

A framework for the social enterprise

Harold Jarche

The social learning revolution has only just begun. Corporations that understand the value of knowledge sharing, teamwork, informal learning and joint problem solving are investing heavily in collaboration technology and are reaping the early rewards. - Jay Cross

Social learning

Why is social learning important for today's enterprise?

George Siemens, educational technologist and researcher at Athabasca University, has succinctly explained the importance of social learning in the context of today's workplace:

There is a growing demand for the ability to connect to others. It is with each other that we can make sense, and this is social. Organizations, in order to function, need to encourage social exchanges and social learning due to faster rates of business and technological changes. Social experience is adaptive by nature and a social learning mindset enables better feedback on environmental changes back to the organization.

The Internet has fundamentally changed how we communicate on a scale as large as the printing press or the advent of written language. Charles Jennings, of Duntroon Associates, explains why we need to move away from a focus on knowledge transfer and acquisition, an approach rooted in Plato's academy:

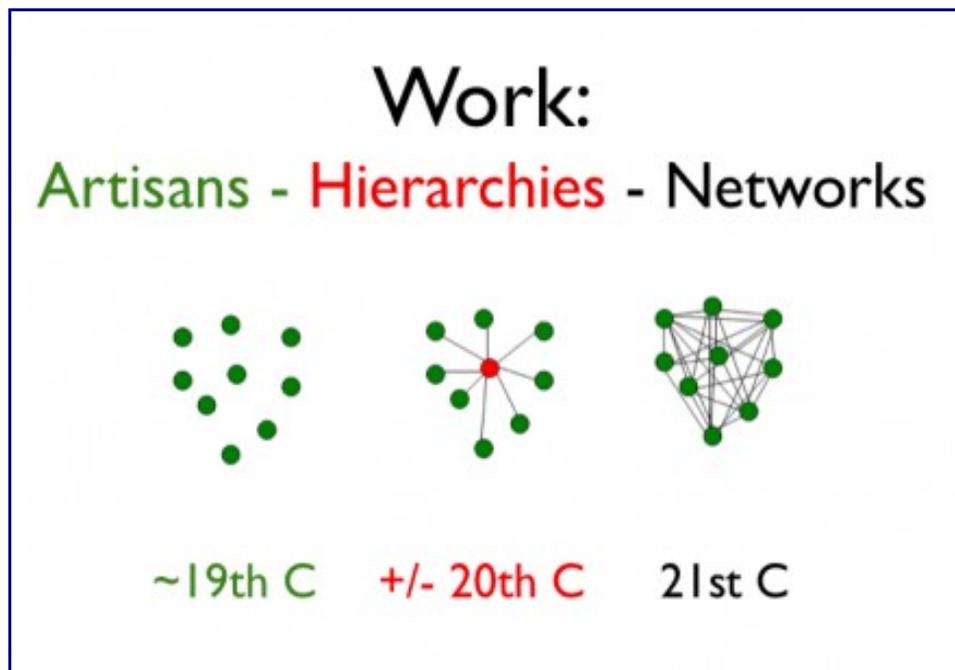
We are moving to the world of the sons of Socrates, where dialogue and guidance are key competencies. It is a world where the capability to find information and turn it into knowledge at the point-of-need provides the key competitive advantage, where knowing the right people to ask the right questions of is more likely to lead to success than any amount of internally-held knowledge and skill.

Our relationship with knowledge is changing as our work becomes more intangible and complex. Notice how most value in today's marketplace is intangible, with Google's multi-billion dollar valuation an example of value in non-tangible processes that could be deflated with the development of a better search algorithm. Non-physical assets comprise about 80 percent of the value of Standard & Poor's 500 US companies in leading industries.

From replaceable human resources to dynamic social groups

The manner in which we prepare people for work is based on the Taylorist perspective that there is only one way to do a job and that the person doing the work needs to conform to job requirements [F.W. Taylor, The Principles of Scientific Management, 1911]. Individual training, the core of corporate learning and development, is based on the premise that jobs are constant and those who fill them are interchangeable.

