

Nevsun gets a real-time handle on its Eritrean mining operation



The Right Place For Social Networking?

IT leaders are wrestling with how to bring informal collaboration into rigorous processes such as global project management and product development

By John Soat

Nevsun Resources is a mining company with headquarters in Vancouver, Canada, and its biggest project is developing mines in Eritrea, a small country on the east coast of Africa. Using a browser-based, software-as-a-service project management tool, logistics clerks, engineers, and project managers are sharing documents, cost outlines, and project schedules across continents, giving CFO Peter Hardie in North America what he calls a “real-time review” of the project in a fairly remote area of Africa. “The spectrum of people using it is broad, and that’s what we were hoping we would get out of the system,” Hardie says.

The system—called Unifier, from the vendor Skire—lets Hardie “bridge the time and distance gaps that exist between the project principals in Vancouver, Eritrea, and South Africa,” he says. It helps Nevsun control costs and track expenditures down to the invoice level.

Social networking norms increasingly are creeping into formal project

internet evolution

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planning and product development tools and processes. And at many companies, the rules both formal and informal for how to use those social computing tools often aren't written down. Nevsun's system lets people comment and ask questions about a record or specific aspect of the project. But there's always a way to opt out of the collaboration flow. Asked if he uses the ad hoc communication capability in the Unifier system, Hardie says: "Me, personally? No." Instead, if he's reviewing specific costs and has a question, he'll simply pick up the phone and call somebody.

4 Tough Tasks

CHALLENGES
TO AD HOC
COLLABORATION

1. Creating Norms When you have a wiki and formal project or product development software, what conversations happen where? One idea: If it's tied to a process step, keep it in the formal tool. If it's about improving that process, go to the wiki.

2. Breaking Convention Product development is a high-stakes process. Injecting social networking conventions adds risks. Yet it could be vital to global teams that innovate ideas as well as execute.

3. Finding Insights Done wrong, wikis can create islands of insights that the right people will never find.

4. Conquering Fear Subject experts might be wary of sharing hard-earned insights, since they see that as their value.

As almost all business becomes global in nature and business processes increasingly are managed online, companies continue to push the limits of technology created to manage projects and teams across time zones and geographies. The goal is to communicate more effectively, work more closely with partners, leverage ephemeral information sources, and ultimately get as close as possible to the feel of what's really going on.

Nevsun's experience with Skire is

just one cross-continent example. In product development, vendors such as Dassault Systèmes, Siemens, and others are plowing Web 2.0 capabilities into their product life-cycle management platforms, adding collaboration and complexity.

Running alongside these formal platforms is the aggressive use of Internet-centric social networking platforms and tools—wikis, blogs, instant messaging, presence awareness, peer reviews, search—to foster internal teamwork and tap into wider communities of knowledge. Yet IT teams are wrestling with how these tools function in concert with collaboration technology, such as document management, project management, and product development systems. Are they adjuncts, integral parts, or even replacements for tried-and-true software?

Plenty of CIOs also are wary of the data integration, security, and productivity issues raised by the introduction of social networking technology in the enterprise, especially when tied to a process as critical as developing a new product or completing a project. Yet some have embraced the dynamic nature of social computing and turned it to their advantage.

Wiki Ready

Take Mark Brewer, CIO of storage vendor Seagate Technology. He works with an IT staff spread across 33 locations in 13 countries. Brewer himself is in Oklahoma City, where one of the company's major data centers is; the other is in Asia. Seagate's headquarters are in Scotts Valley, Calif.

For formal project management, Brewer and his IT team use CA's Clarity portfolio management system. "We use it to track programs, projects, dates, costs, etc.," he says.

Recently, though, Brewer has become a believer in the power of wikis. For the last year and a half, he's been using a wiki-cum-blog tool called Confluence from Atlassian. He's set up a

wiki—IT@Seagate—which he contributes to two or three times a week. "I use it as a forum to communicate with IT folk."

Brewer likes the informality of the platform, that it encourages interaction and communication among the team and provides a greater sense of knowing what's going on. "Things become a lot more transparent," he says. Yet the wiki has formal roles as well. For instance, the data center team uses it to post bulletins about potential outages, and a group within IT uses it to "talk about everything related to data warehousing," he says.

