

FORRESTER®

# Future of the Social Web Roundtable

Event Summary and Findings

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**Tue, Oct 14<sup>th</sup>, 2008**

# Agenda

- **Roundtable purpose**
- Process: group think, vertical breakouts, and solution unconference
- Details of the four predictions, challenges and solutions
- Event summary

*For the first time, on Oct 14<sup>th</sup>, 2008, thirty-eight representatives from key brands and social media vendors gathered to discuss the future of the social web.*

*This presentation is the group findings from this no-cost roundtable lead by Forrester Research.*

# Roundtable Objectives

1. Generate four predictions, challenges, and solutions.
2. Develop relationships ecosystem for partners, vendors, and clients.
3. Continue to fuel Forrester's leadership as a research firm focused on social computing.

# A cross section of industries were present:

- Brands
- CMS
- CRM
- Web Analytics
- Applications, Widgets
- Buzz Monitoring
- Social Networks
- Search



# Leaders from key companies

## Brands

- Scott Lawley, SAP
- Len Devanna, EMC
- Brian Ellefritz, Cisco
- Faith Legendre, Webex
- Bob Duffy, Intel
- Joel Nathanson, Wells Fargo
- Joshua-Michéle Ross, O'Reilly
- Karl Long, Nokia
- Paul Gilliam, Juniper Networks
- Tom Diederich, Cadence
- Justin Kestelyn, Oracle

## Brand Monitoring, Analytics

- Brad Brodigan, Biz 360
- Aaron Gray, Web Trends

## CRM, Enterprise Applications

- Sandy Carter, IBM
- Param Kahlon, SAP
- Oracle
- Eugene Lee, SocialText

## Widgets/Applications

- Rooly Eliezerov, Gigya
- Will Price, Widgetbox
- Jeff Nolan, Newsgator

## Social Networks

- Chris Schalk, Google
- David Recordon, Six Apart, OpenID
- Surya Yalamanchili, LinkedIn

## Community Platforms, CMS

- John McCormick, Documentum EMC
- Adam Weinroth, Pluck
- Bryan House, Acquia
- Cameron Deatsch, Jive
- David Carter, Awareness
- Lyle Fong, Lithium
- Michael Chin, Kickapps
- Mike Walsh, Leverage Software
- Rob Howard, Telligent
- Rusty Williams, Mzinga
- Peter Friedman, LiveWorld

