

The definitive guide developed by AIIM for implementing social processes and technologies. These eight steps will help organizations formalize the implementation of social technologies both inside and outside of the firewall.

1 EMERGENCE

In this step the organization is not using social technologies in any formal or organized way. Instead, individuals or small groups within the organization are experimenting with social technologies to determine whether there is business value to them.



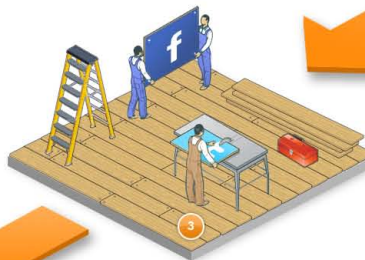
2 STRATEGY

Once the organization begins to develop experience with social technologies and has identified potential business value from their use, it is important to create a framework that identifies how it expects to use these technologies, and the goals and objectives for their use.



3 DEVELOPMENT

With the strategy in place, the organization can make informed decisions about what tools to implement, how to implement them, where to implement them, and how they will potentially scale more broadly within the organization.



4 MONITORING

Initially the organization should spend time monitoring and listening to the conversations taking place in and around a particular tool to get a sense of the nature of the tool, the content of the conversations, the target audiences, and who the leading participants are. This is perhaps more visible in externally focused processes but is important for internal ones as well.



6 ENGAGEMENT

The goal is for participation to move to engagement – from speaking at or to customers to engaging with them. This means creating processes to respond to issues, both internally and externally, and ensuring that communications are clear, accurate, and authentic.



5 PARTICIPATION

Once the organization has done some listening it will be able to participate more meaningfully and should begin doing so according to what it has learned about the target market and the nature of the conversations on the various tools.



7 GOVERNANCE

This step describes the process for developing an effective governance framework for social business processes. Some of the steps are specific to certain tools or capabilities, while others are more broadly applicable, such as an acceptable usage policy.



8 OPTIMIZATION

Once social business processes are in place, they should be actively managed and reviewed to ensure that the organization is realizing the expected benefits. This includes but is not limited to monitoring the tools in real time, identifying and measuring specific metrics, and training users on new or evolving tools and processes.

