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## EXECUTIVE SUMMARY

This paper and the research behind it is based on an online survey conducted between November 2009 and January 2010, targeting MNCs and international organizations. Given the size of the panel (50 set of answers kept), this report is food for thought rather than proven statistical analysis. Financial and technical information was not our focus. Our intent was to study change execution.

Respondents were from the following organizations: Air Liquide, Alcatel Lucent, Alstom, Amadeus, AT&T, Bouygues, Caterpillar, Cisco, Deloitte, DuPont, Ericsson, France Telecom – Orange, GDF Suez, IBM, Kimberly-Clark, KPN, MAN, Mars, Mercedes-Benz, Microsoft, French Ministère de la Défense, Parker Hannifin, Relais & Châteaux, Royal Bank of Scotland, Sapient, Société Générale, Sogeti, Sony, Sopra, Swift, Thales, Tokyo Electron, Ubisoft, United Technologies, Valeo. Respondents answered in their own names rather than representing the official position of their employers; their answers were made anonymous in the report. The report covers applications scope, corporate culture influence, strategic fit, change governance, user adoption and lessons learned. It compares views on the journey of change from different stakeholders, including CIO/IT, HR, Communications and early adopters. It gives a unique set of insights of interest for executives, strategists, change sponsors and change agents: what to focus on, and the right questions to ask at each stage of the change. It also highlights Early Strategies Enterprise 2.0 Maturity Model.

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## INTRODUCTION: THE ESSENCE OF OUR FINDINGS

In this introduction, we will try to summarize the key points you need to understand if your organization has a transformation project underway or plans to start: what factors will the most affect success, what can be done to minimize risks and maximize achievement. Here are our recommendations, deduced and extrapolated from the survey responses but also in some places influenced by other research and case studies undertaken by Early Strategies.

It is a snapshot, valid with today's understanding and we certainly need to discover more on the subject – the fact is that the Enterprise 2.0 term was coined less than 4 years ago, and knowledge is still emerging.

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### A COMPULSORY THOUGH TAILORABLE AND PROMISING CHANGE

We're living through a major society change.

The web 2.0 technology - '2.0' because it allows 'conversations' (two ways) and not just broadcasting (one way) like its previous World Wide Web version -, has entered into every area of the corporate and political lives in the past 6 years. Though many of us still ignore it or barely use it, and though it is still much more adopted on the public internet than on companies' intranets, extranets and public web presence, it is already in every strategist head, from HR to Marketing to the CEO and his board.

We may see it as a voluntary change or as an endured change. Organizations may want to foster collaboration and more, and the technology can help, or they may need to quickly adjust to the evolving world, and take advantage of it rather than suffer from being a late adopter. In both cases, organizations face a paradox that often happens with adoption of disruptive change (whether it is technology, work methods or management patterns): they have to cope with it, but cannot yet justify it nor master the transformation because it is too early, too little history and case studies to learn the lessons from others. Except for some (high tech companies, notably), we are still moving through the early stages of adoption. We have to be pioneers.

The technology accelerates the evolution and lets organizations aggregate fields studied for a while already, and it helps make the best of it: organization's social capital (which took off in the 60's), social network analysis (an organizational field since the 70's), collaboration and communities of practice (70's as well), knowledge management (an established discipline since the 90's), just to mention a few.

Some questions are laid out:

- Where to start, with employees, customers?
- How to start, organization wide or on a specific project or aspect? Do we need to make this transformation a strategy?
- What are the (real) risks?
- Will managers lose power?
- Do we have to worry how it will fit with the corporate culture?
- How long will it take or last?
- How to make it successful for the organization, the groups, and the individuals?
- Do we need to articulate the transformation or let it happen?

We tried to address most these questions and others through this research; and to the last question, the answer is without any doubt that organizations need to tackle the change, though with tact – let us see how.