# Attendee Roles and Schedule

## Roles

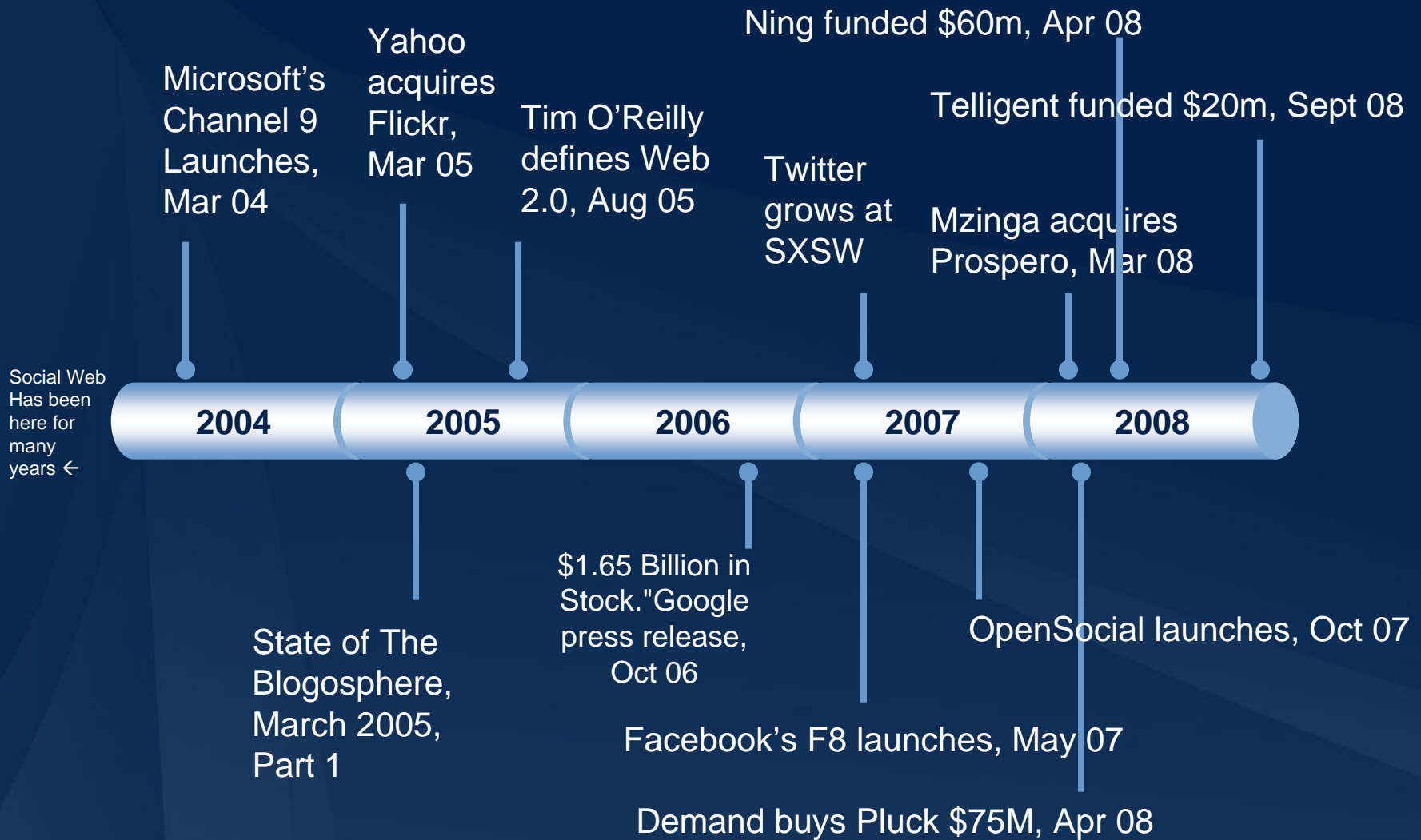
- Common roles from the brand side: Social Media Strategist, Community Manager
- Common roles from the vendor Side: VP, C level, Product Manager, Founder, Alliances, Developer Community.
- Some attendees flew in from Canada, New York, and Boston.

