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## Engagement Technology: The Heart of the Problem, The Core of the Solution



## INTRODUCTION

While the emergence of customer relationship management (CRM) software, the Internet, and social media are contributing to the growth of Enterprise Engagement, technology is ironically a major impediment to strategic implementation. Even though technology offers a plethora of solutions related to specific engagement drivers, it can also stand in the way because of technology silos similar to those that exist in organizational management that impede the ability to integrate all of the key contributors to engagement, no matter what the ultimate goal of the effort.

On the one hand, technology has made it possible for organizations to measure customer, distributor, employee and even brand engagement like never before. The chapters on Big Data and Measurement clearly show the potential for technology to provide revealing information related to levels of engagement across the organization. And now, as a result of social media, companies can get a three-dimensional sense of the level of customer and employee engagement never before possible. In addition, because the Internet has significantly leveled the commerce playing field, making it possible for almost anyone to sell anything in a highly automated way, many organizations are forced to pay more attention to people because it's now the human interaction between customers, distribution partners and organization that can provide the competitive edge in a way that can be measured better than ever before.

In terms of Enterprise Engagement, the problem isn't that there's too little technology, the problem is that there's too much. Unlike in the world of smart phone apps or even sales automation, in which people can integrate various activities on one platform, there doesn't exist in the engagement space a single platform making it easy to integrate all of the technologies that research indicates contribute to engagement. A review of the Enterprise Engagement framework (Part IV, Applications of Engagement) indicates that there's a technology to address almost every type of engagement lever; the challenge is that few if any of these solutions are well integrated.

## ENGAGEMENT TECHNOLOGY CATEGORIES

Almost anyone involved with implementing new technology across an organization knows the human element is almost as challenging as the logistics. People use but a small fraction of the technology at their disposal, and adoption rates vary widely in any organization because of the human element. Therefore, any technology implementation strategy has to include a means of engaging people to use it.

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Here are some of the key elements of the engagement framework and an explanation of the types of technologies involved with each. Keep in mind that most of these descriptions tend to focus specifically on the engagement element being addressed by technology and don't take into account all of the drivers of engagement in an integrated way. Since it's not the purpose of this textbook to recommend technology, we suggest that people use search engines or association websites in the various fields below to locate and research corresponding technology.

**Leadership:** A variety of software options are available to provide one-on-one coaching to managers at all levels, in some cases based on engagement scores, most often from companies that provide these services. This technology can include engagement surveys, electronic messaging, videos, useful articles and/or one-on-one communications between a trained coaching professional and individuals.

**Assessment:** The cost of regularly surveying various audiences continues to go down as a result of technology. (see Chapter 13 on Assessment) The key, of course, is obtaining useful, actionable data that gets into the right hands fast. No matter what form of technology a company is using to achieve a particular engagement goal, assessment is an essential part of the equation.

**Communications:** There's a wide variety of software options to choose from for communicating information. Most organizations of any size have some kind of employee intranet or customer information center. Social media players have also gotten into the corporate act; Yammer social media technology is used by many organizations to help foster dialog across the organization, and many recognition platforms include a social media component. Of course, YouTube and other video technology has created an entirely new application for videos due to the low cost and ease of distribution. The issue is getting all of this information organized for the right audience; easily leveraging communication across the organization so that it's easy to find it when people need it.

*[A note on content. For communications to break through the clutter, it has to be perceived as relevant, useful, entertaining or necessary. When developing your content strategy, consider how to "pull" people into your information by addressing these key factors. Organizations often "push" information at people or focus on selling, rather than thinking like publishers, authors and editors whose job it is to "pull" people into information so that they're fully engaged.]*

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**Permission Management:** Organizations, especially those dealing with consumers, have to make sure they get permission to communicate with people by media, which not only heads off any marketing compliance issues, but also in most cases results in higher response rates.

**Learning:** The training industry offers a plethora of online learning options, with the focus most recently on "gamification," or using games and points to reinforce and reward learning. There is technology not only for different types of learning styles, but also for testing in particular.

**Collaboration and Innovation:** A number of companies offer technology that focuses on promoting ideas, sharing and innovation. These technologies manage all of the elements of submitting, reviewing, sharing, communicating and in some cases rewarding suggestions or innovation. Generally, the technology is packaged with the support services of these vendors.

**Rewards and Recognition:** Probably no aspect of engagement has a broader selection of technological possibilities, from online catalogs to multiple types of recognition and points-based programs to fully-automated back-of-the-house management and fulfillment platforms. So-called "manager-to-peer" and "peer-to-peer" programs have become quite popular, as have social media tools that enable all employees to see news feeds of reward activities. Most of these technologies are proprietary to the solution providers that offer them, meaning that you have to use the services or awards of that company to access the technology.

**Measurement:** Because all of the above activities are usually managed by multiple technologies and platforms, it becomes extremely challenging to collect all of the data coming out of them, let alone correlate it. In theory, it would be highly useful to correlate customer, distribution partner and employee activities with their respective interactions using the above technologies. It would be useful to know how often a manager participated in a coaching session and how the engagement scores of his/her employees changed over time. How well have customers, distribution partners and employees absorbed key messages? How engaged do customers, distribution partners and employees feel, by territory, and how does that correlate to various financial or other results? What is the correlation between performance and test scores? Or participation in innovation programs with employee retention? The data-mining potential is almost endless - if the data were available in one place to analyze.

