Web 2.0 and Social Learning Best Practices

100+ Tips on the Use of Blogs, Wikis, and Forums in Organizations

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Introduction

Organizations of all sizes have in recent years started using so-called “Web 2.0” or “social media” technologies both externally for marketing, customer support, and many other uses; and internally to increase collaboration, communication, informal learning, and ultimately, business success. The technologies vary depending on business need and what is available, but typically include some combination of blogs, forums, wikis, social networking profiles, micro-messaging, social bookmarking, podcasting, video-sharing, and more.

In the largest organizations, where the use of these technologies becomes widespread, the phenomenon is rightly referred to as “Enterprise 2.0.” This isn’t so much because of the technologies themselves, but rather the changes in organization’s culture, day-to-day practices, and so on, that are concomitant to the successful use of the new tools.

Specifically for HR and L&D professionals, using social Web 2.0/social media technologies for internal HRD or learning and development purposes, or to supplement formal training programs, has become known as technology-enabled “social learning.” When it comes to implementing Web 2.0 technologies to enhance social learning in an organization, however, many HR and L&D leaders struggle.

The tools themselves are not difficult to master — indeed, they generally are easier to learn and use than many other enterprise applications. Rather, it is the more subtle aspects of using the tools, such as the cultural changes that often entail and the decisions that need to be made to optimize their effectiveness, which can trip people up. How do you maximize the likelihood of people asking questions in a forum? How do you get subject matter experts to write effective blog postings? What can you do to encourage participation in a wiki or micro-messaging platform? How can you encourage greater participation, with fewer read-only “lurkers” in your new online communities?

The purpose of this whitepaper is to provide the HR and L&D leaders with real-world tips, best practices, and lessons learned. While some might be obvious to you, there may be many ideas
you might not have thought of yet. I like to call the contents of this whitepaper advanced common sense, meaning any one of the 100+ tips provided here might be rudimentary to one reader, but an eye-opener for another. To keep the scope of this whitepaper well-defined, I will focus on just three of the most popular Web 2.0 / social media / social learning technologies: blogs, discussion forums, and wikis, though many of the tips and best practices provided here will have analogues for other Web 2.0 technologies as well.

**Blogs**

A blog (contraction of the term “web log”) is a website or feature of a site that provides regular commentary in the form of postings with the most recent at the top of the page (often referred to as “reverse-chronological order”). Blogs can have a single author or several, such as a department, team, or job role in an organization. Blogs can be focused on a particular topic area or can be wide ranging. They are most often text-centric; making them highly searchable, though they can also include embedded static images, animations, or videos. Unlike wikis, readers do not edit blog postings, but rather communicate with the blog author and other readers via comments for each posting. As a result, a blog’s primary value can come from the blog postings themselves, the comments to the postings, or a combination of both.

The following tips apply to blogs inside organizations in general, including learning and development use cases, with the final category giving some final L&D-focused tips.

**Content and Purpose**

- **Name the blog appropriately.** If the blog will be on a certain topic or supplements a particular formal learning event, then don’t simply name it after yourself (“Joe Smith’s Blog”). Further, being clever with a blog title can be a good thing, but not if it confuses your audience.
- **Create a mission statement.** Determine an appropriate “mission statement” for the blog. Know your goals. This can be especially important for group blogs, to avoid bloggers working at cross-purposes. Consider explicitly stating this below the title of the blog, perhaps as a subtitle or in a description field, if available.
- **Reinforce the organization’s core values.** An internal blog is another medium to interact with your audience (e.g., learners or employees more generally). Strike a balance between your own personal style and the impression the company, department, or team wants to convey.
- **Write well.** Format your blog postings with frequent paragraph breaks, use lists appropriately, and use bold formatting or even tables where applicable. Avoid creating posts that area rambling “walls of words.” Many of the same principles for creating good courseware or e-Learning will apply to creating blog postings that are effective learning vehicles.
- **Consider well-crafted postings versus chaos.** Have a goal with each posting: Are you spurring new thoughts in the reader? Are you educating the reader? Are you asking a question and requesting feedback in the blog comments? Are you brainstorming with your readers? Are you reporting on an event? Are you sharing the results of research? Are you providing an introduction or overview to a topic? Don’t add too much into a single postings—split the content into separate posts appropriately.
- **Determine the tone of postings.** Define the tone you want the blog authors to have—conversational, more or less formal, etc., and give examples to aid the authors.
- **Title posts accurately, but in a way that draws readers in.** Readers won’t like a bait-and-switch, but some might be accessing your blog via a title-only or limited-content Really Simple Syndication (RSS) feed, and therefore might need to be drawn in to read the full posting.
- **Use visuals.** Include images where relevant to improve the blog visually. As with traditional learning materials, think of good PowerPoint presentations (bullets versus images), and the appropriate use of figures in a well-done textbook.
- **Use multimedia content.** Liven up a blog with the periodic inclusion of links to multimedia content. This can make the blog more engaging.
• **Record yourself.** Create and attach or link your own audio recordings; this will make the blog more “human” than text alone. While not technically a podcast, it can have at least some of the same effect.