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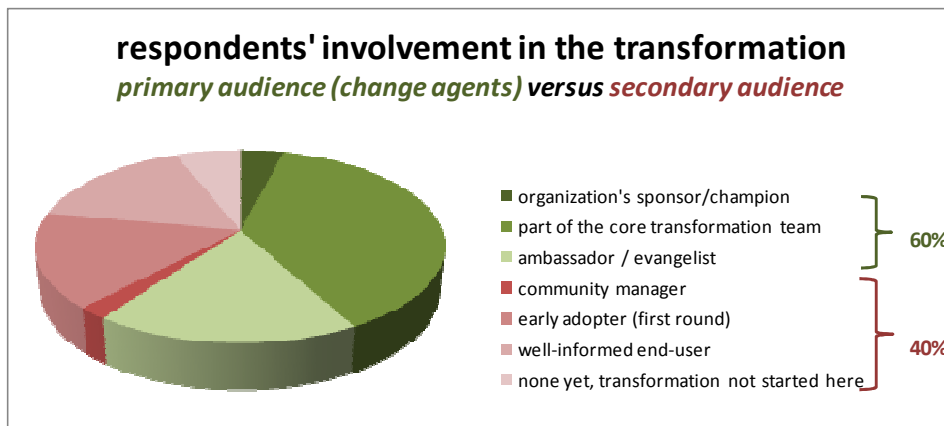
### GIVE IT A SENSE

## WHO ANSWERED THE SURVEY

The survey has been offered online from November 2009 to January 2010. It included 30 questions, including 3 semi-open and 9 open-ended questions. 50 responses from the 56 participations have been kept for the analysis, to match our quality objectives.

Given the limited number of respondents, findings must be seen as food for thought and provocative questioning, rather than statistically proven trends and issues.

## RESPONDENTS



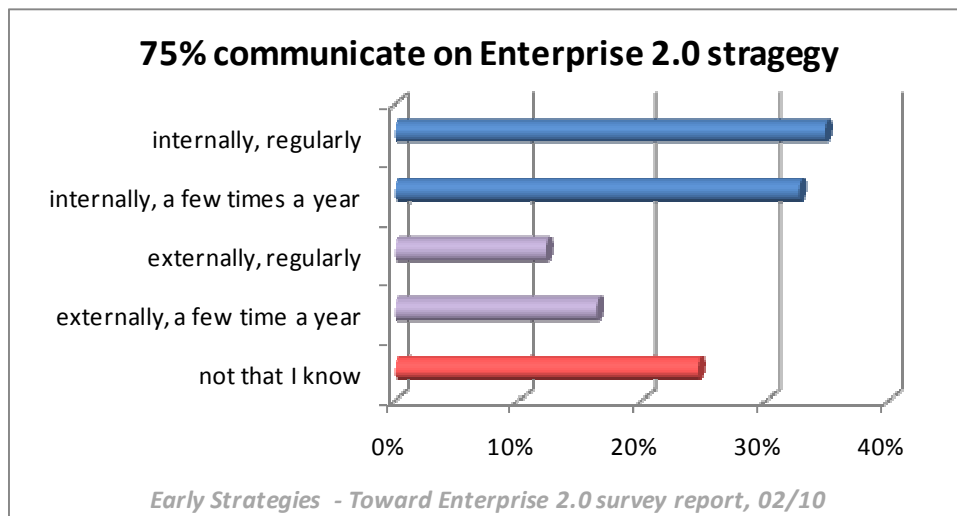
The survey was answered by a primary set of people involved in Enterprise 2.0 deployment, and a secondary audience of well-informed users of Enterprise 2.0 applications and projects. The respondents who answered “*none yet, transformation not started here*” turn out to work for organizations where the Enterprise 2.0 is not officially identified as a strategy, although happening.

Respondents are mostly people managers, at 48%, versus 30% non managers and 22% executive/board members.

They are mainly located in France (48%), the US (18%), the UK (12%) and the Netherlands (10%).

They mostly belong to CIO/IT (38%), followed by HR (16%), Communications (12%) and Marketing (12%).

COMMUNICATION PACE



20% of the respondents report a communication on their organization’s Enterprise 2.0 strategy targeting both internal and external stakeholders; 47% have noticed only internal communication, and 8% only external communication.

**Strategy communication versus Enterprise 2.0 maturity**

Very logically, external communication starts timidly once the corporation is piloting the change – when it is only thinking about it, communication is only internal.

One could think that once the deployment is achieved, the internal communication would decrease – this is not the case. Internal communication is at its peak when the Enterprise 2.0 strategy is fully deployed: it is mentioned by 80% of the respondents then (including 70% regularly). This probably denotes a need to consolidate the new corporate values (collaboration, etc... - see page 15) and ensure they become full ingredients of the corporate culture.

