

Case study
July 2014

Putting social media to work

The Santa Fe Group

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Putting social media to work

The Santa Fe Group case study

This case study forms part of a research project conducted in 2014. The main research report and other case studies can be found [here](#).

The context

Headquartered in London, The Santa Fe Group (SFG) is a global relocation service provider with offices in 56 countries. It was formed from a 2010/11 merger of Santa Fe (Asia based), Interdean (Europe) and Wridgways (Australia). Since then a main focus has been to consolidate common processes and a common corporate culture across the group.

The size and global nature of the merged group brought into relief the need for greater consistency in learning and development and to build on what was already in place. The core offering of The Academy (the internal learning arm of the company), which the group inherited from Interdean, was two residential five-day workshops on moving services, pitched at introductory and advanced levels. These were run annually and brought together colleagues from across Europe. Santa Fe and Wridgways did not have any equivalent formal learning programmes, only ad hoc workshops as required.

The face-to-face training workshops were a successful model, typical of many businesses. As with any face-to-face training experience, the quality of the workshops depended on factors including who the participants in the room were and whether English was their first language, and since 2011, there were also the challenges of delivering to scale and having a comprehensive curriculum that works in all parts of the globe. As

Michelle Parry-Slater, Head of The Academy, puts it, *'there's one of me and there are 3,000 of them. I can't be everywhere, I can't know everything.'* And there was also a question about how well their existing model embedded learning. On The Academy workshops,

[/Participants would] have a really fantastic experience, they'd all get to know each other, their networking value would be fantastic. Then, they'd go back off to their various countries and that's all they had. They didn't have a way of networking with those people other than calling them or emailing them. ... The focus was less on the actual content of what they would learn and more around the networking value. / (Michelle Parry-Slater)

It was agreed that learning and development should be more rooted in employees' day-to-day experiences. Both Michelle Parry-Slater and Katherine Marlow, Director of People, Learning and Culture, shared a basic belief in the 70:20:10 model, which states that learning comes mainly through experience, partly from other people and only in small part from training.

[/All of these things were pushing us towards a virtual learning environment. ... What that looked like, I didn't necessarily know at the time ... I just felt it had to be community driven; I had a very strong sense of that.] / (Michelle Parry-Slater)

The innovation

SFG has used an enterprise social learning network called Fuse to create a company-wide learning and development platform. This is the company's first global learning platform and it serves both to provide a virtual learning environment and to connect employees across the organisation.

The platform, which is called The Academy Online, is available on desktop PCs and through an app for mobile digital devices. It went live in September 2013 with 1,700 office-based employees around the world, covering both relocation services and moving services. The warehouse employees are yet to be included.

Content and membership on The Academy Online is organised by function-based communities. For the launch, about 100 pieces of video learning content (typically a few minutes long) were purchased and loaded onto The Academy Online, but a central aspect of the platform's functionality and purpose is to enable employees to produce and share learning content themselves.

Thus, as well as being able to post comments with links to online learning content, any employee can upload and share files, such as video, PowerPoint, PDFs, Word documents, and so on. They can also record and upload screencasts, whereby they simultaneously record their actions on their computer and a voiceover to talk about what they are doing. The learning and development team can then pick up

pieces of content and order them for ease of use, as well as produce more formal pieces of learning content (for example, what you need to know when working with Company X, or how to use certain software).

Being a social network, The Academy Online also facilitates conversations between employees, everyone being able to post questions and comment and respond to colleagues' comments.

The Academy Online is used within SFG to deliver blended learning and development. An intervention may start with a presentation or workshop and go on to self-directed e-learning through The Academy Online, which involves different learning streams and formats. It is also used in what is a fast-paced working environment to provide employees with access to an array of bite-sized learning, so that they can do worthwhile personal development in even a five-minute slot, or to find solutions on demand to work through a problem they are facing at any given moment.

