented or acquired. Those three technologies (see Figures 19 and 20) are also the top three most often perceived as being prevalent in the broad market, straddling the traditional technology “chasm.”

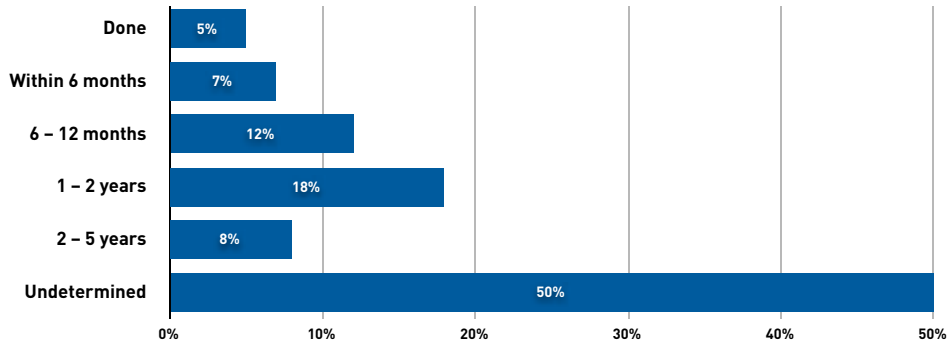
Given the perceived value of consumer-oriented “social media services” such as YouTube, the low rankings of social bookmarking and social ranking/voting in an Enterprise 2.0 setting is somewhat surprising. These would be among the least expensive and easiest methods and functions to graft on as social interaction in existing enterprise content systems, yet are predominately ranked as “No Plans to Acquire/Use.”

This is a case where a cultural environment that does not expect or encourage public commentary and refinement or collaboration on enterprise content impedes adoption, rather than direct cost or technical complexity. However, it is also an area where enterprises clearly need to take heed of what drives “virality” (rapid adoption and spread), and how it might be applied internally. Any of the publicly available comparisons of the success of YouTube over Google Video show that YouTube’s array of easy-to-use social features, such as commentary, ranking, voting, and bookmarking helped drive far greater usage. It is not simply the content, but the ways in which people interact with that content, that drive adoption.

Examining the anticipated timeline for future implementations, fully half of respondents state their implementation timeline is “Undetermined.” Clearly, this is an early market with much work to be done in education and awareness as to the values of both point solutions and a system-oriented approach to Enterprise 2.0. As mentioned previously, however, this “undetermined” implementation state could be due to the ease by which one can begin to experiment and quickly add value to existing systems and processes. It is likely that hidden in this 50% response is a fair amount of experimentation and tactically focused work, or strategy on a small scale.

Reflecting the previously mentioned adoption rate of 5% being “actively used throughout” for Enterprise 2.0 (see Figure 21), 5% responded being “Done” with implementations directly. A total of 37% of respondents indicated having timelines of less than two years to implement Enterprise 2.0 functionality, which echoes the findings of Figure 4 (in Section 3), where 44% of respondents indicated that Enterprise 2.0 was imperative or significantly critical to their overall business goals and success.

**Figure 23. What Is Your Implementation Timeline for Enterprise 2.0 Functionality?**

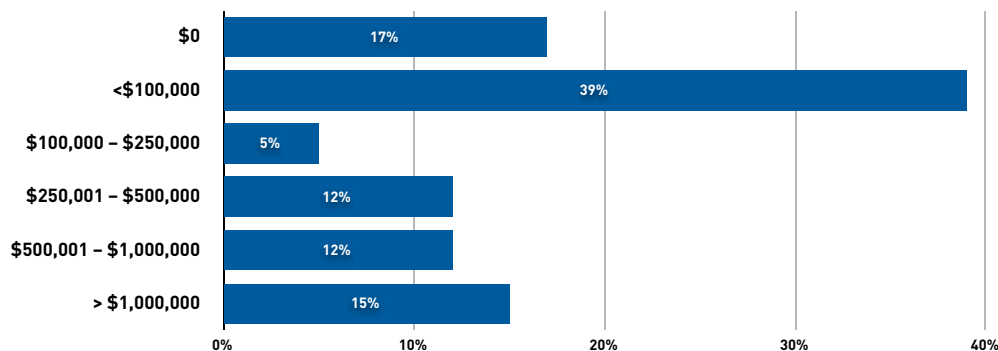


Of any technology or grouping of technologies that AIIM Market Intelligence covers, Enterprise 2.0 has both the largest number of open source (and therefore, often “free”—see Figure 25) options, as well as some of the least expensive, particularly as SaaS/hosted options—a significant part of the “low-barrier” aspect of Enterprise 2.0.

Combine the low costs with the early stage of adoption of Enterprise 2.0, and we see a combined response (56%) of the budget to implement being either \$0 or <\$100,000. (See Figure 24.)

Contrast such budgets with the traditional costs of Enterprise Content Management (ECM) or other enterprise systems, and it is virtually unheard of to enter into buying “enterprise” solutions at that price level, particularly after factoring in the costs of professional services such as consulting or integration work.

**Figure 24. What Is Your Budget to Implement Enterprise 2.0 Functionality?**



Regarding ownership of the Enterprise 2.0 budget, Senior Management and IT are close to each other, showing a synchronous level of interest between two realms that frequently are disconnected rather than aligned. Both are essentially twice as likely as Line of Business Managers to have budget authority, which is surprising given that experimentation in early markets tends to be at a lower level, outside of the purview of both high-level business decisions and low-level technical ones.

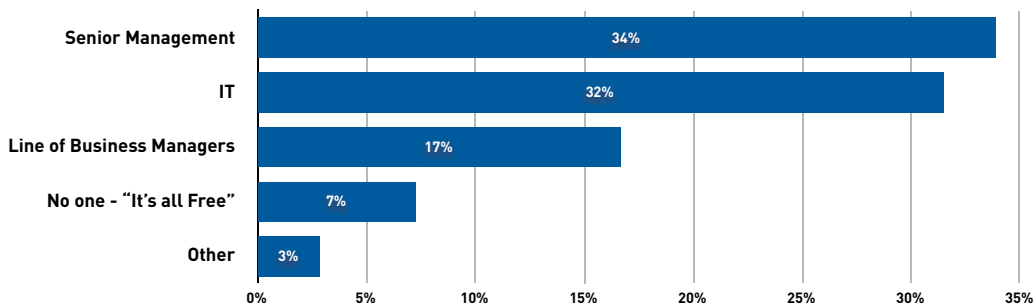
Given the prevalence of open source and low-cost offerings associated with Enterprise 2.0, as well as the rise in perception that content management in general is being embedded into the infrastructure (e.g., the rise of Microsoft Office SharePoint Server), respondents were provided the ability to state that Enterprise 2.0 is considered “free.” This option sparked an 11% response.

As stated throughout this *Market IQ*, low-barrier is a fundamental characteristic of Enterprise 2.0. As discussed earlier, many organizations are using Enterprise 2.0 in an ad hoc, siloed capacity. The 11% that currently view their Enterprise 2.0 expenses as “free” are likely within this group.

As organizations take a more strategic and broader view to Enterprise 2.0, it is likely that they accept that while Enterprise 2.0 is low-barrier, it is not no-barrier. Unlike the ad hoc deployment of a single user’s blog to broadcast opinion across an intranet or the web at large, the orchestration of multiple point technologies in support of and as part of enterprise processes will likely always have some expense associated with it, albeit radically less than more traditional approaches to enterprise collaboration.

A last aspect of this issue is the continuing growth of SaaS offerings. While SaaS isn’t “free” per se, it is serving to bring down the cost per person to a level that can fly beneath the budget triggers of a more typical enterprise solution. The benefit for enterprise users is that they can afford to experiment with these services without having to go through the prolonged cycles and expense that they would typically incur—such as budget justification, RFP development, piloting and finally, deployment. It is interesting to note in this context, that 66% of the survey respondents indicated that they would consider deploying Enterprise 2.0 in a SaaS model (see Figure 39 for more detail).

**Figure 25. Who Specifically Has Budget Authority for Enterprise 2.0 in Your Organization?**



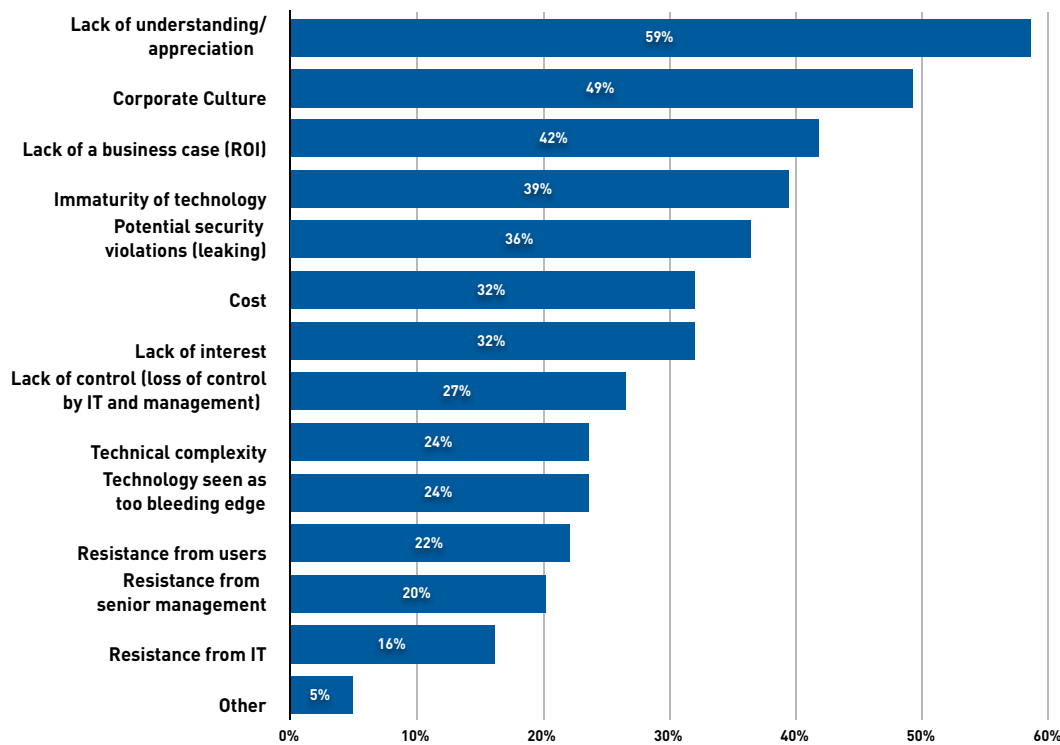
## Impediments and Impacts

Section 3 explored the need for ROI, a lack of successful ROI justification with Enterprise 2.0, as well as the lack of understanding as to why Enterprise 2.0 should be thought of as a system rather than point technologies (such as blogs), and how that is affecting usage patterns.

As reinforced by respondents’ opinions concerning impediments to Enterprise 2.0, “Lack of Understanding/Appreciation” was the top response at 59%, followed closely by “Corporate Culture” and “Lack of a Business Case (ROI).” Given the nascency of Enterprise 2.0 as a concept, and the adoption curves seen earlier, this should be no surprise. Understanding and “pitching” the ROI for Enterprise 2.0 was one of the key areas of debate with our advisory board as well – as discussed in Section 1.

It is interesting to note that two of the more frequently ballyhooed sticking points with Enterprise 2.0 (particularly with blogs and wikis), “Potential Security Violations (Leaking)” and “Lack of Control (Loss of Control by IT and Management)” ranked 5th and 8th and both at less than a 50% response rate. Cost, technical complexity, security, and lack of control—typical stumbling points with new “enterprise software”—do not seem to be the prime culprits in the lack of adoption of Enterprise 2.0. Again, this speaks to the low barriers and perhaps the low risk associated with experimentation and adoption of Enterprise 2.0.

Figure 26. What Are the Biggest Impediments to Implementing Enterprise 2.0 in Your Organization?



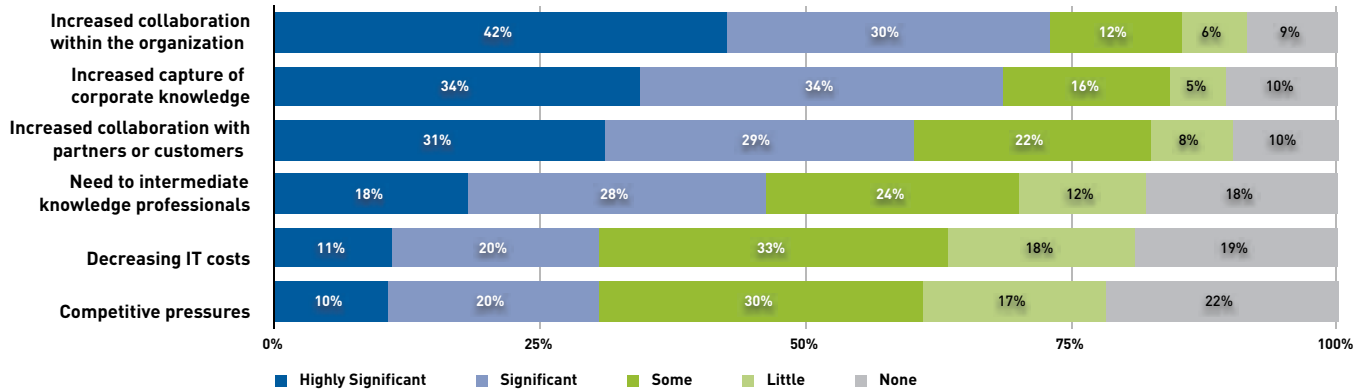
Examination of the impact of Enterprise 2.0 on specific business goals and objectives solidifies a further aspect of the impediments to adoption. “Increased collaboration within the organization” and “increased capture of corporate knowledge” are notoriously difficult areas to measure with “hard benefits.”

Not every aspect of technology adoption can or should necessarily be directly tied to a measurement system. An attempt to measure the benefits and cost or time reductions of Enterprise 2.0 should not be avoided, but if the organizational culture is solely focused on “hard dollar” calculations, Enterprise 2.0 may be a near impossible sell. Again, however, the low technical and financial barriers to Enterprise 2.0 may make it easier to operate experiments under the radar of traditional business justification exercises.

The response of over 50% combined for both “Highly Significant” and “Significant” to the option of “Increased collaboration with partners or customers” directly speaks to the many business models enabled through Enterprise 2.0, including “Open Innovation” or “Crowdsourcing.”

If participation and the “Participative Web” is truly a key component of Enterprise 2.0, then an increase in models that take advantage of a large number of participants, whether internal employees, partners, or the market at large, is a capability that Enterprise 2.0 adopters should be able to avail themselves of much more easily than in prior technological eras.

**Figure 27. What Impact (Planned or Realized) Does Enterprise 2.0 Have on the Following Business Goals and Objectives?**



### Ownership, Use, and Vision

As discussed in Section 3, strategic use and understanding of Enterprise 2.0 leans more heavily towards ad hoc usage rather than strategic deployment, but as noted previously, that is quite typical in an early market. In addition users are driving early adoption of Enterprise 2.0. Examination of where the primary interest of Enterprise 2.0 is occurring shows that part of the bias is due to the large “user-driven” force of Enterprise 2.0 adoption. As illustrated in Figure 27 users edge out “Senior/Executive Business Managers” by 51% to 41%.

When respondents were required to point out a single group driving Enterprise 2.0, however, these same groups tied (24%), for a combined total of just under 50% (see Figure 28). While many proponents and champions of Enterprise 2.0 discuss the benefits of collective wisdom emerging from the “bottom-up” (users) of an organization, it would seem that Enterprise 2.0 may have a strong (yet nascent) following from both the top (Senior and Executive Managers) and from the bottom, which, particularly for an early market such as this, is a relatively rare phenomenon. If the remaining disconnects between top and bottom can be addressed, this will be very good news indeed for all who believe in the potential that Enterprise 2.0 holds.

**Figure 28. Which GROUPS Are the DRIVERS of Enterprise 2.0 in Your Organization?**

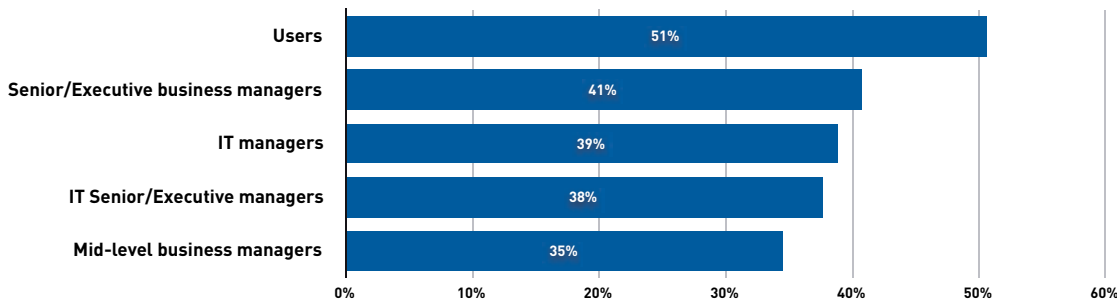
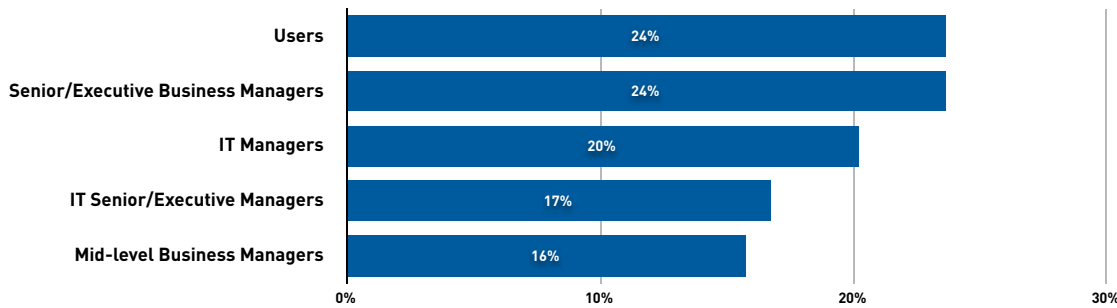
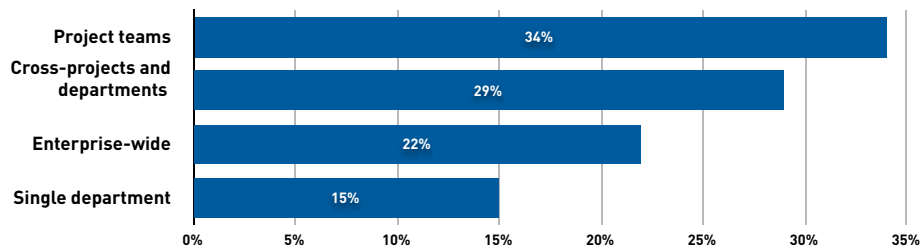


Figure 29. Which Group Is the PRIMARY Driver of Your Enterprise 2.0 Initiative?



Among respondents who are actively using Enterprise 2.0, 85% (combined) are using these technologies to pull teams together or otherwise cut across departmental or product-line focuses, with 15% targeted at a single department use case. Although this has long been the promise of collaboration environments from the days of groupware, it is heartening to see at this stage of adoption that silos/barriers are being broken down through the use of Enterprise 2.0 — no doubt due in part to the low cost and Web-based interfaces — from a usability standpoint.

Figure 30. Where Is Enterprise 2.0 Used Predominately in Your Organization?



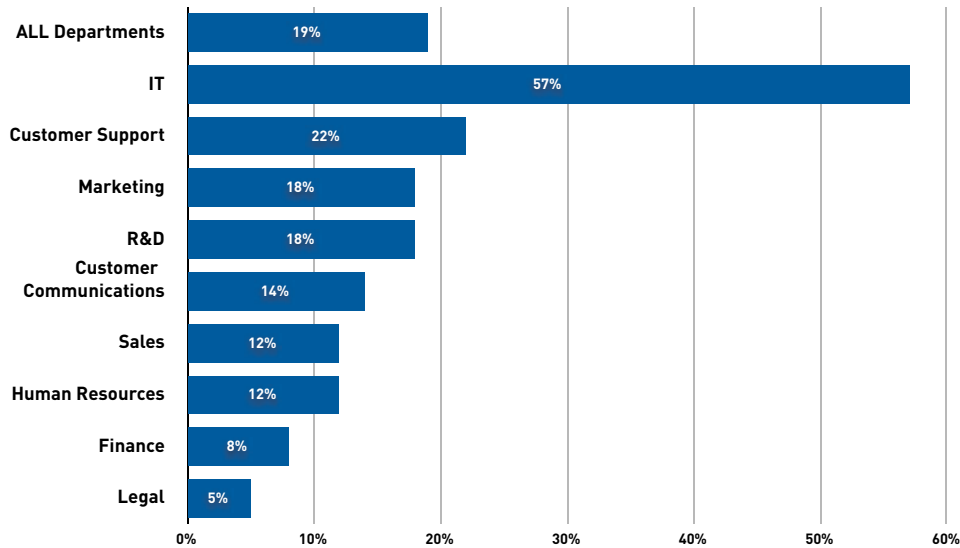
Adoption of certain Enterprise 2.0 technologies, notably wikis, are discussed in the popular press as being widely adopted within IT. In the case of our survey respondents, IT was indeed the runaway candidate, with 57% of respondents indicating that IT was the primary departmental user.

Given that wikis were initially created for software development teams, this is not a surprise, but is nonetheless quite a dramatic response level over all other responses.

For the overall enterprise view, responses to the primary users being “ALL Departments” at 19% (see Figure 31) and the use case of “Enterprise-wide” at 22% in Figure 30 are nearly equivalent. Viewed collectively, these responses indicate the beginning of true “enterprise penetration,” and at roughly the percentage one might expect given classic technology adoption curves.



