The New Communications World

Managing Electronic Records Conference – 2008

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Abstract

It wasn't long ago when e-mail made its debut in our daily lives. Now e-mail drives communication in our organizations and is centric to our work routines - too centric! It's time to break the pattern of e-mail use and consider new options for communicating!

This presentation considers the challenges and opportunities of communicating in a connected world. Specifically, the presentation discusses:

- Formulating communication that gets noticed
- Leveraging communication flows generated by collaboration and co-created content
- Capturing the value of new communication tools such as Wikis, blogs, video, tagging, mashups, etc., for our organizations

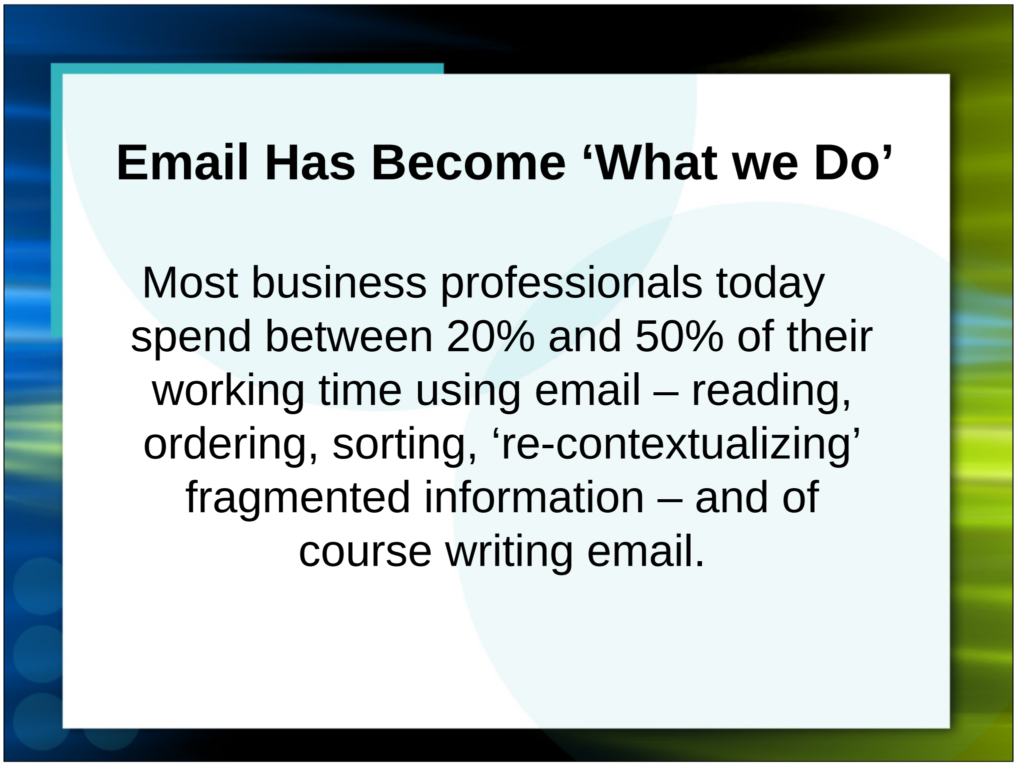
The impact of the new communications world on our ECRM programs and organizations will be considered. This includes getting the message out about our ECRM programs so they are branded for the organization, as well as considering the impact of new content sources and channels. Examples of best practices and industry-leading research will be referenced and made available.

[KS]

Welcome to MER 2008 – It is a pleasure to be here today to discuss this topic with you and have the opportunity to co-present with one of my colleagues, Dr. Reid Smith. I have had the opportunity to work with Reid over the last year on an exciting project at Marathon Oil. It has been a real joy to work with him – and think with him – as we develop a new approach for information management at Marathon. We are challenging old beliefs and habits and implementing a new environment for work in 2008 and beyond.

[RS]

Karen and I intend to engage you in a discussion about communications in the Web 2.0 world – how one channel in particular is now overloaded – and how we can use other channels – to help our organizations reap the productivity and compliance benefits of improved information management practice. In the new world, communications is multi-way. As a result, Karen and I do not intend to simply "present" to you. Rather, we hope to engage you in a participatory experience.



[KS]

Most business professionals today spend between 20% and 50% of their working time using email: reading, ordering, sorting, ‘re-contextualizing’ fragmented information and of course writing email. Use of email is increasing, due to trends of globalization—distribution of organizational divisions, outsourcing, among others. Email can lead to some well-known problems:

Loss of Context: Information in context (as in a newspaper) is much easier and faster to understand than unsorted fragments. Communicating in context is faster and more efficient. "Asocial Behaviorisms" Email can be an "easy out" for those with non-confrontational personalities, perverting the overall health of public discourse in a society that depends on authentic human interaction.

Spam: Email is a push-only medium: control of who receives information lies primarily with the sender. This can lead to an overflow of unwanted or irrelevant information.

Inconsistency: Email can duplicate information. This may be a problem when a team is collaboratively working on documents.

Despite these disadvantages, and despite the availability of other tools, email-based communication is still the most widely used written medium in businesses.

During the past month, RGS received on average 78 messages / day on his Marathon account (the weekends were pretty light) and sent 18 messages /day.

Can you relate to this statistic? What implications does it have on your day-to-day productivity, efficiency, and ability to manage your current work load?

Imagine for a moment receiving this email:

“I am so far behind in email that I am declaring bankruptcy. If you’ve sent me an email (and you aren’t my wife, partner, or colleague), you might want to send it again. I am starting over.” – Fred Wilson, Venture capitalist

Declaring Email "Bankruptcy"

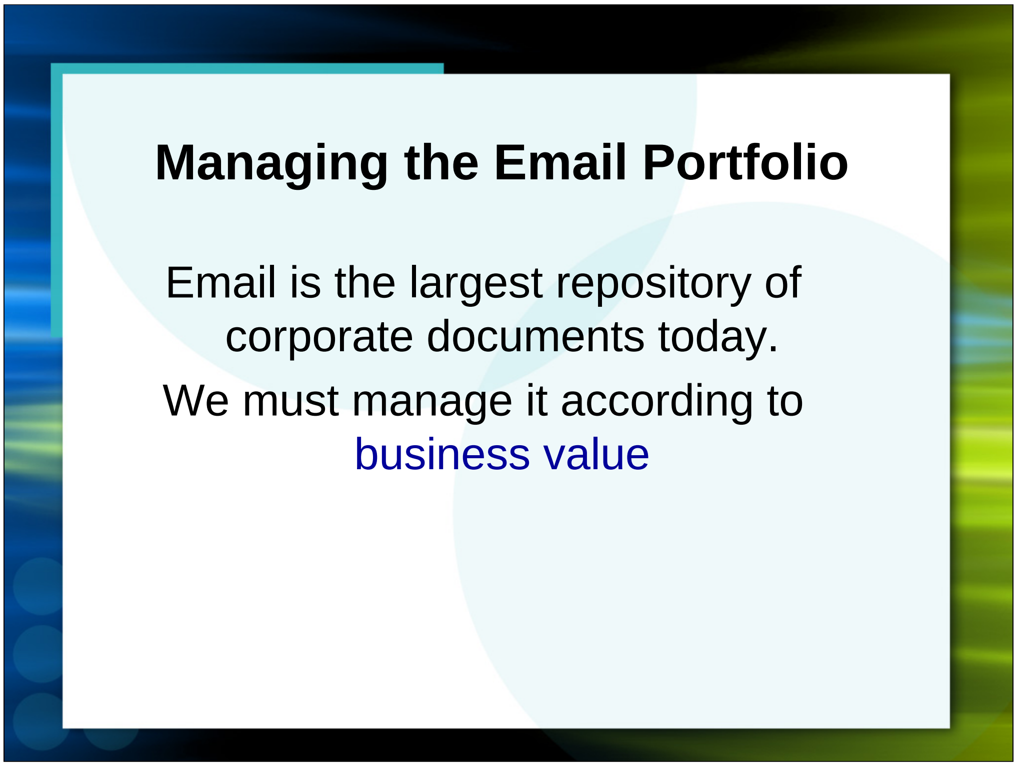
When you ignore a large number of email messages after falling behind in reading and answering them.

