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ABSTRACT

In this paper, we present a case study of the idea, development and delivery of an internal social networking tool inside the Deloitte firewall. We used a four step approach in the creation of D Street including the requirements definition, product evaluation and selection, technical architecture, and design and deployment. We also provide lessons learned both from a technical and a project management perspective.

Author Keywords

D Street, talent networking, social networking, enterprise 2.0, web 2.0, deploying social networking inside corporate firewall, lessons learned.

ACM Classification Keywords

H5.m. Information interfaces and presentation (e.g., HCI): Miscellaneous.

INTRODUCTION

D Street is an internal talent networking tool that increases the points of connectivity between Deloitte professionals. It is a web-based application built on a vendor platform which allows Deloitte professionals to create profiles that share their professional and personal brand. Deloitte professionals can use D Street to find, learn about and connect with other colleagues. D Street takes select elements of social networking sites and applies them to our specific business environments. The purpose of this paper is to present a brief overview of Deloitte's Talent Networking tool and to provide discussion points for organizations to consider as they develop a strategy around deploying a social networking tool.

Birth

The D Street project started in 2006 when the Deloitte organization realized that, the once exclusively external social networking sites like MySpace, LinkedIn and Facebook, were hosting thousands of Deloitte users looking to use the collaborative technology to connect. The business case for an internal networking tool quickly materialized. Leaders from our Knowledge Management, ITS, Talent Organization, and US Communications, as well as members of the user population, worked together on a steering committee to create D Street.

The requirements were developed to build a tool that would allow people to easily connect with others that share the same talent, skills, interests or affiliations. The resulting product, D Street, is essentially a "mash-up" that takes data from human resource systems and combines it with employee-generated content.

PROFILE ELEMENTS

Below is a sampling of the data included on each personal profile:

- Firm directory data including geography, contact information, service areas, service lines, function

- People affiliations

- Personal interests including hobbies and personal favorites

- Suggested restaurants, things to do and places to see when visiting

- Blog module

- Presence awareness

- Resume, publications and content

- Work interests including affiliations, certifications and specializations

- Deloitte programs, community and affinity group participation

Business Drivers

Deloitte had a strong desire to promote social networking within the enterprise in order to establish people-to-people networking that would make our large organization feel smaller to our people. In addition, studies completed on millennial students indicated that there was a strong desire for a future workplace to have increased employee visibility within the enterprise. Lastly, the perceived benefits of fostering relationship building with practitioners across multiple service lines, service areas, geographical locations and affiliations were significant. Some of those benefits included:

- Increased productivity and innovation

- Greater job satisfaction yielding improved retention

- More seamless assimilation onto project teams

- Reduction of knowledge sharing outside of the firewall on external sites

- Improved inclusion by demonstrating the diversity of our talent

Four Part Approach

1. Requirements Definition

2. Product Evaluation & Selection

3. Technical Architecture

4. Design and Deployment

Requirements Definition

The requirements gathering approach was used to keep the implementation simple and within the confines of the Out of the Box (OOTB) implementation.

We created a diverse practitioner advisory board representing various functions and services within Deloitte representing all functions, information technology and talent. This board represented various levels and geographical regions. We conducted focus group sessions to gather information on key D Street requirements and translated those into technical, application and infrastructure requirements for the D Street product.

There were a total of 70 user requirements and 200 Functional and Non Functional Requirements. The package selection focused on the following key requirements:

- A Profile Page for users that is similar to a "People Profile" page on Consulting KX (an internal Knowledge Management System) or a Profile Page on FaceBook

- User Group Rights (Administrator, Moderator, Profile Owner, Visitor)

- Enabling presence indicator for active employees

- Search mechanisms (DeloitteNet Search, D Street Simple Search, D Street Advanced Search, Keyword Search in Profiles)

- Ability to add attachments (pictures, resumes)

- Blogging abilities

Product Evaluation and Selection

The chart below represents the options considered when evaluating and selecting a solution to host D Street. The Vendor Deloitte chose is also the Vendor selected for the our portal solution.