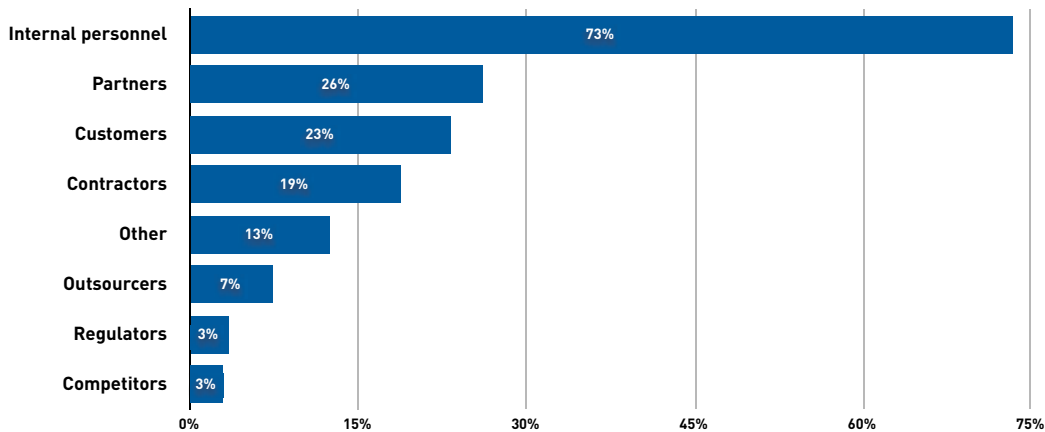
Figure 31. In Your Organization, Which Departments Are Primary Users of Enterprise 2.0 Functionality?



While the full promise of the benefits of Enterprise 2.0 lies in use by the “extended enterprise”, 73% of respondents are using Enterprise 2.0 exclusively with their own internal peers. The next two top responses, however, partners (26%) and customers (23%) are further evidence of the beginning of true “enterprise penetration,” in this case to the extended enterprise, extending these capabilities “outside the firewall.”

Enterprise 2.0 is providing a new approach to facilitate and support the B2B exchanges and marketplaces of the late 90s, but the adoption rate is even more nascent in these situations than in cases purely inside the firewall.

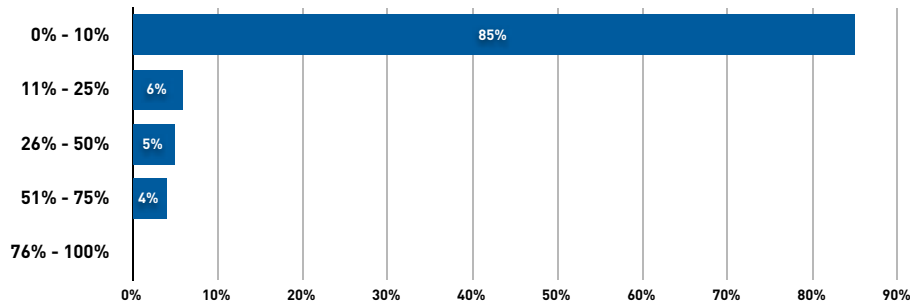
Figure 32. With Whom Are You Working via Enterprise 2.0 Technologies?



## Policies and Business Usage

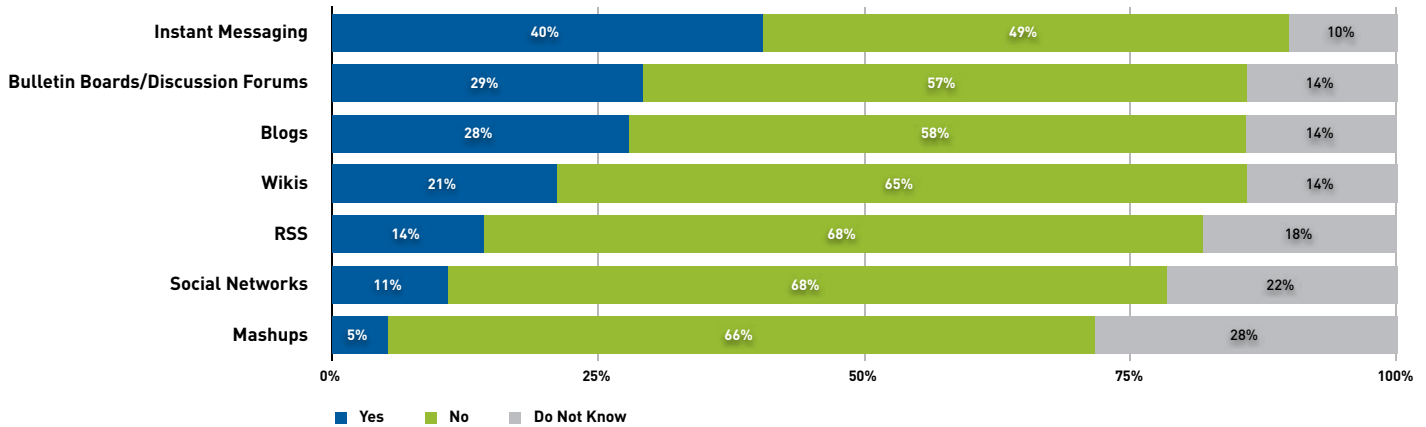
Enterprise 2.0 is an enterprise system, and as such there should be an appreciation for the current state of business practices and procedures that characterize its usage. “Corporate blogging” for example is not an Enterprise 2.0 capability that is applicable to all employees. The overwhelming majority (85%) of respondents stated that only 0-10% of employees are involved in an active business-related blog. The likelihood of “everyone” blogging is nonexistent from the survey population’s standpoint.

Figure 33. Roughly What Percentage of Employees in Your Organization Have an Active (Business-related) Blog?



The examination in Section 3 regarding strategy and ad hoc usage is further borne out in the 49-66% of respondents stating that there is no usage policy in place for Enterprise 2.0 technologies and their precursors, such as Instant Messaging and Bulletin Boards or Discussion Forums. If strategic use were more commonplace, then one would expect the benefits and caveats to be made explicitly in the form of corporate policy. The ad hoc approach currently used in most organizations in deploying Enterprise 2.0 leads to a blind eye for the management and security of Enterprise 2.0 content.

Figure 34. Do You Have a Specific Corporate Policy on the USAGE of the Following Enterprise 2.0 Technologies?

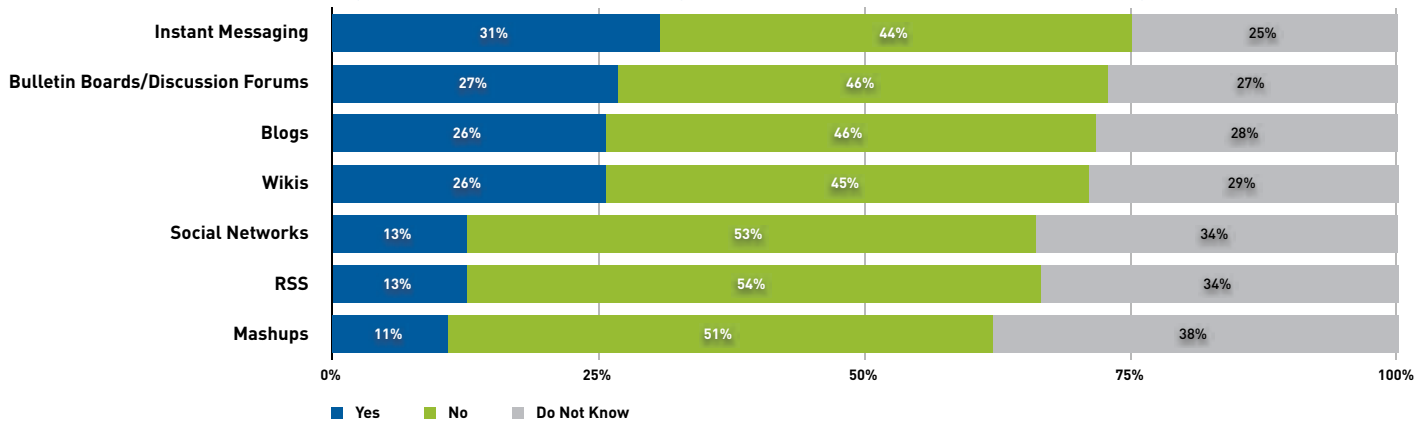


Enterprise 2.0, despite its informal and formal adoption in companies, is practically unaddressed from a records management standpoint in which all “business content,” regardless of the medium, is legally discoverable and admissible as evidence, and therefore subject to retention (See Figure 35). As adoption continues to rise with these technologies, and organizations take a more strategic approach to enterprise-wide deployment, the “records awareness” of organizations should catch up with the increased usage while the desire to “stamp out” rogue environments is tempered by the realization of the potential benefits of these tools.

In this regard, Enterprise 2.0 technologies are similar to a 1.0 technology, e-mail. The path that e-mail has taken, has been from an informal communication vehicle, to a significant conduit for enterprise communications, and lastly, to a corporate business record. This has in turn mandated the subsequent integration of e-mail management well after it should have been addressed. This is likely to reoccur with Enterprise 2.0 content, unless organizations learn from history and begin managing this content from the outset.

But there is good news. Given that Enterprise 2.0 content is largely transparent and open for inspection by two or more people, the ability to pull in such content within a records framework should be easier to accomplish than the silent, siloed, and invisible nature of employees’ individual e-mail collections. Nonetheless, this will require a formalized and official policy and enforcement.

Figure 35. Which of the Following Are Subject to a Corporate Records Management Plan?

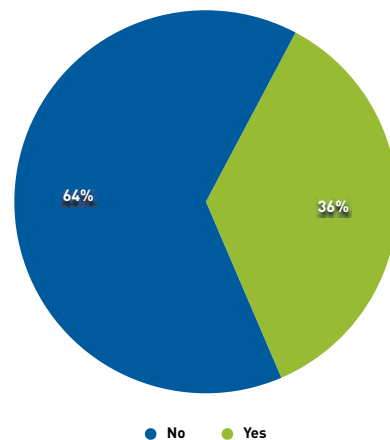


### Champions and Culture

The impact of culture and age on attitudes surrounding Enterprise 2.0 is addressed in Section 5 of this *Market IQ*. In this sub-section of Section 3, however, the presence of and value of Enterprise 2.0 champions as a general finding is addressed.

Nearly two-thirds of the organizations who have implemented Enterprise 2.0 do not have a specific champion or leader of Enterprise 2.0 (See Figure 36). It may be argued that Enterprise 2.0 does not require championing, as it is about group participation, collective intelligence, and the emergence of wisdom from these interactions. That would lead one to believe that Enterprise 2.0 “flattens” the organization, all participants are equal, and will participate through self-motivation.

Figure 36. Do the Enterprise 2.0 Applications (e.g., wikis, blogs primarily) in YOUR Organization Each Have a Champion or Leader?



Experience with Enterprise 2.0 seems to indicate otherwise. A resounding majority (84%), of respondents from organizations that have implemented Enterprise 2.0 to some degree, indicated that it is necessary (i.e., a best practice), to have an Enterprise 2.0 champion or leader (see Figure 37).

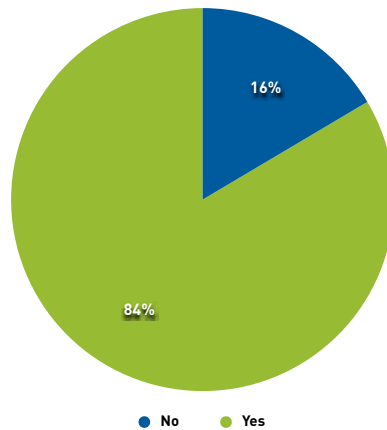
Whether this is past history and experience reasserting itself is speculation at this time. Traditional technology solutions have tended to require champions and, specifically, executive support to overcome organizational inertia and a tendency to resist change. These same solutions, however, have tended to be complex and expensive and driven by a “business-first” rather than “user-first” mindset.

Just as Lean Thinking has changed the mindset of manufacturers from a mass-production to a mass-customization world, and from “push it on the market” to a demand-driven (pull) model, Enterprise 2.0 should (if done well) lead to a similar pull from the users (employees, partners, etc.) to demand greater levels of access and participation rather than being forced to use systems that seem to only add to their work levels instead of enhancing

their professional capabilities. While some organizations may have realized this promise, it would seem the vast majority of respondents believe that that time has not yet come to pass in their own organization.

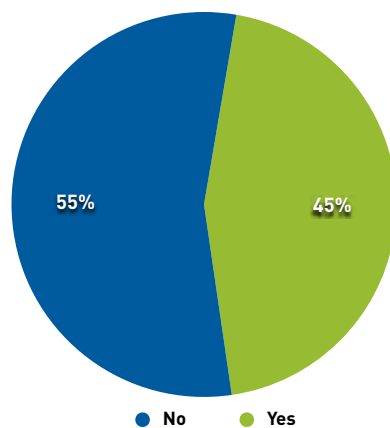
This is likely related to the need for individuals to believe that their participation in Enterprise 2.0 is aligned to and supported by enterprise goals, objectives, and reward systems. In fact, our research did find that a corporate culture that is Knowledge Management-inclined has a very strong and positive impact on the rate of adoption and success with Enterprise 2.0 (See Section 5 of this *Market IQ* for more details).

**Figure 37. Do You Feel It Is NECESSARY to Have a Champion or Leader for Enterprise 2.0 Projects?**



Finally, although respondents believe that champions are a requirement for successful Enterprise 2.0 implementations, only 45% stated that they themselves were champions in their organizations. Is this a lost opportunity? Do these people suffer from the slings and arrows of past efforts? If champions are deemed overwhelmingly necessary, why aren't a larger percentage of the respondents champions themselves? Interestingly, the response differs when looked at from a generational (age) standpoint, which is examined in Section 5 of this *Market IQ*.

**Figure 38. Are YOU an Internal Champion of Enterprise 2.0 Within Your Organization?**



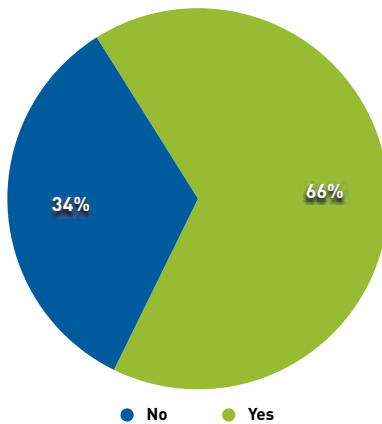
### Enterprise 2.0 Sourcing and Technical Constraints

There is a sense, some of it rightly, that Enterprise 2.0, and its consumer-oriented counterpart, Web 2.0, is about a complete shift from “traditional enterprise software” — and in particular the licensing and professional services models that revolve around the majority of enterprise software sales — to software delivered over the Internet as a service (SaaS).

While that may be the case, none of the responses to the Enterprise 2.0 definitions proposed in Section 1 of this *Market IQ* indicated that SaaS was the only deployment model for Enterprise 2.0. With that in mind, 66% of respondents indicated that they would be likely to implement via SaaS.

Software functionality delivered via SaaS is clearly on the rise. The SaaS model, which provides delivery in a low-barrier manner, is tightly aligned to the low-barrier facet of Enterprise 2.0 deployments. For this reason, SaaS products may be particularly well viewed within an Enterprise 2.0 setting. The challenge going forward will be to avoid siloed SaaS implementations, leading to fragmented, albeit low-barrier solutions. The rise of SaaS platforms that provide a sizable commercial ecosystem—and their established, well-known APIs—directly address this issue.

**Figure 39. Would You Be Likely to Implement Enterprise 2.0 Systems in an Outsourced or SaaS [Software as a Service] Model?**

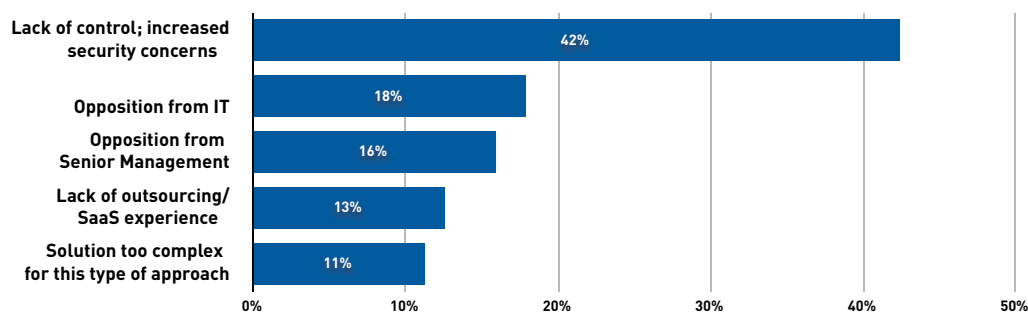


Among the 34% of respondents that stated they would not likely implement Enterprise 2.0 in a SaaS model, perceived security and control issues accounted for most (42%) of the cited reasons. All other responses garnered less than half that rate.

These are the same worries that arose in the mid to late 1990s as Application Service Providers (ASPs) entered the market, and the first serious alternatives to traditional on-premise/deployed software were unveiled. During the ASP wave, security/control was indeed the primary concern, although it typically arose from IT departments.

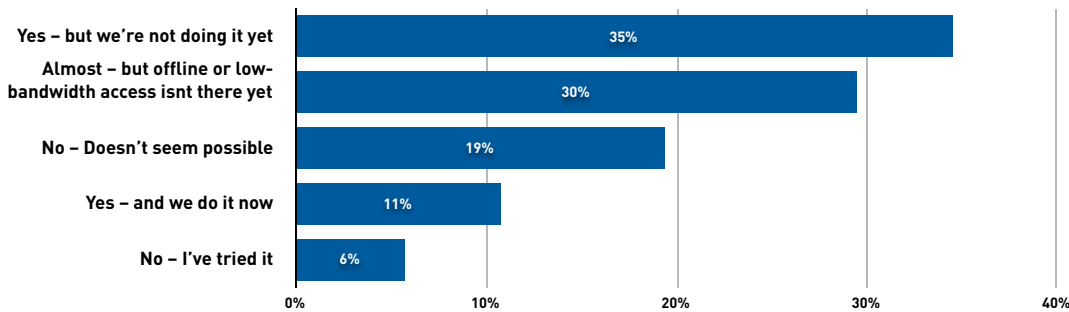
It is interesting to note that “Opposition from IT” was a distant second (18%), in this case. Business users who assume that IT may oppose the outsourcing of Enterprise 2.0, may want to test that assumption to see if their concerns still remain. While not the focus of this *Market IQ*, the changing role of IT and its ability to orchestrate rather than “own and maintain” certain aspects of infrastructure is an issue that is related to the advent of Enterprise 2.0, and an issue on the rise in general, worthy of consideration by every enterprise.

**Figure 40. Why Wouldn't You Implement Enterprise 2.0 via Outsourcing or SaaS?**



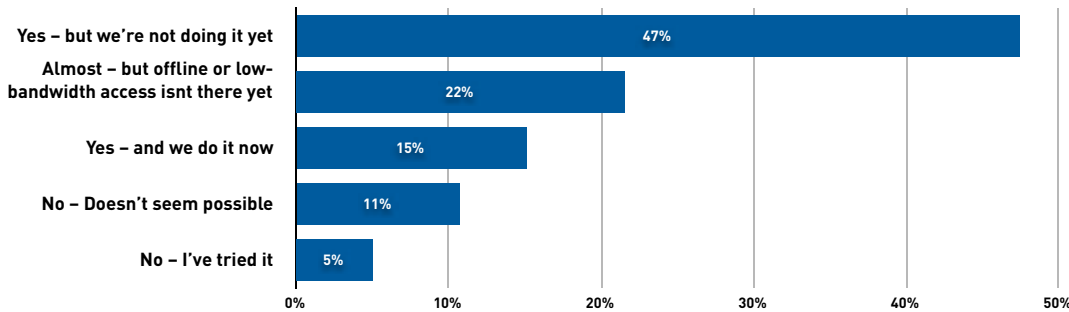
In that vein, respondents were asked if management of an entire enterprise was possible with Web-based tools. Once again, the number of respondents who indicated it was possible either completely or to a significant degree (a total of 65%) leads over those that have accomplished it (11%), and is well ahead of the skeptics who say it can't be done (19%).

**Figure 41. Do You Feel It's Possible to Manage an ENTERPRISE with Purely Web-based/Browser-based Tools?**



Taken at a more modest level, the prospect of exclusively using Web-based tools at a workgroup or departmental level, is more positively viewed (see Figure 42). Where only 35% of respondents stated they were attempting it at the enterprise level, 47% stated they were attempting it at the workgroup or departmental level. Similarly, 11% were doing it at the enterprise level, whereas 15% are doing it at the workgroup or departmental level.

**Figure 42. Do You Feel It's Possible to Manage a WORKGROUP or DEPARTMENT with Purely Web-based/Browser-based Tools?**

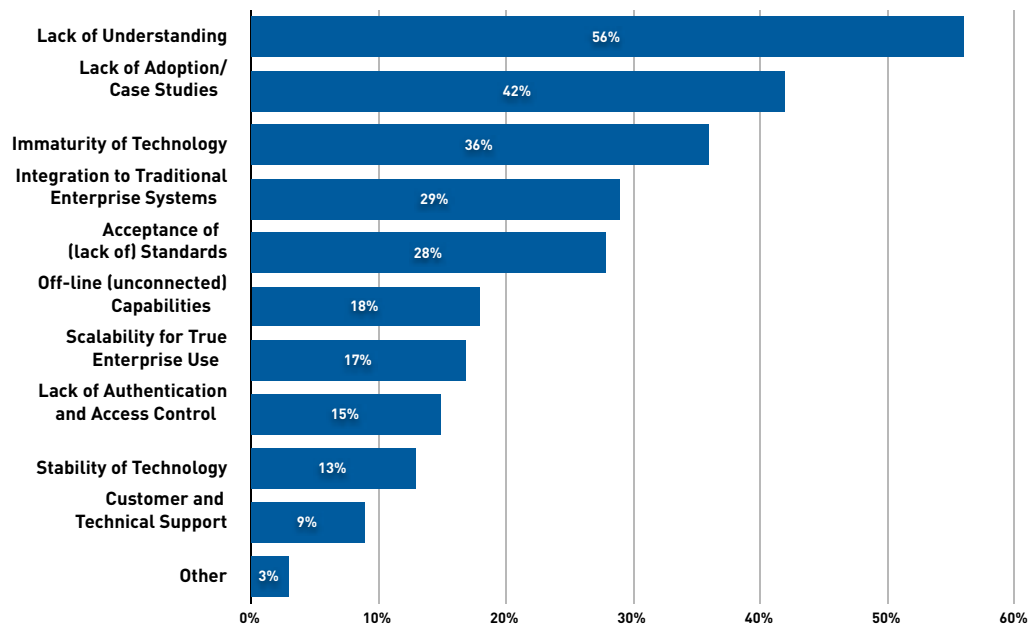


Whether or not it is possible to leverage Enterprise 2.0 functionality to provide collaborative work processing completely in a Web-based environment is moot, currently. Most organizations appear to be taking such implementations slowly, and will likely migrate to a more Web-based environment, versus jumping completely into it.

