Turn Enterprise Social Into Real Business Value

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Contents

Introduction

Social and mobile computing have revolutionized the consumer market. The enterprise market is just waking up to the value of integrating social and mobile with daily work. In this paper, CITO Research explores the power of worksocial, a software approach in which business processes, software systems, and enterprise data combine synergistically with social and mobile to help people work more effectively.

Why Work Isn't Working

Enterprises struggle with issues such as poor customer service, slow time-to-market for new products, and increasing competitive pressures, all of which inhibit productivity and profitability. Today's world is complex and customers (and shareholders) have much higher expectations about how fast we should accomplish our goals. Where once we had to manage only 10 or 20 segments of business, we may now have thousands of segments, with new ones developing every day.

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We need to bring products to market with a high degree of customization and personalization while keeping track of profitability, compliance, and risk. The mobile workforce is expected to do its job 24 hours a day, wherever employees are located. Increasingly, employees and customers expect from a business the same simple and always-connected interactions they have in their personal lives.

Much of this complexity is exacerbated by interrelated yet disparate technologies. While once IT managed technology, today it's managed by everyone. With innovations like the cloud, almost anyone can set up IT resources. Mobile and social can extend processes across departments and geographic locations, as well as to partners and customers. While we must preserve process discipline, we must also find a way to make these new technologies work for us in a real sense.

Silos inhibit effective collaboration. Barriers between employees, systems, and partners ultimately jeopardize operations, products, and services, not to mention the customer experience. Lack of integration pushes collaboration outside of established processes and across numerous diverse systems, producing delays. A delay in bringing a product to market turns into lost revenue. Operational delays caused by disjointed collaboration lead to budget overruns and bad customer service.

Social and Mobile Can Work for Us

Social collaboration and mobile technology have tremendous potential to improve the way we work. According to the McKinsey Global Institute (MGI), there are 1.5 billion social networking users globally.[1] About 80% of all online users regularly interact with social networks. Nearly 70% of companies use social technology in some fashion, and 90% of those derive a business benefit from doing so.

But there is still untapped potential—knowledge workers spend about 28 hours a week writing email, searching for information, and collaborating internally. That's more than half the week spent doing something other than the work they're paid to do! MGI estimates that in industries such as life insurance, retail banking, auto manufacturing, and aerospace, up to 25% improvement in productivity (which translates to $1.3 trillion annually) could be unlocked if businesses could integrate social and mobile technologies into their core processes.

Some of this potential can be seen in what Gartner Group's Anthony Bradley calls **Mass Collaboration Behaviors**.[2] Social and mobile technologies enable:

- **Collective intelligence:** Crowd-sourcing of ideas for process improvements and innovations
- **Expertise location:** Identifying experts and best practices from employees, customers, partners—even prospects
- **Interest cultivation:** Bridging interests among participants so that everyone involved wins
- **Relationship leverage:** Using the reach of social media while maintaining an open channel for collaboration
- **Flash coordination:** Using social and mobile to bring an organization together quickly
- **Emergent structures:** Gaining visibility into exceptions by documenting activity, showing who is collaborating, and how work actually gets done

Some $1.3 trillion annually could be unlocked if businesses could integrate social and mobile technologies into core processes.

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1   *"The Social Economy: Unlocking Value and Productivity Through Social Technologies." McKinsey Global Institute, July 2012*

2   *Mike Beckley, "Life After Facebook: 'Worksocial Real Route to Business Productivity," Washington Business Journal, July 23, 2012:* http://www.bizjournals.com/washington/blog/2012/07/life-after-facebook-worksocial-and.html?page=2

Why Enterprise Social Hasn't Worked Yet

To date, the potential of social and mobile in the enterprise has not been realized. Most vendors address only one aspect of the problem. Some business process management (BPM) and work automation vendors added activity feeds and mobile apps to their offerings via acquisitions, but these are not tightly integrated.