However, when you look at the modern organization, it is moving to a model of constant change, whether through mergers and acquisitions or as quick-start web-enabled networks. For the human resources department, the question becomes one of preparing people for jobs that don't even exist. For example, the role of online community manager, a fast-growing field today, barely existed five years ago. Individual training for job preparation requires a stable work environment, a luxury no one has any more.



A collective, social learning approach, on the other hand, takes the perspective that learning and work happen as groups and how the group is connected (the network) is more important than any individual node within it.

MIT's Peter Senge has made some important clarifications on terms we often use in looking at work, job classifications and training to support them.

Knowledge: the capacity for effective action. “Know how” is the only aspect of knowledge that really matters in life.

Practitioner: someone who is accountable for producing results.

Learning may be an individual activity but if it remains within the individual it is of no value whatsoever to the organization. Acting on knowledge, as a practitioner (work performance) is all that matters. So why are organizations in the individual learning (training) business anyway? Individuals should be directing their own learning. Organizations should focus on results.

Individual learning in organizations is basically irrelevant because work is almost never done by one person. All organizational value is created by teams and networks. Furthermore, learning may be generated in teams but even this type of knowledge comes and goes. Learning really spreads through social networks. Social networks are the primary conduit for effective organizational performance. Blocking, or circumventing, social networks slows learning, reduces effectiveness and may in the end kill the organization.

Social learning is how groups work and share knowledge to become better practitioners. Organizations should focus on enabling practitioners to produce results by supporting learning through social networks. The rest is just window dressing. Over a century ago, Charles Darwin helped us understand the importance of adaptation and the concept that those who survive are the ones who most accurately perceive their environment and successfully adapt to it. Cooperating in networks can increase our ability to perceive what is happening.

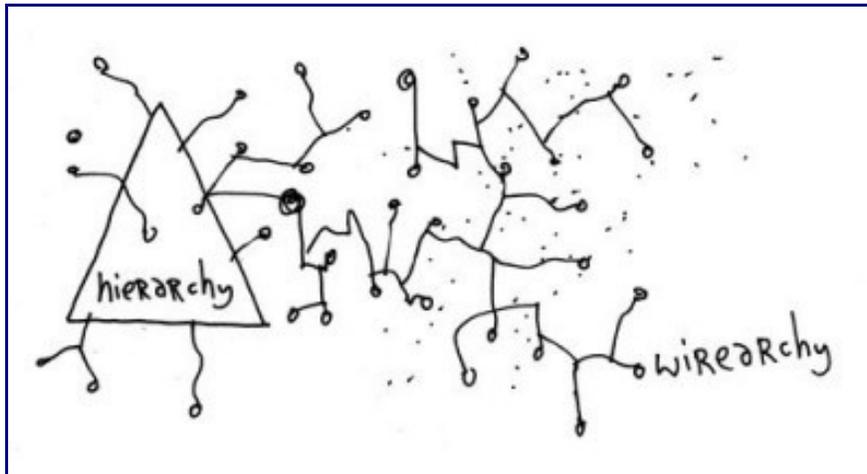
Making social learning work

Jon Husband's working definition of Wirearchy is “a dynamic two-way flow of power and authority, based on knowledge, trust, credibility and a focus on results, enabled by interconnected people and technology”. We are seeing increasing examples of this on the edges of the modern enterprise. WorldBlu.com's annual listing of our most democratic workplaces continues to grow and gain attention. Google's dedicated time-off for private projects, given to its engineers, promotes non-directed learning and collaboration. Zappos

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directly engages with its customers on Twitter, fostering higher levels of two-way trust. As customers, suppliers and competitors become more networked, being more wirearchical will be a business imperative.

Wirearchies inherently require trust, and trusted relationships are powerful allies in getting things done in organizations. Trust is also an essential component of social learning. Just because we have the technical networks does not mean that learning will automatically happen. Communications without trust are just noise, not accepted and never internalized by the recipients.