The interest and capability to do so, however, is indeed rising, and is another aspect of deployment and implementation that should be considered as part of an Enterprise 2.0 strategy.

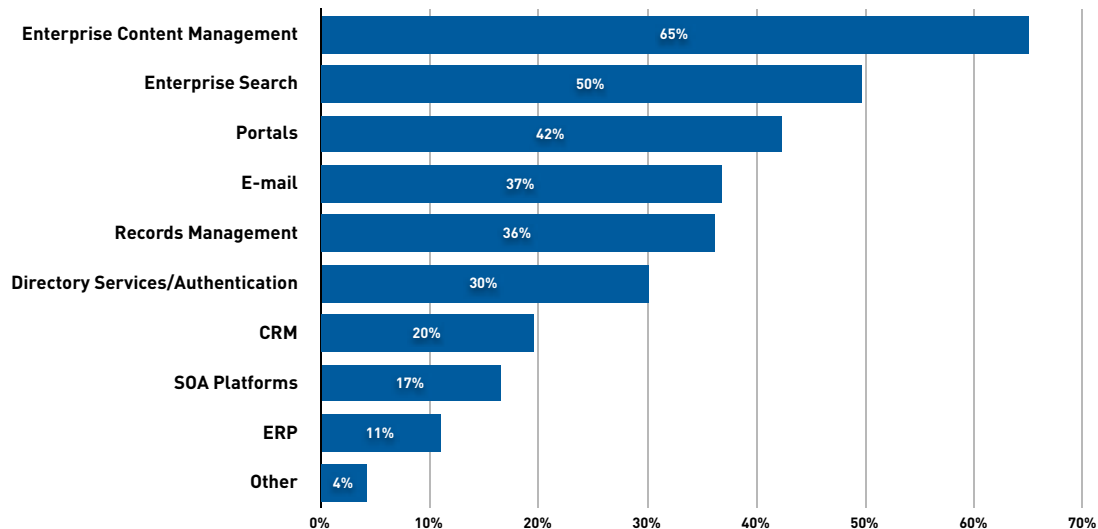
As for the remaining concerns on a primarily technical front, there is a certain amount of hesitation in adoption due to the perceived immaturity of technology (36%) and difficulties of integration with other systems (29%). The overall simplicity of Enterprise 2.0 solutions, and the general inclusion of well-documented and open integration standards should pose far fewer challenges than more complex and "tightly integrated" solutions.

Figure 43. What Do You See as the Current Shortcomings of Enterprise 2.0?



The expected integration points are the remaining aspect of concern. It is heartening to see that Enterprise 2.0 is viewed as tightly intertwined with Enterprise Content Management (ECM), Search, and Portals. In many respects, Enterprise 2.0 is ECM 2.0, Search 2.0, and Portals 2.0 from a conceptual standpoint, providing additional flexibility from past iterations of these technologies, among the other business and cultural benefits we have discussed for Enterprise 2.0 itself. More importantly, Enterprise 2.0 should not be viewed or deployed as a standalone system, but as part of an integrated enterprise strategy.

Figure 44. What Are the Key Enterprise Systems that Enterprise 2.0 Needs to Integrate Into?





Both age and culture affected many aspects of Enterprise 2.0 adoption and success. Of the two, however, age had less of an impact. In fact, despite popular opinion, survey results found only a small number of cases in which generational affiliation impacted attitudes and approaches to Enterprise 2.0.

## Section 5

## Generational and Cultural Impacts

This *Market IQ* predominately discusses Enterprise 2.0 and our survey findings in a holistic manner. In this section, however, we hone in two influencing forces behind the Enterprise 2.0 market and our survey findings: age and culture. We separated our survey responses by age group and by affiliation with an organization that demonstrated a knowledge management-inclined culture.

Our survey population was segregated into three age groups: Millennials = 20-35 years old years old; Gen X = 36–50 years old; and Boomers = 51+ years old (See Appendix for a breakdown).

We culled details about organizational culture using a series of 12 questions extracted from the KM2 knowledge management methodology and developed overall profiles regarding approaches and receptiveness to knowledge sharing and open collaboration. Survey respondents were segregated into two cultural groups: those associated with an organization that exhibited a knowledge management inclined culture, and those that were not.

Both age and culture affected many aspects of Enterprise 2.0 adoption and success. Of the two, however, age had less of an impact. In fact, despite popular opinion, survey results found only a small number of cases in which generational affiliation impacted attitudes and approaches to Enterprise 2.0.

## Generational Impact

Popular press regarding Enterprise 2.0 often suggests that the related technologies are more apt to be embraced by Millennials. For example, Professor MacAfee wrote in a blog post ([http://blog.hbs.edu/faculty/amcafee/index.php/faculty\\_amcafee\\_v3/whats\\_most\\_important\\_for\\_success\\_with\\_enterprise\\_20/](http://blog.hbs.edu/faculty/amcafee/index.php/faculty_amcafee_v3/whats_most_important_for_success_with_enterprise_20/)) that an Enterprise 2.0 project can succeed in part because “there are lots of young people.”

Survey analysis confirmed that generational affiliation does impact attitudes and experience with Enterprise 2.0, but not as much as one might be inclined to believe. Additionally, in some cases, the “positive” attitude or more aggressive adoption was affiliated with the “elders” of the enterprise.

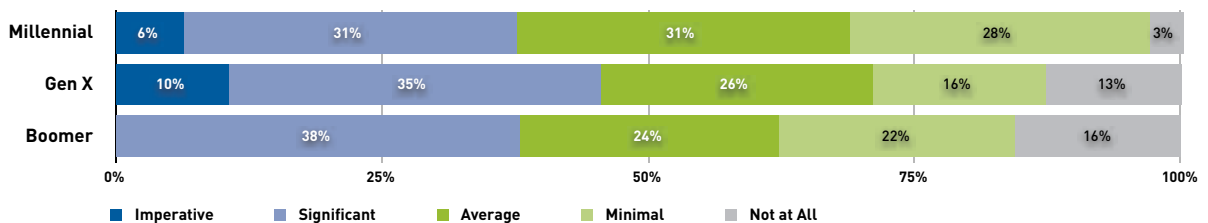
We attribute this to the fact that unlike Web 2.0—which is very “social” in the purest sense—Enterprise 2.0 is about “socialness” in support of specific business goals and objectives. Thus, in situations where Enterprise 2.0 can illustrate a potential benefit to the success of an organization tenured business professionals are more apt to place a premium on it.

### Criticality and Focus of Enterprise 2.0 to Business Success Understood by All Generations

As seen in Figure 45, Gen Xers are most aggressive regarding the criticality of Enterprise 2.0 to business success. Although some Millennials (6%) position Enterprise 2.0 in similarly crucial terms, overall their opinion is not much different from Boomers.

Millennials and Boomers are virtually identical concerning the overall significance of Enterprise 2.0 to business success. Although no Boomers ranked Enterprise 2.0 as critical to business success 38% did rank it as significant. This is nearly identical to the 37% of Millennials that ranked it as either critical or significant.

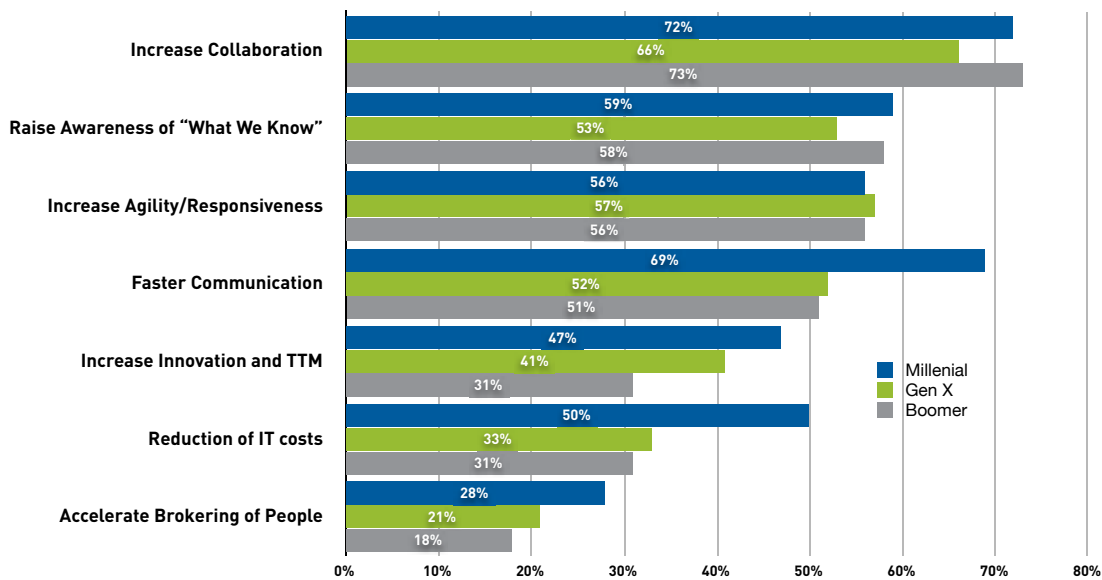
Figure 45. How Critical Is Enterprise 2.0 to Your Organization’s Business Goals/Success?



Overall, opinions regarding the specific business benefits targeted by Enterprise 2.0 are predominately unaffected by generational affiliation. All three generations point to increased collaboration as the most popular reason for deploying Enterprise 2.0, but Boomers and Millennials agree on this to a near equal degree.

Millennials place more focus on faster communication and reduction in IT costs. The latter is likely due to a more intimate appreciation for the technical side of Enterprise 2.0, and thus the ability to develop platforms and applications with minimal IT involvement. The former is likely due to a more naïve attitude regarding security, control, and risk. While Millennials are far more enthusiastic regarding the speed of communication, the enthusiasm of Gen Xers and Boomers is tempered, perhaps by appreciation for the risk of business-related communication that occurs in an unbridled manner. They remember only too well e-mail’s rapid ascent as a form of business communication that was subsequently caught “unaware” as a legally admissible form of evidence. (See Figure 46.)

Figure 46. What Are You Trying to Accomplish with Enterprise 2.0?



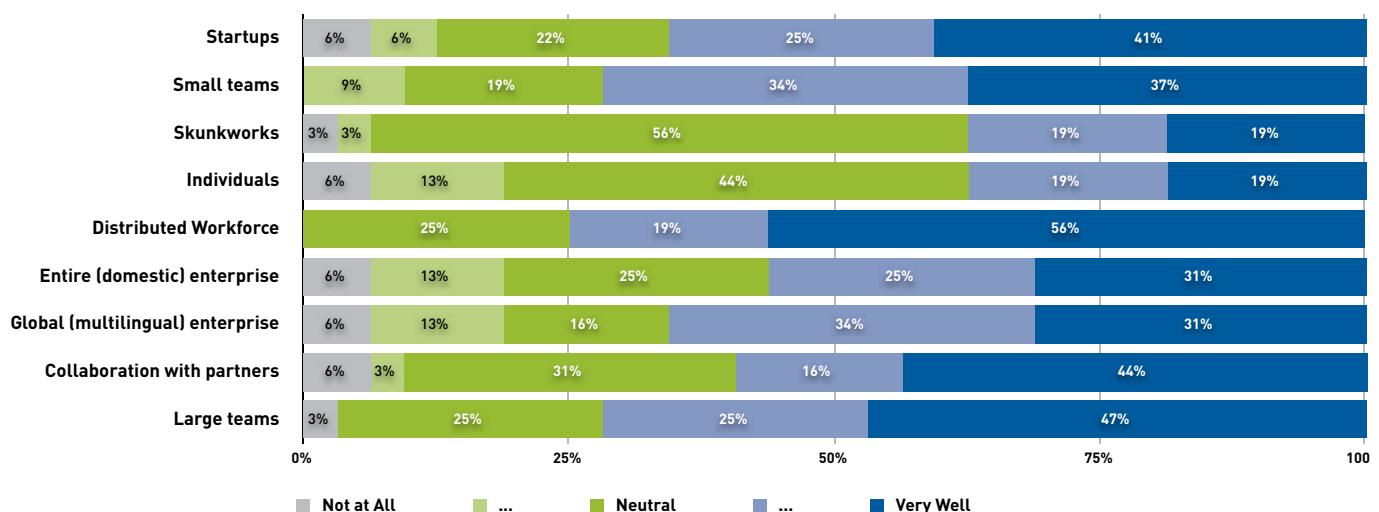
#### Generations Target Different Groups and Practice Areas

Whereas there is some alignment between Millennials and Boomers concerning the importance of Enterprise 2.0, Millennials are far more aggressive concerning the applicability of Enterprise 2.0 specific work groups.

As discussed in *Section 3: Enterprise 2.0 Why Now?* (see Figure 12), overall the survey respondents felt that Enterprise 2.0 was applicable to all work groups with the exception of skunkworks and individuals. Millennials' rankings were in step with the overall findings, but in each case gave even greater emphasis to the degree that Enterprise 2.0 is very well suited to these groups. For example, Millennials ranked Enterprise 2.0 as very well suited to a distributed workforce and a large team was a full 10 points higher than the overall survey respondents. Even more pronounced was the perceived applicability of Enterprise 2.0 to collaboration with partners: Millennials ranked it a full 15 points higher as "very well."

Gen Xers and Boomers, though generally in agreement with Millennials regarding where Enterprise 2.0 is best suited, view its applicability with a bit more trepidation.

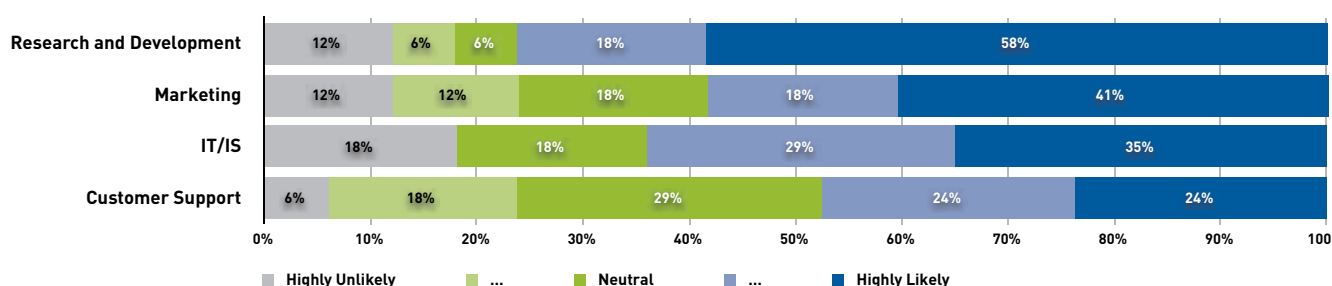
Figure 47. How Well Suited Is Enterprise 2.0 for the Following People/Groups? (Millennials only)



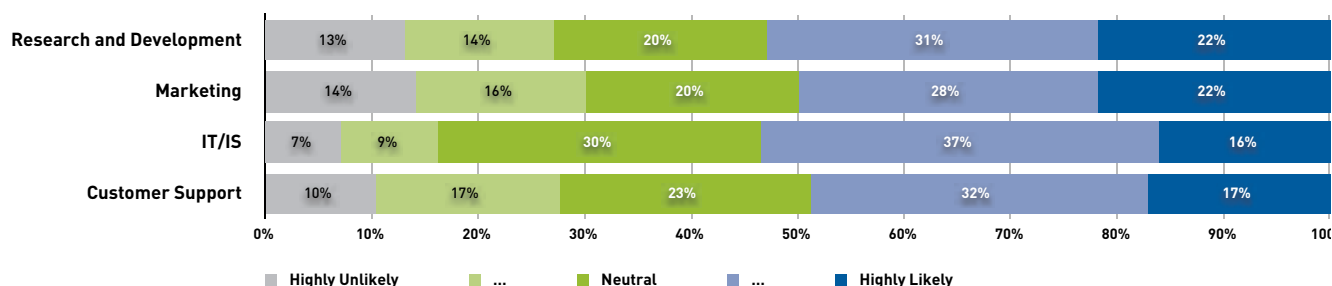
This level of marked enthusiasm and aggressiveness was also exhibited by Boomers concerning the applicability of Enterprise 2.0 to specific practice areas. Again, while the overall ranking of the targeted practice areas was similar among all three age groups, ( See Figure 12 in Section 3), Millennials had a far more positive (e.g., focus on highly likely) opinion regarding the suitability of Enterprise 2.0 to virtually all business practices. Comparison of Figures 48–50, below illustrates that Millennials are far more bullish on Enterprise 2.0, believing it is highly likely to be utilized in virtually all practice areas targeted by the survey.

Millennials, who as a group are more active in Web 2.0, are perhaps more apt to embrace Enterprise 2.0 in virtually any business setting. This leads to an inclination to deploy Enterprise 2.0 in an ad hoc or rogue manner, lacking an enterprise strategy, as introduced earlier in this *Market IQ*. This enthusiasm can be seen as a positive subculture within an enterprise. That said, Millennials likely lack the tenure and associated clout necessary to drive wide-scale adoption. Perhaps that is why Millennials do not position themselves as internal champions of Enterprise 2.0, examined in more detail below.

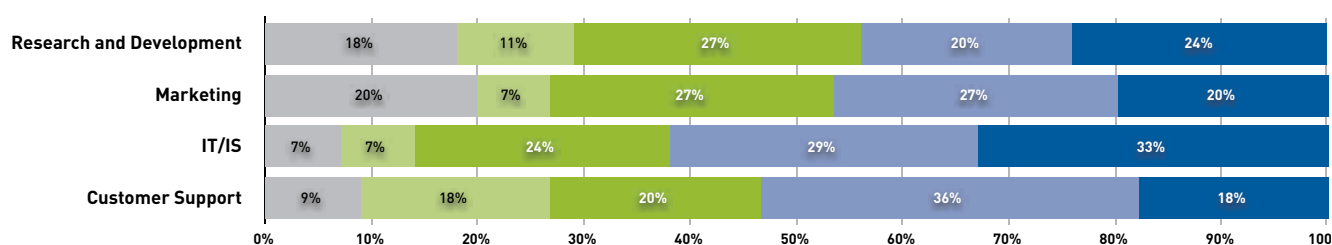
**Figure 48. How Likely Is Your Organization to Utilize Enterprise 2.0 for the Following Business Practices? (Millennials Only)**



**Figure 49. How Likely Is Your Organization to Utilize Enterprise 2.0 for the Following Business Practices? (Gen X Only)**



**Figure 50. How Likely Is Your Organization to Utilize Enterprise 2.0 for the Following Business Practices? (Boomers Only)**

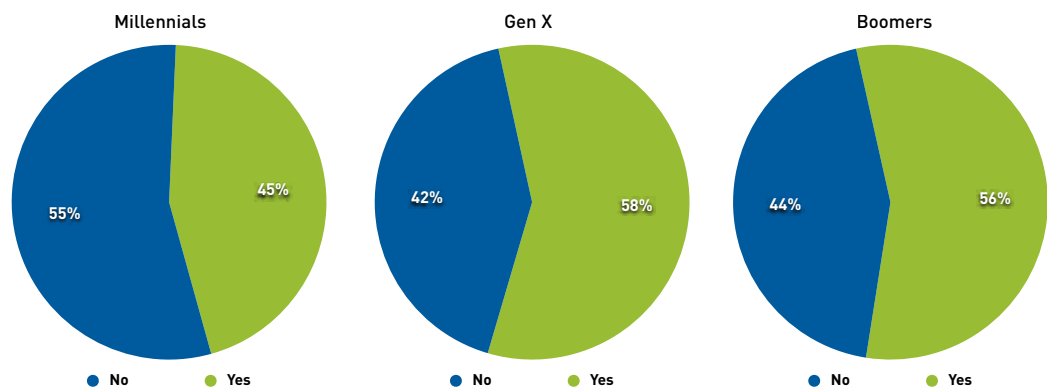


### With Tenure Comes Leadership

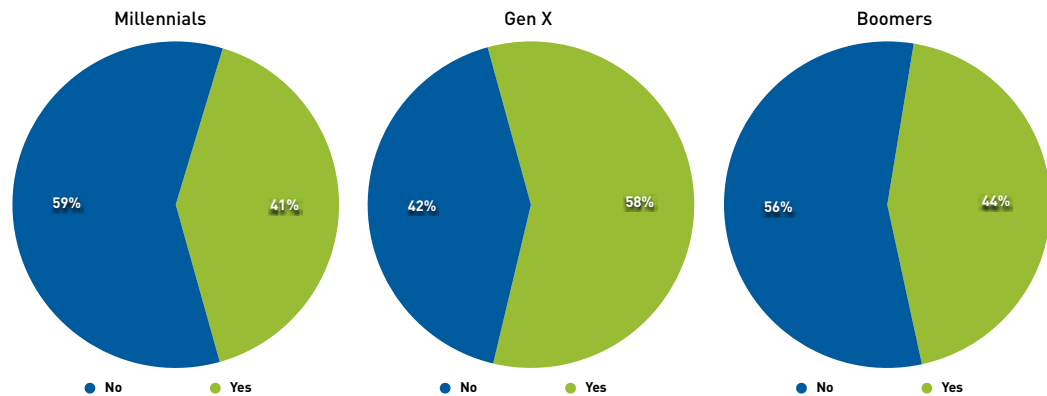
While Millennials are bullish on Enterprise 2.0, they are somewhat less likely to position themselves as internal champions. (See Figure 51.) This may be simply correlated to less tenure in the enterprise. It may also, however, be linked to a generational inclination to deploy the technology in a rogue or ad hoc manner without championing its implementation across the enterprise.

This likely accounts for the similar split amongst Millennials that feel the organization does not measure Enterprise success the same way they do. (See Figure 52.) It is interesting to note, that in this regard, Boomers have similar feelings. Measuring ROI and overall success is a difficult facet of Enterprise 2.0. (See *Section 3: Why Enterprise 2.0 Now*, for more detail.) The two generational extremes share a similar (though not greatly pronounced) disconnect between individual value and enterprise value perspectives that may be mirror images. That is to say, Millennials may feel somewhat disconnected to Boomer objectives and vice-versa.