It may involve sending a boilerplate message explaining that the email inbox is being cleared out.

There are several high-profile people – in industry, academia, technology research, and entertainment – who have declared email bankruptcy – also called "email fatigue."

Others have taken a different approach, they have started auto-responders to reply to each email individually and set expectations regarding the timeliness of a response. One individual stated he had a 10,000 email backlog and took six weeks cleaning it up.

The point is that we have pushed ourselves to a limit – the risk is that declaring email bankruptcy can lead to severe implications from a legal perspective. And, if we don't change our habits, the problem will only return over time.



[KS]

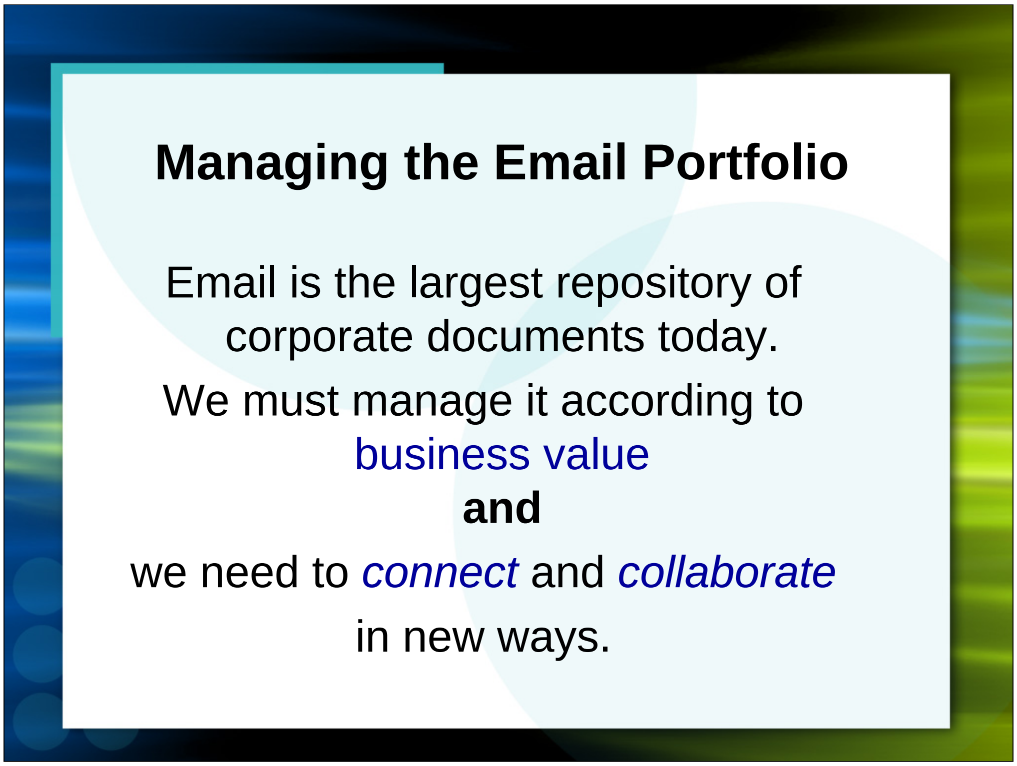
The volume of email has grown exponentially since its introduction. In 2003, a ‘heavy’ email user received between 30-50 emails a day. Today, an average knowledge worker receives upwards of 50 emails a day and it often numbers in the hundreds of messages a day.

Email has become one of the largest repositories of corporate documents today.

Most companies are moving forward with some form of email initiative designed to add filing systems, policies and rules, retention periods, and disposition processes to their email systems. – Some of these initiatives are designed strictly to ‘journal’ all email messages to facilitate e-Discovery, others are designed to classify emails in order to focus efforts on the ‘records’ and retention of them – managing only the volume of emails that are considered ‘records’.

There is a very nice white paper called “The Art of Email Management” produced by Integro and IBM that presents a framework to consider the evolution of email management.

AIIM, just released an email on Thursday titled “ECM without EMM (Email Management) = Failure?” which describes the management of email has central to the overall success of ECM initiatives.

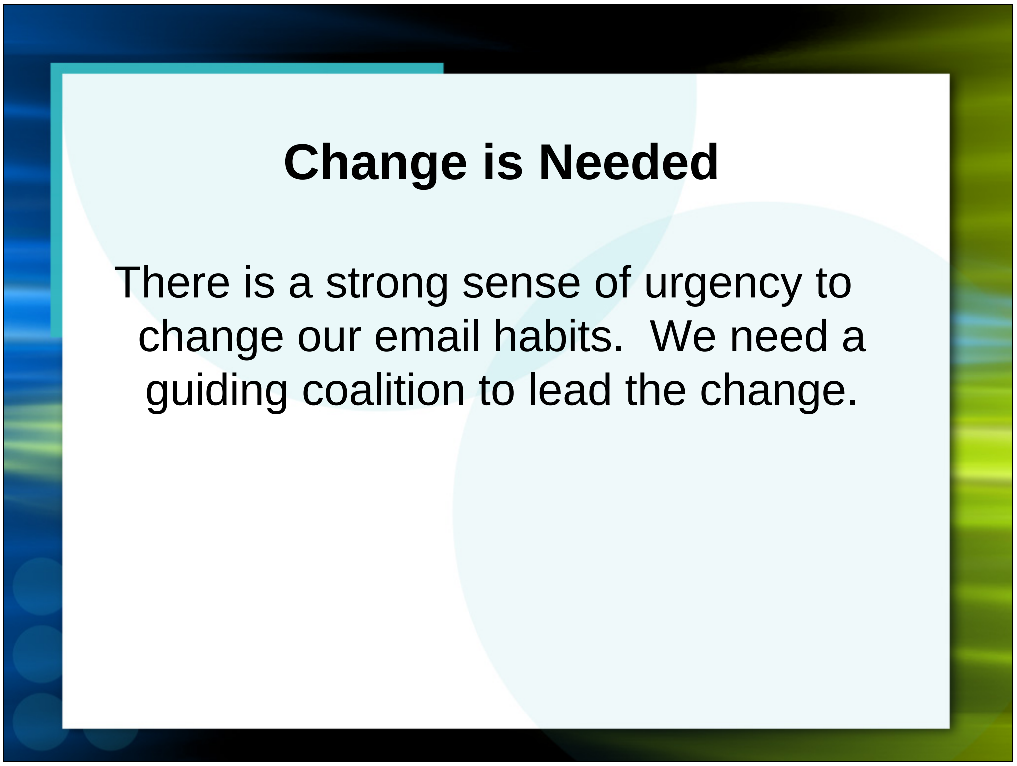


[KS]

It is true we must address both of the ‘volume’ and ‘value’ of email in order to succeed. However, it is also true that we must extend our thinking beyond current work methods and consider the need to connect and collaborate in new ways. We must move beyond this ingrained habit and consider new ways to connect People to Information, People to People, and People to Communities of Practice.

Marshall McLuhan stated “It is the medium that shapes and controls the scale and form of human association and action.” Email has changed the rules of the game for communication today and the way it is played; subtly over time, to where email has become the default method of communication within our organizations. It has personal and social consequences. And for our organizations, it has had “unanticipated consequences”:

Organizational risk, personal stress including productivity and performance hits, and conflicts due improper and incomplete communication cycles using email.



[KS]

A recently released study from IDC defined the ‘Digital Universe’ at roughly 281 Billion Gigabytes in 2007. This was 10% larger than they originally projected.

