Integrating Informal Learning With **Web 2.0** Technologies

IT'S NOT AN EASY PROCESS. A PLETHORA OF DETERMINING FACTORS AND PRODUCTS ARE INVOLVED.

Can informal learning initiatives be successful without Web 2.0 technologies like wikis, RSS feeds and blogs? Not hardly.

Elearning! magazine assembled a roundtable of vendor representatives to help outline the steps a company must take to successfully integrate informal learning with Web 2.0.

Roundtable participants were: Dave Wilkins, senior director of product strategy for Mzinga; Jon Ciampi, vice president of product management for SumTotal Systems; Ben Willis, senior director of product strategy for Saba; and Jeff Whitney, vice president of marketing for OutStart.

And here's what they said.

With more than 80 percent of learning in an organization occurring informally, more are investigating launching a private social network platform within the learning function. How has your LMS solution changed, given this growing interest?

Wilkins - It's a broader shift than just integrating social networking. The real transition is from a model where learning content is primarily created and delivered by established company experts to a more open model, where the majority of learning is created by learners sharing their expertise in specific domain areas. Social networking satisfies some of this need, while social media technologies such as blogs, discussions, tagging, ratings, idea sharing and wikis address other aspects.

[Mzinga has] developed a thorough model across our entire solution set. Within our course authoring technologies, we provide an ability to directly incorporate live social media elements.

We've also incorporated social networking and social media into our LMS [so that] administrators can enable social media features around particular learning objects like courses, certification, curriculum and instructor-led events.

Within the LMS, we also enable social media and networking without an association to courses and learning objects. Learners can participate in social networking activities outside of any learning objects. We can further extend this basic model with idea-sharing, tagging, file-sharing and similar technology once a client is ready.

Ciampi - SumTotal was one of the first companies to offer collaboration centers and informal learning. Collaboration centers allow user collaboration at the course, class, domain and global level. Using the collaboration centers, users can participate in threaded discussions and search threads or ask experts.

In addition, we also offer capabilities to define experts, identify experts, show expert ratings and ask questions to experts. Additionally, we integrate with several collaboration tools such as Adobe Connect, WebEx and Interwise.

We continue to enhance the products to incorporate feedback from our customers about growing interest in peer-based experiential learning.

Willis - Saba has had social and collaborative capabilities in our product suite for a 2004 (the 3.x generation of our suite; we are now moving into the 6.x generation). Our native and long-standing social learning toolset includes wikis, communities of practice, user-generated content capture and exchange, discussion forums, Q&A, expert location, RSS's, search-based learning and — significantly — Saba Centra, a real-time collaborative capability for Web-conferencing, e-meetings and virtual classes.

Our most recent social learning announcement, 'Saba Social,' is a robust enterprise social networking solution that uniquely combines a rich person profile, competency-driven expertise, real-time collaboration and a comprehensive Web 2.0 suite. It is a productivity tool designed to engage employees and customers, build connected corporate communities, and accelerate high-quality knowledge exchange.

Whitney - It's a huge misperception that the LMS is the center of the learning function, and that a social platform is a subset of an LMS.

Don't get me wrong, we market (and have won many awards for) our LMS, but each learning tool has its function: LMS for tracking and reporting; LCMS for developing, managing, maintaining and delivering learning content; and a social platform for enabling informal learning. As a result, we developed a social platform that works independently of, or as a complement to, OutStart's LMS or any other LMS. We have customers who are very successful with either approach.

What are the critical considerations buyers should weigh when considering a blended LMS/social platform?

Ciampi - Make sure the LMS can adopt to your business processes instead of forcing you to change or migrate your curriculum workflows.

Ensure that you are able to profile and identify a very targeted audience for your training programs since ad-hoc training will not deliver ROI in a down economy.

Make sure the LMS has best-of-breed capabilities for blended learning. Without strong formal learning, informal learning

may not be effective.

Identify clear business cases that could use social networking and deliver tangible business value, like community of practice, onboarding and training of virtual workforce, and on-the-job learning.

Focus your attention on key collaboration tools that will deliver direct impact and ROI in terms of 'adoption and retention rates on LMS.'

Focus on solutions to business cases without getting caught up with buzzwords and technologies.

Evaluate your one or two high-value use cases, and then look for technology to solve the problem.

Define and measure clear success criteria, like adoption rate to LMS and retention rate.

