

Collaboration— Requirements for Success

Larry Chait

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MANAGEMENT CONSULTING
KEEPING YOUR INITIATIVES ON TRACK

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Good afternoon.

My name is Larry Chait, and I lead Chait and Associates, a consultancy focused on “change insurance” – i.e., helping organizations do the often forgotten or conveniently ignored things that make change work.

For about four years, until about a year ago, I was Chief Knowledge Officer of Arthur D. Little, Inc., the gone but not forgotten global management consulting firm.

Today I’ll base my comments on my own experience with Collaboration, both within Arthur D. Little and from my work as a consultant.

Just a reminder – please complete your evaluation forms before you leave.

Situation

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

Situation	<ul style="list-style-type: none">• 3,000 people, 50 offices, 30 countries, five continents• 1,000 teams
Challenge	<ul style="list-style-type: none">• Help communities work more effectively in a “different time, different place” environment
Solution	<ul style="list-style-type: none">• Enhanced collaboration, enabled by new Tools

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OK. Now for some background on the ADL situation.

As you can see, ADL was a mid-sized, but global management consulting firm with many teams in operation.

click → Market pressures were forcing the firm to be ever more effective in its sales and client service.

click → We determined that we needed to take team collaboration to a new level, and to do that we would need new ways of working, supported by new tools.

This introduction will give you the context for my thoughts. While collaboration – and many of my comments – are germane to product development, supplier/vendor extranets and the like, my primary focus today will be on people within an organization who must work together in teams to get a job done.

Situation

We analyzed the four basic ways our communities worked.

Same Time, Same Place	Same Time, Different Place
<ul style="list-style-type: none">• Electronic whiteboards• Electronic meeting rooms• Resources<ul style="list-style-type: none">– Document repository– Rosters of multiple types– Calendaring/scheduling– Project/task management– Voting tools	<ul style="list-style-type: none">• Application/whiteboard sharing: view/create• Teleconference• Videoconference• Chat• Broadcast (with participation)• File transfer• Resources
Different Time, Same Place	Different Time, Different Place
<ul style="list-style-type: none">• Desktop computers, kiosks• Blackboards• Group rooms• Resources	<ul style="list-style-type: none">• Discussion databases• E-mail• News feeds• Voice mail and Fax• Resources

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Our analysis told us that our teams worked in four different modes:

- Same time, same place
- Same time, different place
- Different place, same time
- Different place, different time...

Situation

Collaboration Tools could support the four basic ways our communities worked.

Same Time, Same Place	Same Time, Different Place
<ul style="list-style-type: none">• <i>Electronic whiteboards</i>• <i>Electronic meeting rooms</i>• Resources<ul style="list-style-type: none">– Document repository– Rosters of multiple types– Calendaring/scheduling– Project/task management– Voting tools	<ul style="list-style-type: none">• Application/whiteboard sharing: view/create• Teleconference• Videoconference• Chat• <i>Broadcast (with participation)</i>• <i>File transfer</i>• Resources
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...and that different computer and telecommunications tools could be used to support these different modes of work.

Situation

Our communities identified a set of needs that could be supported by Collaboration Tools.

- Forging geographically dispersed communities
- 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



We went to some of our teams and asked them how new tools could help them.

They said the tools could help solve the many challenges the teams faced working across space and time, and in providing access to needed information much more quickly and reliably.

Situation

Our communities identified a set of needs that could be supported...(continued).

- **A virtual workplace with easy-to-use tools**
- **Document repository**
 - Plans
 - White papers
 - Working documents
 - Call reports
 - News feeds
 - Client profiles
- **Management tools, including calendaring/ scheduling and task management**
- **Lists and tables of rosters, tasks, “score cards,” etc.**
- **Communication tools, including e-Mail, discussions, conferencing, and voting**

We then worked with these teams to further characterize the what kinds of tools would be helpful. Here you see the results.

It all boiled down to a “workspace” with tools for storage, management, ongoing team operation, and communication.

