Collaboration— Requirements for Success

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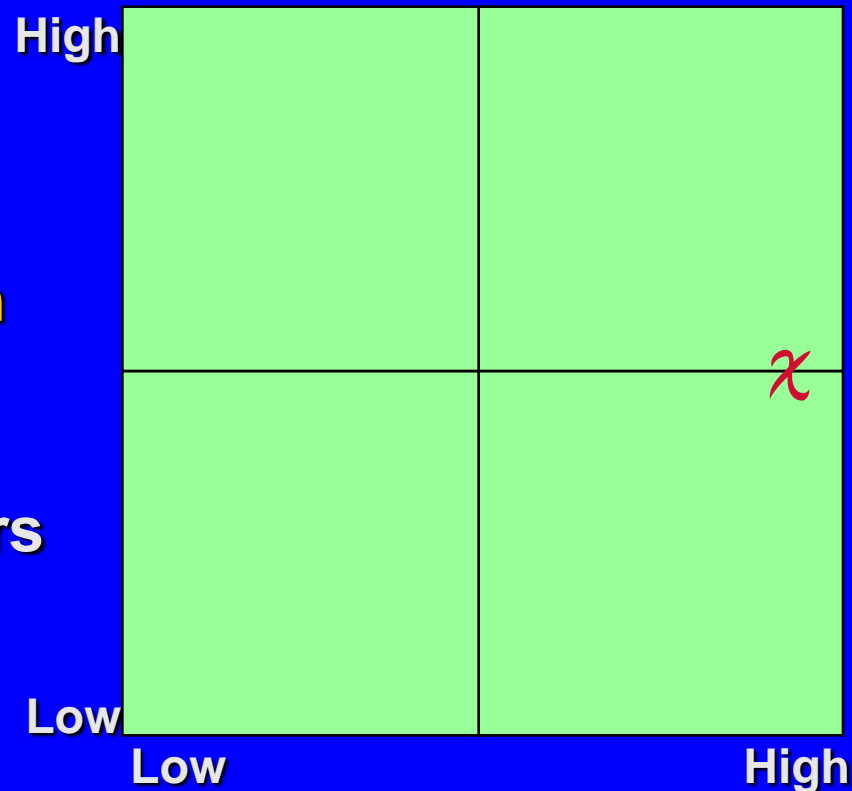
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Contents

- **Situation**

- **Technology Solution**

- **Key Success Factors**

- **Lessons Learned**

What's important in Collaboration?

Collaboration Tools
 i.e., the "hard" factors

High

Low

Low   High

x

Processes, Culture
i.e., the "soft" factors

I was responsible for a Collaboration initiative at an international management consulting firm.

Situation	• **3,000 people, 50 offices, 30 countries, five continents** • **1,000 teams**
Challenge	• **Work more effectively in a "different time, different place" environment**
Solution	• **Enhanced collaboration, enabled by new Tools**

We analyzed the four basic ways our teams worked.

Same Time, Same Place	Same Time, Different Place

• **Electronic whiteboards**
• **Electronic meeting rooms**
• **Resources**
  –**Document repository**
  –**Rosters of multiple types**
  –**Calendaring/scheduling**
  –**Project/task management**
  –**Voting tools**
	• **Application/whiteboard sharing: view/create**
	• **Teleconference**
	• **Videoconference**
	• **Chat**
	• **Broadcast (with participation)**
	• **File transfer**
	• **Resources**

Different Time, Same Place	**Different Time, Different Place**
• **Desktop computers, kiosks** • **Blackboards** • **Group rooms** • **Resources**	• **Discussion databases** • **E-mail** • **News feeds** • **Voice mail and Fax** • **Resources**

Situation

We determined that Collaboration Tools could support the four basic ways our teams worked.

Same Time, Same Place	Same Time, Different Place
Electronic whiteboards	• **Application/whiteboard sharing: view/create**
Electronic meeting rooms	• **Teleconference**
• **Resources**	• **Videoconference**
– **Document repository**	• **Chat**
– **Rosters of multiple types**	*Broadcast (with participation)*
– **Calendaring/scheduling**	*File transfer*
– **Project/task management**	• **Resources**
– **Voting tools**	

Different Time, Same Place	Different Time, Different Place
Desktop computers, kiosks	• **Discussion databases**
Blackboards	• **E-mail**
• **Group rooms**	*News feeds*
• **Resources**	*Voice mail and Fax*
	• **Resources**

Our teams identified a set of needs that could be supported by enhanced collaboration.