• **Attach files when appropriate.** If something is best left as a spreadsheet, PowerPoint presentation, or other file, then attach it rather than alter it to force the content into text in a blog post.

• **Assign appropriate tags to each post.** Assigning tags allows your posts to be found more easily by searches. These tags are similar to categorizing your post, and when supported, allow it to be grouped together for custom RSS feeds, tag/category pages, and so on.

### Getting and Keeping a Regular Audience

- **Link to the blog.** Link to the blog from appropriate locations: intranet portals, your Learning Management System, and so on.

- **Market the blog.** List any blog of which you are a primary author on your business card, email signature, PowerPoint presentation contact slides, and other appropriate spots.

- **Consider recency versus frequency.** Recency is generally more important than regular frequency. Having no posts for two weeks looks like no one is home, while having a post from yesterday makes the blog appear fresh. Posting every Monday and Thursday makes it look pre-programmed, so don’t worry about consistency of posting time, but rather how recent the last posting was.

- **Don’t post too often.** There is a spectrum of blogs in this regard. Some blogs, including some very popular ones, post several times a day with brief comments on topics. Other blogs have fewer, more detailed postings, sometimes verging on traditional articles or essays.

- **Define the scope of your content.** Have appropriately -focused blog topics—this encourages regular readers, especially via RSS. If your topics are too broad, people will be turned off, and will be less likely to learn from your blog. If you go off on a tangent for one or two posts, that can be okay—but note that you are doing so in those posts only, so people don’t think you are taking the entire blog in a new direction.

- **Read and link to other blogs.** Link to other existing blogs in your organization when appropriate—and tell them when you’ve done so, as this could help drive visitors to your blog from return links. Developing a network of blogs—an internal “blogosphere”—can help each to flourish.

- **Encourage people to comment.** If people feel involved in your blog—invested in a conversation with you or other readers—they are more likely to come back. You’ll be surprised how the most passive and quiet employees will all of a sudden speak up in blog comments.

### Which Technology?

With so many Web 2.0 / social media technologies available, it can be difficult to know which to choose for any given initiative. A key is to get clear on your ultimate business goals (increase sales, increase customer retention, etc.), and then clarify what intermediate goal you are trying to accomplish by the use of the new tool. In most cases, a variety of Web 2.0 / social media technologies could be used, so there is not necessarily a single, best choice. That said, here is a list of intermediate business goals and some reasons you might choose from amongst blogs, forums, or wikis as options:

- **Encourage SMEs to share their knowledge.** Set up your best subject matter experts or senior job-role practitioners as individual or group blog authors, with readers able to comment or ask follow-up questions.

- **Encourage people to ask questions of SMEs.** Discussion forums are best suited to letting the less experienced ask questions of the more experienced, with subject matter experts serving as moderators.

- **Share key lessons-learned.** No one wants to make the same mistakes twice, so record what you’ve learned in wiki pages or blog postings.

- **Further enable communities of practice.** Setting up a blog or wiki with limited access can encourage participation from those who typically only “lurk” in a community of practice.