Situation

Community members and leaders agreed: Direct benefits could come from better tools.

- **Community Members**
 - **Access the latest community resources, any time, any place**
 - **Participation in asynchronous, threaded discussions**
- **Community Leaders**
 - **Confidence that all community members would be on the same page**
 - **Ability to stay fully “connected,” any time, any place**

Both team members and their leaders were able to verbalize the benefits they saw.

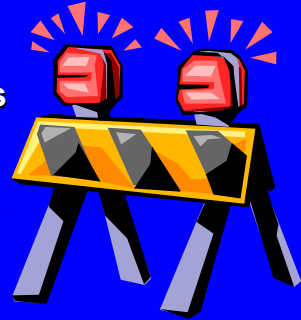
For Team Members, it was all about access to information and the ability to communicate more effectively.

And for Team Leaders, two things were important: helping to ensure that everyone was on the same page and providing a tool for the leader to stay connected.

Situation

At the same time, community 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 community



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But the teams didn't see new tools as a panacea. They saw a set of barriers to their collaboration efforts, and to the use of new tools in those efforts.

It was clear that for the tools to be valuable, the technology would really have to work effectively...

...and that some serious effort would have to be made to enhance support – and the workings of the teams, themselves.

Technology Solution

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

- ✓ **Support realities of environment**
- ✓ **Provide functionality to support communities**
- ✓ **Operate within our technology architecture**

At ADL, we started by setting out some high level requirements.

Technology Solution

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
- Increasing number of “communities”
- Potentially three-to-six teams and communities per person
- Teams and communities operate across geographic and time-zone boundaries

Here were some of the basic features of our global working environment that any tool would have to meet.

Our geographic spread, number of teams, and style of work were all seen as important.

Technology Solution

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

- Community 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 community space and/or intranet; search entire trees or restricted portions

We also established a set of functionality features that we wanted to see.

Features such as team work areas, repositories, discussion databases, and the like were all seen as potentially valuable.

Technology Solution

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

- Relatively slow network
- Lotus Notes/Domino
- Web browser access
- Scalable to 1,000+ teams with different mixes of applications
- Manageable in replicated Domino environment
- Ability to track usage
- Direct links to Notes for authentication and corporate NAB
- Integrated application (i.e., single vendor)
- Integration with existing resources
- Same product for intranet and extranet
- Administration by manager/moderator

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We also documented key features of the architecture in which we expected a tool set to function.

Most important were:

- The speed of our network
- Our Notes platform
- The need for browser access
- Scalability
- And being able to deal with replication

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 (via existing Notes Mail)
- NetMeeting (real-time conferencing, chat, and co-creation of content)

Potential Future Tools

- Community Directory
- Task Management
- Full e-Email Integration
- Personalization
- Scheduling
- Decision support tools
- Event management
- Workflow management
- Meeting support
- Links database

We wanted far more than we needed, so we made a list of “must-have” and “nice-to-have” features.

So, we decided to start with the tools on the left.

[Read list.]

Technology Solution

We evaluated several tools and narrowed the field to five: four vendors and an internal option.

Vendor

- Binary Tree
- Lotus
- Microsoft
- Changepoint

Tool

- eTeam
 - Instant Teamroom
 - NetMeeting
 - Involv
-
- *Internoded*
 - *Marin Research*
 - *Business Evolution*
 - *Imanage Technologies*
 - *Instinctive Technology*
 - *Etc...*

CustomerTrack

Project Gateway

InteractPro

ProManage

eRoom

We then evaluated the marketplace of tools and came up with four that we subjected to further scrutiny.

(Note that this was five years ago now, and that many of the products we looked at have by now either morphed into something else or disappeared entirely.)

(Also, note that because we were a Notes shop, many Windows- and Exchange-based options were discarded early in the process.)

Today's list would include eRoom, but also Groove, WebEx, Quickplace and Sametime, Tacit, and various instant messaging solutions.