Here are some ways to make social learning work in the enterprise:

Think and act at a macro level (what to do) and leave the micro (how to do it) to each worker or team. The little stuff is changing too fast.

Engage with Web media and understand how they work. The Web is too important to be left to the information technology department, communications staff or outside vendors.

Use social media to make work easier or more effective. Use them to solve problems for work teams and groups.

Make traditional management obsolete. Teach people how to fish and move on to the next challenge. If the organization is maintaining a steady state then it has failed to evolve with the environment.

Analyzing social learning

Most 20th century workplaces had two types of learning: formal learning through training and informal learning (about 80% according to available research) which just happened by accident or the result of observation, conversation and time in the job. This focus on formal training, for skills and knowledge, missed out on our social nature. Business has always been social, especially at the higher levels of management and with ubiquitous access to networks, this is once again part of everyone's work. In the global village, we are all interconnected.

Jane Hart, social learning consultant, has shown how social media can be used for workplace learning and that instead of just training, there are five types of learning that should be supported by the organization:

IOL – Intra-Organizational Learning – keeping the organization up to date and up to speed on strategic and other internal initiatives and activities

GDL – Group Directed Learning – groups of individuals working in teams, projects, study groups, etc Even two people working together in a coaching and mentoring capacity

PDL – Personal Directed Learning – individuals organizing and managing their own personal or professional learning

ASL – Accidental & Serendipitous Learning – individuals learning without consciously realizing it (aka incidental or random learning)

FSL – Formal Structured Learning – formal education and training like classes, courses, workshops, etc (both synchronous and asynchronous)

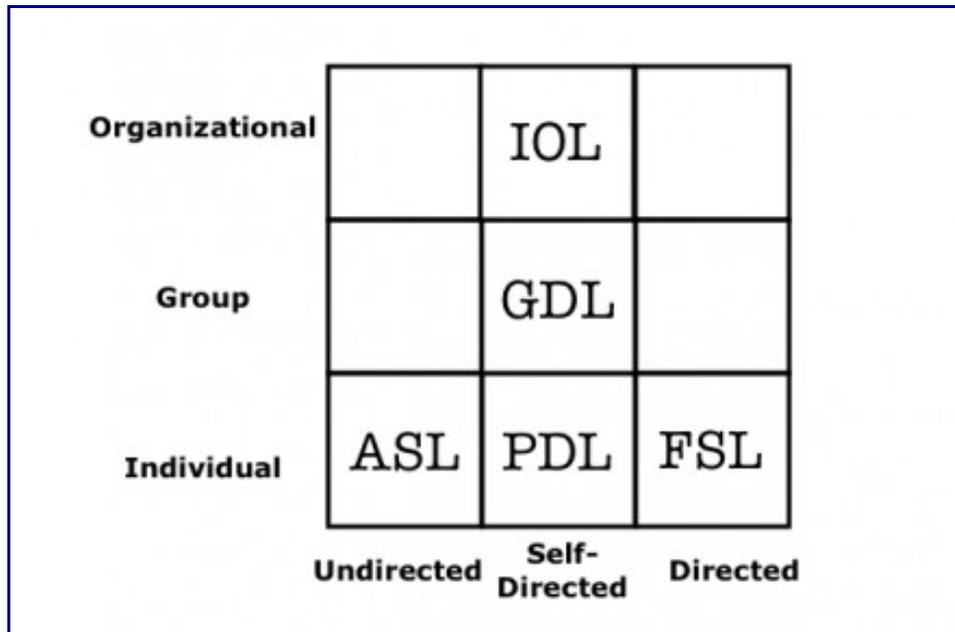
Notice that traditional training (FSL) is only one of the five types. Three of these (IOL, GDL, PDF) require self-direction, and that is the essence of social learning: becoming self-directed learners and workers, all within a two-way flow of power and authority. Social and informal learning are not just feel-good notions, but have a real impact on an increasingly intangible business environment.

