



Intelligent Swarming Assessment and Design Workshop

Background:

Intelligent Swarming is a different way to organize people and work. The traditional support model with levels, or tiers, of support and the escalation of issues from the first to second to third level is giving way to this more efficient model. Our initial experience with Intelligent Swarming is exceeding our expectations in terms of improvement of operational efficiencies, employee engagement, and customer satisfaction and loyalty. Swarming is proving to be a better way to organize people and work.

Intelligent Swarming is most valuable in support environments where the complexity of the issues is moderate to high. Swarming typically does not make sense for support teams that deal with a high volume of known or low-complexity issues.

Determining the appropriateness of swarming for a collaboration team, and designing the best approach for a given group, depends on understanding a number of factors including:

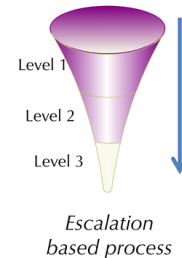
- Complexity of the issues
- The culture of the team: level of commitment to the team goals and level of trust
- Maturity of the group members
- Number of support analysts (or group members)
- Location(s) of the support analysts
- Tools and functionality available to enable collaboration and people profiles

There are a number of different ways to implement swarming. It is critical that the people who will be implementing the swarming model be deeply involved in the design of the swarming process. Successful swarming implementations have all gone through iterations; it is important to expect and plan on an iterative process of improvement.

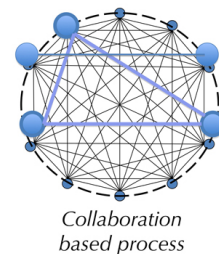
Objective:

Assess the relevance and value of Intelligent Swarming for a collaboration group. If swarming makes sense for the environment, we will guide the group in the developing a common understanding of swarming and design a swarming model and an adoption plan that best suits the needs of the group.

Old Model: Streaming



New Model: Swarming





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Scope:

For the purposes of an intelligent swarm, we define a collaboration group as a discrete group of individuals who would benefit from collaboration on problem solving in a product area or technology. Initially, the collaboration group consists of the level 1, 2, and 3 Support Analysts that work in the same domain. In a highly collaborative environment we do not want to limit the members of collaboration groups to only support personnel. Ultimately, we want to identify collaboration groups based on people's relevance to the customer situation; groups could include people from organizations other than support.

Key Deliverables:

Deliverables include:

- Assessment - is swarming right for the group?
- Collaboration Health Survey - results and analysis
- Social Network Analysis - what is the trust network in place today?
- Collaboration process definition
- Measurement framework
- People profile and reputation model
- Communications plan
- Adoption roadmap

Approach:

There are four phases to developing and adopting a swarming model.

Phase I – Initial Qualification

Does Intelligent Swarming make sense for your organization? We will gain an understanding of some high attributes and characteristics of your organization based on initial data collection and analysis. This will be done through a questionnaire and a few conference calls.

- Conference call to introduce the questionnaire on organizational attributes and discuss data collection requirements
- Complete and submit questionnaire and data
- Conference call to review the questionnaire and data analysis and determine if swarming makes sense. If so, discuss Phase II.



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Phase II – Organizational Analysis

There are many different ways to implement Intelligent Swarming. Obtaining a detailed understanding of the organization's structure, culture, processes, and tools is a critical basis for the planning and design phase. The organizational analysis will help us determine the best approach, as well as identify which collaboration group would be the best to participate in the design session and pilot swarming. This analysis is done through a few conference calls and a survey of the people in the candidate groups.

- Conference call to review the steps for the organizational analysis, setting up the Social Network Analysis (SNA), and Collaboration Health Survey.
- Review questions and assess relevance to the group
- Collect contact and role information for the members of the group
- Conduct SNA and Collaboration Health Survey: Support Analysts take a web-based survey about their interactions with others.
- Conference call to review survey results and Organizational Network Analysis. Discuss which collaboration group(s) would make sense to be the early adopters and participate in the design session.
- Conference call to review/demo existing tools and functionality that would support swarming and a people profile/reputation model.
- Conference call to discuss next steps and logistics for the Design Workshop (Phase III).

Phase III - Adoption Planning and Design Workshop

Given that swarming makes sense, we will develop a common understanding of swarming with the group members and facilitate a design workshop to create a model and adoption plan. This will integrate the insights gained by the Consortium through early adopters' experiences with the characteristics and infrastructure of the organization. The Adoption Planning and Design session will take three to five days and will be done on-site with members of the team who will be implementing the swarming model. (See below for a typical agenda.)

Phase IV - Adoption Support

On-going support for the adoption and continuous improvement of the swarming process is provided via monthly conference calls with key players on the team. The first few calls focus on adoption progress and any outstanding issues or dependencies. Later in Phase IV the discussion focuses on the process and opportunities for continuous improvement. Phase IV typically lasts three to six months.



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Design Workshop Agenda (Phase III)

This sample agenda will be tailored to the group based on the outcome of the assessment activities.

Day 1: Intelligent Swarming: Overview and Benefits

- Introduction to the concepts and principles
 - Abundance vs. scarcity
 - Opt-in vs directed
 - Shift from individual to team mentality
- Exercise: the power of collective thinking
- Benefits: why would we do this?
 - WIIFM for support agents, for managers, for customers
 - Case study summaries (BMC, Cisco, Red Hat, Microsoft)
- Operational concepts: what you need to make it work
 - Motivation: emotion engagement and alignment, balancing skill with challenge
 - Ability: capability and capacity
 - Triggers: matching people to work in a timely, relevant way
- Summary and discussion on the Collaboration Health Survey and the SNA

Day 2: Design

- Exercise: design and implementation
- Design principles
 - Keep it simple
 - Let the support agents/engineers design and own it
 - Expect to iterate
- Collaboration processes
 - Request assistance
 - Offer assistance
 - Exception detection
- People profiles
 - Identity, skills, interests, preferences, availability
 - Reputation (past value created, willingness)
 - Visibility of people to work and people to people
 - Matching capabilities – best fit of people to work

Day 3: Technology Capabilities and Measurement Framework

- Adjusting for reality: current technology capabilities
 - Review current collaboration capabilities in case management, knowledge management, instant messenger, people profiles
 - What can do now, what key functionality do we need long term
- Measurement framework
 - Assessing people's contribution in a collaborative environment
 - Assessing health and productivity of the swarming model

Day 4: Adoption Road Map and Communications Plan

- Adoption roadmap overview and discussion
 - Identify teams: people who would benefit from swarming
 - Identify pilot team – highest likelihood for success?
 - Existing trust network, collaboration health?
 - Discuss what information they would need to get started
- Communications plan
 - Engagement strategy
 - Audiences
 - WIIFM (what's in it for me)
 - Objections and questions
 - Communications event timeline
- Training plan
 - Support Analyst
 - Managers
 - Others