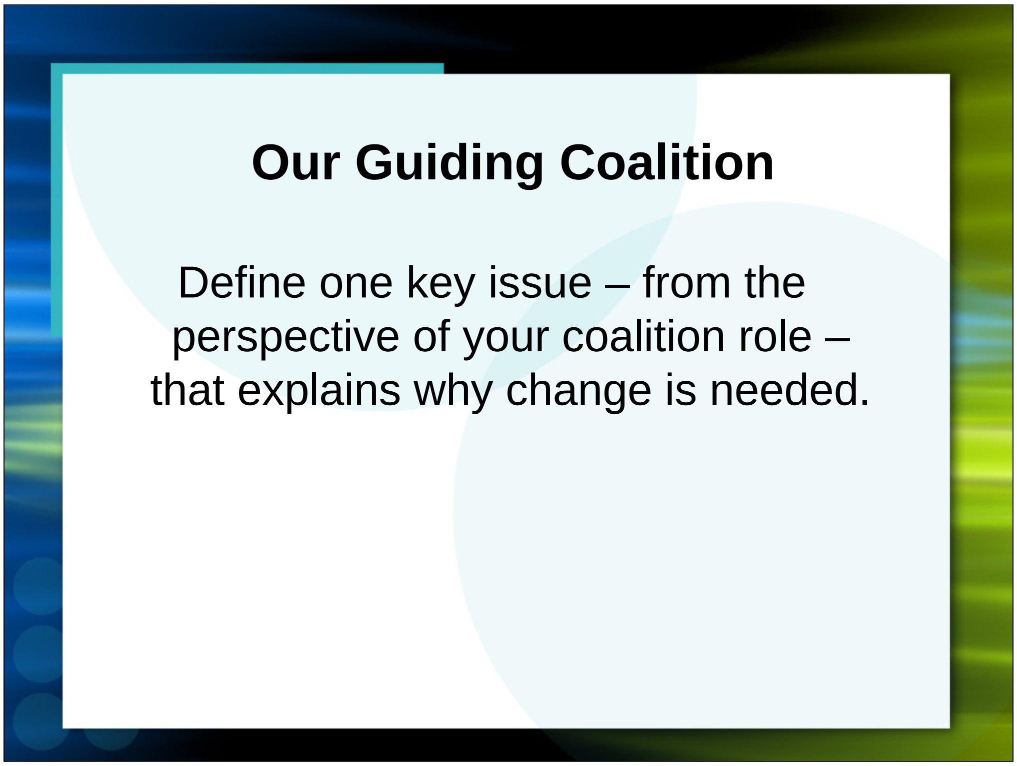
In addition, the estimates for 2011 indicate a tenfold increase in size over 2007. That means 10 times more emails…is your organization ready for that? Are you ready for that?

Obviously, there is a strong sense of urgency to change email habits. And, we need a guiding coalition to lead the change. The coalition needs to incorporate many disciplines – we need a solution that satisfies everyone’s needs.

At this point, I’d like for you to roll your die. Once you have done this, please move to the area with your designated number.

[KS/RS]

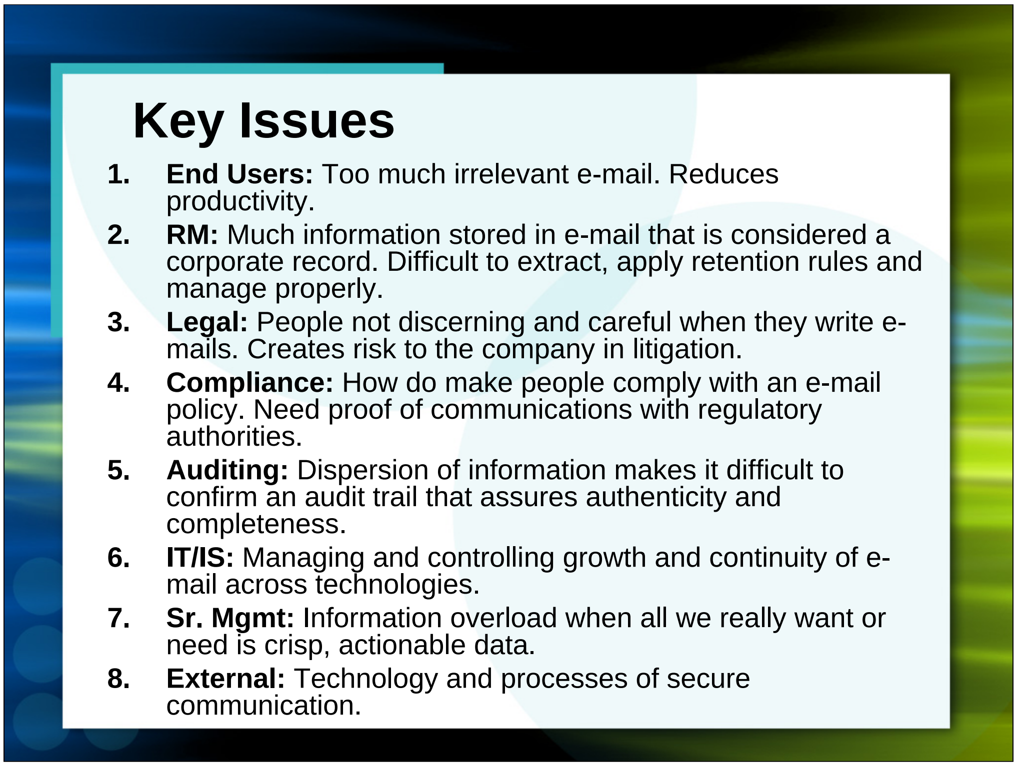
Each table/area represents a specific discipline. This is the role you now play in your organization. As you can see from the slide, people play very different roles … and see the world through different lenses.



[KS/RS]

Each group will have 3 minutes to come up with ‘One Key Issue’ that explains why change is needed in email management – from the perspective of your coalition role.

Don’t ask for more time … and don’t present more than one key issue. It’s a new world – fast-paced and sound-bite oriented. People won’t listen beyond the first key issue. You CAN do it!

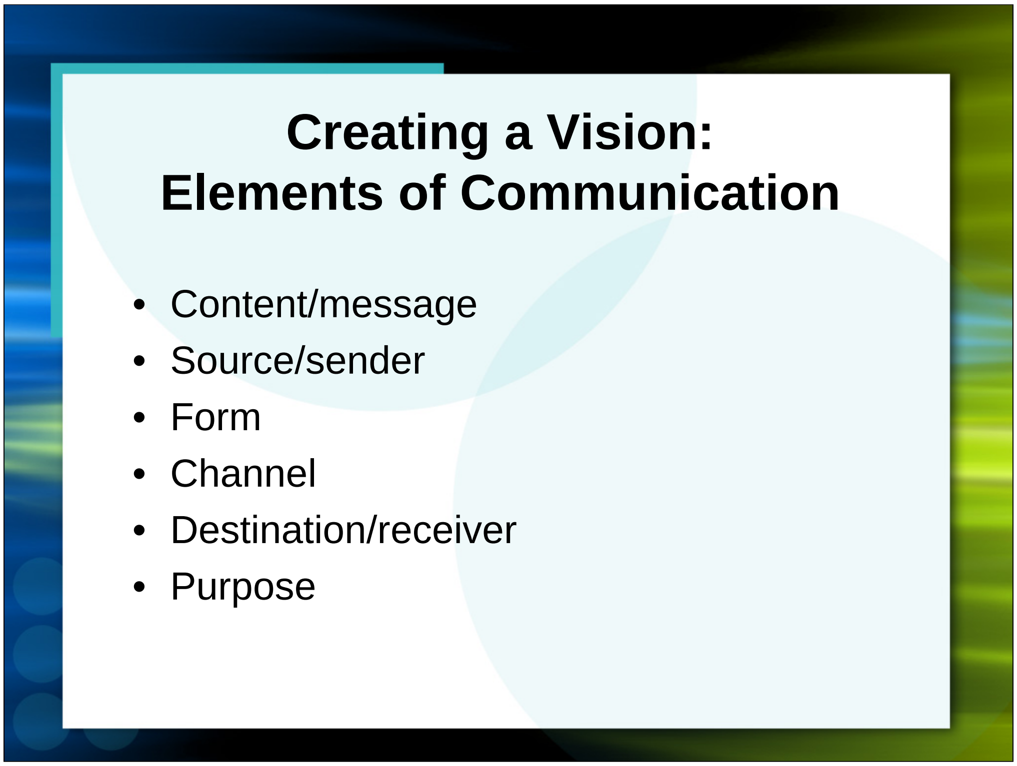


[KS]

One of the future indicators of organizational success will be the ability to capture co-created content that leverages the knowledge and expertise of all “interested parties” [stakeholders a better word?] in a particular situation.