Jay Cross has looked at the ways that social learning is becoming real and developed this table to highlight some of the workplace changes he is observing:

Social Learning Gets Real	
Past	Future
Subject matter experts	Subject matter networks
Need to know	Need to share
Curriculum	Competency
Clockwork, predictable	Complexity, surprising
Stocks	Flow
Clock time	Time-to-accomplishment
Worker-centric	Team-centric

Jay **Cross** November 2009

Implementing social learning



The changes in becoming a networked workplace can be further analyzed using Jane Hart's five ways of using social media for learning in the organization.

ASL – Accidental & Serendipitous Learning: from Stocks to Flow

Learning is conversation and online conversations are an essential component of online learning. Online communication can be divided into Stocks (information that is archived and organized for reference and retrieval) and Flows (timely and engaging conversations between people, including voice or written communications). Blogs allow flow and micro-blogs, like Twitter, enable great flow due to the constraint of 140 characters

The web enables connections, or constant flow, as well as instant access to information, or infinite stock. Stock on the Internet is everywhere and the challenge is to make sense of it through flows of conversation. It is no longer enough to have the book, manual or information, but one must be able to use it in changing contexts. Because of this connectivity, the Web is an environment more suited to just-in-time learning than the outdated course model. ASL is shifting from looking at knowledge as the collection of bits and engaging in the learning flows around us, without any conscious plan. We are working and learning in networks and the only thing a network can do is share.

PDL – Personal Directed Learning: from Clockwork & Predictable to Complexity & Surprising

Complexity, or maybe our appreciation of it, has rendered the world unpredictable, so the orientation of learning is shifting from past (efficiency, best practice) to future (creative response, innovation). Organizing our own learning is necessary for creative work. Workplace learning is morphing from blocks of training followed by working to a merger of work and learning: they are becoming the same thing. Change is continuous, so learning must be continuous. Developing emergent practices, a necessity when there are no best practices in our changing work environments, requires constant personal directed learning.

In complex environments it no longer works to sit back and see what will happen. By the time we realize what's happening, it will be too late to take action. Accepting surprise is similar to the delight an artist may have on completion of a work and only then see an emergent quality not consciously understood during the process of its creation.

GDL – Group Directed Learning: from Worker Centric to Team Centric

As mentioned earlier, the real work in organizations is done by groups. This means that sending individuals on a training course and then re-integrating to their work group is relatively useless. With work and learning merging in the network, groups need to find ways that support each member's learning, while engaged in tasks and projects. Tools that can capture activities and keep group members focused should be used to reinforce group learning.

Social learning requires a certain amount of effort to maintain regular contact and association with our colleagues. Developing social learning practices, like keeping a work journal, may be an effort at first but later it's just part of the work process. Bloggers have learned how powerful a learning medium they have only after blogging for an extended period. With the increased use of distributed work groups, it is even more important to foster social learning and web media are the current tools at hand.

IOL – Intra-Organizational Learning: from Subject Matter Experts to Subject Matter Networks

Mark Oehlert, anthropologist, historian and technologist, recently coined the term *Subject Matter Networks* as a new way of finding organizational knowledge. Instead of looking for subject matter experts from which to design training, we should extend knowledge gathering to the entire network of subject-matter expertise. Once again, the emphasis is no longer on the individual node but on the network. Good networks make for effective organizations.

Networked communities are better structures in dealing with complexity, when emerging practices need to be continuously developed and loose ties can help facilitate fast feedback loops without hierarchical intervention. Collaborative groups are better at making decisions and getting things done. The constraints of the group help to achieve defined goals.

Building capabilities from serendipitous to personally-directed and then group-directed learning help to create strong networks for intra-organizational learning. This is exceptionally important because the emerging knowledge-intensive and creative workplace has these attributes:

Simple work will be automated.

Complicated work will go to the lowest bidder, as processes & procedures become more defined and job aids more powerful (e.g. mortgage applications).

