Key ideas about online engagement

Brutally Simple Mental Model

Every user has to hold the same mental model of the tool and task. The only way to ensure this is to make it brutally simple. When a tool or task means different things to different people they will pull it in opposing directions. If the participants aren't pulling in the same direction the engagement won't reach the essential critical mass.

Provide concrete goals

The participants need to know what is expected of them. If the expectations are not brutally clear, the users will revert to other mental models. The default mental model for online dialogue activities is one-off posting, often with an emphasis on expressing individual knowledge and opinion as opposed to co-creating knowledge with the team.

Model effective behavior

The first interactions that a participant has will cement their mental model. You need to make sure there are clear expectations and examples of appropriate behavior. It can also be necessary to step in quickly to suggest better strategies or behaviors before the community loses focus.

Participant – Application – Community of participants

When you add an online component you need to consider not only the interaction between the single user and the tool, but also their relationship to the community of users. Features that might be useful or convenient for a single user can be detrimental to the community.

Anticipate and respect your participants limited attention

People don't read online, they scan. They typically make up their mind about a site in 15 seconds. We need to respect their time and get them right into a productive and potentially rewarding activity. We also need to minimize the cost of exploring the discussion. Most discussion contain a fair amount of comments the user may not be interested in. If they spend a minute or two seeing material they consider irrelevant, they won't come back.

Keep participant focused

Force participants to stay concise and focused by limiting the size of their posts. In a face to face dialogue we don't expect someone to talk at us for dozens and dozens of sentences. Yet this is very common in online posting. Without some intervention, people will fall into a habit of writing in serial monologues, each chapter expressing many thoughts which makes it very hard to engage one another. Try to limit posts to a paragraph expressing a coherent thought.

Small group discussion

If you value thoughtful exchange between participants, it is important to strive for an Intimate group size that helps encourage respect and engagement.

Don't rely on the participants to come back on their own

The participants won't come back often enough to sustain a dialogue. Proactively send daily email reports and message notifications so the participants can have several turns of dialogue in a short period of time instead of a week. If possible, let them post to the dialogue via email.

Power law of participation

There is a strong pattern of participation in many different online tools. 90% of the participants lurk and read posts, but don't want to post themselves. Perhaps 9% will contribute once or twice, and most of the contributions will come from a very few users.

Provide a continuum of participation

Don't ask too much of the participants, especially at the beginning. For instance most people will add a comment if asked to do so, but most are also reluctant to add to or edit wiki pages. To achieve dialogue, you need to offer a range of options for interactivity, with an eye toward moving them up the scale toward greater participation

Promise, Bargain and Tool

All of these points culminate in the concept of the Promise, the Bargain and the Tool. We often make the mistake of picking a tool and then assume the worthiness of our cause will motivate people to participate. Unfortunately, that doesn't happen.

The **promise** is the reward the user expects in exchange for participating. The promise might be recognition, empowerment, or helping to solve a problem that affects them, for example. The promise provides the motivation to participate and to return.

The **bargain** is the price to be paid for claiming the promise. We need to carefully calibrate the promise and the bargain. If we ask too much and deliver too little, the participants will drift away. What can we realistically expect from the participants?

Once we understand what we can promise and what we can ask of the participants we can then try to choose a **tool** and configure it. Remember, these are tools, not solutions. Too often we start with a tool we either know or can get access to, and then attempt to coax our participants to use it to satisfy the needs of the engagement. This approach is backwards and doomed to failure.

We're all familiar with analogues of this where a group goes through an engagement but the decision makers are either not present or they haven't agreed to do anything with the outcome of the process. It is all too easy to disappoint the participants if we can't deliver on the promise.

Plausible narrative arc / Trajectory

We can also speak of the promise as a plausible narrative arc or the trajectory from dialogue to action. This narrative situates the participants and their expected behavior in a compelling story that illustrates how they will achieve their promise. This closes the circle back to the **Brutally simple mental model**. While it is important that the interface is simple to understand, it is equally important that the reason for using it is compelling and just as clear.

Tools

Email lists / listserve

This is the simplest online tool that you can use. Almost everyone knows how it works and what to expect from it. It can be useful for exchanging ideas and perspectives. They are most effective with a lower activity rate. Most people don't want to get lots of messages. It is also possible to condense the results of the email list into daily or weekly digests. Creating digests will reduce the number of messages each participant sees at the expense of greatly increasing the delay between turns in the dialogue.