- **Forging geographically dispersed teams**

- **Sharing information and documents globally**

- **Collaborating across time zones and physical locations**

- **Sharing creation of and access to work products**

- **Identifying and accessing external experts and resources**

Team members and leaders agreed: Direct benefits could come from Collaboration Tools.

- **Team Members**
  - **Access the latest team resources, any time, any place**
  - **Participation in asynchronous, threaded discussions**

- **Team Leaders**
  - **Confidence that all team members would be on the same page**
  - **Ability to stay fully "connected," any time, any place**

At the same time, teams identified potential barriers to their collaboration as a team.

- **No easy way to share best practices**

- **Insufficient facilities for video conferencing**

- **Inadequate technology—slow PCs and network connections**

- **Technology overload—unable to master old tools let alone new ones**

- **Lack of accessible, effective, credible, local training and support**

- **Poor behaviors when it came to working as a team**
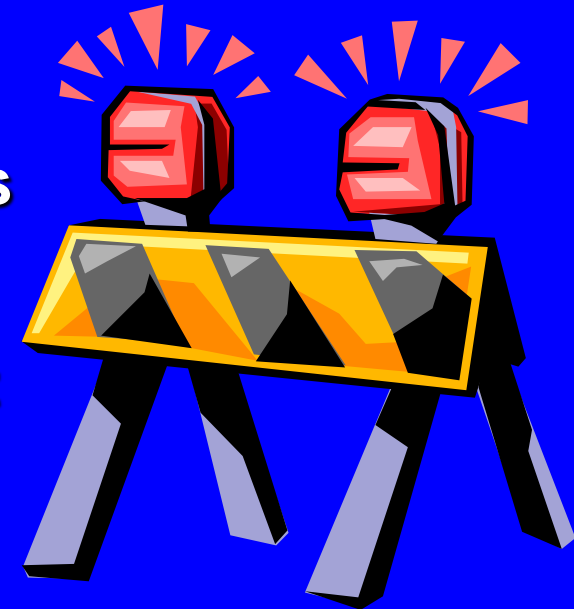
Contents

- **Situation**

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We established a set of requirements for a Collaboration Tool suite.

✓ **Support realities of environment**

✓ **Provide functionality to support teams**

✓ **Operate within our technology architecture**

The collaboration tool suite had to support the realities of our environment.

- **3000 people in 50 offices spread across 30 countries; more than half of staff outside of US**

- **1,000 teams of 3-20 people each; some teams long-lived, others ad hoc**

- **Potentially three-to-six teams per person**

- **Teams operate across geographic and time-zone boundaries**

The collaboration tool suite had to provide the functionality needed by the teams.

- Team home page with "bulletins" and access to tools

- Document repositories supporting attachments linked to our KM repository

- Discussion databases

- Simple task/project management

- Calendaring/scheduling

- Lists and tables

- Collaborative work on documents

- Team Web site

- Conferencing (audio, video, white boarding, etc.) and voting

- Search across team space and/or intranet; search entire trees of restricted portions

The collaboration tool suite had to operate within our technology architecture.

- **Relatively slow network**

- **Web browser access**

- **Scaleable to 1,000+ teams with different mixes of applications**

- **Manageable in replicated Domino environment**

- Ability to track usage

- Direct links to corporate systems for authentication

- Integrated application (i.e., single vendor)

- Integration with existing resources

- Same product for intranet and extranet

- Administration by manager/moderator

Technology Solution

We decided to start with a limited tool set and add additional functionality as needed.

Initial Tools

- **Bulletin Board**

- **Discussion**

- **Document Repository**

- **Web Site**

- **E-Mail**

- **Real-time conferencing, chat, and co-creation of content**

Potential Future Tools

- **Team Directory**

- **Task Management**

- **Full e-Email Integration**

- **Personalization**

- **Scheduling**

- **Decision support tools**

- **Event management**

- **Workflow management**

- **Meeting support**

- **Links database**

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Technology Solution

We selected a vendor who offered the best mix of features that were important to us.