The platform has taken cultural differences into account in its design. In particular, SFG decided it would be insensitive to include a leaderboard to show how people are contributing and, by the principle of gamification, allocate points to encourage participation. This clashes with common values in the one region, where employees do not want that visibility. A part of the solution is better cross-cultural understanding; demonstrating that through the platform was important.

The journey

In late 2011, the proposal was put forward for a socially networked learning and development platform, but this was put on hold due to the merger. Following the merger,

process training for the newly formed Santa Fe Group was delivered in two workshops in London and Frankfurt. This was followed up by Michelle Parry-Slater delivering further training in the different countries to embed the learning. This reinforced her view that this approach was not sufficient to drive a cohesive way of working across the global organisation. While branches in some countries were embracing the new processes wholeheartedly, this was not happening across the board, for reasons discussed above (see *The context*).

SFG's first social media experiment was with Salesforce Chatter, but this was found to be too specific to the sales function and didn't take hold with other parts of the organisation.

“We put all of the people that had been through the relocation training on Chatter and tried to encourage them to communicate in that regard. It was just another task [for them]. They weren't sales people so they weren't in Salesforce; they weren't there all of the time. It wasn't natural for them to be there.” (Michelle Parry-Slater)

Realising they needed a dual-aspect solution of a learning management system (LMS) integrated with a social networking platform, Michelle and her boss, Katherine Marlow, approached various major LMS suppliers at the 2013 Learning Technologies Exhibition. They felt that none offered a decent level of integration.

“They all talked about this clunky add-on. So, ‘Yes, here's your learning, here's your email, your ... neat and tidy course. You click Next: here's your quiz. Then, you come out of that and here's your profile page or your community page.’ I said, ‘No, I want them in

the same space. I want to be able to, actually have: ‘This course, we've just done; let's talk about it.’” People were literally staring at us like we had two heads. (Michelle Parry-Slater)

However, at the end of their day at the exhibition, they wound up at the brightly coloured stand of Fuse, a small new player in the market. Within minutes of listening, they realised that they had found what they were looking for.

“There was somebody who [shared] all of those feelings I had around, ‘We need to have conversations around learning. We need to make it normal to have a conversation around learning. We need to have consistency in a formal way, yet a very informal, accessible platform.’ ... [On seeing a sample] it felt like I was looking at YouTube, Facebook, LinkedIn all smashed together. I instantly felt like, ‘I know how I could drive that; I know I could work with that.’ It just felt right, from that very second.” (Michelle Parry-Slater)

As it was such a new way of learning, they soon realised that it would be a harder sell within the rest of the organisation and to the parent company, East Asiatic Company. So, as Michelle's role moved from regional to global, she took the opportunity to talk to stakeholders across the organisation and socialise the idea that The Academy was going to deliver much more than workshops, as that was not a sustainable solution for a global organisation. Talking to heads of functions about their 'pain points', she found that there was not a single conversation in which a platform like Fuse could not be offered as a viable solution.

“A lot of the problems that they were having were around consistency, were around people

coming on board. Potentially, sitting on their job, five and a half months before attending an Academy course. Or, potentially, wanting to go on an expensive course that then qualified them to go and work somewhere else and then leaving. / (Michelle Parry-Slater)

Having gone through due diligence and contracted Fuse, the learning and development team was ready to launch The Academy Online in late spring 2013, but did not want to launch the product at the start of the relocation industry's busiest season. It set a launch date in September and in the meantime devised a communications plan to prepare the organisation and generate curiosity and enthusiasm.

Firstly, it ran webinars to inform managers about the product and how it would help solve their 'pain points'. It then drip-fed messages through the organisation about its impending arrival, including a cryptic email showing only closed red theatre-style curtains and a message of 'Are you ready?' This got people talking as intended. This was followed up with a video of the CEOs of the three global regions talking and enthusing about the product that would put them at the cutting edge of learning and development, and a small ruler puzzle as a piece of merchandise.

In September, Michelle Parry-Slater ran a series of five webinars for different time zones to introduce the organisation to Fuse. Throughout these, employees were encouraged to go on the platform and try it out.