Complex work requires creativity and is where the value of the post-industrial organization lies.

Dealing with Chaos sometimes has be confronted and this requires creativity as well as a sense of adventure to try novel approaches.

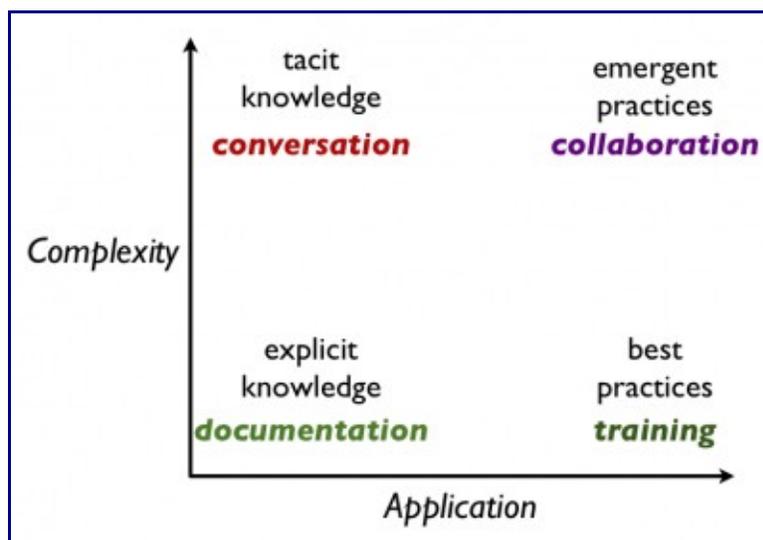
FSL – Formal Structured Learning: from Curriculum to Competency

There remains a need for training in the networked workplace but it must move away from a content delivery approach. The content will be out of date before the training is “delivered” (another outdated term). Work competencies will still need to be developed through practice and appropriate feedback (what training does well) but that practice will have to be directly relevant to the individual or group (group training is an area of immense potential growth). Jointly defining work competence with input from individuals, groups and subject matter networks should become the new analysis process, enabled by social media. Think of it as social ADDIE (analysis, design, development, implementation, evaluation) for the complex workplace.

Complexity: the new normal

Our workplaces are becoming interconnected because technology has enabled communication networks on a worldwide scale. This means that systemic changes are sensed almost immediately. Reaction times and feedback loops have to get faster and more effective. We need to know who to ask for advice right now but that requires a level of trust and trusted relationships take time to nurture. Our default action is to turn to our friends and trusted colleagues; those people with whom we’ve shared experiences. Therefore, we need to share more of our work experiences in order to grow those trusted networks. This is social learning and it is critical for networked organizational effectiveness.

Our current models for managing people, training and knowledge-sharing are insufficient for a workplace that demands emergent practices just to keep up. Formal training has only ever addressed 20% of workplace learning and this was acceptable when the work environment was merely complicated. Knowledge workers today need to connect with others to co-solve problems. Sharing tacit knowledge through conversations is an essential component of knowledge work. Social media enable adaptation, and the development of emergent practices, through conversations.



How organizations have evolved

Most companies start simple, with a few people gathering together around an idea. For small companies, decision-making, task assignments and direct interaction with clients are rather straightforward. With growth, the simplicity ends. As every entrepreneur knows, the initial growth of a company is often synonymous with efficiency drops and decreases in profits, since administrative tasks, indirect structural costs and middle-term forecasts add financial and human pressure on early growth.

Overcoming these obstacles is one of the main burdens of start-ups and young businesses. Innovation abounds in the early stages and knowledge capitalization is aided by a common vision of the business. Further growth equates to sustainable efficiencies and market share increases. For decades, organizational growth has been viewed as a positive development, but it has come at a cost.