- **Support directed conversation.** Extend the power of a group of bloggers by having one blog direct the conversation of the others (see ASTD’s Learning Circuits blog as an example of this.)

- **Support early adopters.** When you roll out a software upgrade or business process change, provide a forum for questions people have or a blog for early adopters to share their experiences.

- **Share tips and tricks.** Set up a group blog or wiki to share top tips, tricks, workarounds, and more.

- **Enable newcomers to learn together.** Let newcomers to your organization or department form a sense of community (“Class of 20XX”) by giving them their own blog to share initial impressions and a forum to ask questions of key veterans.

- **Let FAQs develop organically.** You can harvest the top questions (and answers) from your discussion forums and archive them and let the content organically grow further in a wiki.

- **Obtain senior management’s support.** Ask relevant leaders in the organization to promote the blog, as this will encourage regular reading of it. Even better, have respected leaders in the organization be bloggers themselves, or at least periodic authors at a group blog.

- **Avoid filler posts.** Provide value to your readers. Remember what Plato said: “Wise men talk because they have something to say, fools because they have to say something.”

- **Send periodic emails highlighting blog content.** If there is a group of people that you think might be reading your
Encouraging Authors

- **Who are the best authors?** An ideal blogger is someone who is online all the time, consumes a lot of information, is a good writer, and has a passion for sharing knowledge. Subject matter experts, instructional designers, instructors, or learning facilitators will often – but not always – be good blog author candidates.
- **Motivate potential authors.** Blogging takes time and effort. Reward and incentivize it, such as by having blogger or blog posting of the month awards.
- **Provide good communication.** Always communicate clearly to blog authors. If they don’t think you care about them as authors, they’ll care less about their involvement in the blog.
- **Make blogging an important responsibility.** Make blogging on the job a part of the blogger’s job description, whether they are an instructor, instructional designer, subject matter expert, etc. Otherwise, it will often be de-prioritized and ignored — and this leads to lack of recency of posts and, eventually, the death of the blog.
- **Report on results.** For learning-focused blogs, tell the authors how much they are helping the organization. Share positive traffic numbers with the blog authors (and with management sponsors and other stakeholders).

Governance and Management

- **Define the scope to reduce risk and wasted effort.** Be clear about what employees can and cannot post. Define what is appropriate for each blog, and what is out of scope. Give examples of each.
- **Institute an approval process, if necessary.** Determine the approval process, if any, for blog postings. Set expectations for blog authors for the speed of approvals. Have backup approvers in case the primary one goes on vacation.
- **Verify that content is being posted.** Check regularly to verify that there are new posts. You can have a schedule for postings, but this can make the blog feel artificial and less “human.”
- **Consider potential legal issues.** Assuming the blog’s audience is internal-only, the biggest legal concern is likely to be discoverability of blog content. Have a policy that is similar to that of other corporate content, such as emails, intranet or database content, formal training content, etc. Provide a disclaimer as necessary, and warn users not to share information from the blog outside the organization. To further limit the risk, you could explicitly note that vital trade secrets and financial information are not to be discussed in blog posts, except to the extent they would be in formal training content. Make clear the consequences for violating the policies.

Blogging in a Learning Context

- **Determine the learning objective.** Remember that blogs are better used as informal learning mechanisms to complement formal learning (ILT, e-Learning), rather than attempting to use them for formal instruction.
- **Connect the blog to formal content.** If a formal learning event has a duration of weeks or months, then a blog can provide course updates, post assignments, relate the formal content to current events, give additional examples of concepts, raise reflective questions for learners to respond to, and so on. Do so at selected points in the curriculum that will have the greatest impact.
- **Give learners a reason to read the blog.** You can make them responsible for the material in the blog by making it fair game for quizzes, assessments, etc. You can also simply provide such great value that learners will gravitate to the blog naturally.
- **Set up a group blog for the learners to blog.** Assuming that formal learning has a duration of weeks or months, set up a blog with all learners as authors. Encourage them to share their thoughts about what they are learning, how they will apply the new concepts and skills to their jobs, and so on.
- **Give each student his or her own blog.** Similarly, but as an alternative to a group blog, set up a separate blog for each student. Although more work, this has an advantage over a group blog, as it is less likely that some students will be lurkers only.
- **Use an instructor blog to query the students before class.** Good instructors will often ask their audience, “What do you hope to learn from this class?” If they do this at the beginning of class, it is often too late to make substantive changes to their curriculum. By using a blog ahead of time to ask this sort of question, there is a better chance that the curriculum can be updated to meet the needs of this particular group of learners.
- **Remember that blog posts are arranged chronologically.** Blogs are not wikis, nor are they forums. A new group of students might not see content that was posted in the past, by a separate class of students. Think of your purposes and use the right tool for the job.
Wikis