Take-up and use

At the time of the research, SFG had been using Fuse for less than six months, but in that short

time had already made great strides in starting to change the organisation's culture. Because of their familiarity with social media in general, some people took to Fuse far more quickly than expected.

/ We had a four-point plan, [which] we thought would last about four months. We would start with: just get people to log in; all we want you to do is look. Then, the next month, we were hoping that people would start to like and comment and feel a little bit confident around that. Then the third month, we were hoping that they would feel up to, maybe, sharing content with other people. ... Then the final stage, where they would actually record their own videos. We were blown away that by the end of September we'd got through those four stages with some people. Some people have never logged on but it's a journey, isn't it? / (Michelle Parry-Slater)

At the point of this research, 75% of registered users had logged in the previous week and this is anticipated to have already increased to 80%. The most activity seen to date in a given day was 2,744 views, an impressive number for 1,700 employees.

The learning and development team is trying to establish why The Academy Online is not being used in certain pockets and what they can do to make sure the platform is not failing people, but the main issue seems to be that a number of people have not properly tried it out; once they do, they realise what they have been missing. Although many employees still perceive lack of time as a barrier (due to perceptions of old-style e-learning), increasingly they are realising that they can do bite-sized development activities in the time it takes to eat an apple.

Content creation

One of the first peer-to-peer videos came following SFG's Phuket conference, where a Korea-based employee complemented Katherine Marlow on The Academy Online and mentioned that he had set his computer to automatically open the platform when he turned it on.

/ Katherine said, 'How do you do that? That's really interesting.' He said, 'I'll show you how to do it and then you can share it with everyone.' She said, 'No, no, no. I'm not sharing it. You share it; it's your idea. ... You make a video on it and you share it.' He went, 'Really? Can I do that?' ... So he goes back to his office, he clicks the record button and he puts together a little video on how to set your Internet browser to open multiple windows at the same time. / (Michelle Parry-Slater)

Within the first week, the video received over 250 views. In general, the number of employees actively sharing learning has exceeded expectations, but there are still barriers that are thought can be overcome to increase this participation.

/ People don't like to hear themselves on a voiceover and they don't want to be on a video. ... What we've tried to do is say, 'Look, it doesn't need to be perfect. It needs to be human. It can be fun.' So Michelle and I did a video just before the conference. ... It took us three or four tries. At the end of [the posted] video, we put some text saying, 'This is how much fun a video can be,' and then we put the spoofs or the bloopers in. We had a number of people at the conference say, 'Oh, I loved your video. It was so funny.' Because we tried to open the umbrella, and then the wind is getting us, and everything that

could go wrong went wrong. ... Once people have done it a few times they're okay, but it's getting them to do it initially. ... I think they're just nervous. ... You've just got to keep pushing, showing the success, and it happens. / (Katherine Marlow)

The learning and development team is also encouraging employees with expertise to come to the fore through a webinar series in which they will interview people about their job.

Some employees have now become well known for their presence on The Academy Online. One example is Tiago, a business development manager from Vienna.

/ He clearly is massively engaged in social media generally. He finds fantastic, really relevant, cutting-edge articles that he shares. 'This is the top ten tips on managing a client' or 'How to sell to the difficult person' or whatever it might be; he's sharing. ... So, come the conference, people are, 'Oh Tiago; great article that you shared.' / (Michelle Parry-Slater)

Maintaining relevance of content

SFG has tried to make it clear that The Academy Online should be used specifically for learning-relevant content.

/ One of the things for instance we toyed with is people putting up inspirational quotes and sayings, and it was, 'Well, you can understand why they were putting them up, and they were great to put them up, but is it really learning content? [Yet] if we take them down, are we discouraging people from contributing?' So we basically agreed that we would create a separate community for these types of things, so that every time something was posted it was

put into that community and not everybody else was saddled with it. / (Katherine Marlow)

The learning and development team has discussed the validity of some of the content that is shared, but has concluded that, for the main part, the platform effectively monitors itself. Only one inappropriate comment has been noted, and in this case, it is thought that the person shared it globally by mistake. It was flagged up and the person took their comment down.