There are list serves that offer a web based component which allows participants to check the web for new messages. Any strategy that relies on the participants to visit a web site is likely to suffer even greater latency as most people will check infrequently.

Another option with web based email lists is to use RSS – Really Simple Syndication. RSS automates the process of checking a web site for updates and leaves an unobtrusive notification in your email or on a personalized web homepage such as igoogle or Netvibes. Very few non-techy people currently use RSS so it isn't a useful option yet.

Email lists allow people to reflect on messages and reply when they are comfortable. This can be useful for people that are not comfortable in a fast paced discussion. Email lists do not lend themselves to processes requiring closure or convergence. A facilitator is required to extract the key points and issues from the email stream and then possibly present them back to the participants for ratification. Automated content analysis programs are available to help extract patterns from the emails which can provide some information about the discussion.

Forums

Forums are web based online discussions. The discussion can be chronological or threaded.

In a chronological discussion, comments are listed in the order in which they were posted. This is the simplest format to understand, but it makes it much harder to respond to specific comments. Chronological discussions are more useful for registering your opinion, as opposed to engaging in dialogue and co-creating meaning.

Threaded forums allow participants to reply to specific comments. The comments are displayed in a thread that makes it easy to follow sub-discussions. Threaded discussions support dialogue among participants.

Like email lists, forums do not lend themselves toward closure. They require a moderator to impose process upon the participants and drive them toward closure. Many times topics rise and then submerge back into the stream of the overall discussion. Facilitator moderation is often required to capture the key points of the discussions and place them somewhere else for the team's reference. Forums can also use the automated content analysis programs to help extract patterns.

There are numerous features available on different forum platforms, including the ability to control the display of messages in the forum on the basis of ratings by moderators, reputation of the author, or ratings by other community members.

Forums can be public or private and the number of participants could be limited or unlimited. Small discussion groups offer an intimacy and a sense of commitment that can increase respect and civility. Dialogue circles and weblabs both use the small group dialogue model. Other

forums can be open to the public and are more often used to collect one off comments from citizens during consultation phases.

Like email lists, forums can use email notification, and RSS to drive participants back to the site to continue the conversation. Forums also allow people to reflect on messages and reply when they are comfortable. This can be useful for people that are not comfortable in a fast paced discussion.

Forums are often part of other tools applications such as blogs, wikis, social networks and sites for sharing videos and pictures, for instance.

Chat

Chat is a synchronous communication tool that allows participants to share messages in real time. All of the participants have to be online at the same time. Chat can also be employed as an additional communication channel during other activities such as a conference call. In this scenario it is often referred to as a back-channel communication. Because chat is synchronous, and typically not threaded, the conversation can pass by quickly and not leave time for reflective engagement.

Unchat puts structure around chat to help impose a process that can drive the discussion toward closure.

Most chat tools allow the transcript to be captured and saved for either later review or automatic analysis.

Instant messaging, SMS, and Twitter

These are similar to chat in that they offer real time communication between participants. They can exist more easily on mobile devices and allow users to send comments when they feel like it without opening up the chat tool. While they can allow instant response the messages are easily stored like email and can be reviewed at the recipient's convenience. While these messages can be directed toward groups, they are more typically directed at individuals.

Like chat, these tend to be very short messages, in fact SMS and twitter only allow 140 characters per message. Though experienced users are proficient with writing in a version of shorthand, the length limitations and speed tend to diminish their applicability for reflective group exchange. The transcript can be captured and saved for either later review or automatic analysis.

Preference aggregators

Preference aggregators allow a participant to post an idea and other participants can vote it up or down, typically by giving it a thumbs up or a thumbs down. Preference aggregators let you judge the relative popularity of an issue.

The results generated by preference aggregators need to be considered in light of who is allowed to vote and how often. It is very common for preference aggregators to have two serious shortcomings: the voting can be gamed by voting multiple times, and people can be directed to the site simply to skew the vote. Examples of preference aggregators include Digg and Dell/Salesforce Ideastorm.

A more complicated example is Kluster which allows the organizer to set multiple voting criteria and weight the votes of different classes of users. The votes are then processed to develop a relative rating of 1–10.