A wiki is a collection of web pages that users can directly modify by adding new content and editing or deleting existing content. Users often collaborate in creating the content, as one person can start a page and others can add to it later. Wiki pages are often referred to as “living documents,” and common metaphors center on the organic nature of wiki websites. Wikis invariably have strong history and versioning features, so that content can be easily reverted back to earlier versions, if desired. Wikis are usually very text-centric, but allow for static graphics in the pages as well as attached documents. As such,wikis are useful for creating highly searchable knowledge bases, such as the most well-known public wiki, the large user-generated encyclopedia, WikipediaTM. But they can also be used for less formal collaborations, such as brainstorming sessions where users in diverse locations can all contribute through a common browser interface.

The following tips apply to wikis inside organizations in general, including learning and development use cases, with the final category giving some final L&D-focused tips.

Content and Purpose

- **Name the wiki appropriately.** Is it a departmental or team wiki? A wiki to accompany a particular learning program? A wiki for a particular project?
- **Define the mission statement and purpose of the wiki.** Is it a knowledge base, a brainstorming platform, or both? Wikis can be collaborative in different ways. They can provide rich bases of information, where the ability to both search and browse are critical. In this case, the wiki is likely intended as performance support—and here, collaboration arises, to some extent, in how users edit each other’s work. Or wikis can be more open, freeform whiteboards for brainstorming. In such cases, the content might be short-lived, and the benefit of searching and browsing is lessened. In such cases, however, the level of collaboration is very high. Be careful in trying to use a wiki for both of these types of uses at once, as that can lead to confusion and erratic search results.
- **Have multiple wikis when appropriate.** Consider both common search results and the ability to browse in making the decision to have a single wiki site or several separate wikis.

General Tips

As you read each section of this whitepaper, you’ll note that some of the tips and best practices are similar for blogs, forums, and wikis, with nuances in their application for each. Some higher-level practices, however, are truly shared across all Web 2.0 / social media technology use in organizations.

- **Use tools appropriately.** Use each tool where it is a good fit and where it can provide value, as opposed to falling prey to “shiny object syndrome”: using a tool just because it is new and available.
- **Work with your SMEs.** Consider carefully the subject matter experts that you have available for involvement in social learning. If a particular expert is very knowledgeable, but doesn’t play well with others, then give them a separate blog; don’t waste your energy fighting their nature.
- **Don’t underestimate your learners.** Most will learn new tools if you give a clear WIIFM (“What In It For Me”) statement.
- **Pilot wisely.** Since much of its value comes from large groups interacting in the flow of real work, social learning can be tricky to pilot. Consider piloting with an existing community of practice, or a cohort group of students, in order to maximize early successes.
- **Avoid power struggles.** If you can foresee a power struggle with owners of existing systems content management, communications, or other systems, then strategically bring those individuals into your social media initiative early, and let them serve as additional champions of the effort.
- **Provide hands-on workshops.** Although Web 2.0 technologies are not particularly difficult, the cultural and other changes they entail can often raise many questions and concerns. Be sure to mix-and-match workshop participants so that those who take to social media immediately can help those who are more cautious.
- **Accept the alternate uses that arise.** Be supportive when people find additional, unforeseen uses for the new Web 2.0 tools: they are like blank paper, and have many possibilities.
- **Govern, but govern lightly.** Create a sensible social media governance policy, or amend existing HR/IT policies to include social Web 2.0 / social media tools.
- **Promote transparency.** In general, do not allow for anonymously created content, edits, comments, or deletions. The few exceptions are for things such as HR surveys, where anonymity is required for open, truthful responses.
- **Limit authoring where appropriate.** For instance, in some wikis you might limit who can author content initially (e.g., subject matter experts), and then open it up to a broader audience over time (this could help to seed the wiki with good content if legacy content is not available.)
• **Seed the wiki with sufficient content.** Setting up an empty wiki with a “build it and they will come” attitude is almost certainly to lead to a failed wiki. Consider removing the initial wiki content from alternate, legacy locations, so that users who need that content have no choice but to get it from the wiki.