Complication: the industrial disease

As organizations grow, the original simplicity gets harder to maintain. Current management wisdom – based on Robin Dunbar’s research; the size of military units through history; and the work of management experts such as Tom Peters – considers the ideal size of an organization to be around 150 people. Beyond this size, knowing everybody in person becomes impossible. Intermediate layers of power and delegation begin to develop above 150 people and companies then enter the realm of complication.

Most of today’s larger companies have a complicated structure. To enable growth and efficiencies, more processes are put in place. This is what management schools have been doing for over half a century. To ensure reliable operations and risk mitigation, the core competencies of decision-making and innovation are moved to the periphery. The company’s vision, if there is one, is now supported at the board level but not the individual level. New layers of control and supervision continue to appear, silos are created, and knowledge acquisition is formalized in an attempt to gain efficiency through specialization.

As companies get even bigger, internal growth and innovation reach a tipping point, and companies rely on mergers and acquisitions to maintain the illusion of growth. At some stage of complication, companies do not even create jobs anymore. In France, a study from INSEE showed that large organizations have a tendency to destroy internal jobs: by transferring jobs to subsidiaries, contractors and subcontractors. Large firms barely participate in job creation. Similar studies conducted in other countries show the same results. However, knowledge, and the acquisition of new knowledge, are still key factors for innovation and effectiveness. To compensate for its complicated processes, the enterprise attempts to shift to another paradigm, and tries to become a learning organization, putting significant effort into training.

Complexity and the new Enterprise

Today’s large, complicated organizations are now facing increasingly complex business environments that require agility in simultaneously learning and working. Typical strategies of optimizing existing business processes or cost reductions only marginally influence the organization’s effectiveness. Faster evolving markets challenge the organization’s ability to react to customer demand. Decision-making becomes paralyzed by process-based operations and chains of command and control; thereby decreasing agility. Training, as “the” solution to workplace learning needs, fails to deliver and then gets marginalized, often being the first department to have its budget cut.

Many organizations today are also facing significant demographic challenges. Baby boomers, once the lifeblood of business, are retiring, while Generation Y wants to communicate and interact in a completely different manner. There may be four generations in the modern workplace and each has its unique traits and demands. There is growing complexity both inside and outside the organization.

Organizations need to understand complexity, instead of simply increasing complication. This lack of understanding, as well as some existing, but minor, efficiency improvements in tweaking the old system, are **the major barriers to adopting Enterprise 2.0 concepts and practices**. Companies need to get a clearer view of the competitive advantages of Enterprise 2.0 before an organizational framework like wirearchy can co-exist with hierarchical structures and thinking.

Wirearchy: a dynamic two-flow of power and authority based on knowledge, trust, credibility and a focus on results enabled by people and technology.

Here are some key organizational changes during the journey from simplicity to complexity:

	Simplicity	Complication	Complexity
Organizational Theory	Knowledge-Based View	Learning Organization	Value Networks
Attractors	Stakeholders (vision)	Shareholders (wealth)	Clients (service)
Growth Model	Internal	Mergers & Acquisitions	Ecosystem
Knowledge Acquisition	Formal Training	Performance Support	Social
Knowledge Capitalization	Best Practices	Good Practices	Emergent Practices

Let’s look at how social learning can support emergent practices in the enterprise:

Implementing Social Learning

Knowledge workers get things done by conversing with peers, customers and partners, as they solve the problems of the day. Learning from these social interactions is a key to business innovation. In a globally networked economy, based increasingly on intangible goods and services, constant innovation is necessary to stand out. Markets such as software, financial services, consulting and consumer goods have to continuously adapt their offers to keep up with changing demands and advances in technology.

Hyper-linked knowledge flows have made organizational walls permeable. Official channels are competing with an expanding number of informal communications. A **collaborative enterprise** is becoming the optimal organization for such a networked economy, capitalizing on these expanding knowledge flows. To innovate, organizations need to collaborate internally and this is social. To participate in their markets, organizations, customers and suppliers need to understand each other and this too, is social. Social learning is how knowledge is created, internalized and shared. It is how knowledge work gets done.