Let’s do that now in this situation…

Points shown on the slide were suggested by the individual discussion groups.



[KS]
We need to create a vision for communication within our organizations…

Let's step back for just a moment and review some key elements of communication – terms you would be introduced to in a 'Communications 101' course. Each of these represents a key component of our vision:

- Content (what type of things are communicated)
- Source, emisor [word?], sender or encoder (by whom)
- Form (in which form) – verbal, non-verbal
- Channel (through which medium)
- Destination, receiver, target or decoder (to whom)
- Purpose or pragmatic aspect

Communication is the process of transferring information from a sender to a receiver with the use of a medium in which the communicated information is understood by both sender and receiver.

Communication is defined as a process by which we assign and convey meaning in an attempt to create shared understanding.

[KS]
Two of the elements of Communication need some further discussion: Purpose and Audience

It is important to consider the purpose of our communication and the nature of the audience we are communication to/for.

These are various ‘Purposes’ to communicate….

[KS]

These are the elements that describe the nature of the audience…

Each of these should have an impact on the content, form, and channel we use to communicate.

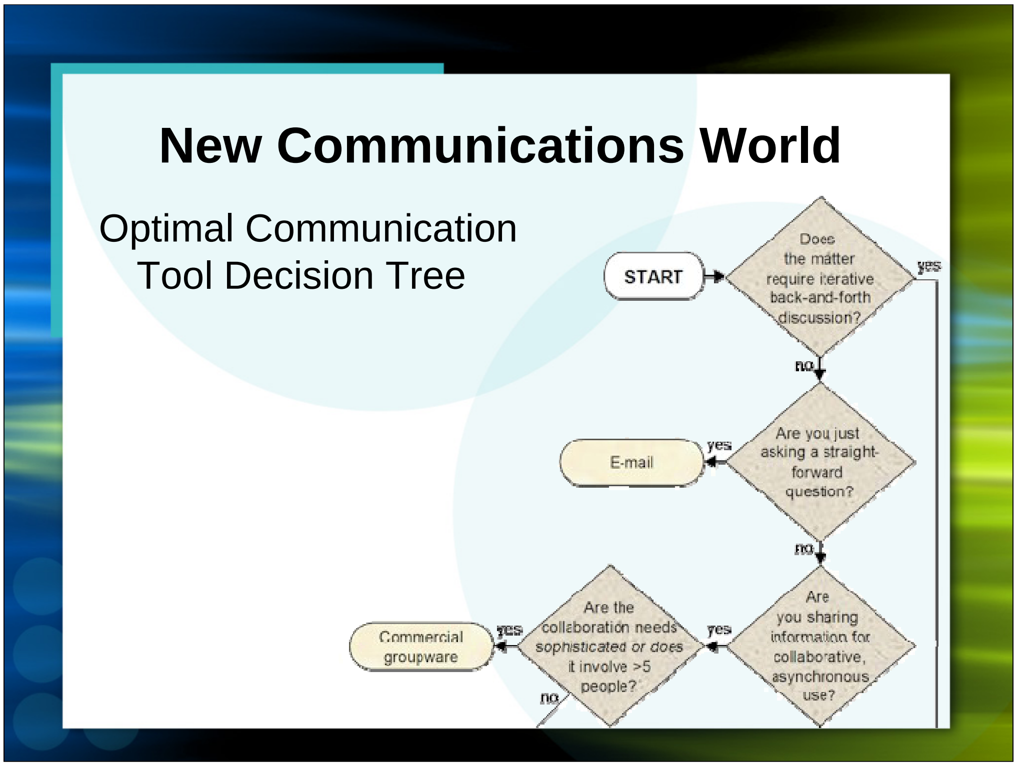
[KS]

Today, we have many ‘channels’ for communicating each of them has a distinctive structure, form, style, and value. In general, however, we are trying to meet increased demands within our organizations for:

- Distributed collaboration,
- Orchestrating and coordinating outsourced activities,
- Understanding connection points and leveraging them,
- Capturing flows of knowledge and best practices,
- Bringing people together – instantly.

Most organizations are just beginning to introduce new communications approaches and are realizing the need for an operating environment where the tools come together in a seamless environment. This will happen over time, and in many cases will be driven by younger generations coming into the work force with different mindsets.

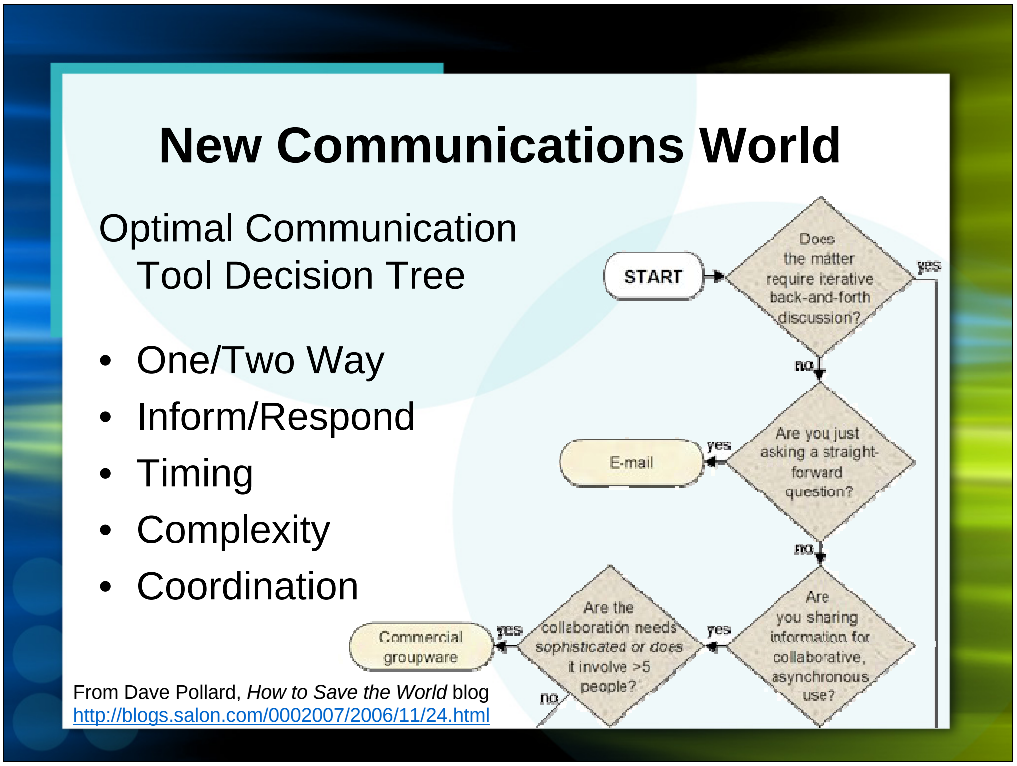
There are so many choices, how do you decide what approach to use when?



[KS]

This questions was addressed by Dave Pollard – a modern thinker – who considers the world, environment, and business in the context of 'making things work'.

Mr. Pollard was asked by a client to build a 'decision tree' around the optimal forms of communication. His decision tree considered several elements…



[KS]
Type of communication – one way/two way, Purpose, Timing, Complexity, and Coordination required

The results included: Email, Wikis, eLearning tools, videoconferencing, blogs, face to face, IM, desktop video, productions video, audio teleconferences, and discussion forums.

In general, he states there are 5 major reasons people use the wrong form of communication:

Habit: We tend to use the tools with which we're most familiar, comfortable, and in the habit of using, even when they're not optimal. It takes some practice to train ourselves to think "what's the best medium to use for this?" *before* we start or respond to a communication.