## Event Schedule

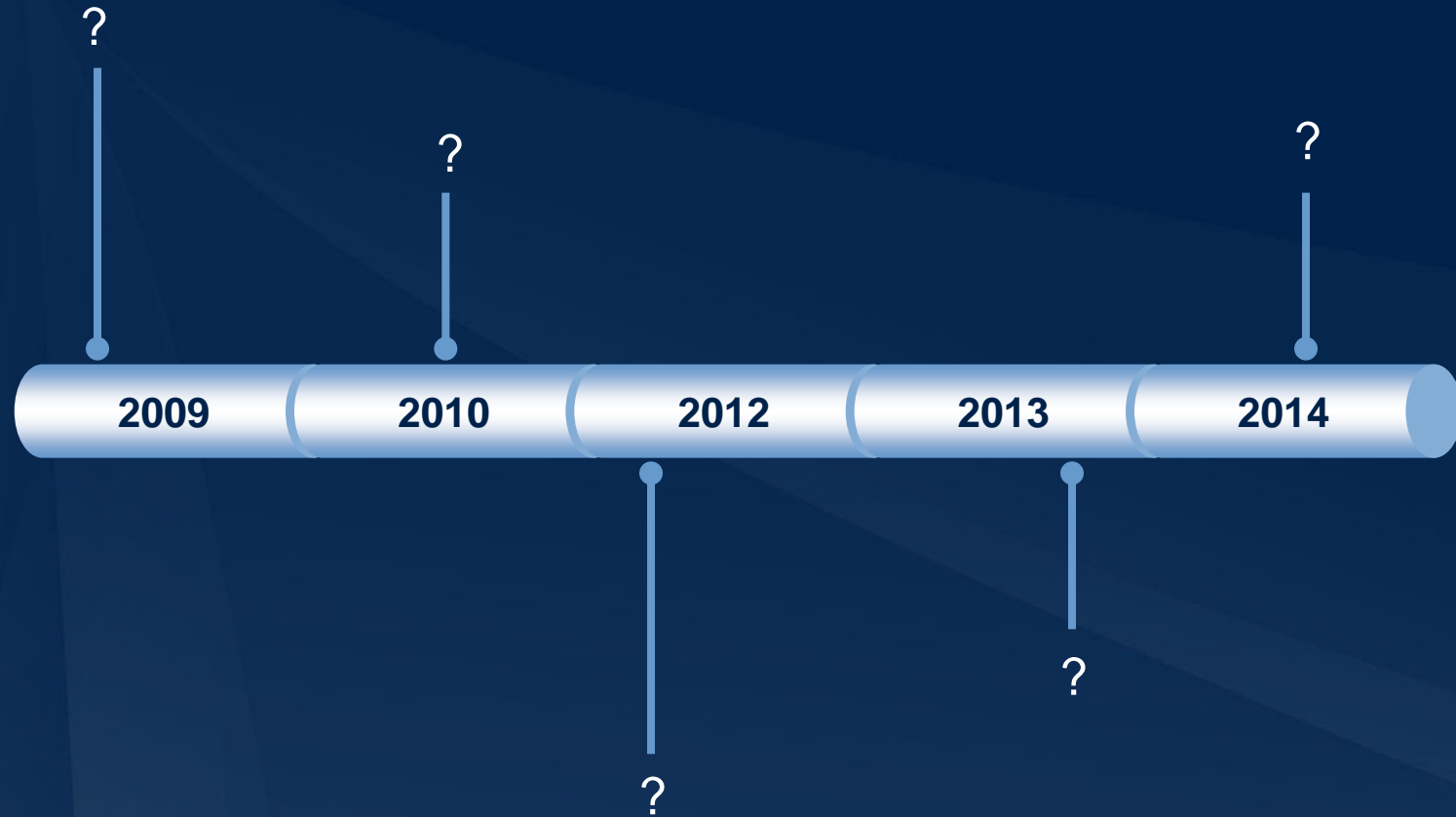
- 10:00: Welcome Icebreaker (Lead by Kenny Lauer of GPJ)
- 10:30: Group Introductions
- 11:15: Event Premise, Guidelines, and Housekeeping
- 11:30: Dream Session: Future of the Social Web
- 12:30: Lunch and Networking
- 1:30: Roadblock Session: Industry Challenges
- 3:30: Break
- 3:30: Solution Session: Overcoming Roadblocks
- 5:00: Findings and Next Steps
- 6:00: Cocktails
- 7:30: Optional Dinner at Blue Chalk Grill and Bar, Palo Alto, No-host