• **Categorize content in the wiki.** People primarily use wikis by search. But don’t ignore the value of categories, as this lets users browse the content effectively. Maintain some control and oversight over the category structure, but don’t be too rigid either. Allow users to submit suggestions for new categories if they can’t alter the categories themselves.

• **For smaller wikis, create a wiki-map page.** For smaller wikis, or wikis that don’t have categories, consider creating a single index or “wiki-map” page that provides structure to the content of the wiki. Visually, such a page could appear as a simple outline with grouped links to each page of content – thereby providing some structure to what is otherwise an informal learning or performance support resource.

• **Create templates for common wiki page types.** Using templates can save wiki users a lot of time, and allow them to know where to look for content on each page.

• **Title wiki pages accurately.** Titles are usually what appear in search results.

• **Use visuals and multimedia content.** Wikis are mostly about text content, making them highly searchable. But you can also include images, and in some cases link to or embed audio or video where relevant.

• **Attach files when appropriate.** If something is best left as a spreadsheet, PowerPoint presentation, or other file, then attach it rather than alter it by forcing the content into text in a wiki page. Consider, however, whether that attachment file type is searchable and how important the information it contains actually is. If it is vital, but must stay as an attachment, then create a separate page to describe that file and include as many keywords as appropriate.

• **Assign appropriate tags to each wiki page.** Assigning tags or keywords can allow your wiki pages to be found more easily by searches.

• **Avoid wikis becoming dumpsters.** Is a wiki a good place to store meeting notes? It can be. But remember that the more you put in the wiki, the more watered down search results will be for people using it as a knowledge base. Think this through before the wiki becomes bloated with low-value content, thereby reducing its informal learning and performance support benefits.

## Encouraging Participation

• **Understand the 90-9-1 principle.** Have reasonable expectations. Literally translated, the 90-9-1 principle states that 1% of a wiki community will be the leaders, 9% will be key participants (authors and editors of wiki content), and 90% will be consumers-only of the wiki information. These are just rough averages to help you set reasonable expectations, but you are wise to do everything you can to encourage consumers to become producers.

• **Motivate your authors.** Creating or editing content in a wiki takes time and effort. Reward and incentivize it.

• **Make wiki participation an important responsibility.** In the case of subject matter experts, make participation in the wiki a part of their job description. Otherwise, it will often be de-prioritized and ignored—and in some cases this can lead to wiki atrophy.

• **Lock pages sparingly.** If you lock down more content in a wiki than is absolutely necessary, you will surely kill the spirit of the wiki. Instituting a wiki is a good time to reconsider traditional processes and requirements in your organization regarding workflows for making changes to checklists, procedure documentation, and so on.

• **Report on results.** Share positive traffic numbers with the wiki community, especially key subject matter expert participants, and definitely with management sponsors and other stakeholders. Also, gather anecdotes of the

### What About Instructors and Instructional Designers?

Many organizations have invested heavily over the years in their L&D staff: instructors/trainers, instructional designers, e-Learning developers, and a network of subject matter experts. With a fixed budget, the introduction of social learning as a complement to formal training could lead to concern that some instructors or IDs will have less job security.