- **Reduced set-up cost and time significantly**

- **Allowed customization without programming**

- **Allowed future integration with existing and planned Notes applications**

- Provided needed functionality, ease of use

- Gave each team its own "space," with ability to add/change tools over time

- Ensured consistency across teams

- Supported our security scheme

Contents

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Eight factors are key to the success of a collaboration initiative.

- **Personal imperative**

- **Mission-critical to team**

- **Management commitment**

- **Committed moderator**

- **Embedded into work processes**

- **Culture and behavior change**

- **Infrastructure support**

- **Appropriate technology**

Key Success Factors—*Personal Imperative*

Adopting new patterns of collaboration must be a business imperative for each individual.

- **The communication, content, and use of the tools must be mission-critical**

- **Each team member must see enhanced collaboration as critical to the performance of his/her job**

- **Team members must take the time to learn new tools.**

- **Team members must use the tools**

- **Team members must change their work processes to capitalize on the tools, and use the tools to enhance their work processes**
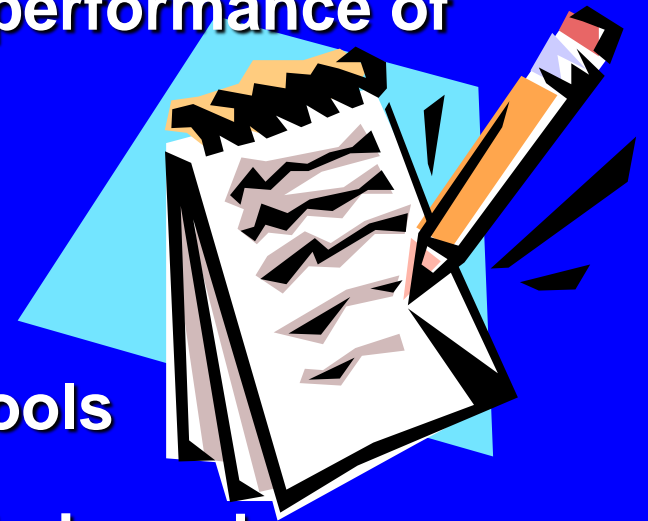
What's In It For Me?

**The new patterns of collaboration must also become mission-critical to each team.**

- **The new collaboration patterns and the supporting tools must have a valid and central role in support of the work of the team—developing and sharing ideas, plans, results, and materials**

- **The business imperative for enhanced collaboration must be shared by everyone on the team**

The team manager must consistently exhibit an *unwavering commitment.*

- **Commit to new patterns of collaboration and use of new tools in the work of the team**

- **Set an unambiguous expectation that enhanced collaboration will be "the way"**

- **Unquestionably "walk the talk"**

- **Provide team members time to learn new tools and develop, adopt, and implement new processes**

- **Appoint a qualified moderator and gives him/her the time needed to do the job right**
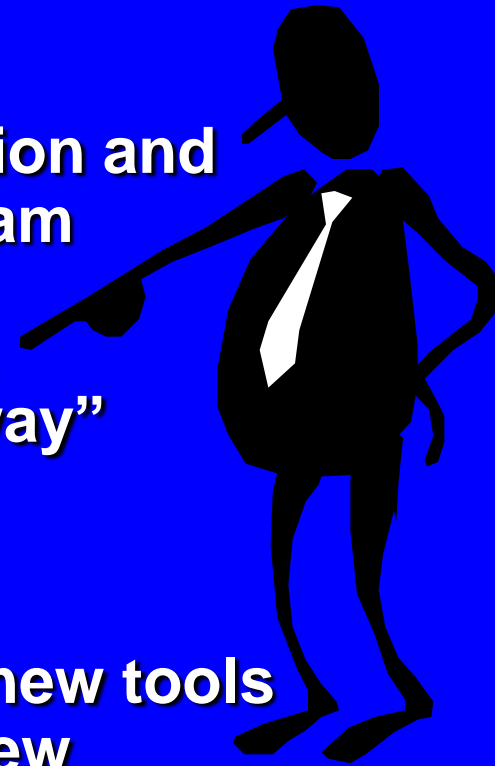
Teams need a committed and well trained moderator with time available to do the job.