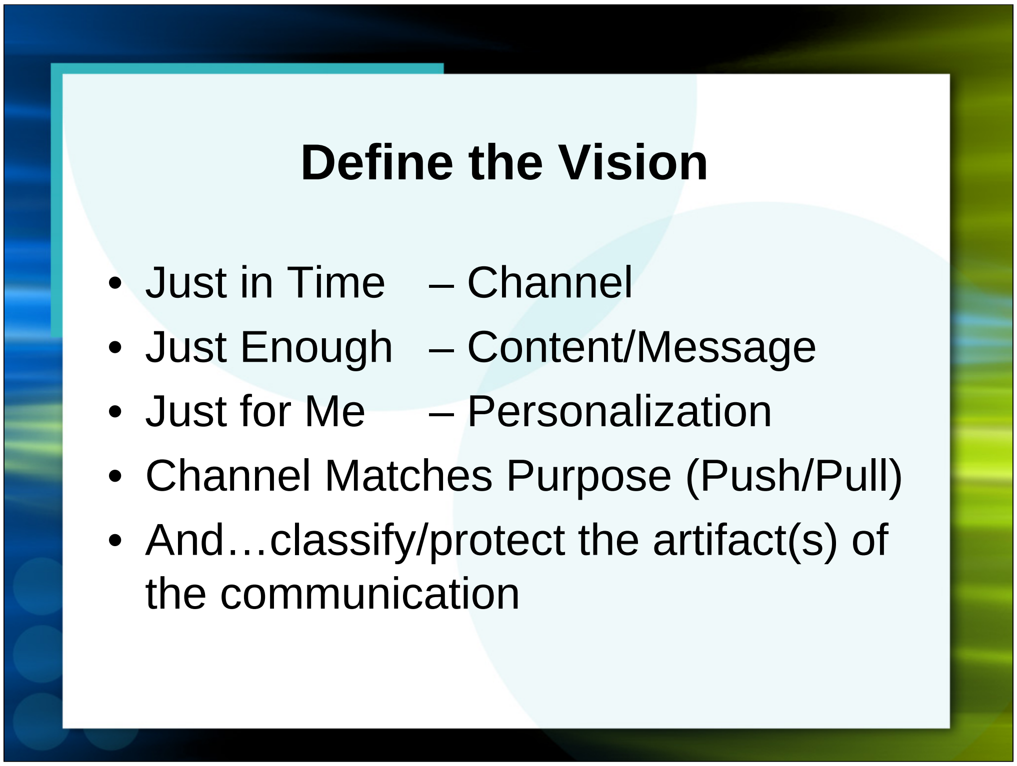
Personality: Some people (e.g., those who are shy about face-to-face meetings) hide behind email even when it's not the right medium. Sometimes it's up to use, the recipients, not to get drawn into time-wasting email threads, and walk down the hall or pick up the phone and talk it through in real time. And then there are the “flame wars” … the kind of “communication” that is rarely happens in person … without a visit to the parking lot … or the woodshed!

Physical layout: Having people who need a lot of face-to-face contact in offices far apart just to pay homage to the organization chart can obstruct the use of optimal communication technologies.

Ignorance: If people don't know communication technologies are available, or if they're hard to learn or remember how to use, or too complicated, they won't be used.

Unavailability: Some organizations refuse to allow IM, blogs, Wikis or free collaboration tools or 'free' tools that need to be downloaded to each PC, for security or centralized management reasons. Obviously, if the tools aren't available, less appropriate tools have to be used.

We have been considering these issues as we develop/implement a new information management framework at Marathon. I will now turn the floor over to Reid to discuss this in more detail…

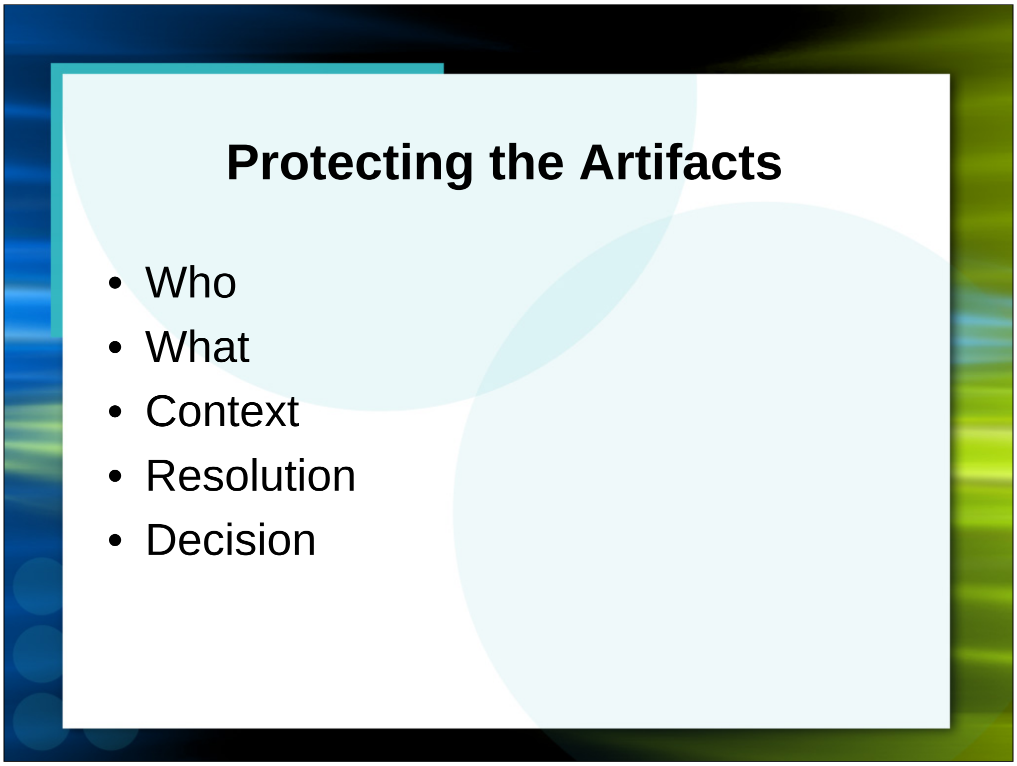


[RS]

Everyone is busy and is bombarded by messages. How do you cause people to pay attention to your message and how can you deliver information that is of use to your colleagues … when they need it!?

Some years ago, a colleague, whose name is “Justin”, convinced me of the importance of: “just in time, just enough, just for me.” Use the right channel and form to deliver information to people just in time to perform the task at hand (information push) … or enable them to obtain that information unassisted (information pull). Deliver just enough information – only what they need now – rather than everything they might ever need, whether or not they need it now. And personalize the information for each individual – rapid, expert-level information for the specialist, tutorial information for those of us who perform certain tasks only occasionally.

And returning to what Karen said earlier, consider a threaded email discussion among members of a community of practice – a multi-way communication whose purpose is to solve a problem – say, how to optimize a manufacturing process. After much back and forth, the community agrees on a solution. This solution must be classified and protected so that it can be found and re-used in future.