Michelle Parry-Slater sees four levels of checking or policing: first, by the individual who posts a piece of content, who makes a decision on what is relevant and not offensive or in some other way inappropriate; second, by other people within the functional communities that form the main groupings of The Academy Online users; third, by the three regional learning leads; and fourth, 'the most powerful level', which is peer review.

An example of peer review is a post of a scanned piece of content in which the image was poor quality, containing scribbled notes, and upside down. While the document was thought to be useful, colleagues commented on the format and the next day, the person had replaced it with a better image.

/ The great thing is we haven't really had to do anything about [irrelevant or poor quality content], because peers ... have commented on it, and sort of said, 'No, I don't think this is right,' or, 'I think this is posted in an unprofessional way. Take it down and redo it.' So it's been self-monitoring, which has been fantastic. Or self-managed, I guess. / (Katherine Marlow)

/ If it's good, it gets discussed, it gets liked, it gets shared. If it's pants, it gets panned, it just falls away. / (Michelle Parry-Slater)

Linguistic groups

From the start, SFG was clear that it wanted The Academy Online to break down geographical boundaries and be based on functions. But one question that has arisen is whether linguistic groups are acceptable or it should all be in English. The initial sense was that they would reinforce geographical boundaries, but eventually it was decided to allow them, so that employees could all communicate in their mother tongue. In fact, they find that people post in two languages. For example, some Chinese users write a post in Chinese and then translate it below into English.

Business impacts

In a little under six months, The Academy Online has already started to change SFG's learning culture, weaning it off what Michelle Parry-Slater calls 'injection education', whereby people's learning needs are 'cured' with a simple, discrete training workshop. As well as training, employees are realising that SFG can now offer ongoing conversations and reminders about that training and ongoing access to more learning resources as and when they are needed.

The Academy Online has also been successful in fostering connections across the global organisation. One recent example of this came when an employee based in Marseille openly posted a question on a technical issue that was picked up by a colleague based in Paris, who was in London at the time. This generated further input from a colleague who works from home in Hawaii. The conversation thus broadened the perspective to people working in very different

regions, created a searchable discussion feed that may be of use to other employees in the future, and formed a connection between employees who previously would not even have known about each other.

But being better connected is not simply a matter of learning and development. The Academy Online is SFG's first global platform available to all office-based staff (SFG had a Salesforce.com CRM platform already in place for global sales teams). There are other benefits too, for example, its search functionality has effectively given the organisation its first up-to-date online directory.

It has made people's lives so much easier. If I'm looking for somebody that does moving in India, for instance, I can find that now, whereas before I could maybe find one person in here and I would have to call around and email. So it's simple, but it's just made a huge difference. (Katherine Marlow)

There is also a knock-on effect from employees becoming more au fait with social technology through The Academy Online, as they are now engaging more with other social technology, such as Skype and webinars.

The cost of the Fuse platform is felt to be extremely good value and the platform has generated large savings elsewhere. In particular, the pre-work and online resources are dramatically reducing costs in flying people around the world for training courses.

Next steps

As a workforce, Santa Fe Group is relatively early on in its journey with internal social media. For example, it is not yet at the point where employees are using it to send

out operational updates or resolve problems in real time, although this is thought to be only a few months away. At the time of the research, SFG was thought to be a year or more away from becoming 'a truly learning organisation'. Employees are still getting used to the platform, as examples like the person posting a poor quality image upside down show.

Whereas The Academy Online is internally facing, Santa Fe Group now plans to use Fuse as a client-facing platform. This will both enable clients to provide content (for example, a video on how they would like Santa Fe employees to work with them) and enable Santa Fe to share content with them (for example, how to use its IT systems).