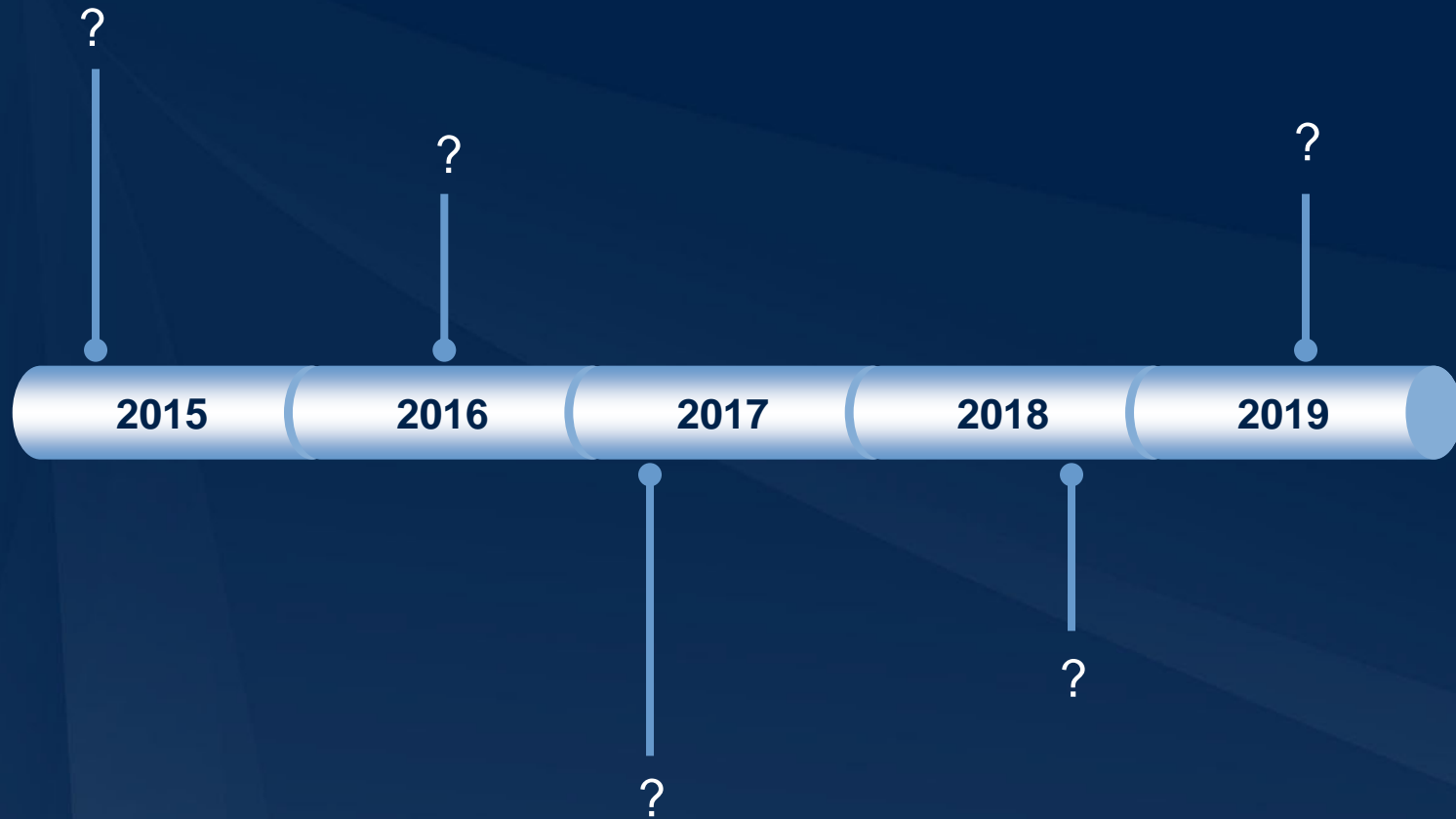
# Recent Highlights of the Social Web

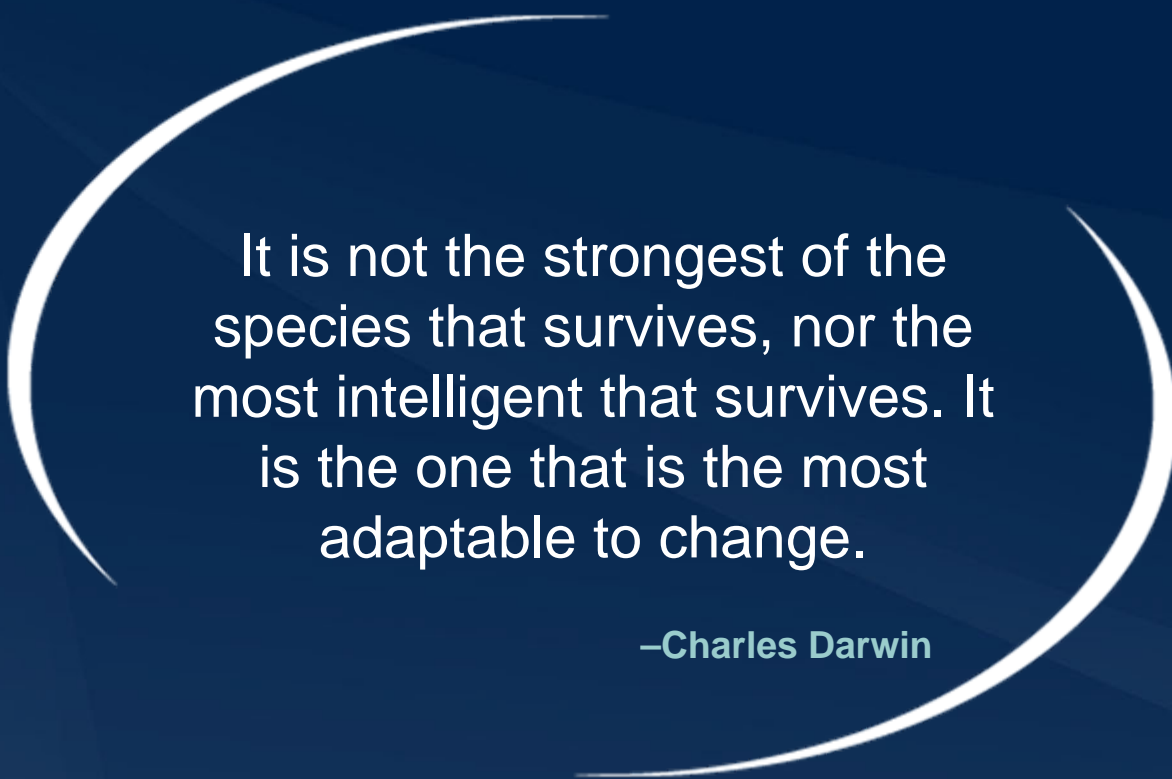


# Yet where do we go from here?



# ...and beyond





It is not the strongest of the species that survives, nor the most intelligent that survives. It is the one that is the most adaptable to change.

–Charles Darwin

# Disclosure and Intentions

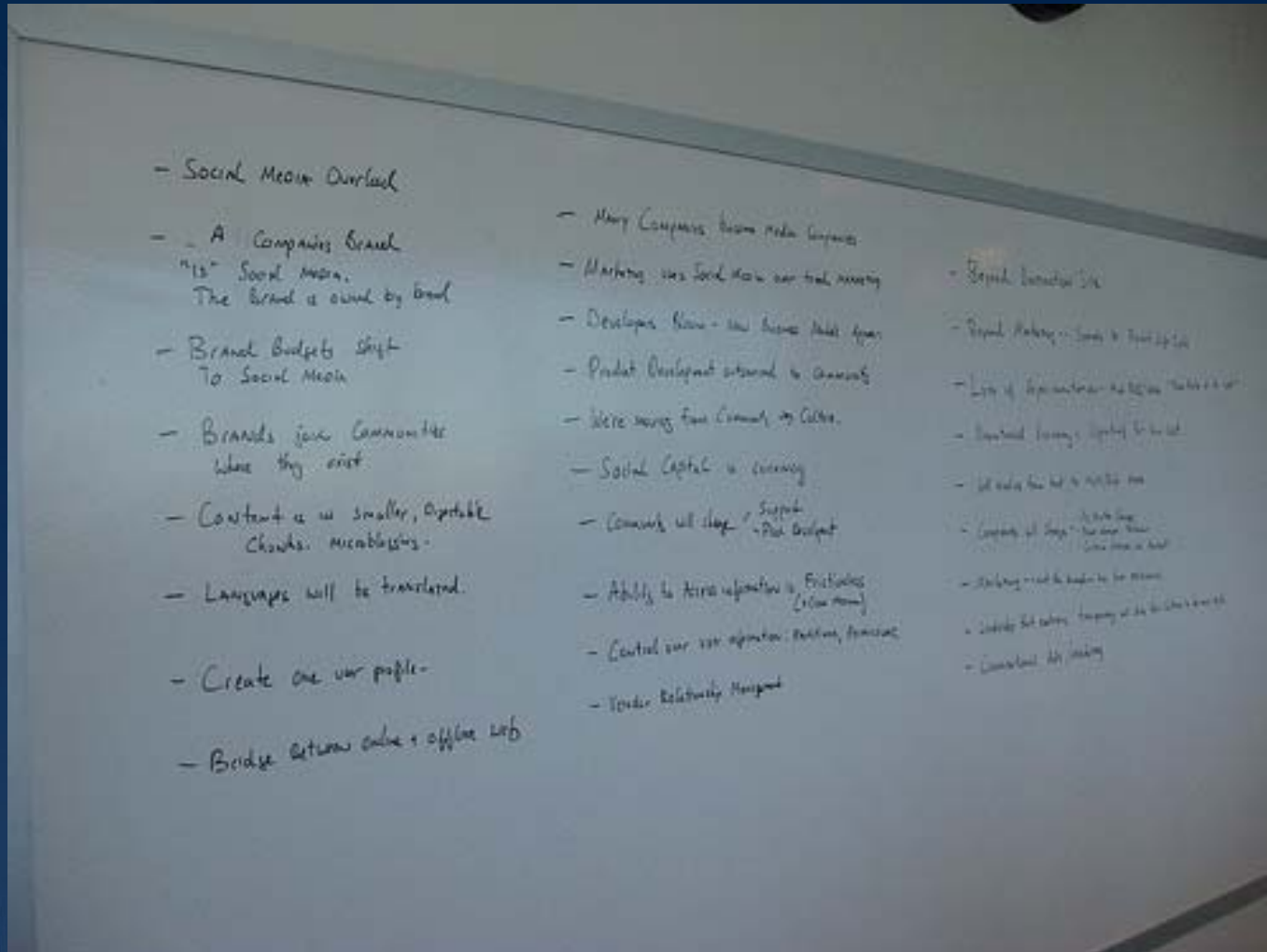
- Group collaboration is the priority
- Soft NDA:
  - » 12 findings will be published in public
  - » Publish thoughts at high level –but not companies or individuals (without consent)
  - » Signal to group if off the record
- About Forrester's Methodology Process
  - » Analysts will continue to lean on the successful and traditional research methodology process
  - » The findings from this event are only *one* element of many of the research process