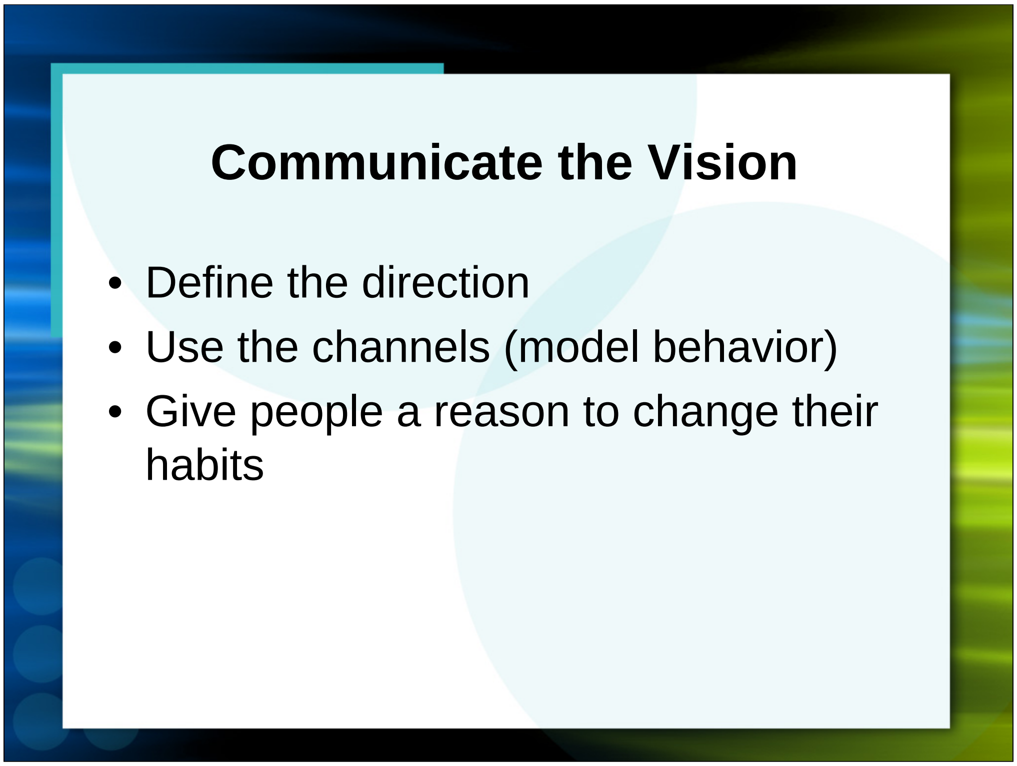


[RS]
It is neither efficient nor effective to share the solution by pointing others to the email thread so that they can retrace the steps. It is better for someone to turn the thread into a reusable “knowledge artifact.” This is a creative process that requires effort.

This is what we mean by “protecting” the artifact – capturing the information shown on the slide.

Thus far we have highlighted the sense of urgency – the need for change in the new world of communications. We have built a guiding coalition drawn from different parts of our organization. We have created a vision for the new world – including multi-channel, multi-way communications and co-created content.

Now how do we get from the vision to actually changing the work environment across the organization?



[RS]

The next step is to communicate the vision – explaining why a change is required, the direction in which we are headed and the benefits to be reaped from adopting the new approach – both for the organization and for the individual stakeholders – regardless of the role they play.

Of course our guiding coalition must model the new behavior. A few broadcast email messages aren't going to get the job done.

We have to explain and demonstrate over and over again – using multiple channels – the behavior, processes and tools we want people to adopt and What's In It For Me (WIIFM).

Remember also that communication is two-way. Part of what you are doing is gaining buy-in to the new approach … so that it becomes a solution developed of, by and for the people of the organization – not something that happens to them. Expect changes as you go forward. There are bound to be issues and situations you did not anticipate when you developed the initial vision and strategy.

To be successful, over-communicate by a factor of ten. Communicate, communicate, and communicate some more.

At last year's conference, DeBe Wantzloeben of Valero noted that one should strive for communications that touch each person at least three times, in three different ways. This honors both the importance of "over-communicating" the vision and the fact that different modes of communication work better for different people.

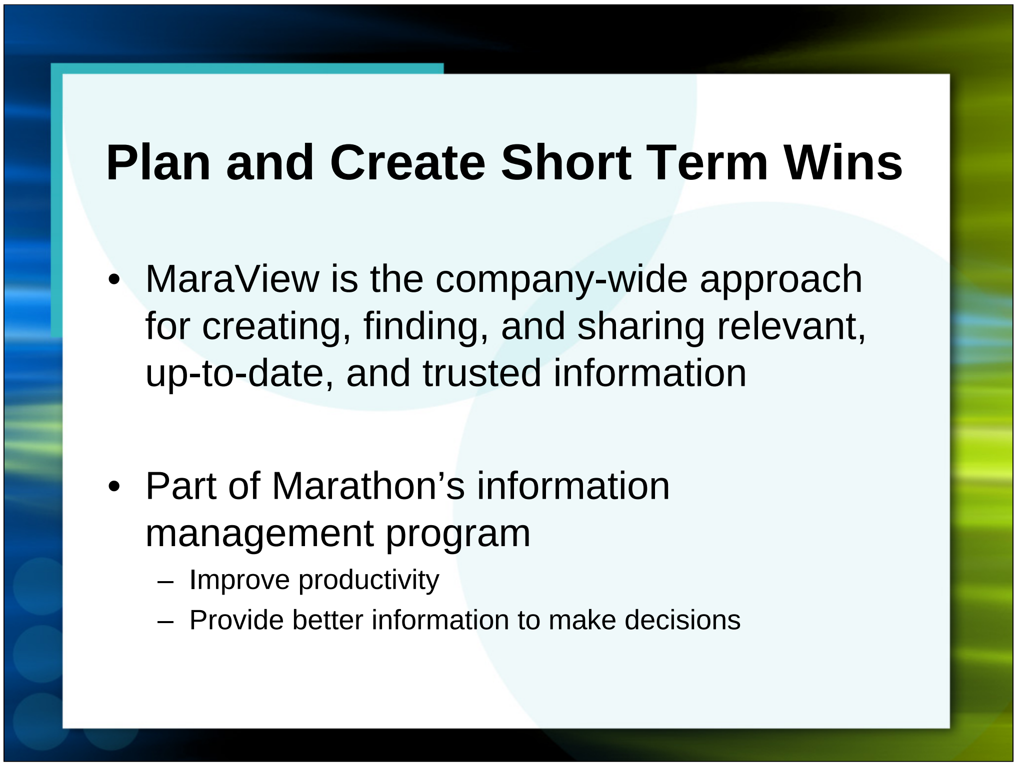
[RS]

The next step is to empower others to act. Make it easy for the pioneers – those who want to strike out in the new direction – to do so.

Support them with policies. For example, write a new information management policy for your board to sign – say, to make line managers accountable for managing the lifecycle of information to comply with regulations, legal requirements and business requirements.

Put in place new processes and technology to simplify adopting the new approaches. And equally important, put people in place to support the pioneers. Don’t just drop new technology on their desktops.

Bottom line: Make it easy for people to do the right things.

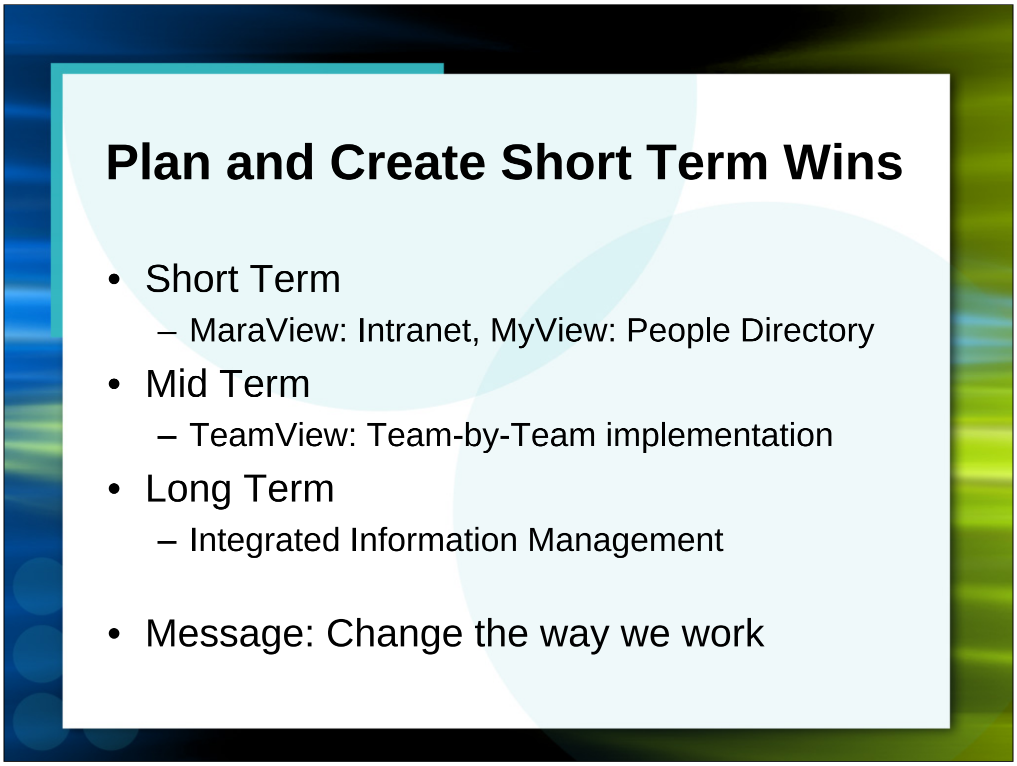


[RS]

Along the way to institutionalizing the new approach, engineer some short-term wins – unambiguous success stories that you can use to continue to build support. I say "engineer" advisedly. The point is to identify in advance possible short-term wins that will make a difference, then "arrange" for them to happen. Don't leave it to chance.