Often, the customer must figure out how to integrate these solutions. Likewise, a collection of much-hyped enterprise social vendors are trying to infuse the workplace with social media facilities without spending time on integrating social into the systems that drive daily work. This creates yet another siloed platform, cut off from broad enterprise processes, data, and actions.

Enterprise social products don't do the things enterprise-grade BPM solutions do. They don't post system-generated events. They don't track collaboration in the context of a business process. They don't measure process improvement or enforce business rules. Where's the social business advantage they claim?

Enterprise social tools complicate business processes by accelerating communication without context. They are no better than email or phone for enforcing a business context. This imposes two burdens on users. First, users need to manage the rules for using these new forms of interaction, and second, once someone receives a task via an enterprise social program, the person must switch context in order to complete the work on another platform. Yet another context switch is needed to create reports.

Enterprise social products may tell you about tasks, but they don't help track them or get them done. Users are responsible for handoffs of tasks, deadlines, and updating systems of record with communications that occur outside of those systems, raising the risk of errors or omissions.

Early adopters of enterprise social tools have abandoned the tools just as quickly because they don't effectively support work. The enterprise social solutions introduced so far have not achieved the potential of social and mobile to improve productivity.

*Enterprise social tools accelerate communication— without business context.*

Worksocial Gets Work Done

The world is moving from an email model of serial collaboration (passing files around and waiting for comments) to a Facebook-style model of real-time collaboration (comments happen live, in one place, in the context of what they reference). To overcome obstacles to productivity and collaboration, we can't just talk about work—we have to adopt platforms that help us get work done. Welcome to worksocial.
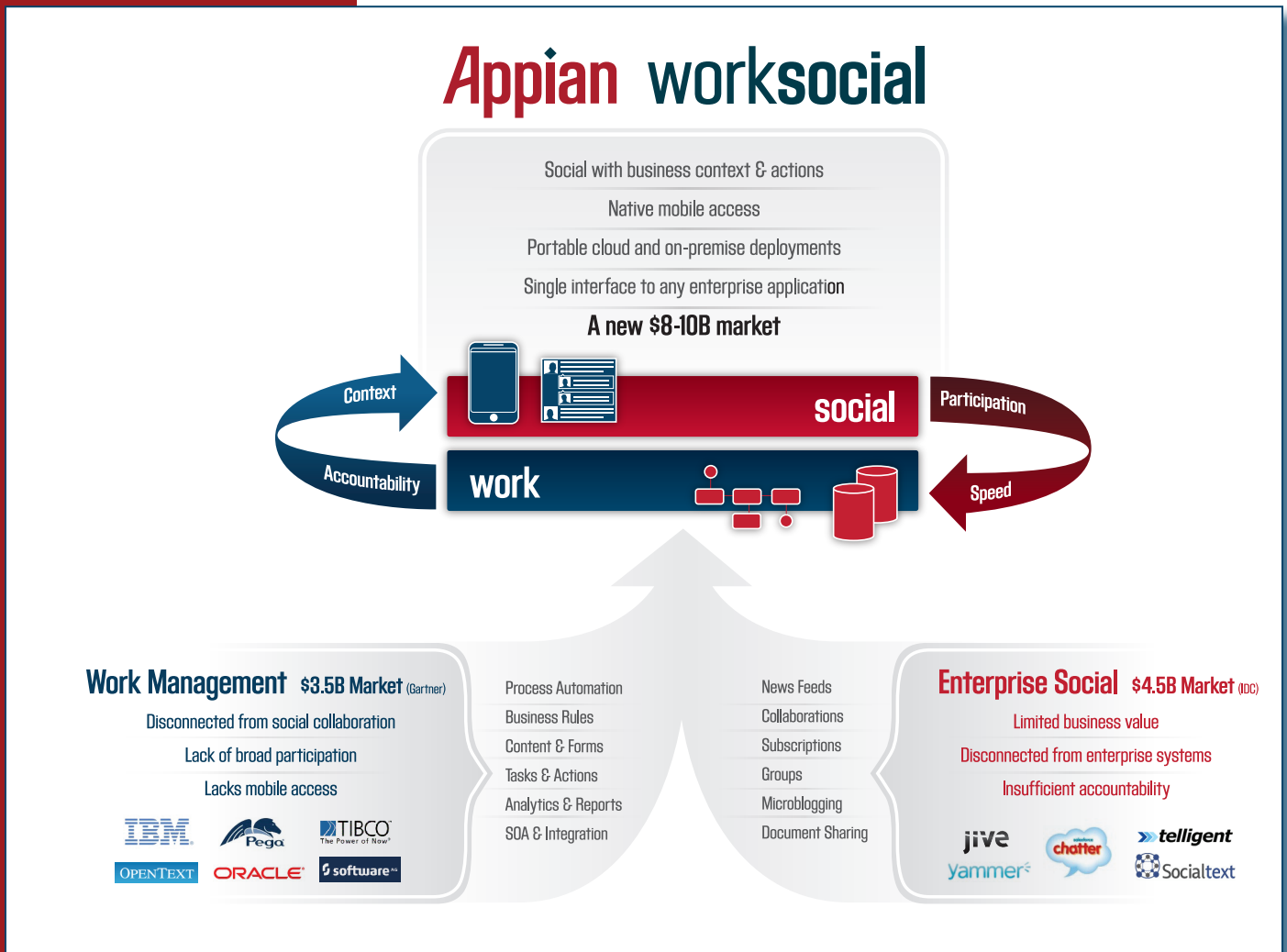
Worksocial is the combination of business process, enterprise systems and data, social collaboration, and mobile access in one shared model for visibility and action across the enterprise. It's where structured processes meet unstructured work. Capitalizing on BPM's roots in work—automating, improving, and simplifying processes—worksocial is an automation platform for organizing and executing