A great way to use the resources you already have is to consider how they can be partially re-tasked to play critical roles in your social learning initiatives. Instructors, instructional designers, and subject matter experts could be the best people to serve as:

• Blog authors
• Forum moderators or discussion generators
• Wiki gardeners (seeding, pruning, weeding the content) or heavy ongoing wiki contributors

Do the same with any other Web 2.0 / social media technologies you are using: consider what role your existing talent can play in using each tool where appropriate.
impact of the wiki: as a performance support and inform-
mal learning mechanism, it can be hard to track return
on investment, so anecdotes matter more than ever.

- **Link to the wiki.** Wherever appropriate, link to the wiki
in intranet portals and other locations, as this will raise
awareness of the wiki as a useful resource. Linking to
from related e-Learning courses can be a great way to
supplement your existing formal learning content.

- **Encourage users to subscribe to recent changes via
  RSS or email notifications.** Receiving notifications for
recent changes to a wiki or wiki page will increase use
because users will see the wiki as a lively resource.

- **Encourage people to comment.** Some people won’t
want to make changes to the wiki page content, but might
be comfortable commenting on the content instead. Give
people incentives to participate in whatever ways they are
willing.

- **Obtain senior management support.** Ask relevant
leaders in the organization to promote the wiki, as this
will encourage participation.

- **Send periodic emails highlighting wiki content.** If
there is a group of people that you think might benefit
from something new in the wiki, email them to let them
know. This helps remind people of the wiki’s existence,
but do not abuse this by sending too many emails.

- **Explain the importance of using wikis as brain-drain
  protection for the organization.** Some people (e.g.,
some subject matter experts) might be reluctant to share
information, seeing it as lessening their value or power in
the organization. Wikis can provide the organization with
protection against brain drain—the loss of key employees
to retirement or another opportunity. Convince employ-
ees it is in their interest to share their knowledge because
others will do so as well and it is now expected as part of
their role.

- **Publicly thank the wiki gardeners.** Thanking partici-
pants is important, but thanking gardeners is even more
important.

**Governance and Management**

- **Define scope to reduce risk and wasted effort.** Be
clear about what employees can and cannot create in
the wiki. Define what is appropriate for each wiki, and
what is out of scope. Give examples of each on a gover-
nance page, if necessary.

- **Create an approval process, if necessary.** Determine
the approval process, if any, for wiki page creation and
editing. Have backup approvers in case the primary one
goes on a vacation.

- **Lock pages when necessary.** Some content in a wiki
might be locked and only editable by certain individuals:
the original author of the page, a group of SMEs, etc.
Do this only when absolutely necessary.

- **Watch for accidental edits.** Although rare, given how
open and transparent wikis are, unintended mistakes
can enter into a wiki. If the community of users is small
each enough, assign someone with knowledge of the group
to watch the recent changes regularly to make sure the
appropriate people are editing each page.

- **Indicate informal owners of some pages.** A middle-
road solution between locking pages and a content free-
for-all is to simply indicate particular individual(s) as the
“informal owners” of pages in a wiki. Doing this promi-
nently, at the top of a wiki page, can greatly discourage
people from making inappropriate edits to the content
out of ignorance or naiveté.

- **Provide a wiki FAQ in the wiki itself.** Don’t make
people look elsewhere for info on how to use the wiki—
include this in the wiki itself, and let users add to it.

- **Consider potential legal issues.** The well-known
problems that Wikipedia has occasionally encountered
are almost nonexistent in organizations because no
anonymous edits are allowed. This is a significant and
effective deterrent to misuse. That said, assuming the
wiki is internal-only, the biggest legal concern is likely
to be discoverability of wiki content. Have a policy that
is similar to that of other corporate content, such as
emails, intranet or database content, or training content
(this can be a separate policy or an addendum to an
existing HR/IT policy). Provide a disclaimer as necessary,
and warn users not to share information from the wiki
outside the organization. Make clear the consequences
for violating the policies.

**Wiki Roles and the Garden Metaphor**

- **Understand that wikis are like gardens.** Wikis grow
organically, through the participation of many people
over time, often in very small increments; seeding the
wiki with content is vital; having people play the role of
a “gardener” is important to prune (duplicate content)
and remove the weeds (undesirable content).