- **Team training**
  - **Guide the group through the basics**
  - **Work to improve group interaction**

- **Content management**
  - **Administer the group's knowledge**
  - **Keep content current and accessible**

- **Usage**
  - **Check in regularly with manager/members**
  - **Ensure appropriate levels of involvement**
  - **Enforce protocols and norms**
  - **Monitor usage and take remedial actions**
  - **Troubleshoot problems, respond quickly**

22

The Moderator has responsibilities across the life cycle of an enhanced collaboration initiative.

Moderator Tasks	Integrate tool into work process	Monitor adherence to new patterns	Monitor content	Proactively seek feedback	Develop lessons learned
Objective	Ensure that work processes are optimized for Tool usage	Ensure team members adopt new patterns of collaboration	Ensure content is in the right place	Make sure team needs are being met	Understand what is and isn't working
Tasks	• Change work processes to capitalize on the Tools • Proactively recommend Tools for specific needs and situations	• Check in with team members weekly • Set up "help" processes • Respond and resolve problems and issues quickly	• Twice weekly, check to view new contents • Work with Leader and members to store content appropriately	• Provide weekly feedback and coaching on collaboration process and application of Tools	• Extract lessons and share them with team members • Regularly communicate with Team Leader

23

# Key Success Factors—*Responsibilities: Members, Leader, Moderator*

To summarize, team members, the team leader, and the moderator all have clear responsibilities for the success in a collaboration initiative.

Roles	Responsibilities
Team Members	• **Personally commit to need for change** • **Change processes to adopt processes / tools** • **Take the time to learn and use new tools**
Team Leader	• **Commit unwaveringly to the program** • **Set clear expectations and "walk the talk"** • **Appoint and empower the moderator**
Moderator	• **Train and coach team members and leader** • **Manage content** • **Monitor patterns and ensure effectiveness**

Collaboration Tools must be embedded into work processes.

- **Understand the work processes of the team**

- **Determine how Collaboration Tools can support the team's processes**

- **Determine how processes can be redesigned and enhanced to leverage Collaboration Tools**

- **Determine when other tools should be used instead**

- **Embed the Collaboration Tools into everyday work processes**
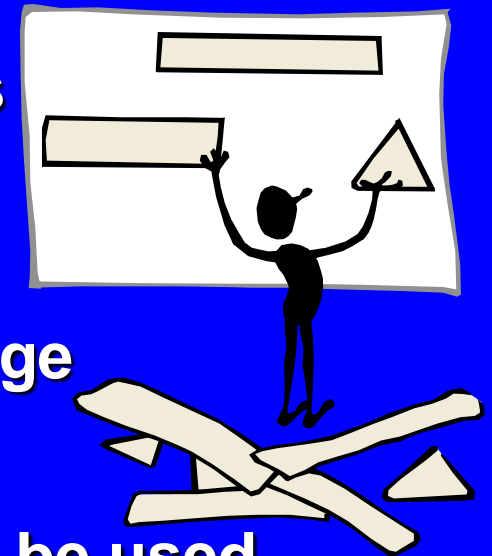
A thought leader in collaboration says that culture is the greatest challenge.

"People accustomed to doing their jobs a particularly way for years may be hesitant to change, viewing new collaborative processes as a threat to their status in the organization and fearing they lack the skills and expertise to operate within the unfamiliar environment.