work in the 21st Century. The best outcome occurs when people "swarm" to collaborate and resolve a business problem, without losing process context or abandoning governance. Worksocial uses rules to automate processes, while allowing humans to intervene in work where needed. It does so by connecting users in an open collaboration platform that provides direct access to applications through a single, unifying interface.

Worksocial is a collaboration platform for organizing communication. But rather than "tacking on" social or mobile modules to an existing BPM paradigm, worksocial embeds a communication model in the platform. Rather than letting the constraints of the system determine processes, users identify concepts that are relevant to the enterprise and groups within it, then decide on and model rules. For example, a financial services company might have more stringent rules around reporting, auditing, and measurability compared with other industries. Worksocial can accommodate this range of needs.

While other approaches leave integration to consultants or users, worksocial includes a model-driven development environment that lets people connect existing applications and create new applications to address process gaps.

Appian: Work and Social = Better Together

Appian is the first worksocial platform, reflecting 13 years of development in work automation, across 350 customers and 3.5 million users. Appian breaks worksocial down into a series of unified components: News, Tasks, Records, Reports, and Actions, as shown in the table below.

Table. Appian functionality increases efficiency and helps get work done.

News	A real-time activity stream of business events and data from enterprise applications, tailored by role. Every event is available for collaboration, and users can drill into events to see underlying data. Users filter news so that only top-priority issues appear.
Tasks	Track, generate, and delegate tasks and approvals across applications, based on role and security clearance, from any location.
Records	Collate information across all applications with a keyword search. For example, find the top-grossing customer (CRM) with the most support issues (trouble ticket system) and the highest outstanding bills (accounts receivable).
Reports	Access a full range of reports with collaboration and contextual viewing. For example, with a daily sales pipeline, a user sees 10 new opportunities and drills down to find out what happened today that brought in twice the number of prospects.
Actions	Take action right away. A news item that says, "resolve billing discrepancy" links to the billing system. After it's resolved, relevant people are notified.