In complex environments, learning is much more than just a matter of structured knowledge acquisition. However, that is all that training enables. Corporate training methods often consist of delivering content and perhaps providing drill and practice sometime prior to doing the task. There is often a gap between training and doing. Training alone cannot address the wide variety of informal learning needs of workers. Nor can it help to transfer the tacit knowledge on which many of us depend to do our jobs.

We know that informal learning happens all of the time but often the best answers or experts are not connected to the person with the problem. Social learning networks can address that issue by giving each worker a much larger group of people to help get work done. Regularly publishing to our networks is how we can stay connected. Here is an approach to embed social learning into organization work flows. This is an iterative process that can be adapted to fit the context.

Listen & Create: Being open to self-education is the foundation of individual learning. Part of this is the development of habits of continuous sense-making by recording what we hear, read and observe; e.g. personal learning environments (PLE) & personal knowledge management (PKM).

Converse: Sharing is an act of learning and can be considered an individual's responsibility for the greater social learning contract. Without sharing, there is no social learning. Through ongoing trusted conversations we can share tacit knowledge, even across organizational boundaries; e.g. social learning.

Co-create: Group performance enables the creation of new knowledge and is a source of innovation; e.g. collaborative work, customer experience.

Formalize & Share: Some informal knowledge can be made explicit and consolidated through the formalization and creation of new structured knowledge; e.g. taxonomies, document management, storytelling.

Enterprise social learning

Jane Hart has created a comprehensive, and growing, list of social learning examples in the workplace. Companies listed here include British Telecom, Sun Microsystems, NASA, Nationwide Insurance, and SFR. The SFR case study, reported by Sue Weakes, shows how a younger workforce is demanding better access to social media.

French mobile phone company SFR implemented ActiveNetworker from Jobpartners to support its new social network. My SFR comprises a company blog, a central space for discussion, and the ability to build profiles that allow employees to share information on career progress, learning and development and aspirations. They can also join groups of interest ... ActiveNetworker has been well received and SFR is averaging 80,000 visits per week from the 10,000 employees that are using it.

Dave Wilkins at Learn.com, describes the case at ACE Hardware in which the company set up a web-based social learning platform for its 4,600 independent hardware dealers to share and seek advice. They were able to look for new sales leads, find rarely used items through the community and share merchandising display strategies. This social learning community strategy resulted in a 500% return on investment in just six months.

Cristóbal Conde, CEO of SunGard, a software and IT services company, was recently interviewed in the New York Times. He discussed how he has flattened the company's hierarchy as a way of dealing with the globalization of the company. One important social communication tool at SunGard is Yammer, a micro-blogging platform similar to Twitter but used internally. NYT: "What kind of things do you write on Yammer?"

I try to see a client every day, and because of my title I get to see more senior people. And so then they'll tell me things — you know, what are their biggest problems, what are their biggest issues, what are their biggest bets. All this information is incredibly valuable. Now, what could I do with that? I'm not going to send that out in a broadcast voice mail to every

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employee. I'm not even going to write a long e-mail about it to every employee, because even that is almost too formal. But I can write five lines on Yammer, which is about all it takes.

A free flow of information is an incredible tool because I can tell people, "Look, this is one of our largest clients, and the C.E.O. just told me his top three priorities are X, Y and Z. Think about them."

The Ford Motor Company has used social media for learning, beginning with SyncMyRide, and now integrating it as a way to connect customers and the company.

Ford's intention is to consider how social media can inform the company as a whole, rather than judging its efforts by the criteria of one department and those "holistic" lessons filter up and down through the company, says Monty [head of social media]. That includes the company's executive board and goes as far as putting up senior execs for online Q&As through Twitter and on the corporate Facebook page. "There is a healthy respect for [social media] and how we participate in it. Two-way dialogue is healthy for a company like Ford, and we've grown as a result of having participated in it," says Farley [Chief Communications Officer]. At some point, as executives grow in seniority, they tend to become "isolated from reality," adds Monty. Making the Ford board aware of and engaged with social conversations counters that isolation. "When [CEO Alan Mulally] says we are making the cars people want, well, how do we know unless we are listening?" asks Monty.