Currently, the group of employees who don't have access to The Academy Online is the warehouse, packing and removals crew, including drivers, as they are not office based. Fuse does have a mobile app but SFG does not yet have a formal bring-your-own-device policy or provide crews with mobile devices. Nonetheless, the potential and relevance is seen for this group of employees – for example, to share videos on how to pack an antique vase or a grand piano – and the plan is to enable them to join the online learning community.

The Academy Online is now becoming the place to go when people want to share anything across the organisation. A next step will be to move SFG towards being socially networked in other areas than learning and development.

It's opened up almost a can of worms ... a good can of worms. People are thinking in ways that they would never have thought before, so not just about L&D,

but how to be collaborative and do social networking. (Katherine Marlow)

Lessons

Having started its social media journey by trying out Salesforce.com Chatter, one learning point was seen to be that Fuse/The Academy Online worked because it gave people a genuine reason to be using social media.

[Internal social media] needs to be purposeful and relevant because just going to people, 'Here is a space; talk to each other,' it doesn't work; there's nothing to drive them to it. ... The ultimate reason why Chatter failed [for all staff] was there was no relevance [to non-sales staff]. There was no reason to have that discussion. (Michelle Parry-Slater)

But more than simply giving employees a practical reason to use it, The Academy Online has made people feel more valued for their experience and knowledge.

One of the reasons why I think it has been successful is we've made it attractive for people to be there. We've made it rewarding [by] the fact that they get the kudos. I don't want the kudos; I don't care if my face or voice never appears on The Academy Online again. It's not about what I know. It's about these guys understanding, firstly, they need to improve themselves, they need to learn, they need to be self-aware; [and] secondly, they do have value and they need to share that value with other people. (Michelle Parry-Slater)

In this way, The Academy Online is allowing employees throughout the organisation to informally step forward as leaders.

✓ *The face that I recognised at the conference, Tiago, he's now made a name for himself. He's relatively new [to the organisation] ... and I think that [activity on The Academy Online] buys him visibility and credibility, given what he's posted. If he posted a lot of rubbish then he would get the opposite.* ✓ (Katherine Marlow)

Related to this, The Academy Online is changing the skill set needed in the learning and development function. Firstly, the team has had to upgrade its IT skills so that it can lead the way in the use of The Academy Online. But more fundamentally, its role is morphing from content creation to curating other people's expertise.

✓ *It's also changed the way we're thinking about learning, and how we sell the concept of learning, that it's more of a blended solution, and it's learn, share, grow. We're trying to get people to stop thinking of development as just a workshop.* ✓ (Katherine Marlow)

Another key learning point for the learning and development team has been not to be too prescriptive about what is appropriate or relevant

material to be sharing. For example, one item shared was an article about Hungarian being the hardest language to learn.

✓ *The headline was, 'What is the hardest language to learn?' That was shared somewhere in Europe an hour ahead of us. ... I'd seen it [at home on my smartphone]. ... Before I'd got into the car to go to work I [thought], 'This is going to be a political hot potato. It's not learning, it's information ... it's not going to teach anybody anything.' ... By the time I had got in, parked my car, had a chat, sat down, looked at it again – so this was only in a window of two hours – the comments were just everywhere. ... I suddenly thought: this is it; this is the cultural element that we were looking for. They all have something to say about which is the hardest to learn because everyone speaks a different language in this company. Let's celebrate that; that's amazing. I would have potentially taken that down as a piece of non-learning content ... [but] what that taught me was to let peers review. The bad stuff just falls away, no one comments on it.* ✓ (Michelle Parry-Slater)

Finally, on a very practical point, SFG's experience highlighted the importance of allocating a decent budget for marketing a product like The Academy Online. This is needed to promote the benefits, but also to manage expectations and explain how it will and won't work. An initiative like this constitutes a fairly major change programme that needs to be managed in a way in which leaders 'make people feel like they're changing with you rather than the changes being done to them.' (Michelle Parry-Slater)

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