**Figure 51. Are You an Internal Champion of Enterprise 2.0 Within Your Organization?**  
(Cross Generation Comparison)



**Figure 52. Does Your Organization Measure the Success of Enterprise 2.0 the Same Way You Do?**  
(Cross Generation Comparison)



### Millennials Look for Increased Experience, Boomers Education

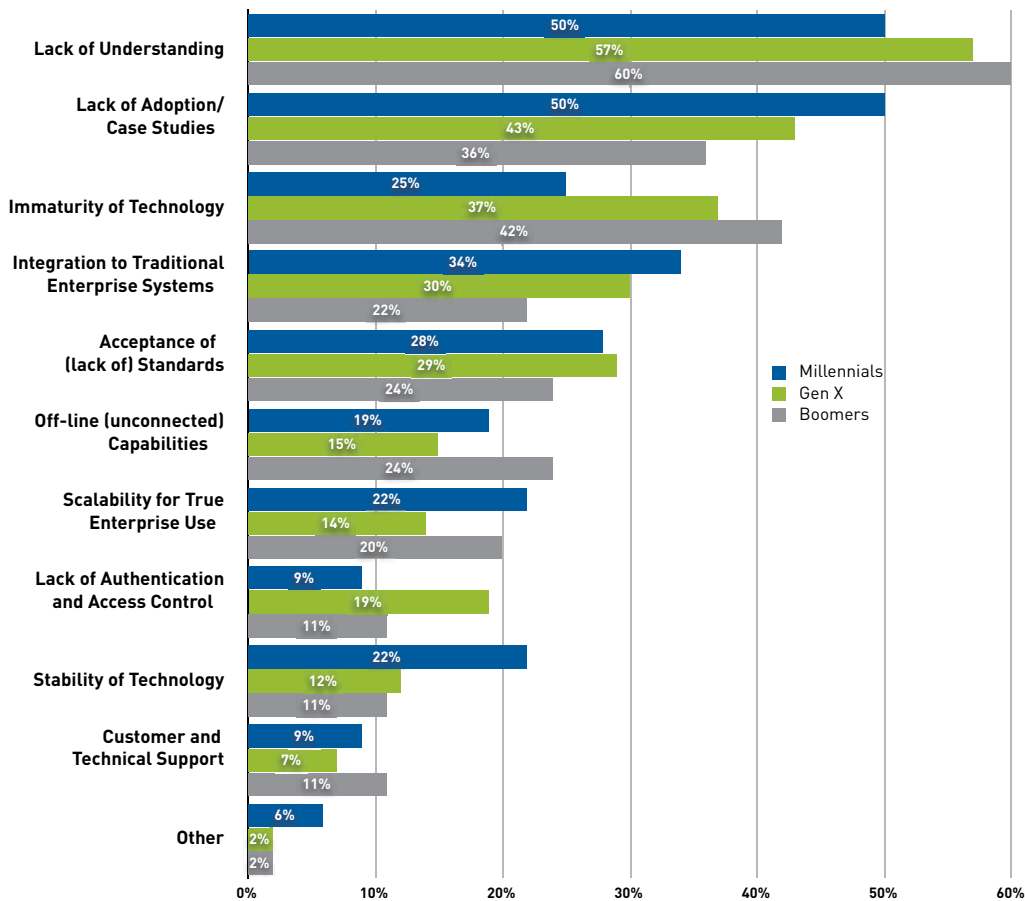
These generational rifts are perhaps best understood by appreciating the differences in opinion among the three generations regarding the current shortcomings of the Enterprise 2.0 market. Perhaps due to lesser exposure to Web 2.0, Gen X and Boomers view “lack of understanding” as the greatest shortcoming.

Millennials, on the other hand, place equal weight on the need for greater adoption and case studies. Experience with Web 2.0 gives them a more positive attitude regarding the maturity of the technologies. Though a subtle difference, it implies that this generation believes that a greater willingness to adopt the technologies and document experiences would drive more rapid adoption.

Similarly, Millennials, with an overall more positive view and aggressive pace of adoption, believe that Enterprise 2.0 should be integrated more tightly with traditional systems. This supports their focus on a need for case studies, with an emphasis on business critical case scenarios.

On the other hand, the risk-averse, more strategic and careful implementation attitudes expressed by Boomers and Gen X are reflected in a higher emphasis on the need for increased authentication and access controls. It is interesting to note that, although ranked rather low overall, the stability of technology was viewed as twice as necessary amongst Millennials than Boomers and Gen X respondents. Perhaps the Millennials’ greater exposure with Web 2.0 foreshadows a need for technology maturity within Enterprise 2.0.

Figure 53. What Do You See as the Current Shortcomings of Enterprise 2.0? (Cross-generational)



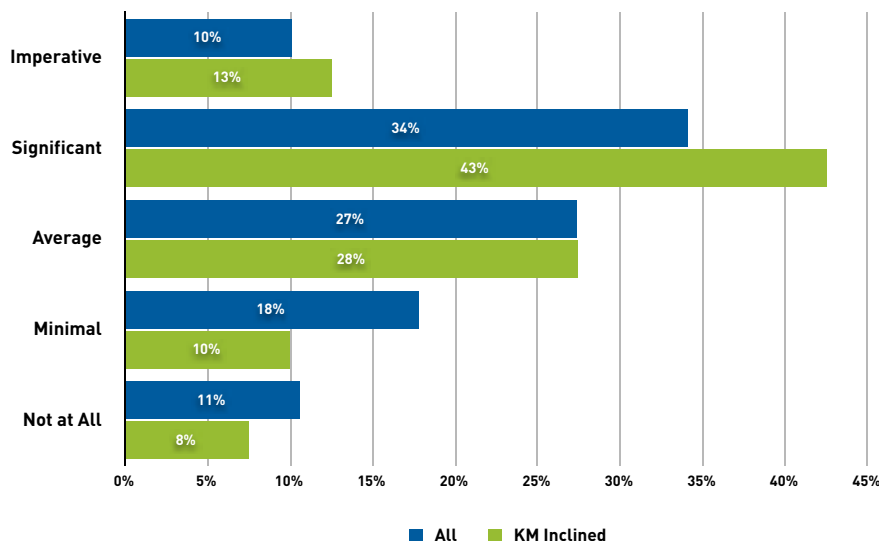
## The Importance of Corporate Culture

It has been stated several times in this *Market IQ* that Enterprise 2.0 is not just about technology, but also about practices and underlying cultures. Analysis of the survey responses supports this premise. In fact, culture demonstrated a greater effect on the potential for success with Enterprise 2.0, and the speed with which it can be deployed, than did age affiliation.

An enterprise culture that is prone to knowledge sharing, user empowerment, distributed decision making, and open collaboration exerts great influence on the attitudes, opinions and approaches to Enterprise 2.0. The difference that having the “right culture” can make to deployment of Enterprise 2.0 is fundamental. Availability of business goals and objectives aligned to collaboration, vision, and leadership focused on the value of collaboration, and a community thus inclined to sharing and open development, creates an environment in which Enterprise 2.0 is more readily understood and embraced. In fact, such a culture can compensate for any generational differences in the enterprise.

Respondents who work within a Knowledge Management-oriented organization ranked the criticality of Enterprise 2.0 to business goals and success 12 percentage points higher at the “significant” and “imperative” level. (See Figure 54.) This difference in opinion can be due to an innate inclination to appreciate facilitated collaboration, or is based on respondents’ experience with collaborative business models. Either way, these organizations have a keener sense for the value of collaboration and thus are likely to place a greater focus on the value of Enterprise 2.0 to business success.

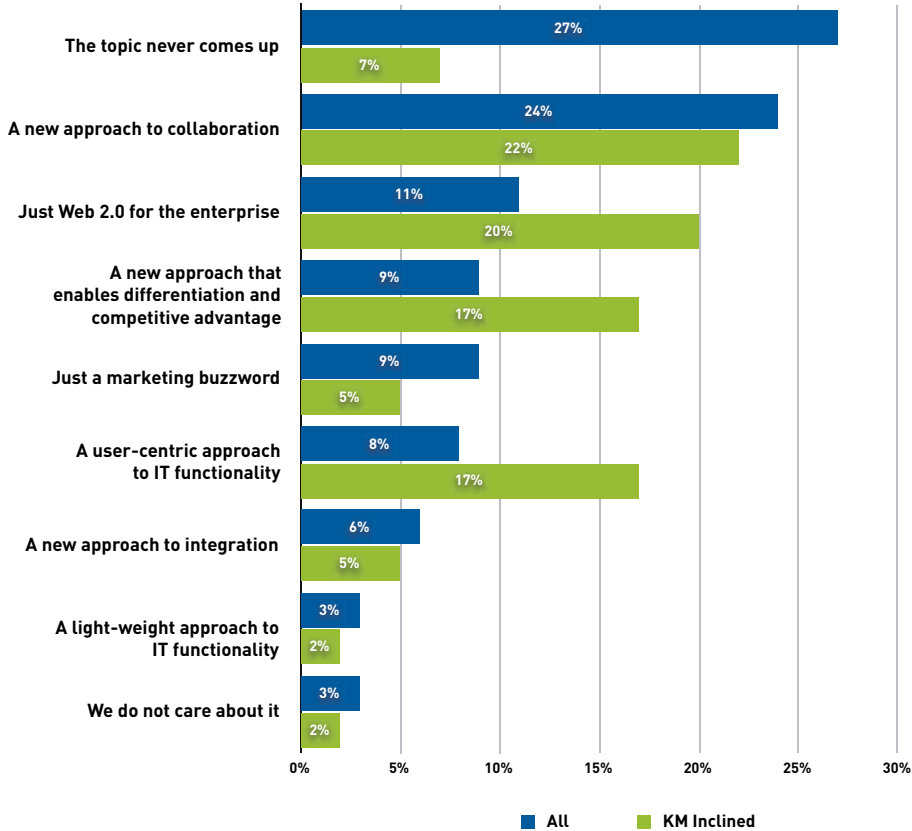
**Figure 54. How Critical Is Enterprise 2.0 to Your Organization’s Overall Business Goals/Success? (KM Inclined Organizations vs. All)**



These same enterprises are also more inclined to seek out business practices and technologies that enable collaboration. Organizations that exhibit a Knowledge Management culture are far more likely to be discussing the merits of Enterprise 2.0. (See Figure 55.) Only 7% of these organizations have not yet discussed Enterprise 2.0, compared to the 27% of survey respondents overall. This leads to a greater inclination to deploy Enterprise 2.0 technologies in some capacity, which is the case, as is discussed later in this section of the *Market IQ*. The relatively new experience with the technologies, however, is evidenced by the 20% who stated Enterprise 2.0 is viewed as “just Web 2.0 for the enterprise.” On the other hand, 17% (nearly double that of the overall survey population), viewed Enterprise 2.0 more strategically, as “a new approach that enables differentiation and competitive advantage,” and “a user-centric approach to IT functionality.”

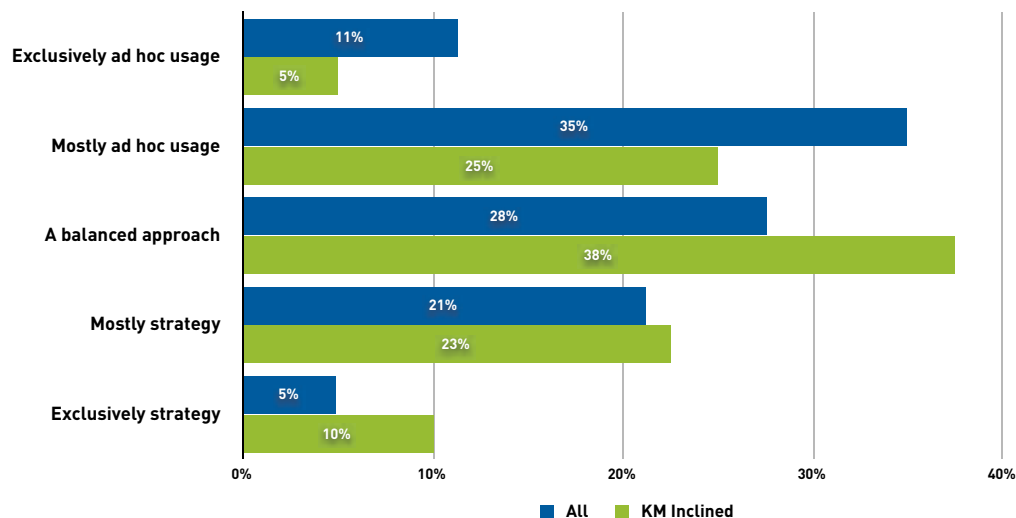


Figure 55. Which of the Following Is Closest to Your Organization's Perspective on Enterprise 2.0? (KM Inclined Organizations vs. All)



Where 46% of the general population indicated Enterprise 2.0 implementations that were predominately ad hoc in nature, Knowledge Management-oriented organizations predominately said they were using balanced approaches, or ones mostly strategic in nature. This latter group will likely derive greater benefits from their Enterprise 2.0 projects.

Figure 56. Is Implementation of Enterprise 2.0 in Your Organization Driven More by Ad Hoc Usage or a Strategy? (KM Inclined Organizations vs. All)

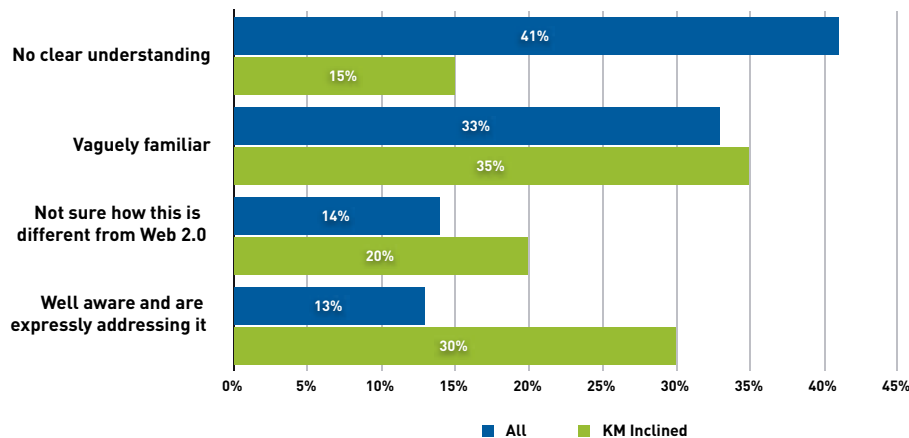


### Corporate Culture Drives Awareness and Adoption

Organizations that have a Knowledge Management-oriented culture indeed exhibit a higher level of understanding of Enterprise 2.0 and are further along in their implementations.

Where 41% of the overall survey respondents indicated that there was no clear understanding of Enterprise 2.0 in their organizations, only 15% of respondents from KM-oriented companies said the same thing. Among the Knowledge Management-oriented organizations polled, 30% were well aware of Enterprise 2.0 and are expressly addressing it. A recurring theme/obstacle in this group is a need for education in order to differentiate Enterprise 2.0 from Web 2.0. Twenty percent of the Knowledge Management-oriented organizations were not sure how the two are different.

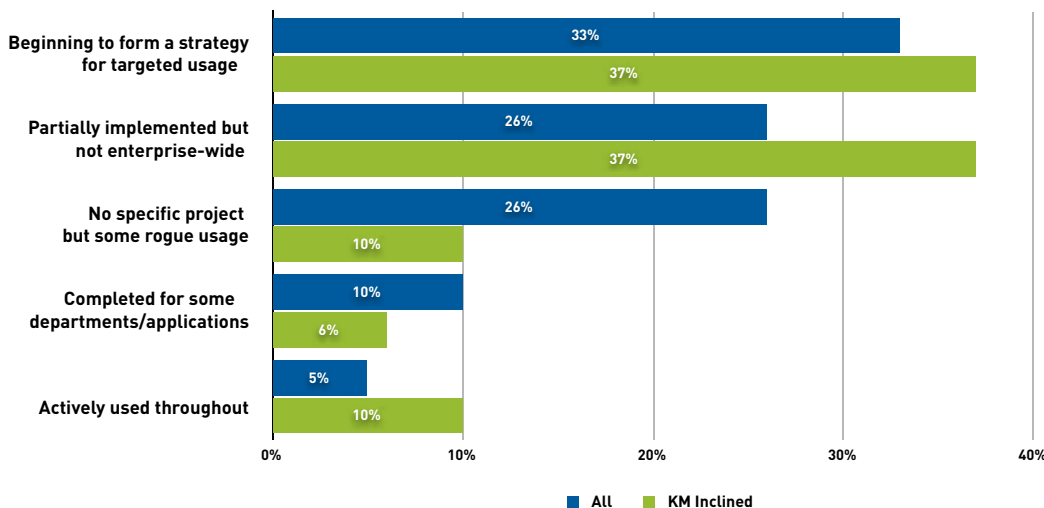
**Figure 57. How Well Is Enterprise 2.0 Understood in Your Organization? (KM Inclined Organizations vs. All)**



The level of strategic understanding and positioning of Enterprise 2.0 within organizations that have a Knowledge Management-oriented culture logically leads to more mature adoption of Enterprise 2.0. (See Figure 58.) There is only a slight difference between organizations that have a Knowledge Management-oriented culture and those that do not, regarding the formation of strategies for targeted usage of Enterprise 2.0. But, there is a marked difference between these two types of organizations concerning targeted implementations and rogue usage.

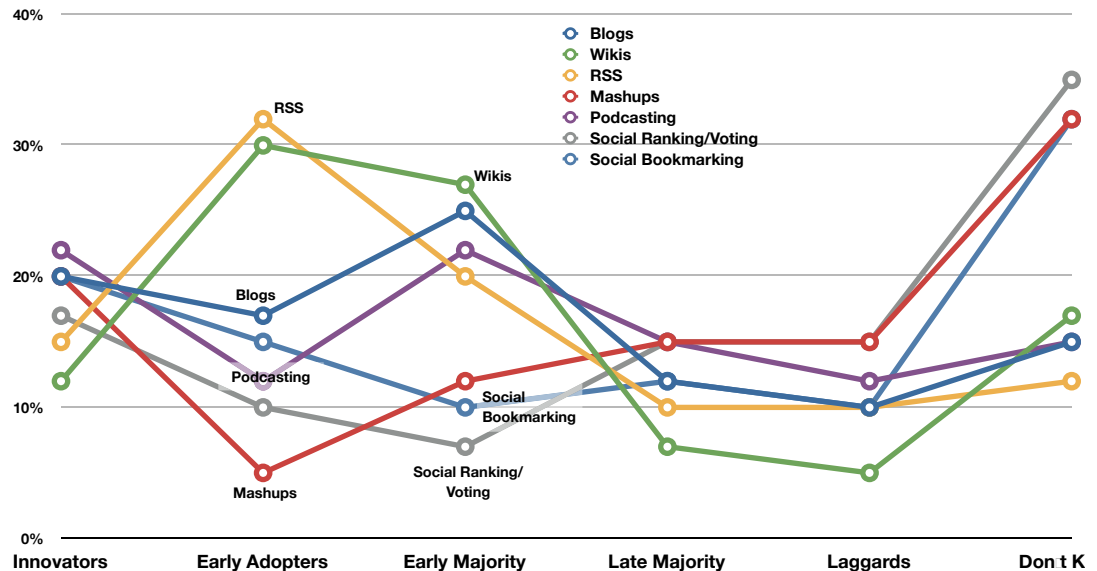
Knowledge Management-oriented organizations are twice as likely to be actively using Enterprise 2.0 throughout the organization, although overall this level of adoption is fairly immature.

**Figure 58. What Is Your Organization's Current Involvement with Enterprise 2.0? (KM Inclined Organizations vs. All)**

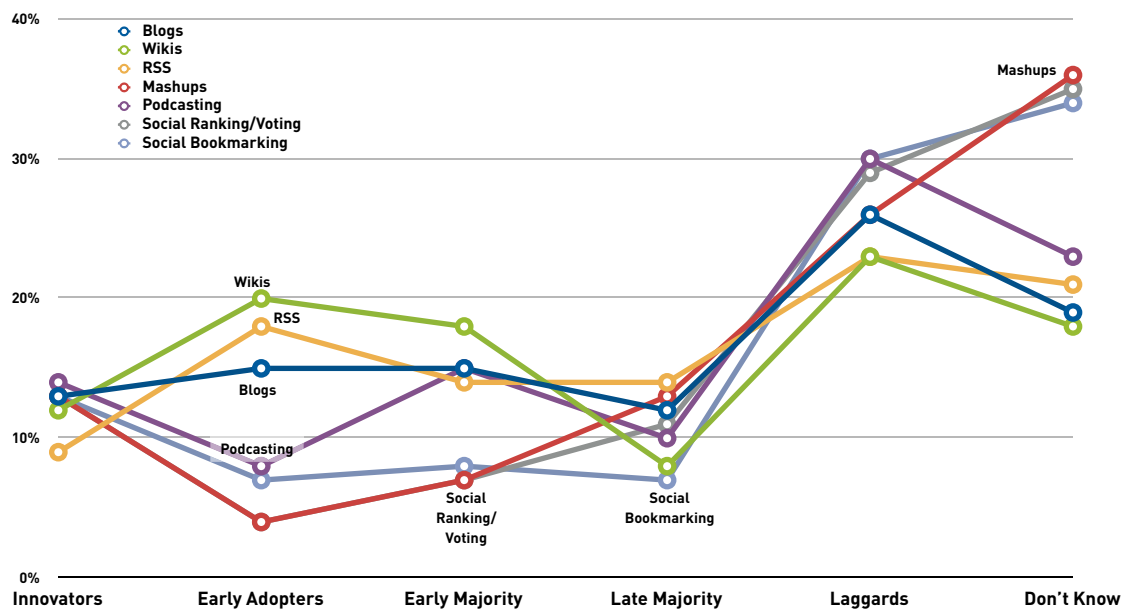


This more aggressive adoption of Enterprise 2.0 by Knowledge Management inclined organizations is intentional. These organizations are cognizant of being ahead of the general market concerning adoption of Enterprise 2.0 technologies. Respondents from these organizations were more likely to see themselves as early adopters of RSS, wikis and Social Networking, and part of an early majority for most other technologies. Far fewer Knowledge Management inclined organizations view themselves as laggards in the adoption of Enterprise 2.0 technologies, compared to is the other respondents to the survey. (Compare Figures 59 and 60.)