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Worksocial closes the gaps left by enterprise social and social-enabled BPM platforms. System notices appear in social media. Approvals can be tracked on mobile devices natively. Actionable reports can be generated directly from live collaboration, on a mobile device. More work is done faster and more thoroughly than before.

With worksocial, old barriers and application gaps in the enterprise melt away.

Get products to market. Whatever the need, Appian can rapidly deliver an application. Appian's development platform has an intuitive visual interface that lets non-IT users create apps to fill process gaps. The metadata model creates an executable application. The application is configured the same on-premise or in the cloud, affording maximum flexibility for expanding and changing business needs.

Users click on notifications about events to take immediate action.

Work faster. With no change of context needed, users click on notifications about events to take immediate action. All relevant employees—not merely those pre-built into a given process model—can swarm around a decision point in real time.

Go mobile. Appian lets you pick up where you left off, no matter where you are or what device you're using, with the same tools and features. Any application built in Appian becomes a native mobile app on all popular mobile platforms.

Collaborate now. Appian drives business value by structuring, recording, and governing collaboration in a process context. Appian's interface requires no training; if you can use Facebook, you can use Appian. Users can not only chat and comment, but can immediately share process improvements. Users send messages to an individual or a group, collaborate on a system event, and subscribe to updates—all in one place.

If you can use Facebook, you can use Appian.

Consolidate your work. Appian is more than a "front door" to applications. Integration is built in; every business user can improve a process by connecting applications to a library of available systems and data elements. Appian was built on a robust framework that anticipates the messiness of disparate data silos left to their own devices. It's a unifying platform for getting work done.

Share knowledge. The documentation and logging abilities of Appian mean that today's audit trail of ad-hoc decisions can become tomorrow's codified business processes.

Appian enforces data security while making the right data accessible to the right people.

Make better decisions. When the right people come together at the right time with the right information, as well as direct access to applications to get work done, good decisions happen faster.

Coordinate technology. Enterprises can use Appian to define gaps between the applications IT has and ones the business needs. To date, custom code bridged these gaps, but it's hard to change later. Business users participate in creating solutions, developers are more productive, and programmers and engineers can be more efficient.

Securely expand data access. Not everyone in the enterprise, or every partner, can or should get a license for systems of record. Appian enforces security while making data accessible to the right people.

Worksocial in Action

Appian has helped hundreds of companies streamline work, including launching new lines of business, increasing operational effectiveness, modernizing case management, and improving the customer experience.

Develop New Lines of Business

Enterprise Rent-a-Car launched Enterprise Rideshare, a new corporate ride-sharing program, on Appian's mobile and social platform. The system handles everything from sales quote approvals through customer on-boarding, driver registration, and approval. It integrates with the customer-facing website and Rideshare fleet maintenance and migrates data from 25 markets into one system. Appian's social interface enables collaboration on all processes for both multi-role and occasional users. Built-in mobility enables rapid quote approvals by sales managers in the field.

CME Group's IT service management uses iPad apps created with Appian, resolving customer issues and installing new builds without having to go back to their desks.

CME Group operates the four largest commodities and financial futures exchanges in North America and runs the largest co-located data center in the US financial industry. The suburban Chicago facility covers 428,000 square feet, the equivalent of about seven football fields. In addition to its own trading engines, CME hosts dozens of high frequency trading (HFT) customers, who need split-second access to markets. This business requires near-constant reapportioning of equipment. CME Group used Appian to design the process of acquiring and maintaining HFT customers.

The IT service management team monitors racks using iPad apps created with Appian. They take pictures, check off tasks, and generate reports, making sure customer issues are resolved and new builds are installed, all without having to go back to their desks.

CME Group acquired Appian to solve one problem but uses it for several purposes, including new product introduction and portfolio management, where it has reduced time to market by 40%; customer support, where it enables rapid responsiveness; and human resource management, where new-hire onboarding has been cut to less than a day. CME Group now has 10 applications built on Appian and more on the way.