Don't forget the fun factor, which is essential for adoption and retention!

Willis - Two considerations stand out as critical.

First, to what extent are the social capabilities truly integrated into the learning process? Are they seamlessly woven in to add value to the core learning processes, or are they add-on capabilities? Social software tools and philosophies can be powerful enablers of true peer-to-peer learning and people productivity, but to achieve this goal, the platform must have social capabilities designed into each and every process in a seamless way. Adding social capabilities to your learning platform should add exponential value, not incremental value. So, for example, does the system surface traditional and social learning capabilities in a single search, or is the search for courses and certifications dis-

connected from the search for experts, wikis, communities or discussions? Can user-generated content be seamlessly incorporated in formal learning programs?

Second, are you buying a tool or a suite? Be sure to buy a suite that will meet your long-term needs. Wikis, blogs, communities, social book-marking, user-generated content, collective intelligence, and on and on. With so many new social tools and

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>
> **—Ben Willis, Saba**

concepts to explore, be sure the platform you are investigating adds a suite of capabilities to your blended learning toolkit and not just a single new tool.

Whitney - First, since an LMS and social platform are separate, they do not need to come from the same vendor. With 80 percent of learning occurring informally, buyers owe it to themselves to carefully weigh the functionality offered and not consider it an add-on to their LMS.

Second, don't try to solve informal learning for the entire organization. Buy the functionality you need to get started with a small (but important) initiative, learn fast and grow. Additionally, the system should have an automated system for identifying, requesting and capturing knowledge from experts as well as easily enabling peer collaboration.

Wilkins - There are four things buyers should consider:

>>Experience. Many companies will add social media and social networking technology to their LMS, but very few, if any, will have any real experience with community or social media. Given that the biggest challenge in this transition is change management and

not technology, companies with real experience with community and social media will provide significantly more value to the buyer.

>> Moderation. Many companies live in a highly-regulated world where one wrong word to a customer, patient or investor could result in costly litigation. Similarly, one wrongly conveyed process could mean non-compliance with a government regulation. Strong moderation technology provides a mechanism to address these issues.

>> Strategy and services. Many LMS vendors will provide the technology with no accompanying services or strategy consulting. Very few companies will succeed in this transition without some level of consulting and services help.

>> The future. A lot of vendors are trying to do it all. At some point, something has to give. Talent management is about top-down organizational control: succession planning; skills and competencies; and compensation management. Social media is about empowering the organization from the bottom up. One of these strategies has to lead the other. Buyers should demand a clear explanation of how the vendor is going to prioritize these models and a clear roadmap of how additional social media and networking tools will be incorporated into the core LMS.

the hosting organization as well as select individuals or groups of people external to the organization. In fact, much of the value of the network is derived from precisely this mix. That being the case, the security of the network cannot simply rely on obvious methods such as being hosted behind a firewall or requiring a user name and password that is authenticated against a pre-defined directory of users or HRIS system. The user creation process itself must ensure security by validating these external users as they provision their own accounts.

Be sure your system is up to the task of screening your external users for you based on criteria you define. Once a user is authenticated, an effective social platform must support both 'top-down' (admin-owned) and 'horizontal' (community-driven) security models.

Whitney - A highly effective method our customers frequently use is the classic user ID and password approach, which enables access to informal learning from anywhere there's a Web connection. A bigger question for our customers is how to validate knowledge. Most customers favor an approach where expert/official knowledge is clearly identified, while other knowledge contributors have their entries rated.

Mzinga to protect our client data. The multi-layer security controls include locked access to servers in the Level 3 facility and access to client application servers and databases that is restricted to select Mzinga application hosting employees.

Additionally, all Mzinga employees with access to the operating system controls have passed background and security checks under standards that are consistent with financial services organizations.

Mzinga uses SiteScope to monitor system performance and activity, as well as a 24-7 page recovery process for alerts on site activity, such as outages and dangerous application performance metrics.

We also use a number of encryption technologies to ensure that the data going into and out of our system is secure. These are consistent with the encryption used by most vendors securing HR and financial data.

Ciampi - The social network is secured using following mechanisms:

>> Basic (user name/password) authentication or single sign-on authentication to control general access to the system

>> security role permissions can control access to the collaboration centers

>> customers can also create collaboration centers associated with specific topics (like learning activities) and only allow users enrolled in those topics to participate

Who among your current customers uses your LMS/social platform? What impact did it have on informal learning and collaboration across their learners?