Let me spend a couple of minutes to explain what we are doing at Marathon – a Fortune 36 integrated oil & gas company.

MaraView is the our new framework for information management. Our brand promise is "relevant, up-to-date and trusted information." The business drivers are productivity, improved decision quality and compliance.



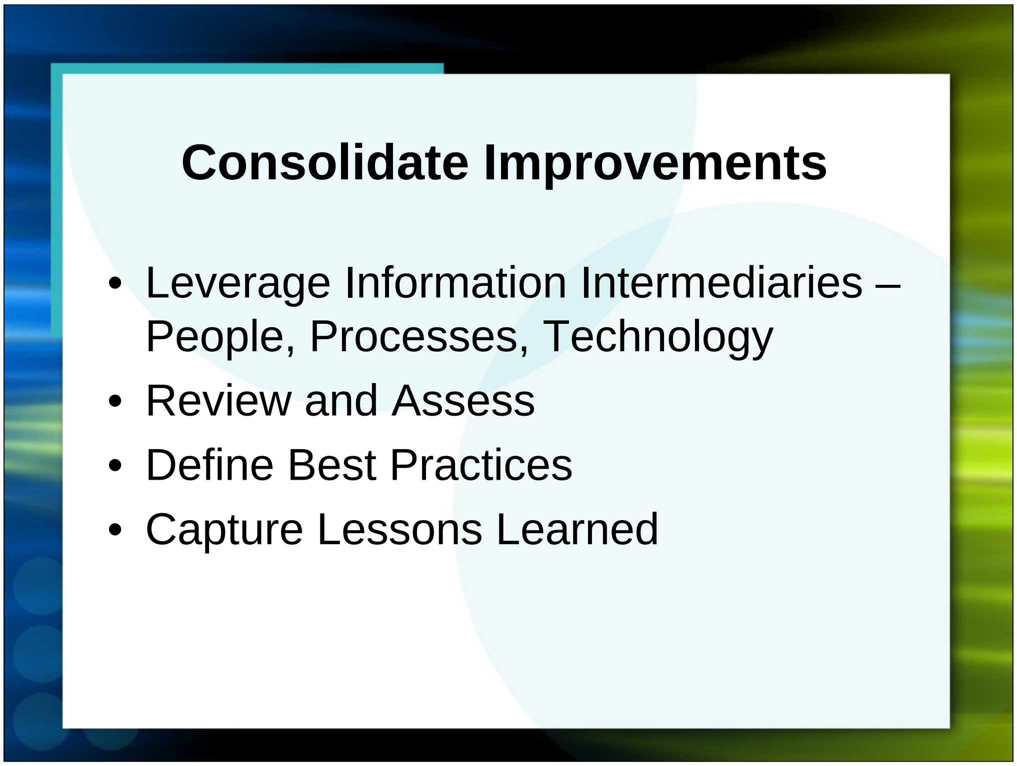
[RS]
We plan the following short-term wins:

First, given the ever-increasing importance of the intranet Web as a vehicle for knowledge sharing, we are replacing the current company intranet landing page – to deliver up-to-date news and improved search in a consistent format, company-wide.

Second, given the importance of connecting people to other people who may be able to help them solve a problem, we are implementing a new people directory or expertise locator.

In the mid-term, we are rolling out what we call TeamViews – to improve information management for collaborative teams across the company (departments, project teams and communities of practice).

In the longer term, we seek integrated information management and search, for all types of information – from email to Microsoft Office files to structured data in applications to people-related information to the “controlled documents” that are so important in process safety management, a major focus for our industry.



[RS]

As the new approach gains momentum among the early adopters and you are feeling that ultimate success is just around the corner, you will inevitably encounter parts of the organization where people are reluctant to change – perhaps VERY reluctant to change.

You will be told: “We are special”, “You don’t understand”, and so on – even if people will agree that things aren’t perfect today. You will be reminded of all of the previous attempts at change … all of the failures of the past … even if they are unrelated to you or anything you are doing. People will attempt to opt out. They will complain to their managers that you are about to set the industry back 10 years … and so on.

Earlier, I said that an early step in achieving the new work environment is to make doing the right things easy. Going forward it is also important to make doing the wrong things difficult.

People, processes and technology continue to be important. One point on technology: you can bake in the new approach.

At this stage, measurement becomes more important. You are on the road to institutionalization … and your way to spend time and money will be compared with all other possibilities … and rightly so.

The bottom line is this: Don’t let up – press harder and faster after the first successes. Be relentless with initiating change after change until the vision is reality. Above all, don’t declare victory too soon.

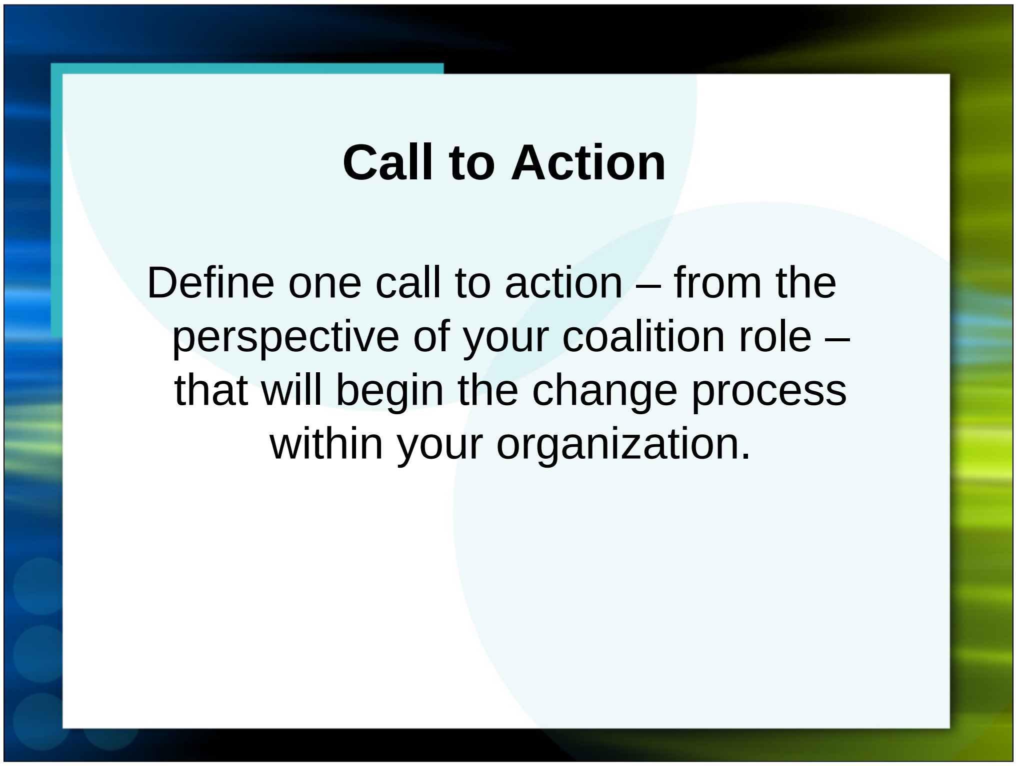
[RS]

The last step in adopting the new approach is institutionalization. You know you have arrived when the new approach becomes expected behavior – “the way we work around here.”