**Figure 59. Where Do You Feel Your Organization's Adoption Is with Regards to the Following Technologies? (KM Inclined Organizations)**



**Figure 60. Where Do You Feel Your Organization's Adoption Is with Regards to the Following Technologies? (All)**

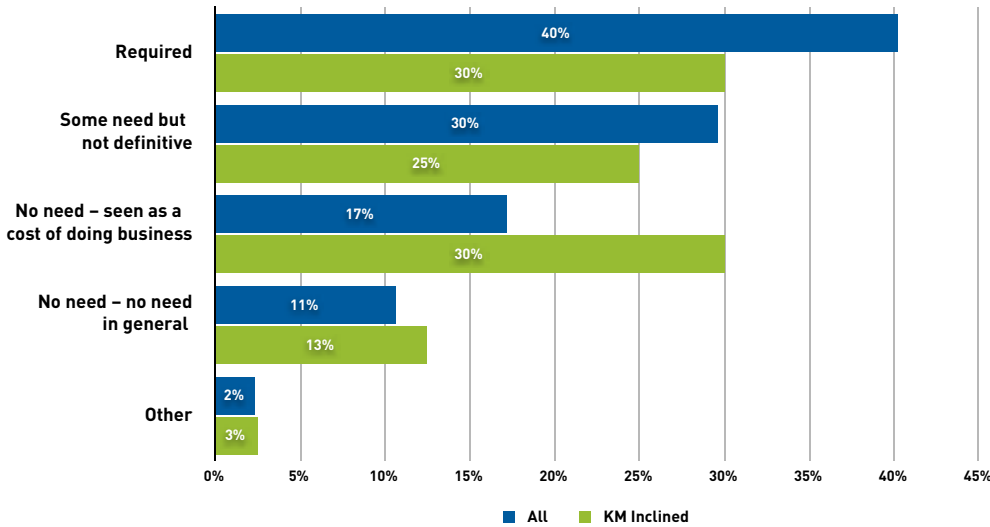


### Culture Aligns Perspectives and Reduces the Need for ROI

There is far less a need for an ROI justification of Enterprise 2.0 projects amongst Knowledge Management inclined organizations. Again, whether driven by successful past experience with knowledge sharing techniques, or just a predisposition to accept collaborative technologies, this inclination and reliance on knowledge practices manifests in a lesser need to “prove” the worth of an Enterprise 2.0 initiative. In keeping with a such a culture, 30% of the Knowledge Management inclined organizations view Enterprise 2.0 as a cost of doing business and therefore do not require an ROI, as opposed to only 17% of companies without such a culture.

That said, 30% of the Knowledge Management inclined organizations Enterprise 2.0 needs an ROI. Perhaps these are organizations that, despite the potential alignment of Enterprise 2.0 with a company's goals, still view ROI as a basic business requirement.

**Figure 61. Is an ROI Study Required as Part of Your Planning for Enterprise 2.0? (KM Inclined Organizations vs. All)**

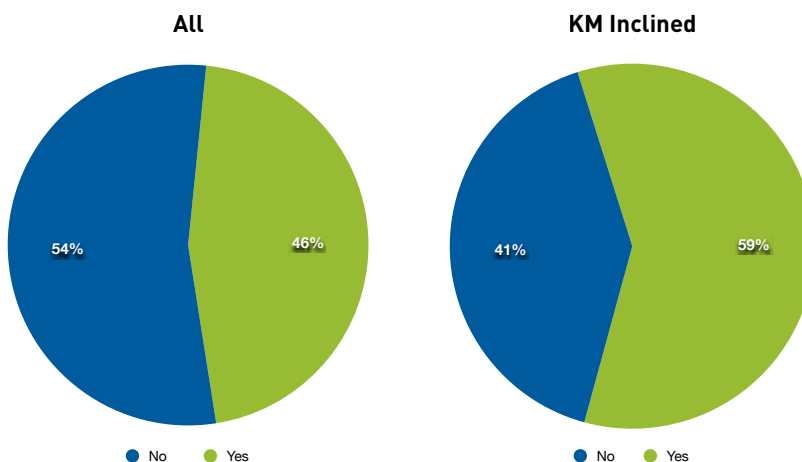


There is evidence, however, that within a Knowledge Management inclined organization, it is easier to show the value of Enterprise 2.0.

As a logical outcome of such cultures, there is a greater chance that individuals view the value and success of Enterprise 2.0, in a manner similar to the way their organization does. (See Figure 62.) Although this is not a foregone conclusion, a majority (59%) of respondents from Knowledge Management inclined companies indicated that there was alignment between their individual perspective and the organization's on what comprises success with Enterprise 2.0.

But the fact remains that 41% of these respondents do not share a similar perspective with their organization. This represents further insight into the lack of a straightforward, hard dollar approach to demonstrating the “worth” of an Enterprise 2.0 application—where the primary objective is “to increase collaboration”—even in the case of Knowledge Management inclined organizations. (See *Section 3: Why Enterprise 2.0 Now*, Figure 17, of this *Market IQ* for more detail.)

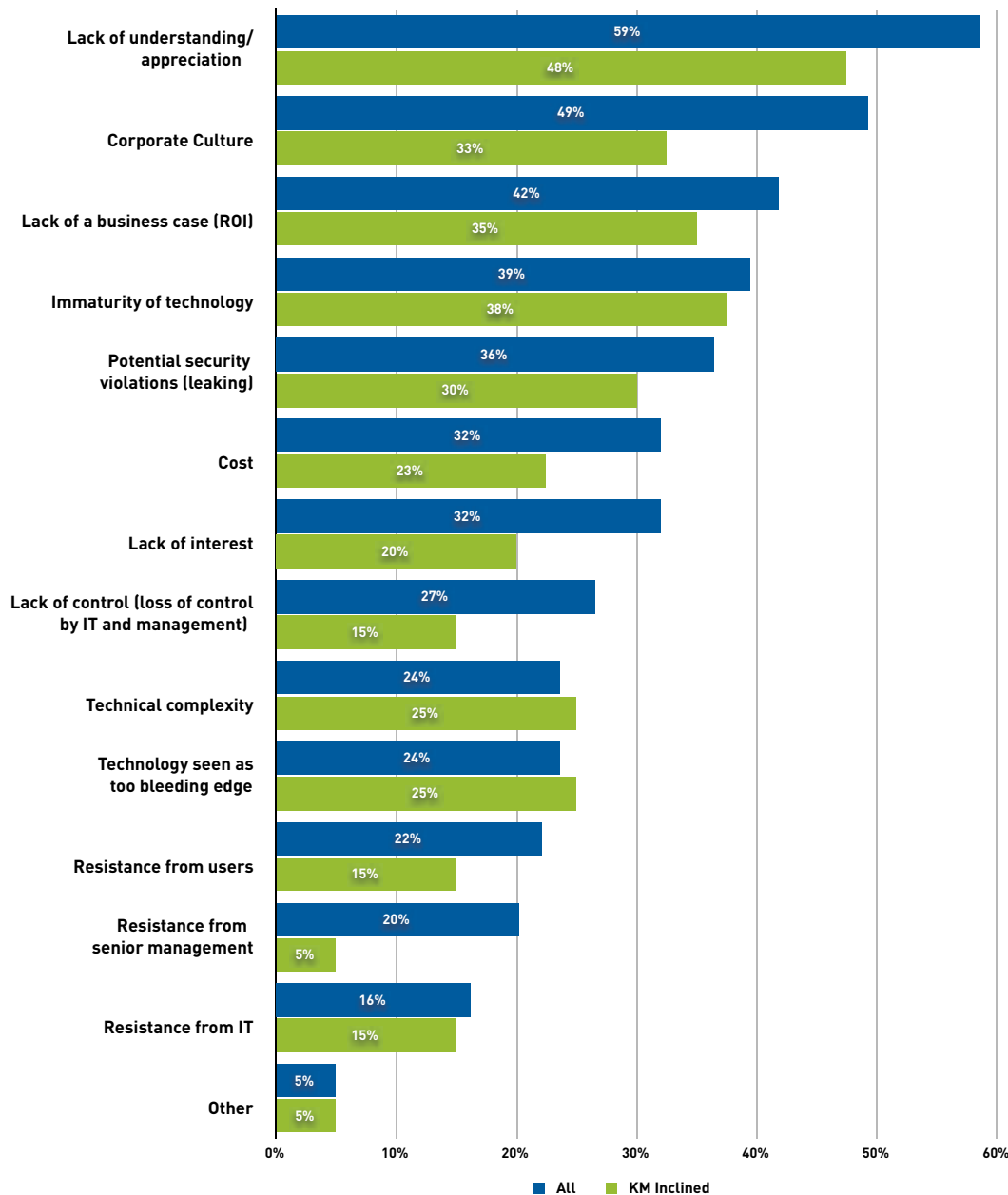
**Figure 62. Does Your Organization Measure the Success of Enterprise 2.0 the Same Way You Do? (KM Inclined Organizations vs. All)**



This is perhaps why despite the heightened awareness and adoption of Enterprise 2.0 among Knowledge Management inclined companies, the obstacles to implementation are predominately the same as those encountered by organizations that have not embraced Knowledge Management. (See Figure 63.) That said, while the obstacles are similar, they are not encountered nearly as much among Knowledge Management inclined organizations, with very few exceptions.

In keeping with earlier observations regarding the lesser need for a ROI, Knowledge Management inclined organizations are less likely to see cost as an obstacle to Enterprise 2.0 implementation. Logically, resistance from senior management and corporate culture are also less of a barrier amongst these companies, although given their nature, it is interesting that this is an issue at all.

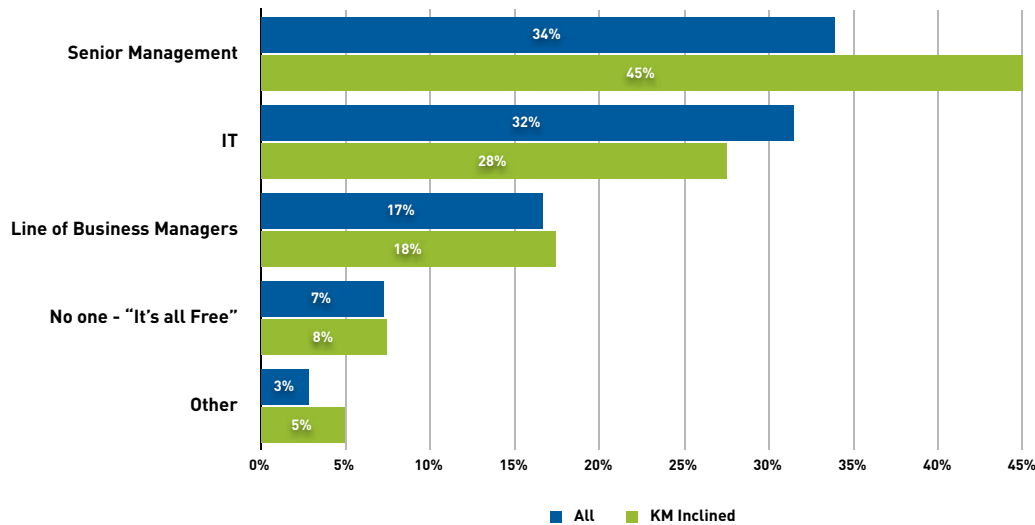
**Figure 63. What Are the Biggest Impediments to Implementing Enterprise 2.0 in Your Organization? (KM Inclined Organizations vs. All)**



### Culture Leads to Business Ownership, Leadership, and Wider Adoption

Organizations that have embraced Knowledge Management are far more likely to see Enterprise 2.0 as a business direction, as opposed to purely a technology strategy. Forty-five percent of these organizations place Enterprise 2.0 budgets under senior management versus 34% of other organizations. Similarly, 32% of other organizations place Enterprise 2.0 budgets under IT, while only 25% of Knowledge Management inclined organizations do so.

**Figure 64. Who Specifically has Budget Authority for Enterprise 2.0 in Your Organization? (KM Inclined Organizations vs. All)**



This business-centric approach to deployment, coupled with a receptive culture leads to a wider acceptance and adoption of Enterprise 2.0. Unlike other organizations, Knowledge Management inclined organizations go beyond project teams, and are more likely to leverage Enterprise 2.0 in cross-division projects and departmental setting. (See Figure 65.) They are also nearly twice more likely to be engaged with Enterprise 2.0 enterprise-wide.

In fact, when asked to identify the primary users of Enterprise 2.0 functionality, respondents from Knowledge Management inclined organizations ranked "all departments" second only to IT. This is in severe contrast to responses from the other respondents, for whom IT was the only significant primary user of Enterprise 2.0 functionality. (See Figure 66.)

**Figure 65. Where Is Enterprise 2.0 Used Predominately in Your Organization? (KM Inclined Organizations vs. All)**

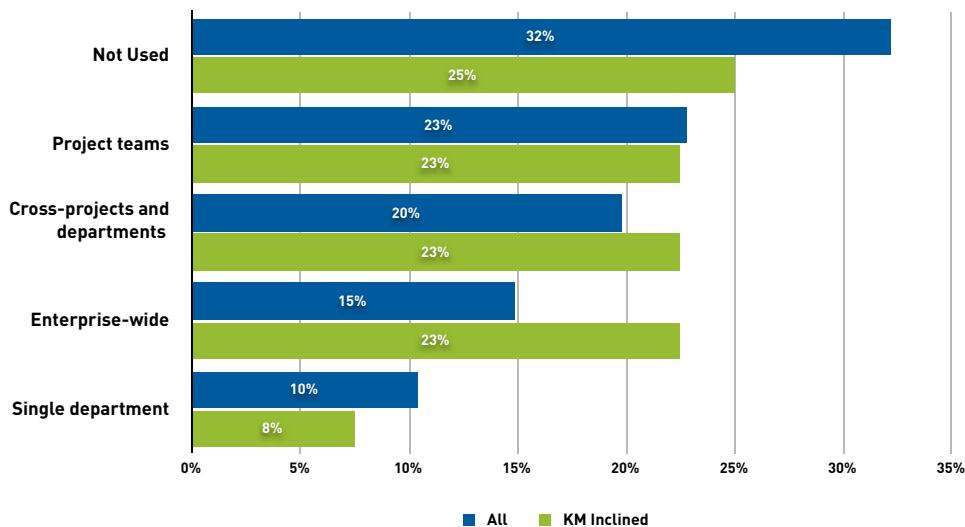
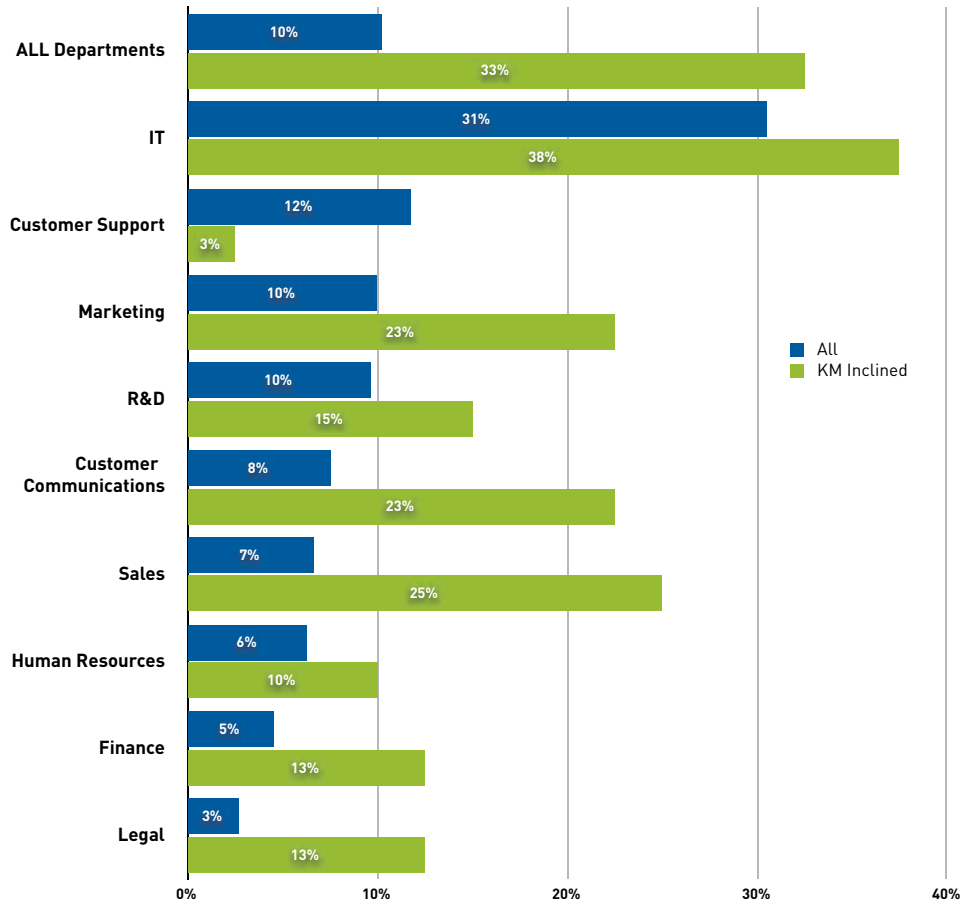


Figure 66. In Your Organization, Which Departments Are Primary Users of Enterprise 2.0 Functionality? (KM Inclined Organizations vs. All)



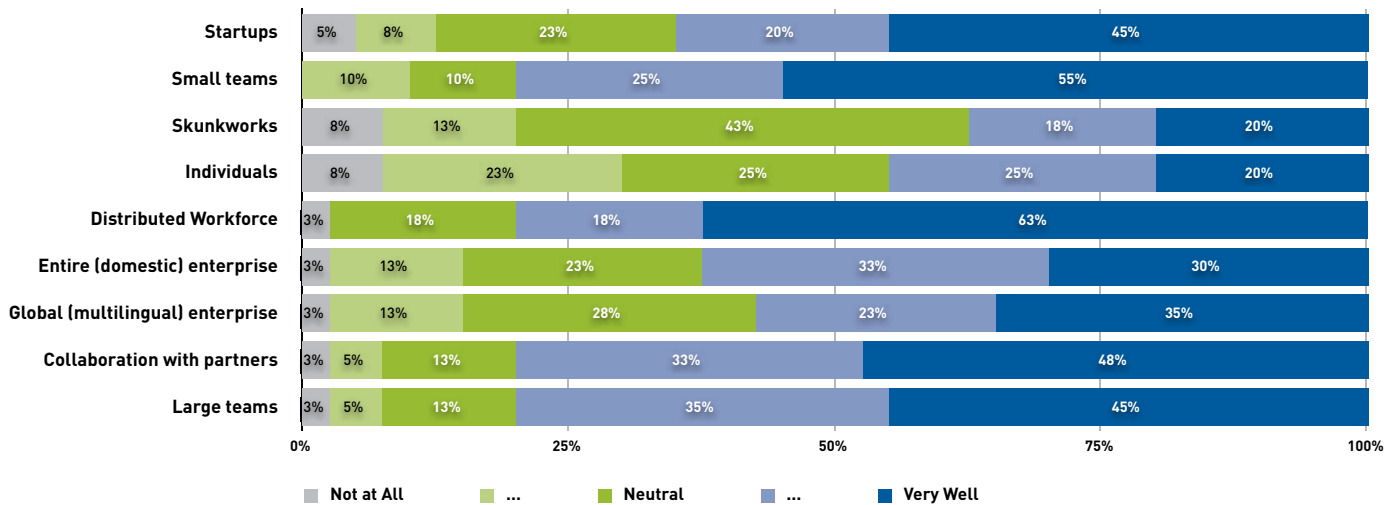
This level of adoption is directly related to a culture that includes an openness and keener understanding of where and how Enterprise 2.0 can be leveraged by particular groups, and the level of impact it can have. As previously stated, while generational affiliation influences the adoption and perception of Enterprise 2.0, this factor pales in comparison to the effect of an existing appreciation for Knowledge Management.

This is especially pronounced when attitudes regarding the suitability of Enterprise 2.0 to particular individuals and groups are compared. As introduced earlier in this section of the *Market IQ*, (See Figure 67.), Millennials exhibit a far more aggressive attitude concerning the applicability of Enterprise 2.0 to specific work groups. Millennials rankings were in step with the overall findings, but in each case put even greater emphasis on the degree to which Enterprise 2.0 is very well suited to these groups.

Respondents from Knowledge Management inclined organizations echoed the sentiments of Millennials, and were markedly more aggressive concerning the applicability of Enterprise 2.0 to startups, small teams, and distributed workforces.



Figure 67. How Well Suited Is Enterprise 2.0 for the Following People/Groups? (KM Inclined Organizations)



Overall, the results show that corporate culture has a profound impact on the way respondents view the business value of Enterprise 2.0. Individuals from Knowledge Management inclined organizations see the level of impact as significantly higher in every instance. Such lofty goals and expectations are symptomatic of communities that are ready to embrace easier, wider collaboration, that are appreciative of the benefits it provides, and are willing to provide the leadership needed to drive adoption and funding.