"Groups that formerly operated independently may resent having to coordinate their activities with others who are often located around the world in areas where work styles and customs may differ significantly from their own."
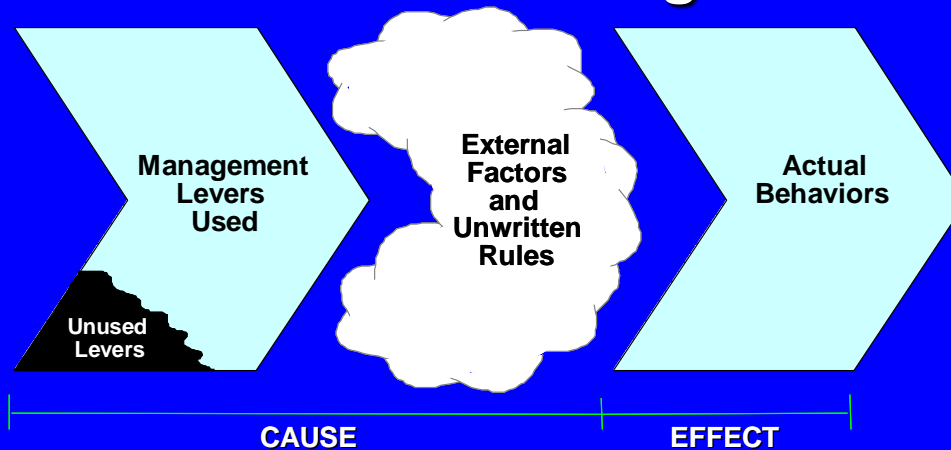
Ed Miller

Source: Ed Miller, *Facing Collaboration Challenges*

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Significant change in the nature of collaboration will require changes in culture and behavior.

- **Adjust motivators, triggers, and enablers to address Unwritten Rules' negative effects**

Management Levers Used

Unused Levers

External Factors and Unwritten Rules

Actual Behaviors

CAUSE   EFFECT

- **Effect changes in behavior**
  - **From "when I have time" and "E-mail only" communication and interaction**
  - **To "regular, self-initiated," and "multiple tool"**

Social Network Analysis can help identify where change may be most needed.
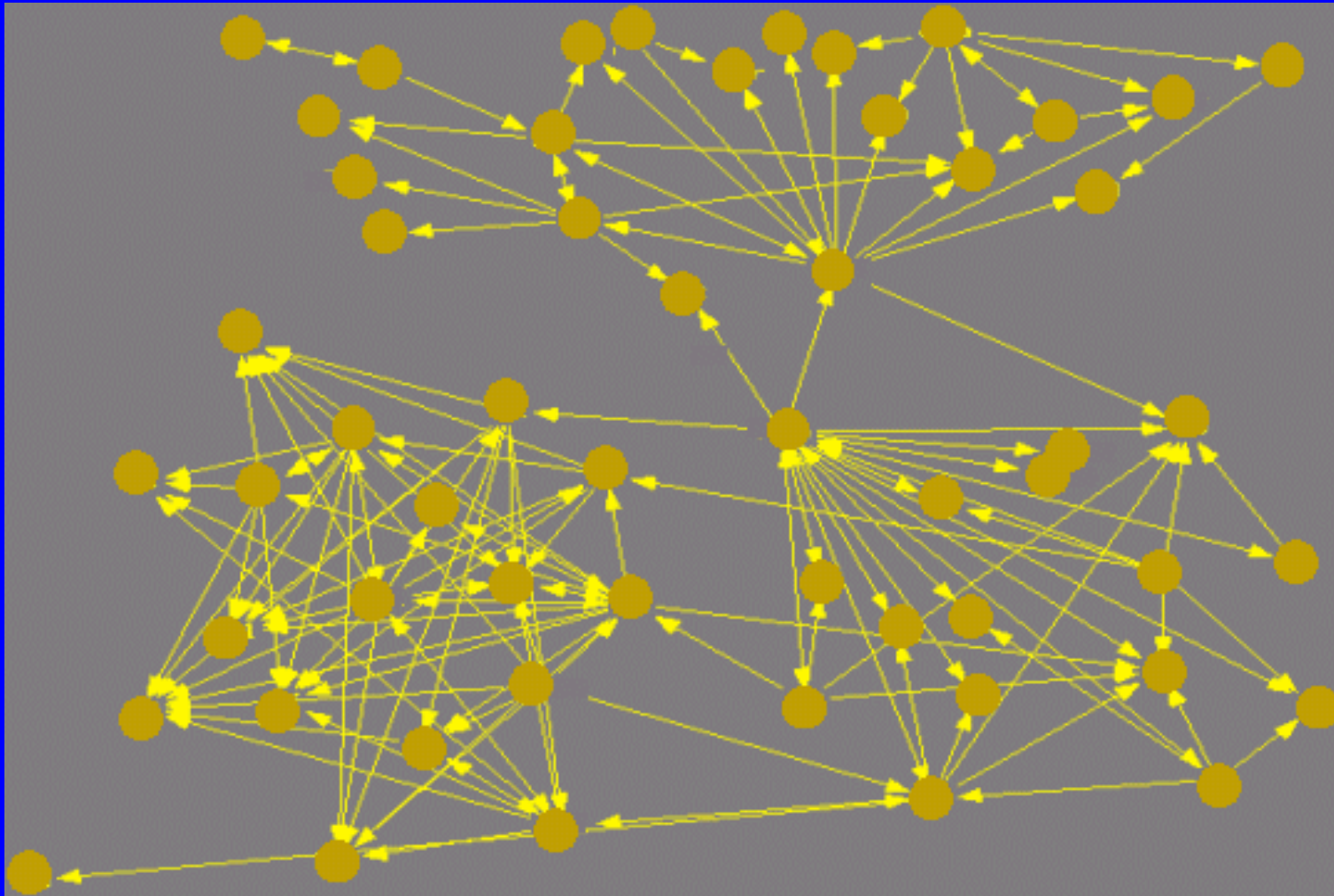
A high level of infrastructure support is required.