Binary Tree, Inc.
eBusiness Product Solutions

Technology Solution

We selected Binary Tree's e-Team suite as the backbone of our collaboration tool set.

- **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

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The tool set we selected was e-Team from Binary Tree.

It met our needs and was the best set of tools available on a Notes platform.

As most important, we saw

- The package's ability to reduce our set-up cost and time
- That it would allow customization without programming
- And that it would allow integration with existing and planned Notes applications

Binary Tree still exists, but they are no longer offering e-Team under that name. It appears to have been integrated into the Collaborative Application Portal that's part of their ezMerchant Collaborative Commerce Suite.

Technology Solution



We also adopted NetMeeting as our platform for conferencing.

- Applications sharing
- Co-developing documents
- Live chat
- Electronic white boards

We also decided to use Microsoft's NetMeeting as a "same time/different place" collaboration tool. NetMeeting still exists today – along with much more sophisticated tools for this type of collaboration, such as WebEx.

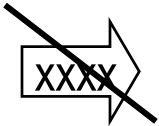
Key Success Factors

Eight factors are key to the success of Collaboration Tools.

- Personal imperative
- Mission-critical to team
- Management commitment
- Committed moderator
- Embedded into work processes
- Culture and behavior change
- Infrastructure support
- Appropriate technology

There are eight factors; we'll discuss each in turn.

[WILL APPEAR ALL BY SELVES!!]



Key Success Factors—*Personal Imperative*

Use of the Collaboration Tools must become a business imperative for each individual.

- Both content and use of the Tools must be mission-critical
- Each community member must see the use of Collaboration Tools as critical to the performance of his/her job
- Community members must take the time to learn new tools.
- Members must use the tools
- Members must change their work processes to capitalize on the tools



First, personal imperative.

As the slide says, “Use of the Collaboration Tools must become a business imperative for each individual.”

People must see use of the tools as critical both to the mission of the team and to successful performance of their own jobs.

When they do, they’ll take the time to learn and then to use the tools.

And along the way, they will learn how to change their own work processes to leverage the tools and to improve their individual and team performance.

***What's
In
It
For
Me?***

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Who knows what “WIIFM” means?



That's right: What's in it for me?

Bottom line? If people don't see use of the tools as being in their own enlightened self-interest, they simply won't use them.

Key Success Factors—Mission-critical to Community

Use of the Collaboration Tools must also become mission-critical to each community.

- Collaboration Tools must have a valid and central role in support of the work of the community—developing and sharing ideas, plans, results, and materials
- Business imperative for Collaboration Tools must be shared by everyone in the community



The tools prove most useful when teams operate in “different place/different time” mode.

Importance to the individual is key, but so is importance to the team.

The team as a ***unit*** must come to see use of the tools as critical to their ***joint*** success, and they must work ***together*** to ensure that success.

Key Success Factors—Management Commitment

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

- Commit to the use of Collaboration Tools in the work of the community
- Set an unambiguous expectation that the tools will be used
- Unquestionably “walk the talk”
- Provide community 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



Our third factor is the behavior of the team leader.

The key words here are, “unwavering commitment.”

The leader must set expectations and then be the **best** of role models in the use of the tools.

The Leader also has the responsibility to provide the **time** necessary for tool adoption and the **human resource** – i.e., the individual – needed to act as moderator.

Key Success Factors—Committed Moderator

Communities need a committed and well trained moderator with time available to do the job.