Whitney - We have a wide range of customers using our social platform, ranging from sales and call center teams to engineers. The feedback we get includes:

>> more effective knowledge-sharing as best practices;

>> competitive information and sales strategies are more easily found and exchanged;

>> knowledge retention goes up because knowledge shared once is organically captured by the platform for re-use by users;

>> formal learning is enhanced and reinforced because it's surrounded with informal learning; and

'Focus on solutions to business cases without getting caught up with buzzwords and technologies.'
—Jon Ciampi, SumTotal Systems

How is the network secured?

Willis - Your social network should be secured in a variety of ways. Many 'private networks' are in fact semi-private networks where the people invited to participate represent both employees of

Wilkins - Mzinga partners with Level 3 Communications (www.level3.com/) as our third-party hosting center. Level 3 is one of the largest communications and Internet backbones in the world. There are multi-layer security control and monitoring procedures in place with Level 3 and

>> happier customers as they get better answers, faster from a more knowledgeable group of sales people, call center agents or engineers.

Wilkins - A number of customers are already using social media as a form of learning to support particular initiatives.

When Ford and Microsoft teamed up to create the SyncMyRide system, Ford faced a significant challenge: how to account for a huge and growing number of devices that support Bluetooth integration. They knew that they couldn't possibly address compatibility and usage questions across all of the current, let alone future, Bluetooth devices that might synch with their solutions.

Ford turned to Mzinga to create an embedded message board that lives on the Ford site. Through this moderated discussion area, users support themselves. Some users post questions, and other users as well as Ford experts provide answers. While this is not an LMS sort of solution, it is certainly a social learning solution and one that has been a resounding success.

By integrating social media and networking into our LMS, Mzinga's goal is to bring these sorts of social learning and sharing experiences into a more formal model, thereby enabling a broader view of learners' varied experiences and the kinds of content from which learners derive value.

Ciampi - Citrix was able to create communities of employees, customers and partners. The key measures of success were the 'adoption rate of employees to LMS due to the fun factor and community' and the 'retention rate of employees onto LMS due to the community effect.'

Citrix was able to achieve both adoption and retention successfully, which was essential for their fast-paced growth since they believed their employees were the most critical asset. The employees were also able to take ownership of their career growth and get the mentorship needed from the pool of respected experts.

Last month, Citrix did a Webinar for us focused on how they were using our platform for social learning. We'd be happy to provide you with the link upon request.

Willis - One of the U.K.'s leading financial

services companies uses communities of practice within Saba to extend the value of its formal learning programs. It has 70 communities that encourage informal contributions from different organizations

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—Dave Wilkins, Mzinga

across the corporation, including a community set up for the learning organization itself. By building its implementation from the ground up as a system for both formal and informal learning, it is working to ingrain collaboration into every aspect of how its employees learn.

Most of the communities are based on business function or focus groups, such as cost efficiencies. If you are part of a department or business function, you might be required to join a related group. In addition, the communities increase morale and include under-served groups at the organization.

What best practices can you share with buyers interested in adding a social networking feature?

Wilkins - There are several strategic decisions and activities that buyers need to think through:
>> What is the desired state in the long-term? A workplace or learning community that includes LMS-like features or an LMS-like solution that includes community and social media features?
>> How will you measure success? Do not accept the notion that it's impossible to measure the impact of social interactions or sharing. If you are trying to

reduce turnover, you could possibly correlate social networking activity and turnover stats. If you are trying to improve close rates, maybe you could correlate time spent contributing and

sharing expertise with other sales reps with close rates?
>> Think through moderation strategies. When will you use pre-moderation? When will you use watch words? Who will be responsible for post-moderation?
>> Establish 'rules of the road' for your social media and social networking. Will you allow personal content and interactions? Or is it purely work-related? What behaviors are not allowed? Will there be rewards for certain behaviors?
>> Lastly and most importantly: don't continue to conduct business as usual with social media tasks layered on top. Participating in social networking and creating social media needs to become part of their job, not a side activity.