Increase Operational Effectiveness

Crawford & Company is the world's largest insurance claims outsourcer. During catastrophic events, Crawford must rapidly increase its claims adjuster staff across global territories, while ensuring consistency and operations excellence. Crawford used Appian to build Crawford Community, an application that streamlines catastrophe adjusters' assignments. It includes profiles, skills, and a scoring system for adjusters as well as a mobile claims assignment and scheduling application that integrates geo-location. Crawford can assemble ad-hoc teams of adjusters, assign the right adjuster for a given claim based on location, and complete the claim review process with greater speed and accuracy.

Modernize Case Management

The US Department of Veterans Affairs uses Appian to help US veterans find government and civilian work. Appian automates the reintegration, recruitment, and retention processes in the "VA for Vets" career support and management program, helping counselors track veterans through the employment process. At a 2012 VA Job Fair in Detroit, volunteer event support staff learned the Appian social interface in minutes, then used iPads to register, schedule meetings, and track progress for thousands of attending veterans. More than 1,300 veterans received job offers and close to 800 more got second interviews, according to the Veterans Employment Services Office.

Appian partner Serco supports the implementation, in addition to providing human resources for VA's career center, coaching, call center, help desk, training, and communications.

"We were able to implement the application in time for this year's hurricane season, and it has proven successful in getting adjusters onsite quickly," said Brian S. Flynn, Crawford's Global CIO.

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Worksocial turns the revolutions in enterprise mobility and social collaboration into real business value.

Provide Excellence in Customer Experience

A global beverage retailer uses Appian to perform store quality inspections. Two hundred inspectors roam the globe, serving 17,000 stores. The process was time-consuming and manual—taking photos, filling out forms, and going back to the office to process results. In six weeks, the retailer built an iPad app that records data onsite, communicates with backend systems, and benchmarks store quality. The inspector and store manager collaborate and agree on any corrective actions, sending the action plan to headquarters from the inspector's iPad.

Inspectors select the next store to visit and get directions. They can collaborate with other inspectors to resolve supply and quality issues via real-time chat directly linked to application objects. The ability to resolve quality issues in the field without going back to the office has had a tremendous effect.
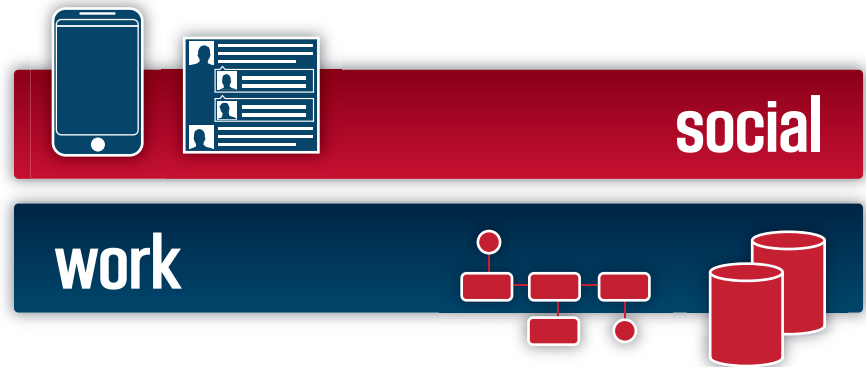
Conclusion

Past attempts at incorporating social and mobile into business processes have failed because vendors have not invested effort in the heavy lifting of enterprise integration. With worksocial, as typified by Appian, process design, automation, business visibility, collaboration, and action happen in the same place.

Appian has leveraged 13 years of experience improving work environments to create a truly modern rule- and role-based, shared model that documents and drives the entire enterprise. Communication turns into action because it happens in the same platform. Time-to-market decreases, new lines of business are easier to start, operational effectiveness increases, and customer engagement is heightened. More people can participate in the disciplined creation of applications that solve real problems. Worksocial turns the revolutions in enterprise mobility and social collaboration into real business value.