A business imperative

Deloitte's Shift Index of 2009 highlights the challenges facing several industries today, that of declining return on assets and the need for innovation. One recommendation is to enable knowledge flows, a key benefit of social learning:

Given the growing importance of knowledge flows, perhaps the most powerful form of innovation in this context may be institutional innovation –re-thinking roles and relationships across institutions to better enable them to create and participate in knowledge flows.

One of the great things about web social media is that they are for the most part free. Experimentation does not require an enterprise-wide software deployment strategy at the onset. As Seth Godin, marketing and branding expert, says:

You guessed it: new media is largely free. So why teach it in school as if it were a scary theory? Why encourage people to be afraid? Just do it. Build your own platform. Appear in the places that seem productive or interesting or challenging or fun. Experiment quietly, figure out what works, do it more. No need to be a dilettante, and certainly you shouldn't spread yourself too thin or quit at the first sign of failure... but... quit waiting for the right answer.

Our social networks have a greater influence on us than we think. Nicholas Christakis & James Fowler explain the latest research in great detail in the book, *Connected: The surprising power of our social networks and how they shape our lives*. Robin Hanson, of OvercomingBias.com, shows that we seldom change our behaviour based solely on getting new information. “People don’t believe something works until they’ve seen it work in something pretty close to their situation. A media story about something far away just doesn’t say much.” Again, social learning is about getting things done in networks.

Getting started

According to Rebecca Ferguson at The Open University in the UK, social learning can take place when people:

- *clarify their intention – learning rather than browsing*
- *ground their learning – by defining their question or problem*
- *engage in focused conversations – increasing their understanding of the available resources.*

Following the process explained earlier:

Listen: The first step in social learning is paying attention and watching what others are doing. Finding trusted sources of information is very important. Hearing what others are doing and connecting to them with social media such as Twitter or blogs increases the chances of accidental and serendipitous learning. For example, one can follow conversations on Twitter by searching for “hashtags”. Typing “#PKM” shows current conversations on personal knowledge management.

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Converse: By engaging in conversations and providing valuable information to others one becomes part of professional networks. Many experts are willing to help those new to the field but newcomers first must say what they don't know.

Co-create: Over time one can engage more in co-operative activities, such as adding comments to a blog post or extending the thought in an article or discussion thread. For many people used to traditional work, working transparently in the open takes some time to get to used to.

Formalize & Share: Writing professional journals or lessons learnt can ingrain the important process of formalizing aspects of social learning. Sharing with others, internally or externally, over time becomes part of a normal daily work flow.

As our work environments become more complex due to the speed of information transmission via ubiquitous networks, we need to adopt more flexible and less mechanistic processes to get work done. Workers have many more connections, to information and people, than ever before. But the ability to deal with complexity lies in our minds, not our artificial organizational structures. In order to free our minds for complex work, we need to simplify our organizational structures.

According to the authors of the book *Getting to Maybe*, in complex environments:

*Rigid protocols are counter-productive
There is an uncertainty of outcomes in much of our work
We cannot separate parts from the whole
Success is not a fixed address*

This is the next evolution of social enterprise.

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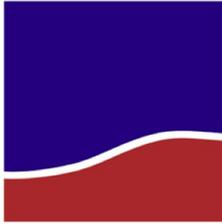
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Jay Cross | Jane Hart | Jon Husband | Harold Jarche | Charles Jennings | Clark Quinn

Harold Jarche is not afraid to challenge conventional wisdom. Through his blog and consulting practice, people look to Harold for innovative ideas on business, technology, social networks and learning. He helps make sense of the complexities facing organizations today with creative approaches for working smarter that are grounded in analytical thinking. As a pioneer who has worked and learned online since the dawn of the Web, Harold continues to develop his practice and help his clients face life in perpetual Beta.