Ciampi - SumTotal has the following best practices:
>> Identify clear business cases that could use social networking and deliver tangible business value. Without clear business case, informal learning will be viewed as a cool technology without applicable use.
>> Look at the cases used by best-in-class companies: community of practice, onboarding and training of virtual workforce, corporate engagement, cus-

tomer support forums and on-the-job learning. These will give you ideas about business cases that will deliver tangible value.

>> Do not get caught up with buzz-words and technologies like wiki, blogs, RSS and collaboration center. Evaluate your one or two high-value use cases, and then look for technology to solve the problem.

>> Start small with one or two critical-use cases. Demonstrate clear value and ROI before broader roll-outs.

>> Define clear success criteria, like adoption rate to LMS, retention rate to LMS, and increase in percentage of self-initiated learning (ownership of career growth).

>> Don't forget the fun factor, which is essential for adoption and retention.

>> Measure the success criteria and their impact on business objectives (revenue, customer satisfaction, productivity and compliance) before initiating wide-ranging initiatives.

Willis - Understand that there are legitimate tensions between those that view these new notions as enabling productivity and transparency and those that view them as introducing risk and/or loss of control. Others may not embrace these new ideas as you have.

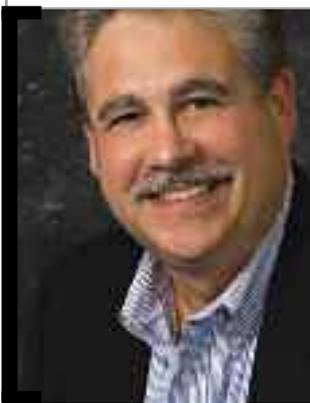But don't let that stop you, because — in the now-famous words of Euan Semple:

"The 100 percent guaranteed easiest way to do Enterprise 2.0 (Learning 2.0)? Do nothing. And then your bright, thoughtful and energetic staff will do it for you. Trouble is, they will do it outside your firewall on bulletin boards, instant-message exchanges, personal blogs and probably on islands in Second Life, and you will have lost the ability to understand it, influence it and integrate it.

"The second easiest way is to find ways of allowing this to happen inside the firewall, which can be as simple as sticking in some low-cost or free tools and then making sure your existing organization can get out of the way.

"The third easiest way is to do the second-easiest way and then engage those who would have done the easiest way and get them to help you.

"And the hardest way: You don't need me to tell you that!"

Whitney - First, separate the social platform from its LMS. Each delivers highly independent value. Second, get started with an important, but contained initiative. Third, be prepared to launch and market the use of the social platform and reward users. This often can be as simple as recognizing people within the system for sharing quality content. And fourth, measure use and impact and make adjustments on a regular basis.

How has the economy impacted your business and prospects? What advice do you have to buyers of technology in this market?

Ciampi - We are seeing positive momentum in several strategic initiatives such as aggressive penetration into SMB market.

Our advice and three best practices to demonstrate ROI for your key learning and development initiatives:

1 Understand your business imperatives. Evaluate your company's annual reports to pinpoint specific challenges that can be resolved through learning and talent development programs. After isolating those challenges and areas of focus, interview key stakeholders for those areas. Dig deep to understand their strategic objectives and pain points.

2 Identify high-impact initiatives. Next, look at your strategic corporate goals — such as revenue growth, reduction in customer churn, or productivity improvements — and determine which high-impact learning initiatives best will align to those objectives.

3 Link business goals with current pain points. Conversely, you also need to identify your current challenges, and show how they reflect your existing inability to meet strategic business goals.

Whitney - We just closed our best quarter and best year ever and remain cautiously optimistic about 2009. We are seeing our successful buyers focus much more on communicating their business impact to

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—Jeff Whitney, OutStart

senior management in three key areas: business agility; customer, partner, and employee enablement and ROI.

Business agility is all about providing the knowledge people need to understand and adapt to rapidly changing business requirements. Enablement provides employees, partners or customers with the knowledge they need to perform their jobs more successfully. And, our successful buyers are focused on showing rapid and significant ROI.

Wilkins - Interestingly, our current pipeline is at the highest level it has ever been, and we continue to close very significant accounts. We believe that social media and networking (and LMS's that incorporate these features) may be at least partially recession-proof. Social media can reduce costs, increase sales, improve productivity and scale, improve relationships, and deliver many other very significant bottom-line results that are at least as valuable in a downturn as they are during boom times.

With reductions in budgets and staff, "doing more with less" is a business imperative; social media delivers on this promise. ☉