A sobering thought: Few organizations have the vision, coupled with the stamina, the solid policy, process, technology and people foundation to achieve it.

[RS]

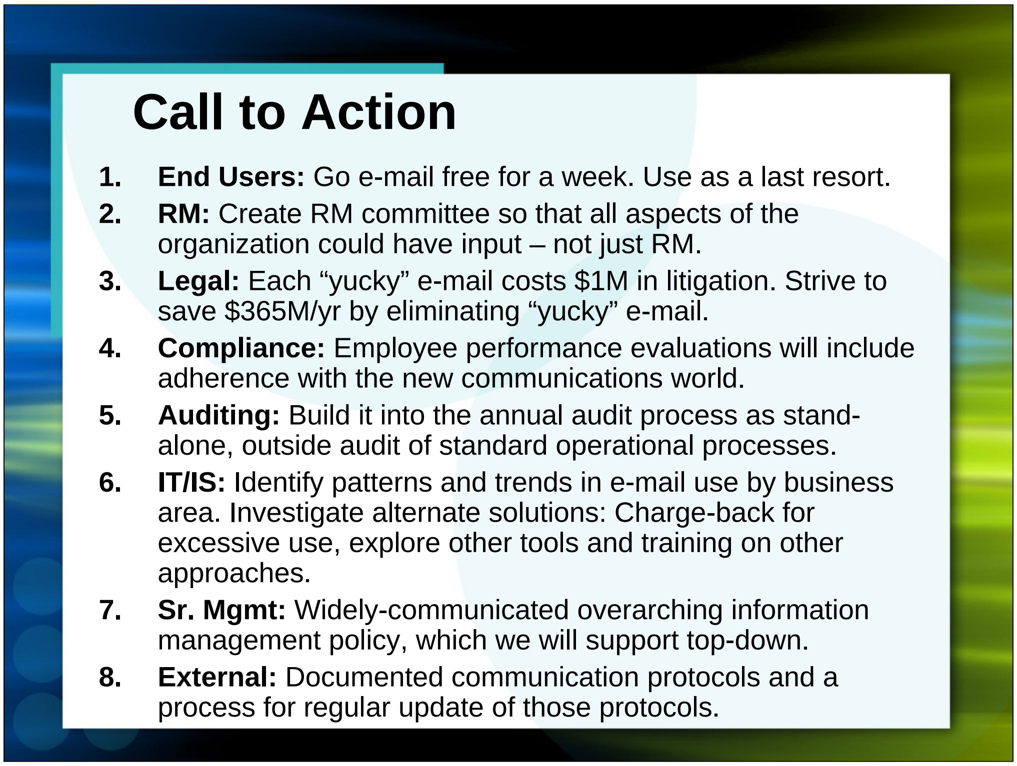
We have now outlined the steps of the journey to the new world. It is time to return to our guiding coalition … and to devise a “call to action.”



[RS/KS]
Examples of a call to action

1. IT Department
   Inform your business partners on what's coming
   Help us define success for your business partners … and yourselves
   Make us aware of integration opportunities
   Start educating yourself on the new technology
   Get involved when we migrate your business partners
   Ask questions and make suggestions

2. Records Coordinators
   Inform your business partners on what's coming.
   Help us define success for your business partners … and yourselves.
   Ensure your information is being maintained according to the current retention schedule.
   Inventory your physical storage.
   Work with the ECM team to actively manage your information.
   Ask questions and make suggestions.



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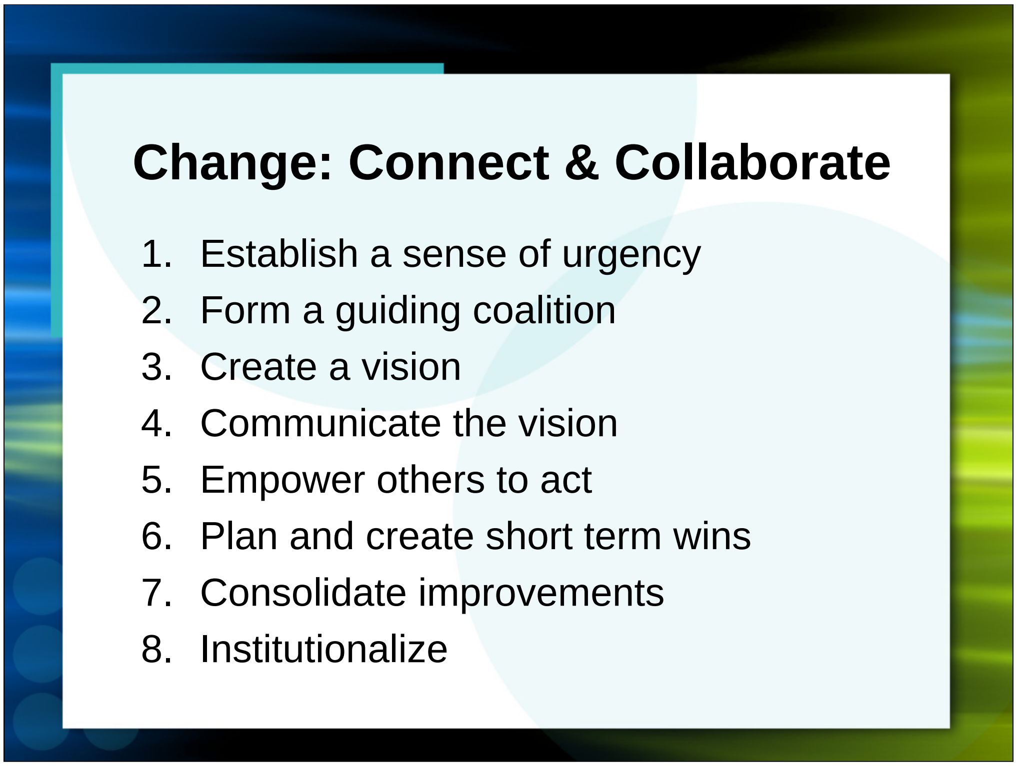

We mentioned at the beginning of the presentation – Managing the Email Portfolio requires addressing business value; it also requires us to connect and collaborate in new ways.

The change that is needed will require a process to be successful. There are 8 steps of successful change:

[KS]

Set the Stage:

1. Create a sense of urgency – help others see the need for change and the importance of acting immediately
2. Pull together the guiding team – powerful group guiding the change – leadership, credibility, communications ability, authority, analytical skills

Decide What to Do:

3. Develop the Change Vision and Strategy – Clarify how the future will be different than the past, how you can make that future a reality

[RS]

Make it Happen:

4. Communicate for Understanding and Buy in – make sure as many others as possible understand and accept the vision and the strategy
5. Empower others to Act – remove as many barriers as possible so that those who want to make the vision a reality can do so
6. Produce short term wins – create some visible, unambiguous successes as soon as possible
7. Don't let up – press harder and faster after the first successes – Be relentless with initiating change after change until the vision is reality

Make it Stick:

8. Create a New Culture – hold on to the new ways of behaving, and make sure they succeed, until they become strong enough to replace old traditions

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[KS]

We hope some of these ideas/concepts can be useful in your work environment immediately. Change must be absorbed in a way that does not overwhelm – BUT you cannot afford to be left behind. Change is necessary.

It is important that we all develop a new, distinctive capability for connecting and collaborating – beyond email – this directly affects productivity and ultimately competitive advantage. This will require a technology infrastructure that is open-ended so tools can be plugged in as they are developed as well as creating a record-keeping facility to capture who came together over what issues, the context and the resolution.

This is the basis for learning – it is vital to expanding our capabilities.

Your die is a physical reminder for you – to listen/capture the needs of all influencers/participants, to follow a change process, and to avoid leaving it to chance.

Define, direct, and lead the change.

Thank you!