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Prediction Generation: As a single group attendees were tasked to generate predictions to the social web

# Dozens of ideas were generated...





# Yet distilled to four key findings...then voted by all



Groups were split by industry, and tasked to determine challenges for each of the four predictions:



# Patterns emerged from the ‘Challenge’ findings

Color coding indicates similar findings from each vertical

## Brands (*theme: lack of standards*)

- 1) Managing the culture shift.
- 2) Reorientating the organization to deliver value to the community first.
- 3) Complete overhaul of the HR (legal) function needed.
- 4) Standards around identity

## Brand Monitoring, Analytics, CRM, ERP

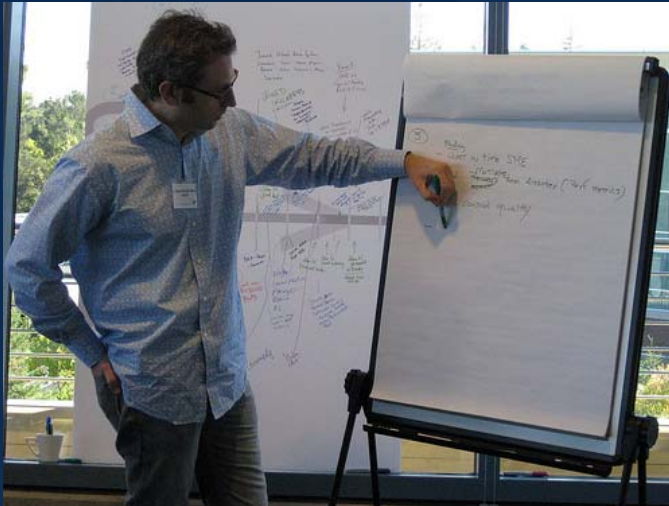
- 1) Organizational boundaries (physical/cultural) and silos prevent adoption.
- 2) Brand stewardship by monitoring your brand wherever they are.
- 3) Rules within corporate culture prevent adoption.
- 4) Users may have trust issues with a single ID.

## CMS/Community Platforms

- 1) Brands don't know how to measure.
- 2) Exposure and control issues, brands don't want to get "burned".
- 3) Fear of repercussions of doing something not culturally accepted.
- 4) Brands want to own the data

# Solution Generation

- In an unconference style workshop, attendees could join any of the “challenge” stations to develop “solutions” or create their own session.



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**Prediction 1:**  
Community will participate  
in all aspects of  
marketing/strategy,  
product development, and  
support



# Finding 1: Overview

- Prediction: Community will participate in all aspects of marketing/strategy, product development, and support.
- Challenge: Yet brands will have difficulty managing the culture shift.
- Solution: Develop a business program to create incremental benefits.

# Finding 1: Solutions

- Teams broke out “unconference” style to develop solutions to meet challenge, and generated the following suggestions:
  - » Develop a program to create *incremental* benefits.
    - Provide case studies from other companies that have done this is successful.
    - Create urgency: develop actual ‘skunk works’ projects that are sponsored, as well as bottom-up.
    - Be able to communicate to stakeholders why this matters.
    - Cultures is communicated through Language, story, and cultural norms.
  - » Vendors –and brands – need to have a common language and nomenclature.
  - » Case Study
    - One brand had a 1 day training that lasted for 8 weeks internal mandatory training, that kicked off pilots. IBM. Also, Cisco, and Cadence did this (agreed to be public knowledge)



**Prediction 2:**  
Brands to be present and  
participate where organic  
communities exist –not  
just corporate created  
communities

## Finding 2: Overview

- Prediction: Brands present and participate where organic communities exist –not just corporate created communities
- Challenge: Reorientating the organization to deliver value to the community first.
- Solution: Brands require monitoring tools, internal training and processes, in order to deliver value to communities where they exist.