Preference aggregators can be combined with forums and email notification. Surveys are another form of preference aggregation, but typically do not have any forum component.

Blogs

Blogs are generally a broadcast channel from one or a few authors to multiple readers. Blogs are formatted as chronological diaries and the newest content is always at the top.

Many blogs offer comment systems that allow readers to respond back to the author and the other readers. For most blogs, the comments are displayed chronologically rather than threaded. The conversations in the blog comments tend to be declarative statements to the author of the community and extended exchanges are very rare. The posts by the blog author and the comments can be automatically retrieved via RSS.

Blogs also support conversations across the net between blog authors. Trackbacks are special links that tie two blog posts together. Author 2 can comment on a post by Author 1 and provide a link from his/her comment back to the original post.

Blogs are ideal for easily updating content to a community of readers. They are less ideal than forums as a site for discussion among participants/readers.

Wiki

A wiki is a web page that can be easily edited by readers and visitors. The exact distribution of privileges to read or write a wiki is easily configured. Each revision of a wiki is permanently recorded and inappropriate edits can be rolled back. Authors and readers can be notified via email or RSS when a wiki page has changed.

While the ability for anyone to edit a page may feel insecure, in practice the notification, revision history, and revision rollback features mean that malicious edits (vandalism) can be immediately detected and undone.

Wikis can be combined with forums to make them more deliberative. Wikis allow teams to capture and record their ideas and wisdom. They can be very good for collaborative editing by multiple authors, but not simultaneously. When someone begins an edit on a page, others are locked out of editing that specific page. The edit will expire after a certain period to ensure that others can edit in the not too distant future.

A problem with wikis is that only the last edit is visible and only one version of the page can exist at a time. Edit wars can break out where the last two authors struggle for supremacy. Wikis do not support an inherent process for collaboration, but they are pretty close to brutally simple,

Social networks

Social networks combine multiple tools such as blogs, forums, chat and pictures. Social networks can be useful to engage constituents and make them part of a group. Members in a social network can communicate publicly about the main "cause" of the group and they can also communicate directly with other members in private. Social networks record how people are

related and allows members to follow the links between members. The communication channels typically available in a social network fall into the categories already discussed.

Group pages

Group pages combine multiple tools such as email lists, forums, wikis, chat, shared documents, shared calendars, task lists, whiteboards and even screen sharing to allow a team to have multiple modes of interaction.

Group pages can allow a team to collect a variety of content and activities in one place. They do not generally support the notion of a process inherently, so the process needs to be superimposed by a team leader. The communication channels fall into the categories already discussed. The more complex ones such as whiteboards and calendars are beyond the scope of this workshop. Group page are not brutally simple and often require strong team leaders.

Debate mapping/Argument mapping

These are debate visualization tools, Only the strongest arguments for an against an issue are presented by default. This solves the problem of visibility being usurped by the last author as opposed to the better argument. This mapping "allows people to easily view and comprehend a complex debate as a totality with different positions and arguments clearly juxtaposed in a consistent manner that reflects sound argumentation principles" (http://debategraph.com)

Debate mapping can provide a good view of the pros and cons of an issue. It attempts to ensure both quality and a variety of view points. On the other hand it tends to discount opinions and dialogue in favor of presenting the strongest arguments. Debate maps can be accompanied by forums and notification systems.

Process

One of the shortcomings of the tools that have been described is that they do not offer an implicit process and require intervention by a facilitator to connect the activity within the tool with the promise of the engagement.

CivicEvolution

CivicEvolution combines threaded discussions, wiki functionality and multiple notification options in a process driven tool that lets participants capture, refine, and prioritize the knowledge that is co-created in the dialogues. This process of knowledge creation is embedded in a larger process that drives the team toward developing a detailed, multiple step, collaboratively authored document, for example a public policy proposal. This complex functionality and process is packaged in a highly responsive website that strives to brutal simplicity. Please visit http://civicevolution.org.

This document was prepared by Brian Sullivan of Practical Evolution, LLC, the developer of CivicEvolution.

Some resources to consult

Infotopia: How many minds produce knowledge
Cass R Sunstein

Here comes everybody: The power of organizing without organizations
Clay Shirky