#### **THE LEGACY CHALLENGE**

Further compounding the problem is that many organizations have intranets or customer websites that go back a decade or more, many of them with miscellaneous information provided by multiple managers over time and often not well maintained. In many organizations, IT professionals are hopelessly bogged down with pressing issues and don't have time to regularly maintain information.

Many of the above technologies often are provided by third-parties in such a way that it's not possible to integrate them with other technologies except in the most rudimentary ways. It's difficult at most organizations to set up a system for strategically rewarding points for different behaviors because most of the technologies through which those behaviors would be tracked don't talk to one another.

To fully integrate its engagement technology and reward platforms, a company not only faces major logistical issues, but also organizational issues because different people are usually in charge of management coaching, assessment, learning, rewards and recognition, innovation and collaboration.

### **STRATEGIC AND TACTICAL**

The issue of technology arises at both the strategic level of an organization and at the tactical level where division or department heads need to engage specific audiences to achieve specific goals.

At the strategic level, the discussion about technology is secondary to the issues related to developing an overall engagement strategy that encompasses the enterprise brand, leadership, culture, communications, learning, collaboration and innovation, rewards and recognition and measurement tactics.

This process usually involves creating an executive committee representing leadership of each organizational group (including IT) who meet annually to agree upon an overall engagement plan based on organizational goals and then communicate regularly in follow-up meetings to make sure everyone's operating in agreement with the plan.

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After this mechanism is set up, it becomes possible to begin to look at engagement technology from an organizational standpoint. The engagement team should address such questions as:

1. What will be the "authorized" communication channels with each organizational audience, from customers and distribution partners to employees, vendors and other communities? Who's in charge of each and who can influence how those channels will be used?
2. How do we make sure that customer and employee messaging are aligned on the various platforms for overall branding consistency?
3. Is the content being offered customers and distribution partners helpful to them? Does it provide useful information in addition to just selling the virtues of the organization? What about the employee portal - does it contain all of the information employees need to understand organizational values, the types of behaviors important to the organization and all of the resources available to them to continually advance through learning? How easily can individual department managers use the platform for their own communications needs?
4. What type of engagement surveys are conducted and what is done with the results? How is this information made actionable? Are all of the right people receiving this information?
5. How are customer and distributor websites used to make sure people have the knowledge they need to best interact with the company or utilize its products and services?
6. What types of learning and testing strategies are used with the various audiences and how are results tracked across the organization? What kinds of tools are available for use by department heads for specific purposes?

7. What types of collaboration and innovation strategies exist? What is being done to encourage people across the organization, including customers and distribution partners, to encourage suggestions? How are those ideas processed and communicated back to the contributors and organizations? How is any of the technology for these purposes integrated with other technology, such as rewards platforms, learning centers, or assessment to track participant engagement?
8. How well are rewards and recognition technologies integrated with the above efforts? Can the organization reward people for returning surveys, passing tests, exhibiting desired behaviors and actions, etc.?
9. How well is all of the data coming from the above activities being correlated, analyzed and fed back to management at all levels? Is there any way of correlating such information? Who is responsible and how will the information be used?

### **A TANGLE OF TECHNOLOGIES**

Many department or division heads are tasked with achieving specific objectives – customer loyalty; distributor commitment; employee service, quality, productivity, knowledge, wellness, safety, etc. They usually can't wait for top management to develop an organizational infrastructure to provide for all of their technology needs, and rarely can get the access to necessary IT resources. They therefore routinely select particular technologies based on their specific needs. As a result, most large organizations have a tangle of technologies that are very rarely integrated beyond featuring a single log-in experience for participants.

Until a centralized platform emerges for engagement as has emerged for sales force automation and enterprise management, managers selecting any of the above technologies should take the following factors into consideration:

- How easy will it be to connect software with your portal so there's at least a single log-in experience?
- How easy is it to address other elements of engagement beyond the specific behaviors being tracked or managed to make sure people are fully engaged with using the technology for the desired purpose?
- Who will need to be trained on using the technology and how will training be conducted?
- What will be done over time to make sure people properly use the technology and take advantage of its capabilities?
- How will data obtained from the technology be correlated with desired outcomes?

### **THE MOBILE ISSUE**

With the proliferation of smart phones and applications, engagement is increasingly defined, in part at least, as the time people spend using an organization's social media, smart phone apps, or websites. In fact, the web advertising and social media businesses define customer engagement almost exclusively on this basis, rather than on the broader definition that includes "net-promoter scores," a term created by loyalty expert Frederick Reichheld that measures the willingness of someone to recommend an organization, or other indicators of commitment to an organization.

That said, with people using their smart phones so often today, the more that can be easily accessed via a smart phone the better, especially when it comes to delivering messages, useful information, standings, results, tips, etc. With people increasingly using smart phones to fill idle moments, organizations want to make sure they're present when people are receptive. This doesn't mean organizations need to have apps for their various engagement strategies, but certainly it's now beneficial to have re-sizable content so it displays effectively on all screen sizes.