- **Teaching and training**
  - **Train *team*—it's a *team* process**
  - **Train in electronic mediation of team functions**
  - **Provide robust documentation**
  - **Implement proactive coaching**

- **Program management**
  - **Measure usage, behavior, results**
  - **Intervene to improve**

- **Resources to promote successful use; e.g., access, staff, cameras**

Example

The Company Intranet

Collaboration Tools: Overview

A Tools "Cheatsheet"

A Quick Reference Guide

June 2002

Quick Reference Guides available include:
- Overview
- Knowledge Management
- Search
- NetMeeting
- Collaboration Tools
- Remote Access
- Passwords

To access the latest version of the Guides, click on the appropriate documentation link under **Help on the Home Page of the intranet**

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Last but not least, new patterns of collaboration often require improved technology support.

- **Stable environment**

- **Effective local and remote access**

- **Access and tools that are easy to use**
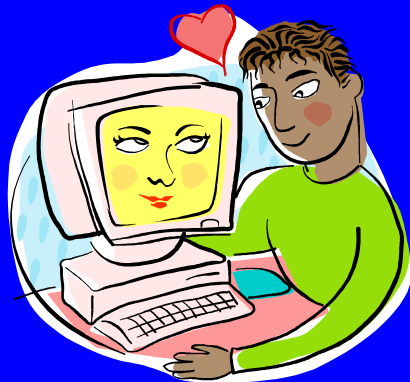
- **Consistent tool set, integrated with other user technology environments**

- **Tools appropriate for work processes and for team members' work styles**

Contents

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A UCLA professor reports that successful implementations of group tools do five things.

- **Train for life**

- **Give users a voice**

- **Create early positive awareness**

- **Recognize and reward use**

- **Work actively to increase usage**

Source: Eric D. Darr, in *Chief Executive*

Another firm summed up its experience in "Five years of lessons."

- **Teams that don't collaborative now won't just because you add technology**

- **If it's harder with the software than a phone…**

- **Get buy in, Get buy in, Get buy in**

- **Train, Train, Train**

- **Use facilitators – they make it work first, then the real people take over**

- **Don't go "Zero to 60"**
  Source: Jay McConville of Elenia! Inc.

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Lessons Learned

Our experience echoes the avoidance of "Zero to 60"—*achieving success takes time.*

- **Members must become fully committed**

- **Tools must be mapped to unique team needs**

- **Leaders/moderators need *real* training**

- **Leaders have time to set expectations and walk the talk**

- **Moderator must learn role and build support**

- **Members must have—and take—time to learn**

- **Relevant content must be found, built, stored**

- **Use must evolve: intrusion→ toleration→ habit**