- **Understand the importance of a wiki champion.** While
a group of people can be the gardeners, it is usually best
for there to be one champion (aka, ultimate admin or
benevolent wiki ruler) to make ultimate decisions in the
rare cases of conflict. The wiki champion can be an ap-
propriate leader in the organization, but often is a grassroots
leader who gets the wiki off the ground and promotes its
initial use until it takes off.
Wikis in a Learning Context

- **Determine the learning objective.** Remember that wikis are generally better used as performance support and informal learning mechanisms to complement formal learning (ILT, e-Learning), rather than attempting to use them for formal instruction.

- **Use wikis for learners to post projects.** If the formal learning involves projects, creating samples, etc., users can post their work to a wiki for others in the class to review and comment on. The same wiki can be used for multiple instances of an ILT or e-Learning class, thereby building up an archive of learner projects.

- **Use wikis for in-class brainstorming.** Use wikis as collaborative brainstorming whiteboards, for students to tackle a problem together as part of a group activity. This can be particularly useful during virtual classrooms, where students are geographically distributed and not in the same location.

- **Provide additional content in a wiki.** Use wikis as a knowledge base of additional information and examples not found in the formal learning, and then reference that material during the formal instruction.

- **Use wikis to let learners learn more about each other.** Wikis can be useful in extended learning events where social networking profiles are not otherwise available. Create a template and ask learners in the class to describe themselves (background, interests, expertise, etc.) on their own wiki page. This helps to introduce them to the wiki software should it be used for other purposes in the class.

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Discussion Forums

A discussion forum (alternately known as a discussion group or board) is a web application for holding discussions between users. A forum is typically structured as a series of discussion “threads,” which start with an initial posting, followed by replies, and replies to the replies. Such threads can have any number of levels of responses, and thereby promote conversation between many users, not just a dialogue between two. Many forums are meant for Q&A purposes, but others are used for more general discussions. Often, one or more people serve as “moderators,” either allowing or disallowing each posting before it can be seen by the group, or editing/deleting undesirable content after the fact. Discussion forums have been available through the Internet since well before the recent surge of Web 2.0 technologies, but they share many of the critical characteristics of Web 2.0 technologies: user interaction and generation of content, collaboration, and so on.

The following tips apply to forums inside organizations in general, including learning and development use cases, with the final category giving some final L&D-focused tips.

**Purpose**

- **Determine the purpose of the forum.** Is it primarily for people to ask questions of subject matter experts? To discuss topics and learn informally with peers? A bit of both? Have multiple forums when appropriate.

- **Name the forum appropriately.** If the forum is for questions about or discussion of only a particular topic, then include that in the title.

- **Describe the purpose of the forum.** In a description field under the title, or in another prominent location, briefly describe the purpose of the forum and what kinds of questions and discussions are in-scope.

**Encouraging Use**

- **Link to the forum.** Wherever appropriate, link to the forum: intranet portals, your Learning Management System, and so on. Linking to and from related e-Learning courses can be a great way to supplement your existing formal learning content.

- **Encourage people to visit the forum.** Give examples of how the forum has saved others time in finding answers. The more people who access it regularly, the better.

- **Obtain senior management’s support.** Ask relevant leaders in the organization to promote the forum, as this will encourage people to use it.

- **Send periodic emails highlighting forum content.** If there is a great discussion at a forum or if someone asked a really good question, and there is a person or group of people that you think would be interested, then email them to let them know. But do not abuse this by sending too many emails, especially if RSS feeds are available.

- **Gather the best content and create FAQs.** Consider harvesting the “best-of” content from a forum and posting it to a wiki.
• **Recommend that people subscribe via RSS or email notifications.** People are busy, so they might want to visit only a particular forum or a particular thread, and only when it is updated.

**Governance and Management**

• **Determine if you need expertise moderators or etiquette moderators.** If a forum is mostly a support mechanism, then you likely need expertise moderators (who will also edit postings for etiquette). If it is intended more for open discussion, then etiquette-only moderators should suffice.