The wiki/blog has expanded beyond the IT staff. Other corporate execs are using it to communicate with Seagate employees. Also, IT staffers have opened up the wiki so that they can use it to work with outside suppliers.

Not everyone's such a believer in the power of wikis and blogs to help global teams communicate and collaborate. "It's too easy to do it wrong," says Tom Davies, director of data center services for Tata Communications, the telecom arm of the Indian conglomerate Tata. People can easily end up creating "islands of data, with no consistency, in a way that's worse than having nothing at all."

Davies does use Web 2.0 and social networking tools to interact with his global team of 12 product developers who help architect Tata's data center services offerings, tools such as instant messaging, voice over IP, Web conferencing, and PC-to-PC videoconferencing over Skype. Also, at least once a month, Davies, who works out of his home in Orlando, Fla., travels to Tata's Herndon, Va., corporate office to participate in a videoconference with company officials in India using Cisco's high-end, room-sized Telepresence system.

It's the knowledge-gathering tools that Davies is wary of, particularly wikis and blogs that promise the functionality of knowledge management

software but deliver less. “Unless you have that taxonomy for what data goes in and what it’s used for, you end up with a lot of information for no reason,” he says. The use of wikis and blogs “has to be clearly defined,” he contends. “I haven’t yet seen a company do that.”

So what do Davies and his team use? For resource material, they tap documentation libraries on an intranet. For collaboration, he says, “there’s an awful lot of e-mail.”

Grudgingly, Davies admits he’ll end up implementing some kind of collaboration and knowledge management system that will incorporate wiki and blogging capabilities, probably within the year.

The Replacements

Social networking software is still struggling for a corporate identity. SharePoint is one of Microsoft’s fastest-growing products, and its newest version combines social networking capabilities such as wikis and user profiles with file sharing. The same is true for IBM’s Lotus platform, with its Connections social networking software. Given their base of enterprise customers and ability to bring in functions such as formal workflows, these vendors could help bridge the gap between formal and informal project collaboration. But there also are some relative newcomers targeting the enterprise with social networking tools.

For Brewer, who’s been using the Confluence software for 18 months or so, the wiki is a general-purpose sharing and collaboration platform that can be used to store project information and documentation, as well as perform other functions. It’s not intended to replace the more fully functional project management system. “We use both,” he says.

Yet, Brewer has been able to “sunset” a file-sharing system his group was using to create “intranet pages locked down behind passwords”—a waste of

data and resources, in his opinion, since the wiki’s a more inclusive alternative.

Bill Hopkins has an even bigger ambition for wikis. The director of global IT for international executive recruiter Egon Zehnder has swapped out nine applications for sharing information in favor of a single wiki-based collaboration system from Socialtext. But the real prize will be phasing out the company’s “core CRM system” by this fall and replacing it with a system he’s calling Orchestra, based on the Socialtext technology—a move that comes with major culture implications for the company.

Egon Zehnder has 1,500 employees in 65 locations in 40 countries. The majority of them are tasked with seeking out high-end executive talent for open positions. In the past, Hopkins says, those executive searches were mostly location based, specific to the requirements of a certain geographic region. Two recent trends have changed that. First, Egon Zehnder is handling more “pan-border” searches, for companies looking to tap executive talent anywhere it’s available. Second, new requirements are influencing search criteria. For instance, experience with “green” initiatives is a very desirable attribute in an executive these days that translates across the globe.

As new thinking was being applied to searches, Hopkins says, corporate strategy had to change, too. Egon Zehnder could no longer be “office centric”—that is, rely on local teams of researchers and consultants employing face-to-face “huddles,” or impromptu brainstorming meetings, to exchange notes and plot search strategies. It had to figure out “some way to get this round-the-clock thinking without taking time out of the busy day or night to have conversations,” Hopkins says. The company needed people to share thoughts that were “not necessarily vetted for gold-standard communication.”

Ross Mayfield, chairman of Social-

text, says companies like Egon Zehnder show how social networking is spurring a collaborative approach that’s eclipsing the “follow the sun” time-zone hand-off strategy touted as a productivity boon from globalization. That kind of “batch processing” is inefficient, he contends, while “wikis are



Hopkins sees a wiki replacing his CRM

very asynchronous. People can focus on the flow of work when it’s time to get work done.”