Figure 68. What Level of Impact (Planned or Realized) Does Enterprise 2.0 Have on Individuals in Your Organization? (KM Inclined Organizations)

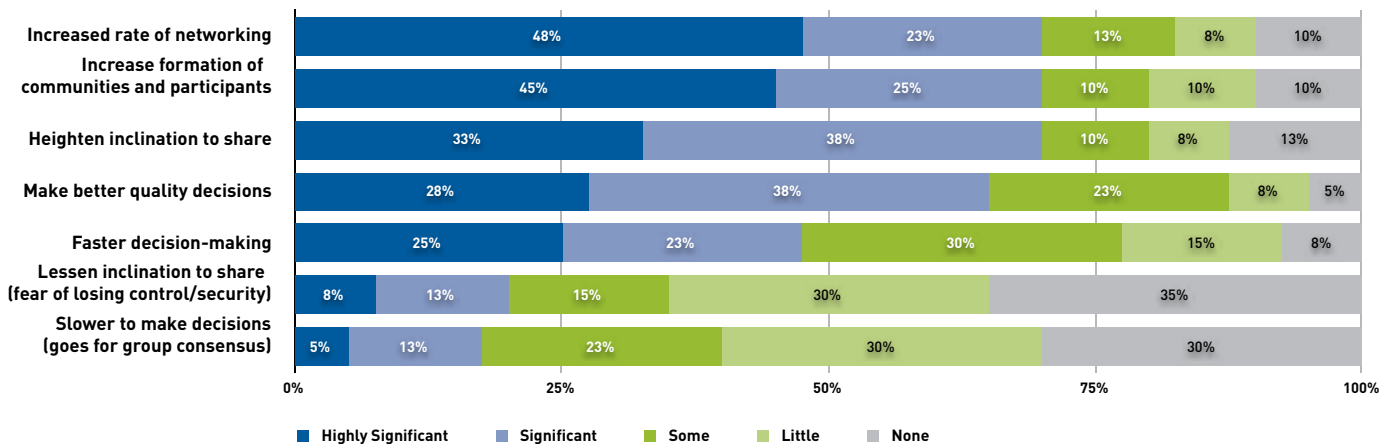


Figure 69. What Level of Impact (Planned or Realized) Does Enterprise 2.0 Have on Individuals in Your Organization? (All Organizations)

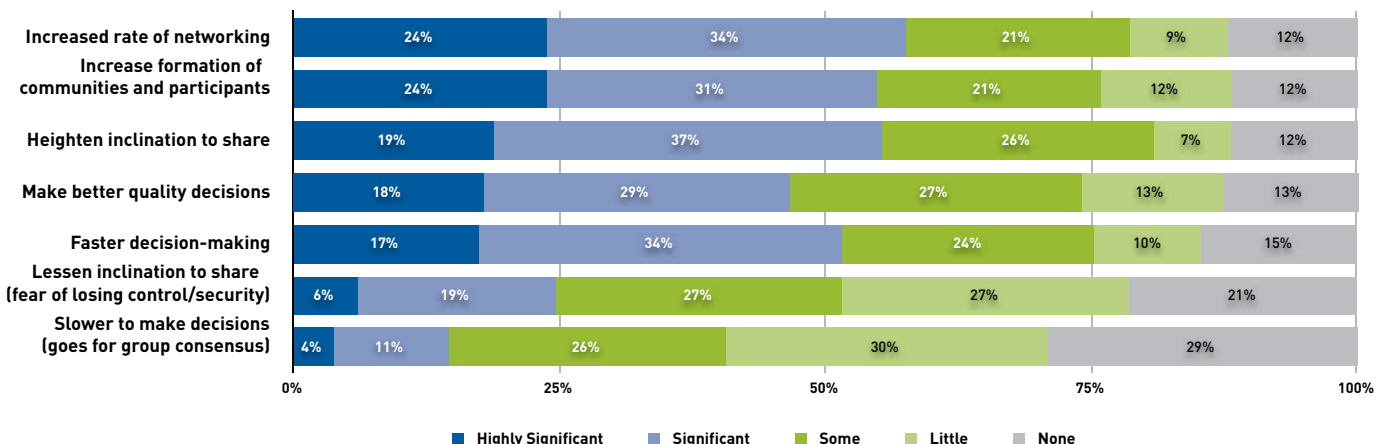


Figure 70. What Impact (Planned or Realized) Does Enterprise 2.0 Have on the Following Business Goals and Objectives in Your Organization? (KM Inclined Organizations)

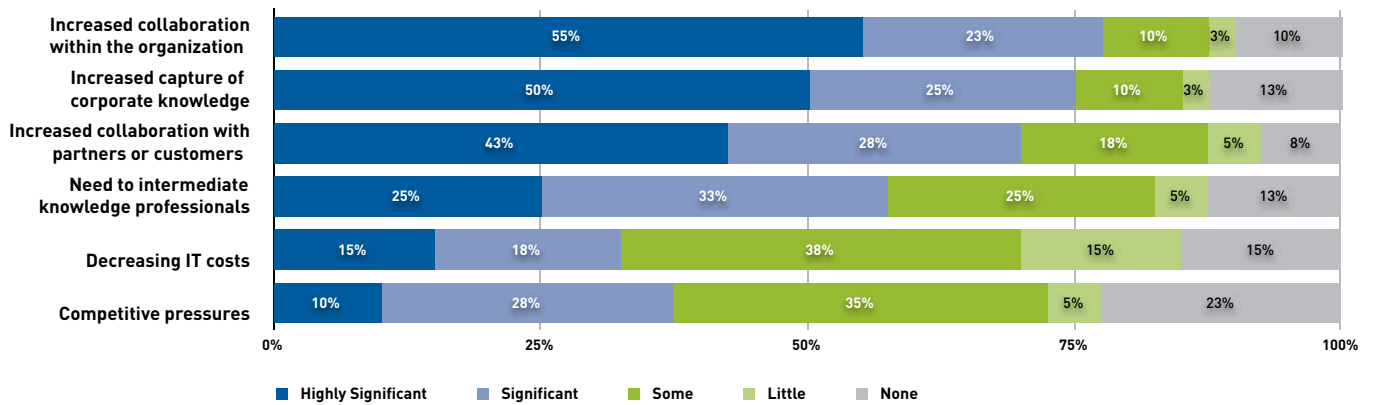
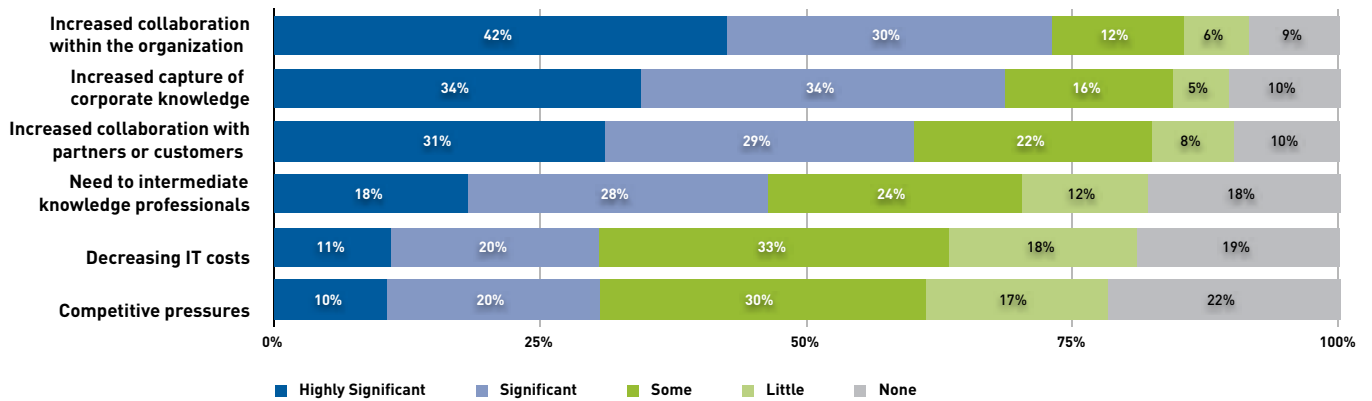


Figure 71. What Impact (Planned or Realized) Does Enterprise 2.0 Have on the Following Business Goals and Objectives in Your Organization? (All Organizations)



There is an appreciation for how Enterprise 2.0 will (tactically) be critical to success, but little understanding of how it can be leveraged strategically across the enterprise. Most organizations are not addressing Enterprise 2.0 in a deliberate manner, which leads to the chasm between perceived critical need and the level of understanding.

## Section 6

### Conclusions and Developing an Enterprise 2.0 Model

In the short time since the term Enterprise 2.0 was coined in 2006, it has achieved significant attention from the business and technology communities. As introduced in Section 3, 44% of survey respondents indicated that Enterprise 2.0 is significant or imperative to business success. More importantly, only 30% indicated that Enterprise 2.0 has little to no impact on business success. Indeed, Enterprise 2.0 has been at least discussed by 73% of the surveyed organizations.

On the other hand, as introduced in Section 4, much of the current Enterprise 2.0 activity is characterized as rogue usage, non-strategic in nature. Only 33% of polled organizations are starting to form a targeted Enterprise 2.0 strategy and just 5% reported enterprise-wide usage of Enterprise 2.0 technologies and techniques.

As introduced in Section 3, there is much confusion and a vague understanding at best concerning Enterprise 2.0. As Section 2 outlined, most survey respondents claimed to have high awareness concerning individual Enterprise 2.0 technologies, but Section 1 showed there is no clear definition of Enterprise 2.0 among survey respondents.

There is an appreciation for how Enterprise 2.0 will (tactically) be critical to success, but little understanding of how it can be leveraged strategically across the enterprise. Most organizations are not addressing Enterprise 2.0 in a deliberate manner, (which leads to the chasm between perceived critical need and the level of understanding).

Nearly half (45%) of the surveyed organizations are predominately deploying Enterprise 2.0 technologies in an ad hoc manner. Only 26% of the companies are taking a mostly or exclusively strategic approach.

The low-barrier, low-cost nature of Enterprise 2.0 acts as a double-edged sword. Users and groups of users can readily deploy the associated technologies and achieve some level of benefit. This potentially enables an organization to learn through experience.

But the results may be siloed both in terms of participants and technologies. If the value from Enterprise 2.0 is to be maximized, and leveraged as a bona-fide enterprise resource, there needs to be an educated and calculated alignment of technology, processes, and business goals. As the research showed, this has not yet happened in the majority of organizations.

This nascent state of the market is likely a fundamental reason why 77% of the organizations that conducted an ROI exercise around Enterprise 2.0 couldn't achieve an acceptable result.

Siloed implementations can cause myopic views toward alternative technologies. Section 2 introduced the range of technology components that potentially comprise an Enterprise 2.0 platform. If an organization is initially exposed to wiki technology, for example, they may erroneously believe all collaboration should occur in this format. Also, simply replacing a portal or intranet with a wiki is potential disaster waiting to happen. A plethora of technologies—including some that preceded Enterprise 2.0—can and should be leveraged to establish an effective Enterprise 2.0 platform, one that integrates into a broader IT strategy encompassing governance and process control.

Strategic approaches to Enterprise 2.0 should also recognize and take into consideration community attitudes, current practices/experiences, and corporate culture. This is what makes Enterprise 2.0 expand from a series of technologies into a business system. Section 5 introduced the impact that age and culture can have on Enterprise 2.0 initiatives. This issue should not be ignored by any organization. Too frequently, emerging technologies are promoted under the “Field of Dreams” premise: “Build it and they will come.” This will be true, in only the most serendipitous situations.

Initially, an organization may choose to experiment with Enterprise 2.0 as part of an education, or to leverage its low-barrier nature to quickly solve some immediate points of pain or need. While one strength

of Enterprise 2.0 is the fact that it allows specific technologies to be user-driven in an ad hoc, low-barrier manner, it behooves the organization to take a strategic approach to the technical and cultural side of Enterprise 2.0.

Such a strategy is founded on the definition and evaluation of three specific aspects of an organization, and determining their point(s) of intersection. These are goals/objectives, technology, and culture.

## Goals and Objectives

Most organizations point to goals such as increased communication and increased collaboration as the endgame of Enterprise 2.0. Such statements recognize the concept's basic capabilities, and are perhaps a good starting point to developing a strategy, but there is a need to go further. Why does an organization desire increased collaboration and communication? What current business challenges and opportunities will it address? Will such capabilities provide equal levels of benefit across all functional areas, applications, teams, and projects? Do different sub-communities or applications within the organization require the same approach to collaboration and communication?

More importantly, if “no friction” collaboration and communication were accomplished in each of these settings, what is the anticipated specific business advantage? Should the organization expect to experience increased customer satisfaction, quicker time to market, increased market share, faster compliance with regulations and legal demands? The list is virtually infinite, with a crucial one overarching the entire discussion: Do the increased collaborative abilities provide an entirely new business model, service, or product?

The objective of this facet of the Enterprise 2.0 strategy is to put some boundaries on the limitless menu of potential endgames and specifically set a target. As part of this effort, it is also wise to establish from the outset, a metric by which change (positive or negative) will be measured, lest an organization may never definitively know the degree to which its goals are being met.

As discussed earlier in this *Market IQ*, this is an elusive issue. It defied definition in a simple and direct survey question by advisers and ourselves. Nonetheless, it is an issue that an enterprise can and must try to address. In the current market, too many organizations are not making a formal, consistent effort. ( 59% of survey respondents stated that their organization did not measure the success of Enterprise 2.0 in the same way that they did.)

## Technology

A technology strategy can be developed by fostering an appreciation for goals, objectives, targeted applications, and communities. It should include an inventory of current capabilities. As we discussed in this *Market IQ*, Enterprise 2.0 technologies can be complemented and augmented through a host of other types of technologies.

The Enterprise 2.0 strategy should leverage existing technology investments and provide extended functionality through the integration of multiple point technologies. Enterprise 2.0 components may obviate the need for certain intranets and/or portals. The ability to do that may provide additional input into an Enterprise 2.0 ROI study. Conversely, existing platforms, such as intranets and or portals may provide an underlying platform for introducing Enterprise 2.0 to a community and linking it to other applications and sources of content.

Similarly, it should be determined whether existing 1.0 and 1.5 technologies can be leveraged (e.g., e-mail as a delivery for E20 signals, or chat rooms as a discussion forum for wikis).

It should also be appreciated that the introduction of Enterprise 2.0 is likely to result in the creation of more enterprise content (everything from blog posts to meta tags). This content must be viewed with the same scrutiny as any other form of enterprise content. Does it need to be searchable—how and by whom? Issues such as publishing control and access controls levels should also be addressed. Depending on requirements, there may be a need for search, taxonomy, Web content management, workflow and BPM.

The technology assessment should provide an inventory of current functionality, and of required or desired functionality. By comparing the two lists, enterprises can identify gaps and set priorities.

Before the implementation strategy is finalized, however, the enterprise should also analyze its culture. As stressed in Section 5, culture exerts a powerful influence on enterprise attitudes, opinions and adoption rates of Enterprise 2.0. Technology decisions concerning issue of control and security are often based on cultural inclinations rather than strict legal requirements (although these too must be considered).

## Culture

Culture indeed impacts the attitudes toward and speed of deployment of Enterprise 2.0. Any strategy should clearly understand that culture's profile, strengths and challenges. The organization's attitude toward knowledge capture, collaboration, low-barrier application development, and open communication also need to be assessed.

While this must be done for the entire enterprise, any analysis should also be vigilant to weigh anomalies, or sub-groups within the enterprise that exhibit unique cultures and inclinations. Potentially, these can be better than the norm (e.g., a project team that stresses the need for collaboration and is already working in an open collaborative environment), or worse (e.g., a functional group that does not believe its content needs to be shared, that sees little or no value in access to content or individuals in other functional areas, and believes any and all content should be subjected to strict security).

Section 5 discussed the impact that workers' age can have on attitudes and adoption of Enterprise 2.0. The potential of leveraging generational attitudes within an enterprise should be determined as part of a cultural assessment.

Various methodologies and techniques can be used to perform the cultural assessment, but ultimately the profile should outline the enterprise's attitude and inclination to the business proposition of Enterprise 2.0: Open, collaborative, highly social, low-barrier business processing.

The corporate culture should be ranked or positioned within a spectrum. A desired end state can also be included. (See Figure 72.) This allows for a gap analysis of the company's culture, and the change management that might be required.

It should be appreciated that within a corporate culture, subcultures may exist. These can be associated with an official department or project team that exhibits a distinctive unique culture, or rogue community of individuals that share a common approach to work. These subcultures are not just identifiable, but different from the overall corporate culture. In other words, many subgroups and communities may exist that share a general culture with the organization as a whole. These can be rolled into the overall organizational culture assessment.

The type of subcultures this level of analysis focuses on exhibit a culture markedly different from the overall corporate culture. These can be more open and collaborative (positive) than the organizational norm, or more closed and insular (negative).

More positive subcultures potentially represent fertile ground for Enterprise 2.0 pilots. Subcultures that tend to be negative should be avoided initially, until there is success in moving the culture forward, so that it might embrace the levels of facilitated collaboration being targeted by the Enterprise 2.0 initiative.

In each instance, however the validity of the subculture should be determined. In other words, the legal department of a highly regulated and litigious company may exhibit a highly controlling and closed culture. This may be in the best interest of the organization, and should not be challenged. In the absence of valid legitimate business reasons, any subculture that lags behind the organization, especially an organization that has targeted Enterprise 2.0 to help drive and facilitate collaboration, needs to be managed and led to change, or else they will be left behind in the best-case scenario, or will sabotage the success of an Enterprise 2.0 initiative, in the worst-case scenario.

**Figure 72. The Cultural Inclination Continuum**



This figure represents a spectrum of potential organizational cultures concerning collaboration. The far left end, labeled “Isolated Protectionism,” represents an extreme state of siloed functions, applications, and people. Cultures positioned at the far left would exhibit technical and social isolation. Little to no cross-application integration is provided. Technical capabilities are repeated in each department. Cross-functional teams are non-existent. No effort is made to proactively share know-how and insights. Management style is typically hierarchical, command and control.

The far right end, labeled “Fully Engaged & Extended,” represents an extreme state of openness and collaboration. Technology and management styles are leveraged to foster open communication and sharing. Workers are encouraged and rewarded for collaborative development. Business processes openly and directly involve entities not traditionally viewed as within the organization (e.g., partners, customers and suppliers). Automated approaches to emergence are used to drive collective wisdom and awareness.

In between these two extremes are varying levels of openness and cooperation. Team-based development, network management styles, integrated applications and use of technology to encourage sharing of know-how within the organization would exist to one degree or another. Communities of Practice and Communities of Interest exist. Approaches to assessing collective wisdom are used. Social networking facilitates the brokering of like-thinkers. (The more frequent and strongly these characteristics appear, the further the culture moves to the right.)

In this example, arrows have been inserted at various points of the continuum. The arrows on the bottom of the bar represent the overall assessed current culture (the bar to the left), and the desired end state, (the bar to the right), the culture assessed as the ultimate goal for the Enterprise 2.0 project, as determined by its champion(s). The space between them represents the degree to which cultural change management is an issue for the project. Technology introduction must be carefully orchestrated with approaches to move the culture to a more collaborative state, increasing the chance that employees will embrace the collaborative functionality and leverage its potential.

The arrows on the top represent identified subcultures within the enterprise. In this example, four subcultures were identified.

The two arrows on the left represent subcultures that lag behind the overall culture. These communities are not fertile starting points for an Enterprise 2.0 initiative. Further assessment is warranted to determine if these subcultures should be allowed to remain intact, or challenged, providing guidance on moving to a more open environment and embracing Enterprise 2.0 functionality as it is rolled out.

The two arrows on the right represent subcultures that are more open than the overall culture. These communities are fertile starting points for an Enterprise 2.0 initiative. These cultures do not have to be managed or educated as part of the Enterprise 2.0 initiative in order to sell them on the merits of the Enterprise 2.0 model.

### Security as a Component of Culture

As part of the cultural assessment, it is also wise to separately and specifically assess the organization's perspective on security. As indicated in Section 5, more senior respondents tended to rank the need for security and control more highly than younger respondents. Every organization should determine if this rift is evident in their case, and more importantly, if it is caused by valid business concerns not seen by junior staff, or dated inclinations by older workers.

In fact, any security concerns should be examined in this manner. Some may be legitimate requirements (e.g., blogs and wikis associated with particular product development teams may be subjected to strict industry and government compliance and security issues. This may require proactive records management and file-level access controls. Other security concerns may be founded only in paranoia and unnecessary approaches to business. These should not be ignored, but must be addressed from a culture change management perspective, not a compliance perspective.

Legitimate concerns need to be addressed because as has been highlighted throughout this *Market IQ*, the low-barrier, open nature of Enterprise 2.0 constitutes

a double-edged sword. This ability, matched with a zeal to accelerate collaboration and realize the many benefits associated with Enterprise 2.0 may later lead to legal and compliance issues similar to those experienced of late by organizations that naively and enthusiastically embraced e-mail, without a critical eye on legal and compliance issues.

Enterprise 2.0 security is potentially a complex issue that may need to be aligned more broadly into an enterprise content management strategy. The orchestration of multiple point technologies, used in a coordinated effort, provides more than just security of content. Content security is a lifecycle approach to not only protecting content, but to maximizing the value derived from it.

The issue of content security was the focus of the Q4 2007 *AIIM Market IQ*. That report should be referenced for further detail on state-of-the-art approaches to securing enterprise content (including Enterprise 2.0 content), and developing formidable enterprise content security schemes.

**Figure 73. The Control/Security—Collaboration/Innovation Continuum**



This figure was originally introduced in Section 3 of the *AIIM Market IQ on Content Security*. It represents a roll-up of an organization's business needs spanning from its need or desire to control and secure content on one hand, over to its interest in collaboration—the focus of Enterprise 2.0.

In this example, arrows have been inserted at various points of the continuum. They represent specific requirements of the business, based on a full needs assessment. When viewed collectively, a full appreciation for the degree to which a strategy and system are needed to secure and control, the degree to which security is not an issue (open content up to unfettered access), and the degree to which regulated and monitored access is required (the gray area), becomes evident. Based on this level of analysis, a technology strategy, to support the business strategy begins to develop.

In this example, the organization has determined it has six specific policies or levels of security to provide. There is a slight preference toward "control & secure." In these instances, emphasis will be placed on technologies such as trusted timestamps, CAS and records management.

The two arrows approximately in the middle of the continuum suggest that policies must be created that support regulated and monitored access, indicating a need for technologies such as digital rights management, Web content management, and data loss prevention.

The arrow at the far right of the continuum represents a need to make some content generally available in a highly collaborative format. This may require technologies such as content and user authentication. The continuum is not the definition of the strategy per se, but a way to visually appreciate the range of needs.

## The Impact of Enterprise 2.0

The formation of an Enterprise 2.0 strategy that looks at needs across all user types as well as business drivers across every business area, requires a formidable effort. But this work provides great reward. Ad hoc rogue implementation is currently the more popular approach to implementing Enterprise 2.0 in most organizations. There is some benefit to this, but also drawbacks, including the challenges of executing a positive ROI. Both aspects are discussed in this report.

If Enterprise 2.0 implementations are strictly left to grassroots, informal adoptions, the full potential of the capabilities may not be realized. There is a chance of developing redundant systems and siloed applications, as well as simply putting technology in place

to support existing business approaches, rather than reevaluating the underlying paradigms and enabling new and innovative approaches. There is also the potential to create security and compliance concerns, ones that might not immediately be realized, but could potentially grow greatly in magnitude later on.

Enterprise 2.0 is about facilitating business processes and communication, the creation of official business content. Therefore, it should be addressed with the appropriate level of seriousness and deliberate action. The end result of taking a centralized strategic view to Enterprise 2.0 is not just a well thought out strategy, but a much clearer appreciation for how the investment in Enterprise 2.0 can be leveraged across the organization.



## Appendix A Methodology Used & Survey Demographics

### Methodology Used

Two sources were used in producing this *Market IQ*, the accumulated experience and ongoing research of the AIIM Market Intelligence team (with input from our advisory panel), and a survey developed and administered by the AIIM Market Intelligence team.