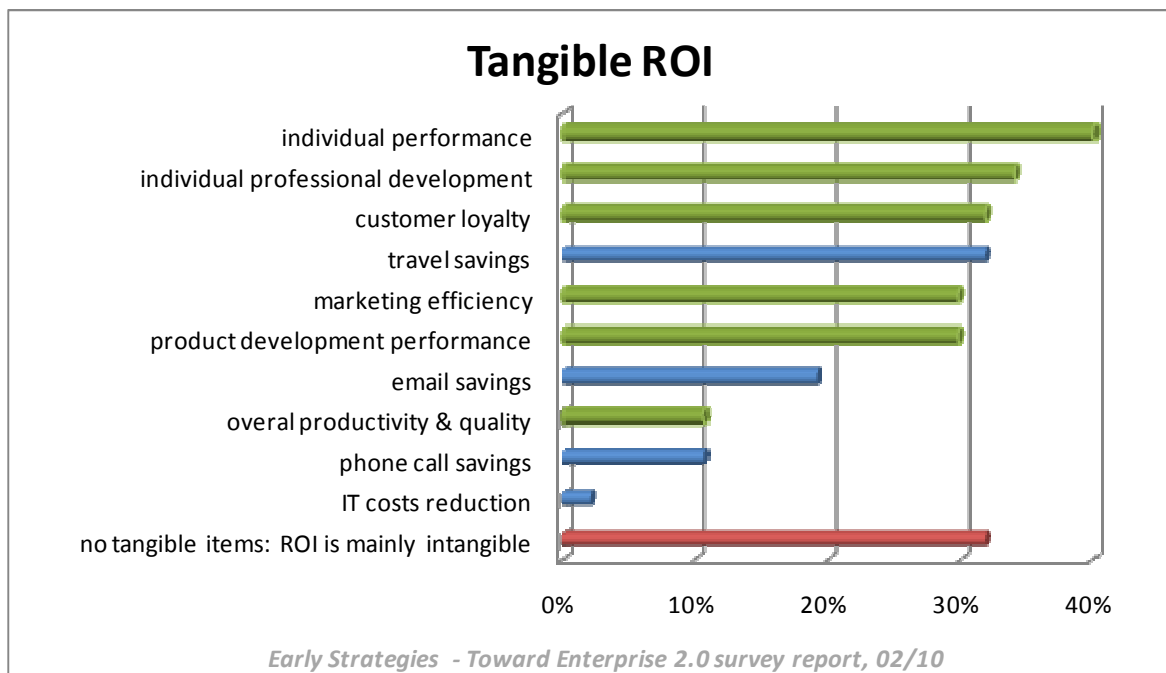
External communication reaches its peak when the deployment starts, and remains stable afterwards, with 40% of the organization communicating, half regularly, half a few times a year.

**Strategy communication versus Go-to-market type**

- External communication: B2B companies are the one communicating the more externally (39%) followed by B2C (25%) and B2B+B2C (8%)
- Internal communication: B2C and B2C+B2B organizations both communicate more internally (75% of them) than B2B (61%).



## TANGIBLE ROI



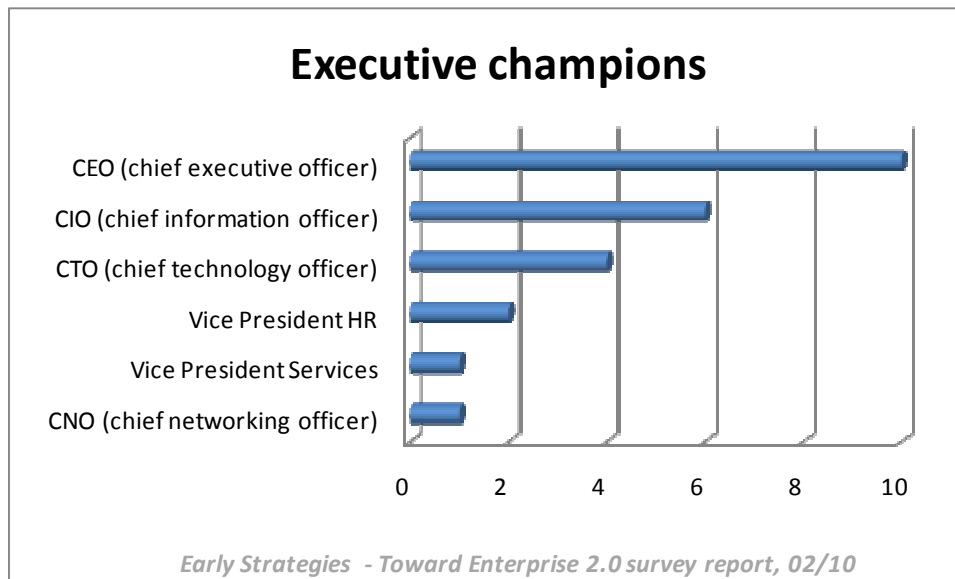
32% of the respondents clearly state that there is no tangible ROI for the transformation toward the Enterprise 2.0, only intangible ones.