	PROS	CONS
Leverage current platform	• Known capabilities and skill sets exist • Development could start immediately, if resources are available • Leverages foundational work already in place • Some connections to data sources already exist	• Will need to be upgraded shortly along with platform • Will likely not support all functionality • Not "bleeding edge" • Work effort may approach that of custom development
Third-Party (hosted)	• Quickest to market if integration is found to be straightforward (rarely is) • Can achieve pilot with smaller investment • Opportunity to create marketplace buzz with 3rd party relationship (e.g. Facebook)	• Risks with hosting internal information and PII data outside • Seamless integration may be challenging (e.g. SSO and connection to data sources) • Elevated likelihood of eventual migration
Purchased Product	• Quick to market if integration is found to be straightforward • Leverages "best of breed" while retaining (**INCOMPLETE SENTENCE**)	• Leading vendors are experienced selling their offerings as a service but not a "product" • Seamless integration may be challenging (e.g. SSO and connection to data sources) • Complicates IT landscape
Vendor	• Leverages latest offerings from selected vendor • May be able to get vendor support for "flagship" project • No immediate migration/upgrade	• Lead time to install and become familiar with platform and capabilities
Custom Development	• Can develop tool based directly on specific requirements • Full control	• Longer lead time • Heavy burden on internal resources • Custom development not preferred approach

Table 1. Product Evaluation and Selection.

Technical Architecture

D Street was architected to co-exist with the components available from the vendor and provide both the Social Networking and personal workspace for all of our users. One of the advantages of the architecture framework selected is that minimal customizations will be needed when Deloitte's firm portal migrates over to the vendor in 2009. The design team worked closely with the vendor team to gain oversight on the design and build processes that would maximize the product potential.

Design and Deployment

Using the requirements defined by the practitioner advisory board, the design team quickly went to work creating an alpha product that was launched in July 2007 to a group of 1,500 individuals representing cross functional experience, and knowledge in the organization. The Alpha population represented individuals located in the Dallas, Tulsa and Little Rock locations of Deloitte. During the alpha phase, the implementation team worked closely with office and regional leadership to drive usage and profile creation. In the first 8 weeks of the alpha launch, 25% of the population had personalized their profiles on D Street. This quickly became a benchmark for launching to other populations across the organizations.

During the alpha stage, the implementation team worked on change management components associated with processes, communications and the overall launch of the final product. After several technology enhancements, D Street was launched in January 2008 with new reporting tools, enhanced performance and functionality and profiles created for all 46,000 Deloitte professionals.

D Street rollout included a phased approach. In January, the shared services organization which includes human resources, technology support, knowledge management, marketing, business development, administration, finance, field operations and all non-billable resources were invited to participate on D Street. This team, compromised of 10,000 employees, was developed as the support and driving team that would assist the client-services part of the organization to implement, understand and use D Street. In April, after another technology enhancement release, the product was made available on a phased in basis to the client service practitioners across the organization. By June 2008, all 46,000 Deloitte professionals had been invited to use D Street for their personal and professional branding tool to connect with others.

By August 2008, 25% of the entire organization had created a personalized profile. The organization continues to monitor profile creation, but will also create energy and efficiencies around developing communities and groups on D Street and measuring how the organization is connecting.

LESSONS LEARNED

There were several lessons learned during the requirements, design, selection, and implementation phases of the D Street Project. While the importance of leadership buy-in cannot be understated, we also learned several key things in the area of governance and overall program management.

In the area of governance, the team quickly realized the importance of buy in from all areas of the business early in the project and defined key project stakeholders to establish guiding principles and standards for posting content. This was key in the solution development as the legal guidance up front drove several aspects of the requirements definition.