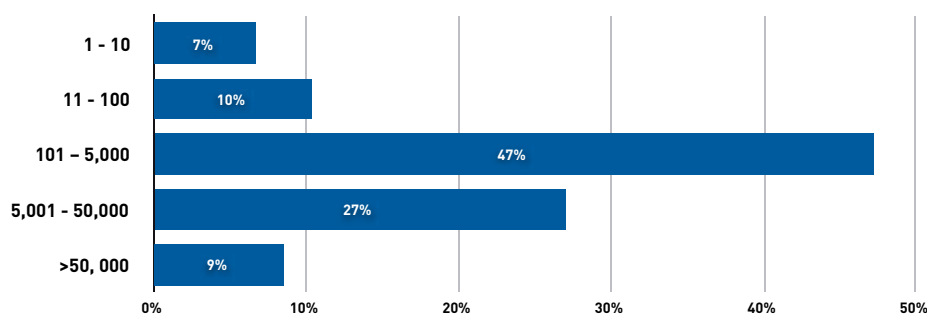
The survey was conducted between January 7 and January 18, 2008, using a Web-based survey instrument. Invitations to take the survey were sent via e-mail to several thousand individuals both from the AIIM community and outside the AIIM community. A total of 441 individuals responded to the survey.

### Survey Demographics

#### Organizational Size

Survey respondents represented organizations of all sizes. The largest portion (47%) of the survey population was comprised of medium-sized organizations (101 – 5,000 employees), with the second largest grouping (27%) being large organizations (5,001 – 50,000 employees). The entire breakdown by company size is provided in Figure 74.

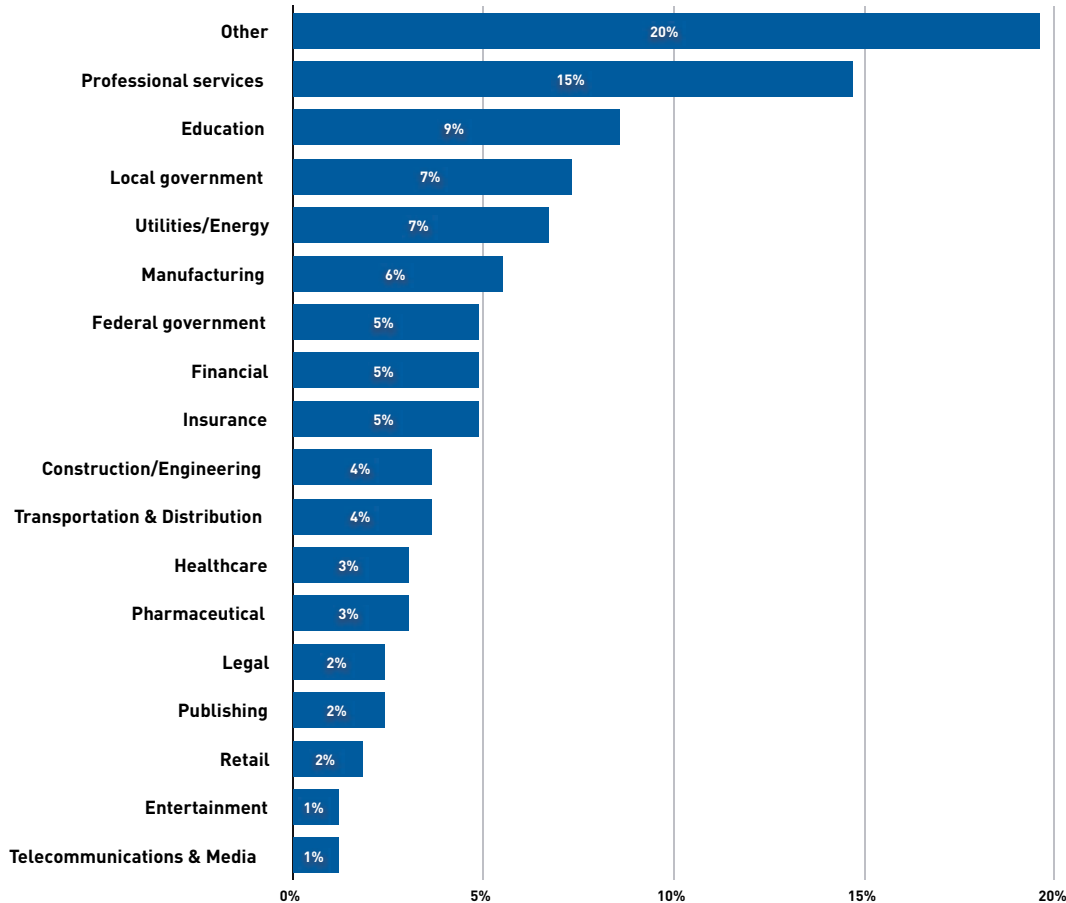
Figure 74. How Many Employees Are in Your Organization?



## Vertical Industry Affiliation

The survey population was comprised of individuals from across a broad swath of vertical industries. With the exception of Professional Services (15%), no single vertical industry comprised more than 9% of the total population. This provided a good perspective across verticals.

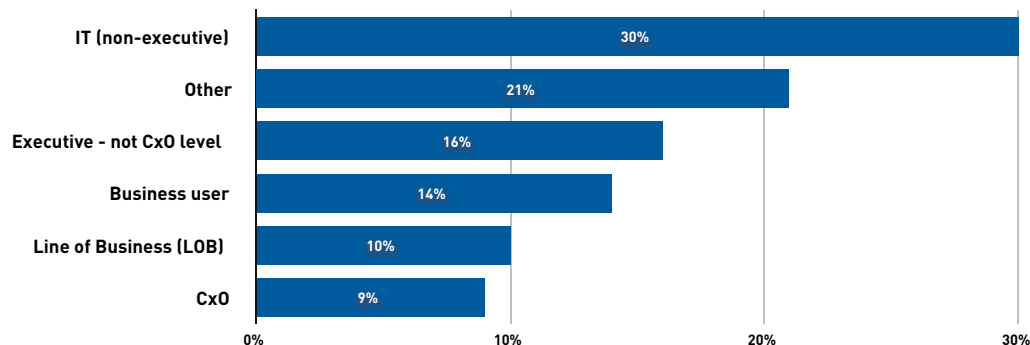
Figure 75. Which Vertical Industry Do You Work In?



## Role

Survey findings are reflective of multiple roles and departments within an organization. IT-related personnel accounted for 30% of the survey population. Senior-level management (including CxOs) comprised 25% of the survey population. The entire breakdown by role is provided in Figure 76.

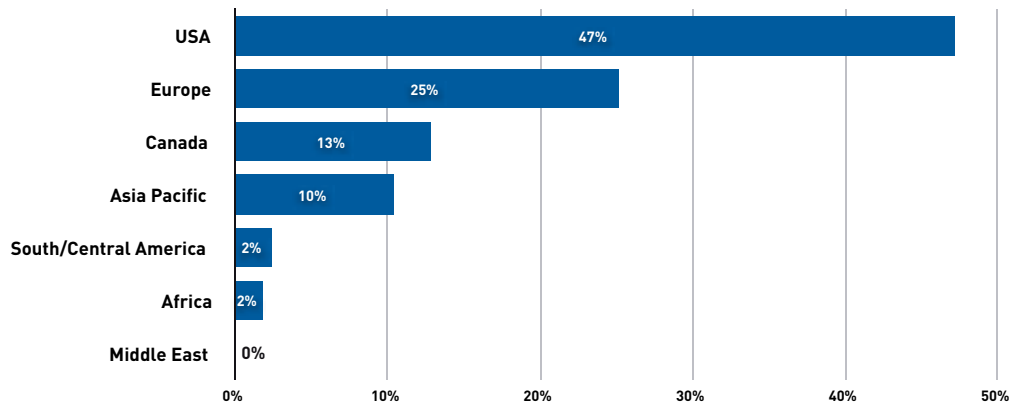
Figure 76. What Is Your Role in Your Organization?



## Geographic Region and Global Reach

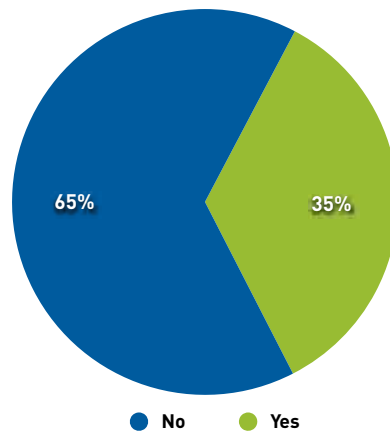
Overall, the survey findings are reflective of a global community. Nearly half (47%) of the survey population came from the United States. Another 13% came from Canada. European respondents comprised 25% of the survey group. The remaining 15% were spread across regions, as indicated in Figure 77.

Figure 77. In Which Geographic Region Are You Located?



The surveyed organizations, on the other hand, were split between those that are global organizations and those that are physically located in only one region.

Figure 78. Is Your Organization a Global Organization (i.e. Has Physical Offices in Multiple Countries/Regions)?

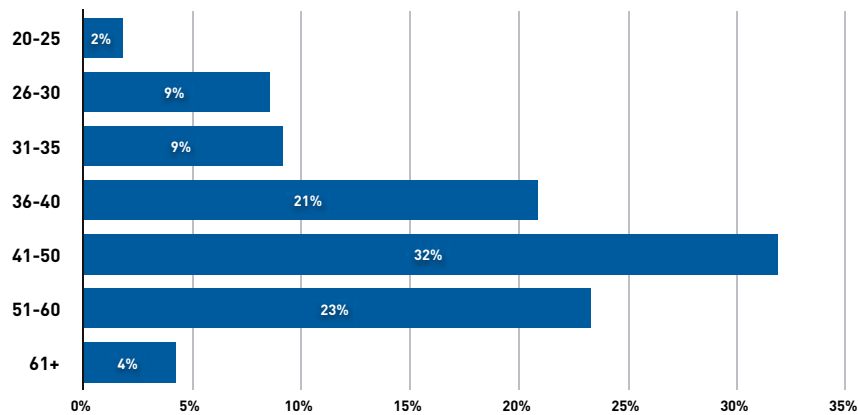


## Age

Normally we do not segregate the survey responses by age. In the case of Enterprise 2.0, however, given the potential for a rift in opinion based on generation affiliation, we did ask survey respondents for their respective age. Responses were grouped into generations categories (i.e., Millennials = 20–35 years old, Gen X = 36–50 years old, and Boomers = 51+ years old).

Approximately half (53%) of the survey population was GenXers, with a nearly even split of the other half between Boomers (27%) and Millennials (20%). This provided a cross sampling of opinions by generational affiliation. In some instances, there were marked differences of opinion and experience based on generational affiliation. (See *Section 5: Generational and Cultural Impacts* for more detail.)

**Figure 79. How Old Are You?**



## Knowledge Management Inclination

Lastly, survey respondents were asked to answer a series of 13 questions, with responses viewed in aggregate, in order to profile the organizational culture of the respective respondent. This approach to profiling was based on the KM2, Knowledge Management methodology. KM2, and this abbreviated form of it measure the propensity and inclination of an organization to adopt and leverage a knowledge sharing/collaborative culture and work environment. Based on this methodology, our survey population was separated into 40% associated with an organization that have a Knowledge Management inclined culture, and 60% associated with an organization that does not have a Knowledge Management inclined culture. In some instances, there were differences of opinion and experience associated with these two groups. (See *Section 5: Generational and Cultural Impacts* for more detail.)

## Appendix B Glossary

### Agent

Search/query functionality that runs in background 24/7, allowing relevant information to be delivered to users as it arrives, and can filter information according to user preferences.

### Agile Development

A family of development processes, not a single approach to software development, focused on ways of creating software in a lighter, faster, more people-centric way. Agile is Adaptive, and focuses on adapting quickly to changing realities rather than entirely pre-identified, hard-coded, predictive software requirements.

### Algorithm

A mathematical rule or procedure for solving a problem.

### Apache

A popular Web server that is freely available under an open source license. The current version runs on most UNIX-based operating systems, as well as on Windows. It is estimated that more than 60 percent of all Web sites run on Apache servers.

### Application Server

A server program that houses the business logic for an application, executing the operations necessary to complete transactions and other interactions between endusers and a businesses' back-end databases and applications. Application servers provide functionality such as load balancing, database access classes, transaction processing, and messaging.

### Asynchronous Communication

Exchange of ideas and content that bridges time and space. In asynchronous communications all recipients need not be connected to each other at the same time; messages are stored and forwarded as recipients become available.

### ATOM

"The name Atom applies to a pair of related standards. The Atom Syndication Format is an XML language used for web feeds, while the Atom Publishing Protocol is a simple HTTP-based protocol for creating and updating web resources."

[http://en.wikipedia.org/wiki/Atom\\_%28standard%29](http://en.wikipedia.org/wiki/Atom_%28standard%29)

It is a way of both consuming and producing feeds for feed aggregators and readers, and is a key component of the SIGNALS aspects of SLATES and FLATNESSES.

## Authorship

A facet of SLATES and FLATNESSES that refers to the ability to create content, both as an original “author” and in any other “participative” manner (such as commenting).

## Blog

Short for Web Log, a light-weight authoring platform, typically focused on a single-author model, primarily textual, although can include essentially any type of “multimedia” content as well. Commenting or other interaction methods are typically provided for audience participation. The lowered barrier of AUTHORSHIP with blogging platforms is credited with the more rapid adoption of such toolsets, versus a traditional Web authoring system.

## Browsing

From a “knowledge-seeking” standpoint, the electronic equivalent of wandering the library stacks, looking for related information, rather than launching a purposeful, specific “search” (based on keywords or other criteria).

## Bulletin Boards (BBS)

An online, group-oriented and conversation-based facility to exchange ideas. Precursor to Discussion Forums and more modern “social networking” solutions, these were siloed and disconnected from related systems, coded in proprietary client/server technology, and frequently oriented towards a local region.

## Business Intelligence

The practice of gathering and coordinating operational data and using it to create aggregate reports for executives and managers. Competitive organizations accumulate business intelligence in order to gain sustainable competitive advantage, and may regard such intelligence as a valuable core competency. BI often uses Key Performance Indicators (KPIs) to assess the present state of business and to prescribe a course of action.

## Business Process Management (BPM)

A means to study, identify, change, and monitor business processes.

A generic term that encompasses the techniques, structured methods, and means to streamline operations and increase efficiency.

BPM techniques and methods to enable the identification and modification of existing processes to align them with a desired (improved) future state.

## Chat Room

Free-form, “real-time” communication channels, which may or may not have archives for historical views. Used primarily for “live” discussions, such as online meetings, in an enterprise setting.

## Classification

Organization by categories in a systematic manner—for example grouping by subject, function, or other criteria.

## Clustering

Used in the context of document categorization to describe unsupervised methods for identifying classes of documents based on their similarity, typically using neural network or statistical methods.

## COI (Community of Interest)

A group of two or more people that share a common interest.

## Collaboration

“Working together to fulfill a shared, collective, and bounded goal.” - Source: [http://en.wikipedia.org/wiki/Collaboration\\_software](http://en.wikipedia.org/wiki/Collaboration_software)

Collaborative software, also known as groupware, is application software that integrates work on a single project by several concurrent users at separated workstations.

## Collaborative Filtering

A method of determining the relevance and/or “value” of content or other contributions by the actions of individuals. May be influenced by implicit actions (such as purchasing an item, indicating “popularity”), or explicit actions (such as a ranking or rating, whether textual or via a rating mechanism such as 1-5 star reviews).

## Collective Intelligence

Insight or discovery that emerges from the collaboration of many individuals.

## Concept-based Searching

A search for information related conceptually (at a higher or lower-level) to a keyword—rather than just those containing the specific term.

## Controlled Vocabularies

A collection of preferred terms that are used to assist in more precise retrieval of content. Controlled vocabulary terms can be used for populating attribute values during indexing, building labeling systems, and creating style guides and database schema. One type of a controlled vocabulary is a thesaurus.

## COP (Community of Practice)

A group of two or more people that share a common role, responsibility, or expertise.

## Crowdcasting

A problem-solving and idea-generating technique in which an organization provides details of a specific problem or situation to a group of people (crowd) for potential solutions. May be run as contests, with “prizes” ranging from public recognition, a payment for the “winning” idea, and potentially a revenue share of the ultimate solution. Used for both simple and complex problems, although the “crowd” being targeted for feedback may need to be adjusted depending on the required experience/knowledge to provide relevant solutions.

## Dashboard

A user interface paradigm used to simplify information presentation from underlying/attached systems up into a concise view, similar to an automotive dashboard. Intended to highlight the “core” information of any given process or business, and is typically linked to deeper Business Intelligence reporting capabilities, for further details.

## Discussion Forums

The evolution of Bulletin Boards (BBSs), into more flexible group-based knowledge exchanges. Asynchronous communication platform. The primary difference from BBSs was in the adoption of more open access methods to the forums themselves, whether via e-mail, or a Web-based interface.

## Dynamic Web

Addition of multimedia, interactive, or database-driven information to Web sites, as opposed to manually or “static” pages, frequently spoken of as “brochureware.”

## Emergence

Pattern analysis that detects issues/insights that arise out of a convergence of discrete actions. Analysis may be done by algorithms measuring facets of “interest” based on traffic, purchase habits, etc., or by humans observing patterns, such as popularity of blog entries by a simple count of the number of comments on an entry.

## Enterprise 2.0

A system of Web-based technologies that provide rapid and agile collaboration, information sharing, emergence and integration capabilities in the extended enterprise.

## Enterprise Architecture

The explicit description and documentation of the current and desired relationships among business and management processes and information technology.

## Enterprise Content Management (ECM)

The strategies, methods, and tools used to capture, manage, store, preserve, and deliver content in support of business goals and objectives.

## Enterprise Search

The practice of identifying and enabling specific content across the enterprise to be indexed, searched, and displayed to authorized

## Extensions

Recommendations to related content, provided to a system user, based on emergence from similar activity within the system.

## Feedback

Mechanisms established to create “emergent” indicators of the relevance and interest of content, communities, or contexts of Enterprise 2.0 systems. Dynamic and ongoing, the feedback systems and the emerging patterns may be overtly displayed (such as 1–5 star ratings on Amazon) or used to change the presentation or ranking of information.

## FLATNESSES

A framework for Enterprise 2.0 environments developed by Dion Hinchcliffe. The acronym stands for: Freeform, Links, Authorship, Tags, Network-oriented, Extensions, Social, Search, Emergence, and Signals.

## Folksonomy

A practice of collaborative categorization using freely chosen keywords. More colloquially, this refers to a group of people cooperating spontaneously to organize information into categories. In contrast to formal classification methods, this phenomenon typically only arises in non-hierarchical communities, such as public Web sites.

## Freeform

A facet of FLATNESSES that refers to the ability to create content with little to no barriers, ease of use.

## Identity Management

A set of security procedures and practices that manage information about users, including their attributes, roles within and organization, and access rights to objects.

## Indexing

The process of creating an index for a database or search engine. A database index associates specific keys or keywords with a unique record. Indexing facilitates the process of locating specific records within a database. Whether and how (and how often) a database, text, or XML repository is indexed can play a significant role in the quality of search results.

## Information Architecture

The organization of information in terms of navigation, layout and search functionality. The goal is to enable users to find the information they are seeking in a clear manner.

## Innovation Management

Implementation of new ideas and discoveries, and the implementation of an innovation culture in an organization, to promote and make possible the development of new ideas and business opportunities. Innovation management consists of innovation strategy, culture, idea management and implementation of innovation processes.

## Intermediation

An approach to brokering those who need to know with those who know.

## Knowledge Management

A system consisting of people, process and technologies for leveraging collective wisdom and experience to accelerate innovation and responsiveness.

## Knowledge Monitoring

Agent-based technology set at a group level, used to track the activity of a COP/COI.

## Lean Thinking

A methodology coming from the manufacturing world, and popularized in the book “The Machine That Changed the World” by Womack et al., that describes the Toyota Production System (TPS). Focuses on reduction of waste (of time, materials, effort, etc.), and an analysis of the “value chain” to understand how best to make value “flow” from one end of the chain to the other (typically, from the manufacturer to the end customer, although it can extend to suppliers, partners, post-sale service, etc.). Transparency, teamwork, simplicity, adaptability, and collaboration are key components to this methodology. Value, in the end, is “pulled” by customer demand, through the entire value chain, with no product/service being created until needed.

## Lifestreaming

“An online record of a person’s daily activities, either via direct video feed or via aggregating the person’s online content such as blog posts, social network updates, and online photos.”

<http://www.wordspy.com/words/lifestreaming.asp>

## Links

The use of hard coded (i.e. XML, html) functionality that figuratively ties one piece of content to another. By selecting a link, the user traverses to the other end of the link.

## Localization

Adapting a software, product, or service for different languages, countries, or cultures. In addition to language considerations, such as support for foreign character sets, localization may require adaptations for currency, time zone, national holidays, cultural assumptions and sensitivities, dialect, color scheme, general design conventions and user preferences, both implied (heuristic) or specified.

## Mashup

“A web page or application that combines data from two or more external online sources. The external sources are typically other web sites and their data may be obtained by the mashup developer in various ways including, but not limited to: APIs, XML feeds, and screen-scraping.

Often built using APIs that provide a variety of ways to view the relationship between a mashup and any supporting APIs used to create that application.”

<http://www.programmableweb.com/faq>

## Metadata

A definition or description of data, often described as data about data. For example, the data of a newspaper story is the headline and the story, whereas the metadata describes who wrote it, when and where it was published, and what section of the newspaper it appears in. Metadata can help us determine who content is for and where, how, and when it should appear.

## Navigation

The practice of browsing a content repository using a classification scheme, such as a hierarchy.

## Network-Oriented

A facet of FLATNESSES that specifying that all content must be network addressable.



## Ontology

A controlled vocabulary that describes objects and the relations between them in a formal way, and has a grammar for using the vocabulary terms to express something meaningful within a specified domain of interest. The vocabulary is used to make queries and assertions.

## Personalization

The process of tailoring pages to individual users' characteristics or preferences. Commonly used to enhance customer service or e-commerce sales, personalization is sometimes referred to as one-to-one marketing, because the enterprise's Web page is tailored to specifically target each individual consumer. Personalization is a means of meeting the customer's needs more effectively and efficiently, making interactions faster and easier and, consequently, increasing customer satisfaction and the likelihood of repeat visits.

## Podcasting

Short for "iPod Broadcasting," a term coined by Adam Curry, former VJ for MTV. Sometimes called "The Multimedia blog" format. What separates a true "podcast" from simple embedded audio/video clips, is that a podcast channel may be subscribed to using a feed, such as RSS or ATOM, so that users can consume this content by pulling that content rather than being sent from a broadcaster out to a recipient.

## Portal

A user interface paradigm and development framework to provide the integration of content, community and process in a Single Point of Access (SPOA). Similar to a dashboard, although typically oriented more towards content than numerically or data-oriented information display.