For the remaining respondents, more improvement items (in green above) are identified than saving items (in blue).

Topping (chosen by 30% or more respondents) are: individual performance, individual professional development, customer loyalty, travel savings.

A remark on marketing efficiency, identified above as an improvement item, which could also be part of the savings items thanks to the User Generated Content.

## EXECUTIVE CHAMPIONS



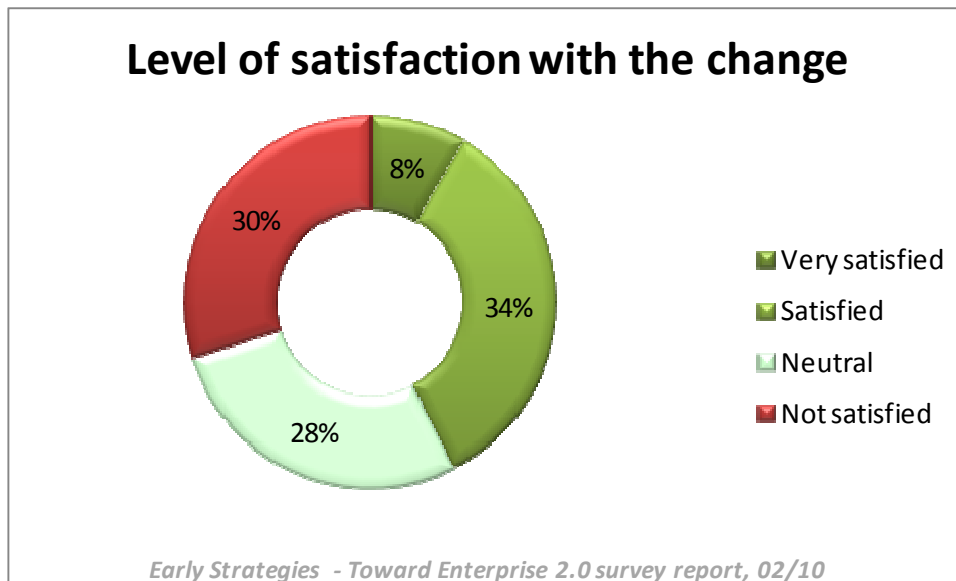
When identified, most often the CEO is mentioned as transformation champion.

In **20% of the cases, several people** are identified as being the champions; the following examples are mentioned:

- CEO and CIO
- Senior VP HR and CIO
- 3 members of the Executive Committee

In 37% of the cases, no executive champions are known.

## LEVEL OF SATISFACTION



Here are the significant profile elements of the different level of satisfaction:

**Very satisfied respondents are:** deploying or having deployed, having many tools available (in average, 16 in the list of 21 proposed, see page 16), the tools are mostly integrated (75%) or integrated (25%), seeing the change as both a top-down effort and a bottom-up adoption equally, seeing both internal and external participation very welcomed or depending on the manager, considering Enterprise 2.0 adoption as very useful for the organization and for their own daily work.

**Satisfied respondents are:** at any stage of the change, having their tools mostly integrated (37%), barely integrated (31%) or integrated (25%), none of them are discouraged to participate internally or externally, they see the change as very useful or useful for the organization.

**Neutral respondents are:** at any stage of the change, not limited or discouraged to participate internally, but happen to be for external participation.

**Unsatisfied respondents are:** at any stage of the change, many having tools not integrated (71%; barely integrated 21% and mostly integrated 7,1%), 50% of them not being aware of any policy, having a lower level of employee adoption (average 0% at ease, and 41% not understanding / pushing back), internal participation most often depends of the manager (50%), external participate most often is discouraged (50%), having a single transformation leadership most often (one is leading, other are little involved at 64%).

Please refer to the previous pages for more detail on each of the criteria.

Some pages are omitted from this preview.

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