Community Minded

An area of business that involves substantial teamwork and collaboration that’s fertile for social computing is global product development. Indeed, the major vendors of product life-cycle management software have embraced the promise of Web 2.0 capabilities and the potential of social networking tools specifically. PTC, a PLM tool vendor, has begun using the term “social product development” to describe its interpretation of the intersection between product development and social networking. In June, PTC introduced a version of its product data management application, Windchill, which uses SharePoint as a collaboration engine. Windchill ProductPoint is intended to make “the whole process of interacting much more free-flowing” for engineers involved in

product design, says Robin Saitz, senior VP of solutions marketing and communications.

Social networking tools can fill a significant gap in the PLM process, says Jim Brown, president of Tech-Clarity, a PLM consulting firm. That's because PLM technology is "designed to incorporate results but not all the steps that led up to those results." For instance, when designing a product, a global design team might discuss different business, marketing, or technology approaches. That discussion represents a lot of shared knowledge, "and a lot of that knowledge is lost, typically in e-mail," he says. Someone

with suppliers. For one, Leader is working to integrate PDM data with data in the company's Oracle ERP system. For another, he's also looking to bring the company's manufacturing partners more closely into its design and development process. To accomplish that, Leader is working on providing them with "secured access into a secured portion of the Windchill system." That access for outsiders will come "via the tools themselves, in controlled ways," he says, and not through ad hoc social networking technology.

PTC's Saitz, who was an engineer at Raytheon before she came to PTC, admits the product design community is

Sanjeev Pal, who worked at Dassault before becoming research director in the project portfolio management and PLM areas at IDC, says engineers may be wary of using social tools even in a closed-loop environment like PLM because they don't want to share their personal trade secrets, the wisdom built up over a career that they see as their value add to the company. "Engineers don't embrace the idea of information sharing," Pal says. "They're scared of losing the IP they've gathered over the years."

Tried And True

There's a long way to go before social networking constructs and tools take the place of tried-and-true project management and product development systems—or even blend comfortably into today's processes. That's because those collaboration systems are familiar, secure, and, for the most part, functional.

Black Diamond Equipment manufactures gear for outdoor sports including rock climbing and skiing, and uses the Teamcenter product development system from Siemens PLM Software. CIO Josh Dees says the Teamcenter technology lets the company's global distributed teams—in the United States, Switzerland, and China—communicate in a central place about issues and milestones that come up in the design and production process. "Instead of a lot of 'Hey, we have an issue about a heel on this boot' going across on e-mail," he says, that communication can be logged into the Teamcenter system, where it can be backed up and restored on regular schedules and audited.

Of course, not all of that type of communication finds its way into the system, Dees admits. "'All' would be a strong word to use," he says, noting that there are still occasions "where people plop in and out of e-mail." Still, he adds, "more and more, this will be the place where that communication takes place."

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going back looking for all of the process and decision making that went into the product will find that interaction "hard to re-create."

Still, vendors may be ahead of their users in this trend, and there might be more resistance than they anticipate, as companies worry about adding informal collaboration to the discipline of product development.

iRobot designs and markets Roomba, the self-propelled floor-cleaning robot, as well as other commercial robots and robots for the federal government. The company uses PTC's PLM tools, including the Windchill product data management product, in design centers around the United States and in India. At the same time, iRobot outsources all its manufacturing: commercial products to Chinese manufacturers and the products it develops for the U.S. government domestically.

CIO Jay Leader says iRobot is looking to leverage its design technology and data, and increase collaboration

worried that the introduction of Web 2.0 and social networking tools will "undo some of the consolidation work that has been done" through the use of standardized PLM technology.

"The question is, how integrated into your actual process do you want to use it?" says Tom Emmerich, president of PLM vendor Dassault Systèmes Americas. Dassault uses the term "PLM 2.0" to describe its approach to the intersection of Web 2.0 and PLM. Much of Dassault's PLM 2.0 efforts, with its V6 platform, focus on taking advantage of broadband networks that change what's possible in terms of shared online access to design visualization and 3-D capabilities. It also allows for online communities around projects. The vendor recently took an equity stake in Blue-Kiwi Software, a developer of wiki tools. But Emmerich emphasizes that social networking technology has its limits when it comes to formal structured design. "Nobody's going to design products on Facebook," he says.