## Portlet

"Pluggable user interface components that are managed and displayed in a web portal. Portlets produce fragments of markup code that are aggregated into a portal page."

<http://en.wikipedia.org/wiki/Portlet>

## Records Management

Field of management responsible for the efficient and systematic control of the creation, receipt, maintenance, use and disposition of records including processes for capturing and maintaining evidence of and information about business activities and transactions in the form of records. - Source: ISO 15489.

## Relevancy Ranking

An abstract measure of how well a document satisfies a users query. Based on any number of algorithms the retrieved content is displayed in relevant order.

## RSS

Really Simple Syndication. The most popular/prevalent SIGNAL from SLATES/FLATNESSES in Enterprise 2.0. Standards-based, and formatted as XML for easy consumption and transformation by feed readers, aggregators, dashboards, or mashup solutions. RSS (and ATOM, a variant feed type) are pull-based rather than push-based (as compared to e-mail, for example) communication streams.

## Signals

From SLATES/FLATNESSES model, used to actively notify users of new or updated content. Any mechanism that accomplishes the sending of a signal is valid, although RSS and ATOM tend to be the primary delivery vehicles. E-mail tends to be the fallback signal mechanism due to it's near universal adoption, particularly in the enterprise.

## SLATES

A framework for Enterprise 2.0 environments, developed by Andrew McAfee. The acronym stands for: Search, Links, Authorship, Tags, Extensions, and Signals.

## Social Bookmarking

A form of Tagging, done by individuals, to "remember in public" resources (based on URLs), and which communicates context and categorization that may not have been seen through a more formalized taxonomy-driven viewpoint. Popularized via the service, del.icio.us.

## Social Computing

Applies to the emergent properties of Enterprise 2.0 in that the social actions/interactions (the analog of "computations") of people cause interesting/useful information to arise, as information is created or refined. Some practitioners and solution providers prefer the term Enterprise Social Computing rather than Enterprise 2.0, but the terminology is interchangeable in most cases.

## Social Network Analysis (SNA)

A toolkit and set of methodologies used to uncover the patterns of interactions within a social network. In an organizational setting, SNA may be used to uncover “how work is actually done” vs. a traditional organizational chart of the division of labor. It may be used to identify bottlenecks, or hidden key players who facilitate work outside of what is “normally” seen as their role. The outcome of SNA is frequently a visualization of the network, showing the numbers of connections between participants, the strength of connections, and in some cases, the volume of interactions (such as e-mail, phone, etc.).

## Social Networking

Dynamic “relationship” (friend, co-worker, family, employer, etc.) building, Social Networking is foremost about person-to-person connections, and not necessarily “community” or collaboration. Without being linked or integrated into a communication platform (e.g., discussion forum), the value of being able to use the established network is harder to achieve, as discussions are taken out of context into another channel. Facebook and LinkedIn are prime examples of consumer-facing Social Networking sites.

## Static Web

Refers to Web 1.0 and the tendency for Web sites that are either handcrafted, or built using solutions that create pages and sites that remain unchanged for long periods of time. The content may remain static due to the author or organization thinking of the Web as simply modern paper (or “brochureware”) or because of usability and process problems in getting fresh or updated content published. This content also tends to be purely one-way, mass-publishing, with no ability for users/readers to interact via feedback mechanisms.

## Sustainable Development

“Sustainable development is development that meets the needs of the present without compromising the ability of future generations to meet their own needs.” - Brundtland Commission (a commission of the United Nations), 1987. Sustainable Development was originally focused on sustainability in the sense of minimization of natural resources needed to maintain a “developed world” – meeting the needs of the present without compromising the ability of future generations to meet their own needs. Has more recently moved to include “sustainable IT” or software development as part of its operating scope as well, in the form of the Framework for Integrated Sustainable Development (FISDEV).

## Syndication

A method of distributing content, frequently based on standards such as RSS and ATOM, to share content between systems directly with cross-linking between the sender and receiver. Used to distributed content to a broader audience, to provide an ability to “mashup” content/data between systems, and move and re-use rather than copy (or duplicate) content.

## Systemics

Also known as “Systems Thinking,” a methodology that examines problems holistically to determine if a narrowly focused solution in a sub-system causes more harm than good to the overall system. Can be used to breakdown operational or technical silos via a collaborative process, and works towards simplifying systems to ensure that interactions between subsystems contribute more value to the overall system than they take away from the larger value statement. Aims to view problems through the lens of the consumers of both the final output, as well as the interim steps, to ensure the entire system is optimized for all participants.

## Tags (Tagging)

See metadata for underlying definition. Tagging tends to refer to activities such as social bookmarking where users rather than administrators, authors or taxonomists provide metadata for purposes of navigation or search. See Folksonomy as well.

## Taxonomies

In science, taxonomy allows people to precisely identify any organism by its kingdom, phylum, class, order, family, genus, and species.

## Transparency

Taxonomy, as it relates to content management, does the same job. It describes a classification structure for content. This structure, typically highly regimented, impacts the data model, directory structure, and file naming conventions for a given implementation of a content management system. Taxonomy can also be language-oriented, as in specifications for subsets of XML, such as ebXML.

The property of Enterprise 2.0 systems that allows greater visibility into information and collaboration flow, allowing participants to understand and participate in both lower and higher levels. Tied to the tendency of these systems to break information out of siloed systems and into a larger context. Key to information sharing capabilities, if not to participative decision making processes. Transparency is a key and common underpinning to the methodologies of Agile Development, Lean Thinking and Systemics.

## Voting

One of the simplest forms of social interactions in information systems, providing a yes/no, thumbs up/down aspect of feedback that can provide visual or other indicators to other users, as well as in manipulating the ranking/ordering of presented information.

## Web 2.0

Term coined/popularized by Tim O'Reilly in 2004. Refers to characteristics separating Web 1.0 (the initial popularization of the Web), from "modern" Web applications. The Web As Platform, Harnessing Collective Intelligence, Data is the Next Intel Inside, End of the Software Release Cycle, Lightweight Programming Models, Software Above the Level of a Single Device, Rich User Experiences.

## Web Content Management (WCM)

A content management system (see ECM) specifically oriented towards the requirements (such as scale) and capabilities (such as hyperlinking, embeddable multimedia) of Web deployed content and applications.

## Web Service

"Software system designed to support interoperable machine-to-machine interaction over a network."

– Source: adapted from W3C and [http://en.wikipedia.org/wiki/Web\\_services](http://en.wikipedia.org/wiki/Web_services)

A standard means of interoperating, by the use of XML, between different software applications, running on a variety of platforms and/or frameworks.

## Wiki

(Hawaiian for quick) Server software that allows users to freely create and edit Web content using a browser. It supports hyperlinks, has a simple text syntax (at minimum) for creating new pages and cross-links between internal pages on the fly. Contributors can edit content as well as the organization of content in a wiki platform. Wikis are frequently associated with the AUTHORSHIP aspects of the SLATES/FLAT-NESES models.

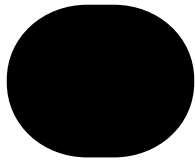
## Workflow

"The computerized facilitation or automation of a process, in whole or part."

Source: Workflow Management Coalition glossary, <http://www.wfmc.org/standards/docs/tc003v11.pdf>

## Workstreaming

The "professional" and enterprise-focused variation of Lifestreaming (see definition). Used in particular to allow disconnected/disparate team members to remain aware of their teammates ongoing work activity, in place of traditional "water cooler" chats or hallway meetings.



# Day

## *What a difference Day makes...*

Enterprise 2.0 is more than just the application of Web 2.0 methods and concepts within the enterprise. It is more than just social networks and mashups behind the corporate firewall. Enterprise 2.0 is, in fact, the next generation of Enterprise Content Management (ECM).

For Day Software, a true leader in technology innovation and standards adoption, Enterprise 2.0 is much more than just a catchphrase. It is Day's mission to provide our customers with the very best content applications and content infrastructure to enable compelling Enterprise 2.0 solutions.

To explain Day's enabling technologies better, let's revisit some of the slogans that have helped to shape the way we think about ECM. From the Web 1.0 mantra of "Content is king", we have shifted to Tim O'Reilly's motto for Web 2.0, "Data is the new Intel inside." But, is it really data that is providing the true value to consumers and enterprise users alike, or is it actually *content*?

Content is indeed the enabler that allows us to go from Web 1.0 static Web sites, to Web 2.0 corporate intranets, internal blogs, wiki pages, profiles in social networks, items in internal prediction markets and comments on a message board. Content is the glue that binds people, interests and organizations together. But, content needs the support of an appropriate infrastructure in order to flourish.

Delivering the content stored in proprietary repositories can be an expensive and complex task, but there is a solution. Under Day's leadership, an expert group of leading vendors has developed a standardized way to access all enterprise content. This industry-wide standard, JCR (JSR 170), clearly defines how to interact with content that resides in the various repositories, and delivers all critical content services required for true Enterprise 2.0 solutions. JCR is quickly becoming to enterprise content repositories what SQL is to relational databases.

Enterprise 2.0 introduces an added dimension to the more traditional content access challenges, as Enterprise 2.0 actively incites the creation of new content from employees, colleagues, partners, customers and suppliers alike. But, the creation of new content, using social and collaborative content applications like blogs, wikis, calendars, message boards and chat rooms, only solves half of the content equation. To fully realize the benefits resulting from Enterprise 2.0 solutions, a truly unified content infrastructure is critical.

It has been shown that Web 2.0 tools only become truly *enterprise-ready* when coupled with out-of-the-box access-controls, security, full-text search, versioning, observation and workflow. With these controls in place, content contributors can be effectively monitored and managed, but still have the ability to actively engage in social collaboration. In other words, by enabling the creation and delivery of relevant, localized information, all within corporate design and messaging guidelines, Day provides true "freedom within a framework."

As basic Enterprise 2.0 services come online, there are additional compelling benefits that can be realized. New and interesting ways of combining content from different applications emerge with the presence of a centralized content repository. A shared repository provides the ability to create mashups, building new, innovative applications through content sharing and common data formats. It is important that a content repository is capable of running multiple content applications, like blogs, wikis, and Digital Asset Management (DAM) systems. One example is the ability to use assets from a DAM application within a wiki page, then to comment on this page from a personal blog. When shared data access benefits are taken into consideration, the powerful potential for content-centric enterprise mashups is realized with Day's common content repository.

Today, there is only one Enterprise 2.0 solution built entirely on the JCR (JSR 170) standard, and it was created by the experts at Day. The company's full range of content-centric applications include Web Content Management (WCM), Digital Asset Management (DAM), Advanced Collaboration (AC), and content-centric infrastructure applications, such as Java Content Repositories. Its products provide standards-based, future-proof content infrastructure. Day's innovative solutions enable companies to substantially reduce the complexity and cost of their information systems while making valuable content accessible throughout the enterprise and beyond.

# EMC<sup>2</sup>

## where information lives<sup>®</sup>

### Ready for Enterprise Content Management 2.0? Good. It's Here.

As business embraces Web 2.0 technologies, what will happen to enterprise content management? EMC, the industry leader, is fast addressing the important issues raised by Web 2.0:

- **New ways of working.** As individual participation and social networking pervade the enterprise, these new ways of working must be enabled while ensuring IT, compliance, and other departments can maintain the control they require.
- **More and better metadata.** As users generate an ever-greater volume of content, making sense of it will require more and better metadata that supports emerging and unexpected technologies such as data visualization and mashups.
- **Content managed everywhere.** As a single content repository can no longer realistically meet demand, it must be replaced with a model that manages content no matter where it resides—even beyond an organization's borders.
- **Flexible infrastructure.** As scalability expectations rise as a result of Web 2.0 technologies, the underlying infrastructure must become more flexible to manage changing application requirements without compromising security and compliance.



**ECM 2.0—Enterprise Content Management Without Compromise**

#### Enterprise 2.0

The broad emergence of dynamic and interactive UI technologies in the enterprise will take advantage of blogs, wikis, RSS feeds, mobile devices, and more to facilitate user participation in content-enabled business processes—from within the enterprise as well as beyond. The key will be to facilitate collaboration and creativity without compromising the organization's need to manage user-generated content.

Another key for the enterprise using Web 2.0 tools, which are contributing to new ways of collaborating and proving extraordinarily effective in ad hoc workgroups, involves stepping up the requirements for security and scalability—and that's what EMC is doing. Because this new collaboration isn't constrained by organizational boundaries, bringing content-enabled applications to the extranet requires even greater protection to ensure things don't spin out of control.

#### Information Analytics

As your managed content assets grow to billions of objects, simply knowing what's in there, and how to access it all, is not enough. How do you discover, and use, that information's value? Search capabilities, no matter how sophisticated, won't turn information into knowledge. Rather, organizations will rely on analytics and business intelligence to discover

connections between people, processes, and data, thus uncovering the buried knowledge implicit in information.

EMC has always offered unmatched search, metadata management, and classification technologies. To that we're adding folksonomies, social-based knowledge management, and more. Top-down enterprise classification based on corporate taxonomies, coupled with community tagging and expertise management, will open a new world in business information value.

#### Service-Oriented Architecture (SOA)

The EMC Documentum architecture is already services-oriented and fully supports Web Services-based interfaces. We have long provided our partners with a common set of services for accessing and managing content enterprise-wide.

Web 2.0 applications require an even simpler way to expose and orchestrate content services. These applications must be dynamic—sometimes, as with mashups, they are even created by the users themselves. Content and business process management systems have already closed ranks. But as Web 2.0-era processes become more widespread, organizations must look beyond process simulation and optimization, making sure to include collaborative approaches in their process automation. In the end, process is not about performing a sequence of tasks, but about getting work done.

#### Repository Virtualization

Even though EMC offers the most scalable content repository available, it's impractical for most enterprises to move all their data into a single repository. Within the enterprise, the virtual repository has started addressing this constraint. But Web 2.0 means repositories can be distributed anywhere, inside and outside the enterprise—so the entire "cloud" must now be considered the new virtual repository.

EMC is leveraging its existing content integration framework to build out the most sophisticated virtualization technology yet imagined, enabling applications to manage content no matter where that content physically resides. Using EMC's virtual repositories, companies can apply a common set of policies and rules—security, retention, location, and more—to any information, anywhere.

#### EMC's Vision for ECM 2.0

Enterprise content management 2.0 is introducing a new set of requirements. Web 2.0 technologies must be harnessed without compromising organizational control, security, and compliance. The enterprise content management infrastructure must step up in terms of its scalability, services orientation, and virtual repositories. At EMC, we understand this—and we are making it a reality.



## ■ Product Overview

# Livelink ECM™ – Extended Collaboration

## Drive innovation with collaboration across the enterprise

**Success depends on your ability to seize new business opportunities. To maximize agility and responsiveness, companies today are focused on improving collaboration among employees, partners, and customers.**

Effective collaboration connects people and processes to circulate ideas, experiences and knowledge. People can quickly form cross-functional project teams, capture shared knowledge, manage processes and meet project deadlines even across geographic and departmental boundaries. Many organizations also face a demographic shift as the baby boomer generation prepares for retirement. As a result, effectively capturing shared knowledge becomes a vital part of efforts to minimize knowledge gaps and preserve intellectual capital.



The community front page provides immediate access to all relevant, timely, and popular community content.

Livelink ECM – Extended Collaboration delivers the tools teams need to collaborate effectively by combining a robust knowledge repository with project workspaces, polls, news channels, tasks and milestones. For broader community applications, specialized enterprise-ready Web 2.0 tools like forums, blogs, wikis, and real-time chat, along with newsletter views, FAQs, and event calendars help promote shared expertise and best practices. These tools deliver content in an intuitive, Web-based environment, encouraging people to work together while capturing critical project information. Underpinned by industry leading Enterprise Content Management (ECM) security and access-control policies, organizations can extend best practices in managing business content to the use of emerging social networking tools.

“Open Text understands that content governance should be format agnostic. That is, all business content should be captured, protected, and preserved in accordance with defined records management policies—regardless of file format.”

### Benefits

- Safely delivers the emerging Web 2.0 social networking tools business users demand
- Effectively connects employees, partners, and customers
- Improves collaborative capabilities – easily identify subject matter experts, expand social networks, share content
- Accelerates and simplifies collaboration with real-time capabilities
- Protects corporate content across the enterprise with strong records management

### Feature Summary

<b>Improve relationships with customers and partners</b>	Connect individuals, teams, and organizations across geographic, departmental and organizational boundaries, and integrate these relationships into processes and procedures.
<b>Reduce project cycles</b>	Project workspaces help teams access and collaborate on all project-related information, including project scope, status, tasks, and deadlines. Members can share ideas through interactive discussion forums.
<b>Quickly launch new communities</b>	Built-in wizards and out-of-the-box templates, including industry and expert community templates, make it easy to set up a community.
<b>Enable prolific community members to share</b>	Most knowledge workers are passionate about what they do and how they do it. Advanced journaling components enable members to generate informative, community-specific blogs.
<b>Promote social awareness and belonging</b>	Create positive, hardworking groups built on a foundation of reputation and trust. Real results and a sense of achievement encourage future initiatives.
<b>Stay connected</b>	Collaborate in real time through instant messaging and screen and application sharing, while automatically receiving email notifications of new content.
<b>Leverage best practices and lessons learned</b>	Save best practice methodology and build on these tactics to stay on track. Reduce ramp-up time and enable participants to contribute more quickly.

Visit [www.opentext.com](http://www.opentext.com) for more information about this and other Open Text solutions.



# Socialtext

**About Socialtext** – As the first wiki company, Socialtext leads the industry in applying next-generation Web 2.0 technologies to the critical challenges facing businesses. In fact, in the most recent Gartner Magic Quadrant for “Team Collaboration & Social Software,” Socialtext was ranked as the most visionary vendor and with a leading ability to execute on this vision. With the most flexible deployment options in the industry - including appliances, hosted services and open-

***"For Angel.com, Socialtext wikis increase productivity by 10%, saving each employee 3-4 hours per week, which equates to \$500,000 savings annually." – CNN Money***

source software – Socialtext wikis are designed for any organization that wants to accelerate team communications, better enable knowledge sharing, foster collaboration, and build online communities. Today, over 4,000 organizations use Socialtext, including BASF, CondeNet, Epitaph Records, Humana, IKEA, Intel, MicroStrategy, MWW Group, Manning & Napier, Nokia, Ogilvy PR, SAP, Symantec, USA Today, Washington Post, among others. Based in Palo Alto, Calif., Socialtext is a privately-held company with world-class investors including Draper Fisher Jurvetson, SAP, and the Omidyar Network.

**About Socialtext Wikis** – Socialtext offers the industry’s most complete set of business-class wiki features. Socialtext wikis include an intuitive, easy-to-use web interface, plus integration of weblog (or blog) publishing and RSS feeds. Tight email integration simplifies users publishing to the wiki, as well as getting notified of changes. Additional flexibility is provided through features for mobile access and support for disconnected mode. Socialtext wikis integrate easily with existing IT infrastructure such as directory services and enterprise applications, like Microsoft SharePoint and IBM Lotus Connections. Key features of the Socialtext solution include:

- Business-class wiki collaboration
- Integrated blog publishing & RSS support
- Integration with email, chat & presence
- Advanced search & contextual tagging
- File management & full revision history
- Personalized & customizable navigation
- Granular access controls & permissions
- Support for mobile & off-line, disconnected use
- Integration with enterprise infrastructure
- Automated, network-based software updates
- Enterprise-class 7x24 support, professional services and training to drive adoption

***"The gulf between individual productivity tools and formal tools like Web content management has been filled by wiki vendors like Socialtext.... Wikis enable groups of people to work together to generate and publish content." – Forrester***

**Learn More** – For more information about Socialtext, visit [www.socialtext.com](http://www.socialtext.com) or call 1-877-GET-WIKI. Socialtext also offers a free, 14-day trial of Socialtext wikis; sign-up at [www.socialtext.com/trial/1](http://www.socialtext.com/trial/1).



# springcm™

*The New Standard in Enterprise Content Management*

## Enterprise 2.0 and Software-as-a-Service: The Future of ECM

It's not about which ECM companies will embrace Enterprise 2.0. All of them will. So why not choose an ECM solution that already embraces the Enterprise 2.0 on-demand delivery model?

**With SpringCM, you get all the SaaS advantages including rapid deployment, low initial cost, no hardware to buy or maintain, enhanced security and greater business agility.**

Whether you need an ECM solution for accounts payable, marketing, contract management, human resources, legal, medical records or anything in between, SpringCM can rise to the challenge.

*"As a Web-based model with a Web services layer, SpringCM makes integration more straightforward than it would have been in the past."*

—Kevin Jackson, CIO, Priority Solutions International

### The SpringCM solution covers every facet of your ECM needs:

- Full-text search for all documents regardless of capture method
- Annotation capabilities for files ranging from Word documents to images and even CADs
- Scanner integration, including the ability to scan paper documents and automatically route them to a specific folder in SpringCM
- Detailed audit trails—complete with previous versions—for all transactions
- Intuitive steps for adding, managing and deleting users that enable anyone to function as an administrator for your SpringCM account
- eForms that capture information for use in workflows and document generation
- Document delivery options including e-mail, fax and even postal mail
- Custom Reports that display detailed document activity for any criteria you choose
- Electronic Signature to digitally sign important documents like contracts
- Integration to CRM, ERP and other line-of-business systems
- Advanced Workflow/ BPM to automate the most complex business processes

*"I know that on-demand software is the future. SpringCM got us working efficiently in less than a day with no hassle."*

—Jonathan Charles, senior account executive,  
Sentinel Health Group

Ready to discover the power of SpringCM's Enterprise 2.0, SaaS-based ECM technology? Download our free solution paper "Five Tests to See if Software-as-a-Service is Right for Your Organization" at [www.springcm.com/fivetests](http://www.springcm.com/fivetests).







For more than 60 years, AIIM — The Enterprise Content Management Association has been a neutral and unbiased source for helping individuals and organizations understand the challenges associated with managing documents, content, records, and business processes. AIIM is international in scope, independent and implementation-focused. As the representative of the entire ECM industry — including users, suppliers, and the channel — it acts as the industry's intermediary.

The AIIM community has grown to more than 50,000 professionals from all industries and government, and has a presence in more than 150 countries and all levels of management, including senior executives, line-of-business, and IT. With every organization in the world handling some type of paper or electronic content, the ECM industry will continue to expand. As the industry grows, AIIM can be counted on to provide market education, peer networking, professional development and industry advocacy. Visit AIIM on the Web at [www.aiim.org](http://www.aiim.org)

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