# Finding 2: Solution

- Brands require monitoring tools, internal training, in order to deliver value to communities where they exist.
  - » Identify Benefits
    - Set goals, reward with perks and measure
  - » Having monitoring tools: including sentiment
  - » Training your employees
  - » Provide a voice of authority from company within the community
  - » Trust: Community needs to trust brand to be conversational, transparent, and accountable.
  - » Enabling and amplifying 3<sup>rd</sup> party experts and SMEs
  - » Community Platform vendors should build technology to extend brand communities to organic communities.
- Brands want to be able:
  - » To attach their content to communities where it exists, yet maintain content integrity, as well as measure results, then understand what the customers outcomes.
- Challenge point
  - » How is this different than RSS?

# Finding 2: Solution (continued)

- Potential fix?
  - » Could there be a contextual 'ad' that would be able to pull in content?
  - » A widget that could: find the problem, connect, and then deliver content.
  - » It's a learning management system, and finds content and then ties it together to need by 'dropping module'
- Is there a need to collect customer information on 3rd party communities to tie into existing CRM systems?
  - » Not a strong demand (from this group, half is B2B)
  - » Although some sales folks could be interested.
- Challenges:
  - » Concerns about accuracy over data that's being collected.

**Prediction 3:**  
Work style evolves as  
employees collaborate  
beyond colleagues to get  
work done

## Finding 3: Overview

- Prediction: Work style evolves as employees collaborate beyond colleagues to get work done
- Challenge: Yet rules within corporate culture prevent adoption
- Solution: Develop strategy for internal process change

# Finding 3: Solution

- » Create evidence and best practice of leadership companies on the best in class companies.
- » Update current companies code of conduct
- » Pick a project and pilot a social media project, and measure business results.
- » Ensure there's top down sponsorship
- » Share best practices and education throughout enterprise.
- » Setup a community for internal evangelists.

**Prediction 4:**  
One identity with  
controllable multiple facets  
empowers users to control  
their web experience



# Finding 4: Overview

- Prediction: One identity with controllable multiple facets empowers users to control their web experience.
- Challenge: Industry does not agree what should be portable, and how it should be, resulting in no trust
- Solution: Despite this being a prediction, market demand doesn't yet exist to spur adoption and innovation

# Solution 4: Solution

This wasn't a station that was attended during unconference, yet as a group this was discussed.

- Technology adoption that need to happen at user and platform level
- Brands are prioritizing this as lower, as SSO has greater priority.
- Most attendees are familiar with OpenID
- There's a challenge getting OpenID to be adopted by early adopters.
- Until we're losing customers we don't want to do it.
- Brands present don't have the core business need, as they're still trying to get full social media programs.
- Metadata APIs is more important

# Additional Group Discussions: Measurement

- Measurement was a recurring theme throughout the breakout teams.
  - » Question to brands: “What would you choose to measure to cause you to *use* social media”
    - Brand response: What was the business benefit and outcome of the effort.
    - Optimizing social media mix: “Doing social or traditional alone doesn’t work, integrated works, therefore would want to see a scoreboard that measures mix”
    - Brand says they want different attributes: Engagement, loyalty, word of mouth, interaction, awareness.
    - Brand says they want to measure movement in the marketing funnel
    - Brand says they want to measure “temperature of conversations” like net promoter, or amount of support tickets that are being solved, as what product management is getting out of
  - » **Challenge:** Vendors are all different
    - Three types of measurement: Platform (log files), Analytics (tags), Sentiment, (spiders)
    - There isn’t consistency among vendors
      - Operational (page views, posts)
      - Analytics is looking for
      - Sentiment is looking for buzz
  - » **Solution:** Suggest a measurement standards board

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# Summary

- The social web industry was able to collaborate towards a single goal.
- Predictions generated weren't "earth-shattering" yet group consensus confirmed industry direction.
- Most challenges indicated culture and change management processes within corporations –not a technology issue.
- The social web is still in early stages –standards have not been fully developed nor adopted.
- Measurement continues to be a key issue to determine progress and value –as well as a lack of standards.
- Key relationships were developed pan-industry.

# Thanks to:

- SAP event host
- George P Johnson Events Team
  - » Kenny Lauer
  - » Molly Weston
  - » Misha Andaya
- Forrester Research

# Contact information



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