In addition, assuring business leaders and stakeholders that the product would be monitored for inappropriate use quickly eased some of the concerns from senior leadership. The team defined a robust moderation protocol and team during the Alpha stage that is now responsible for monitoring content posted on D Street. In addition, moderation reports and tools were built into the January release to allow moderators to view all new content posted. This allowed us to quickly obtain buy in from executive sponsors on governance guidelines and created significant accountability for stakeholders with respect to the quality and ownership of information shared on D Street. Lastly, in the area of governance, the team developed a Technical Advisory Council that guides technical architecture and

issues. The TAC oversees the architecture, governs the platform, liaisons with our vendor and resolves technical issues. In addition, the council concentrated on limiting customization as much as possible.

Project Management Lessons Learned

There were several best practices that the team identified as being instrumental in the success of D Street:

- Develop a technical architecture document that is derived from the business requirements.

- Staff the project with skilled resources. Staffing our team with professionals experienced with vendor technology development, as opposed to focusing on .Net skills made a large difference in the overall product.

- Plan for two-stage code reviews (Stage 1 with automated tools and Stage 2 with vendor technology development resources)

- Plan for time and effort to validate and update source data. Also plan on a data cleanup exercise prior to launch. Poor data management is readily exposed in a talent networking platform.

- Clearly define roles and responsibilities of the implementation owners and provide communications, scripts, guidelines and other useful materials in order to create consistency.

- Assess user experience formally and informally and gather feedback that is actionable. Make continual incremental improvements to the system based upon feedback received.

- Define a core set of reports with consistent frequency that articulates WHERE and HOW the product is being used.

- Incorporate the product into the organization's communications wherever possible. A name is no longer a name but a hyperlink to a person (or group) profile.

- Create a product home page that elevates content and highlights profiles. Make it user friendly and timely.

CONCLUSION

Social networking tools behind the firewall work and act differently than external social networking tools as the business practices, policies, governance, and goals are unique to individual businesses. D Street, from its conception to release, was the first enterprise-wide deployment of a web-based tool which allowed each of our organization's 46,000 employees the ability to create, share and find others based on employee generated content (EGC) as well as business data. D Street takes select elements of social networking sites and applies them to our business environment thereby allowing employees to feel

connected, to build their own professional brands, to find   others, to affiliate with groups, and to be more productive.

Appendix

For Tax Communications Call – D Street + Blogging

9/24/2008 3:18:00 PM

I will be presenting on the Tax Communications Call on Thursday, September 25, and, instead of keeping my thoughts to myself, I thought I'd share with everyone – well, everyone who happens to either subscribe to my blog via RSS or who stumbles on my page every once and a while. Thanks – you know who you are!

You are asked to write/create/post a blog for a leader – how can you do this on his/her D Street blog?

(The notes/tips below could also be used for your own D Street blog; however, since I'm talking with Communication Teams, I thought it would be appropriate to gather resources I've already created and present the why D Street/what's in it for my communication plans/channels/goals. These techniques can also be used to amplify/promote/engage folks on your individual D Street blogs.)

1. You need to be a delegate on his/her profile
    1. On the leader's computer (or logging into your computer as that person, depending on whether you have his/her login credentials for DeloitteNet), go to their profile on D Street.
    2. Go to "My Settings"
    3. On the right hand side, there is a box called "Delegates"
    4. Under the "Add Delegate" Box, select the address book icon
    5. In the Find box, Put in the last name, first name of the delegate (which would you - lastname, firstname)
    6. You should see your name listed – click on it and it should appear in the Add box at the bottom.
    7. Hit Ok (then you will see your name in the white box on the "My Settings Page")
    8. Hit ADD Delegate in the Delegate Box (THIS is key!)
    9. Your name should now appear in the Delegates box on the other person's page.
    10. When you go to your leader's page, on your computer, logged in as you, you should see the "Edit My Profile" option when seeing his/her profile.
2. Write the blog post.
    1. Go to your profile page
    2. Select "View All" under the Blog section (scroll up if you see white space – sorry – double scrollbars...)
    3. Select "Create a Post" under the Admin links