• **Make response-time expectations clear.** Discussion forums are not synchronous support tools like phone calls or instant messaging. If a forum is moderated by experts who are there to answer questions, then set requirements that they check every X hours/days, and respond within a reasonable amount of time. Let users know these guidelines as well. Do spot checks to ensure the turnaround times are being met.

• **Encourage the use of tags.** Encourage those answering questions to assign tags to their valuable postings. This enables people to find them via search, and reduces the chances of people asking the same questions time and again.

• **Motivate your experts.** Although participating in a forum can reduce redundant calls or emails they would otherwise receive, participating in a forum does take time and effort—so reward it.

• **Make forum moderation an important responsibility.** Make participating as a forum moderator a part of the person’s job description, otherwise it will often be de-prioritized and ignored—and this leads to a lack of responses to forum questions and will discourage people from posting.

• **Report on results.** If the forum is meant to educate end-users, remind the experts how much they are helping. Share positive traffic numbers with the forum moderators (and with management sponsors and other stakeholders).

• **Encourage the appropriate use of any abuse-reporting feature.** The feature is there, so make sure people understand its proper use.

• **Consider potential legal issues.** For internal forums, the primary issue is discoverability of content. This is similar to other internal content in an organization, such as email, intranet content, or formal training content. Provide a disclaimer as necessary, and warn users not to share information from the forum outside the organization. Make clear the consequences for violating the policies.

**Forums in a Learning Context**

• **Determine the learning objective.** Remember that forums are better used as performance support and informal learning mechanisms to complement formal learning (ILT, e-Learning), rather than attempting to use them for formal instruction.

• **Link self-paced e-Learning courses to a forum for questions.** Self-paced e-Learning has many advantages, but one downside is the inability to ask questions of instructors, experts, or peers. Providing a forum reintroduces this classroom or virtual classroom value (albeit asynchronously).

• **Set up a discussion forum to complement ILT classes.** If an ILT program lasts longer than a single day, set up a forum for use throughout.

• **Set up a discussion forum as a follow-up to a formal learning event.** Whether ILT or e-Learning, enabling learners to ask questions or discuss the material afterward promotes retention of the information.

• **Use instructors as expert moderators.** In most cases, the natural moderator for a forum is the instructor in the classroom or virtual classroom. If he or she is too busy, make sure a secondary subject matter expert is available to moderate and answer questions.

• **Consider the many possible topics for discussion forums.** Beyond general Q&A and support, forums can be created around any number of learning and development initiatives: new software rollouts or process changes, sharing best practices and lessons-learned in a particular area, or using a “virtual book club” approach. Be creative and try forums for a variety of purposes to see what provides the most value.

**For More Information**

Two helpful resources:

  A database with dozens of social media governance policies that corporations and government entities have made public. This is a great resource to use to see how organizations similar to your own are handling the legal and policy-related aspects of implementing Web 2.0 / social media technologies, both internally and with regard to public sites such as Facebook, LinkedIn, Twitter, YouTube, and more.

  Kevin Jones and David Wilkins have created an outstanding checklist for those embarking on a social learning initiative in their organization.
**Closing**
In most organizations, informal learning happens all the time—arguably making up the majority of workplace learning. The many Web 2.0 / social media technologies—including but not limited to blogs, wikis, and forums—can serve many purposes in an organization, but one prominent one is to better enable informal learning. This sort of technology-enhanced social learning flourishes best in work environments where the learning culture has matured in ways that promote openness, transparency, collaboration, and knowledge-sharing. Social and informal learning is not intended to completely replace traditional formal learning, whether classroom ILT or traditional e-Learning, but rather complement it in the ways detailed throughout this whitepaper.

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**Endnotes**

1. In early 2009, Element K provided a whitepaper, titled “Blending Web 2.0 Technologies with Traditional Formal Learning,” which described the context for the use of Web 2.0 tools for learning, described the most common tools available, and then provided extensive descriptions of ways that these tools can be used to complement what most organizations have invested so much in over the past several decades: their ILT classroom and e-Learning formal training programs.

2. The ASTD Learning Circuits Blog is available at http://learningcircuits.blogspot.com/
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