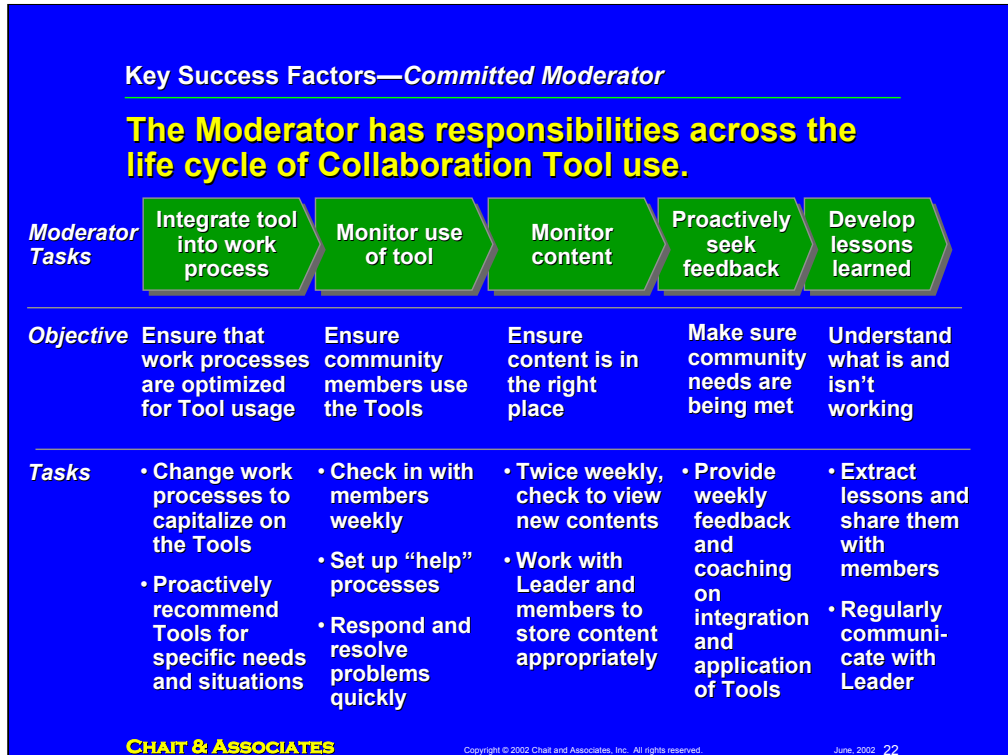
- **Community training**
 - Guide the group through the basics
 - Work to improve group interaction
- **Content management**
 - Administer the group's knowledge
 - Keep content current and accessible
- **Usage**
 - Check in regularly with manager/members
 - Ensure appropriate levels of involvement
 - Enforce protocols and norms
 - Monitor usage and take remedial actions
 - Troubleshoot problems, respond quickly



So, the fourth factor is the role of moderator.

The moderator focuses on training and support, on managing the content in the tool's workspace, and on monitoring and enhancing usage.

Without an effective moderator to facilitate the ramp-up process and ongoing operation, most teams fail to gain and sustain the momentum necessary for success in their collaboration efforts.



I've come to see a role like this moderator to be key in the adoption of many – if not most – major changes in organizations. The moderator is the local champion, a person with the time and resources needed and committed to make an initiative successful.

Here, with Collaboration, the moderator has responsibilities that touch on every aspect of the use of collaboration tools and the collaboration activity itself.

Key Success Factors—Responsibilities:
Members, Leader, Moderator

To summarize, community members, leader, and the moderator all have clear responsibilities for the successful use of Collaboration Tools.

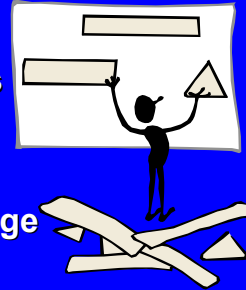
Roles	Responsibilities
Members	<ul style="list-style-type: none">• Take the time to learn new tools• Use the tools regularly• Change processes to capitalize on the tools
Leader	<ul style="list-style-type: none">• Commit unwaveringly to the program• Set clear expectations and “walk the talk”• Appoint and empower the moderator
Moderator	<ul style="list-style-type: none">• Train members• Manage content• Ensure effective usage

To recap, the team member, the leader, and the moderator each has clear responsibilities if the introduction of enhanced collaboration and its supporting tools are to be successful.

Key Success Factors—Embedded into Work Processes

Collaboration Tools must be embedded into work processes.

- Understand the work processes of the community
- Determine how Collaboration Tools can support those 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 the processes



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The fifth key success factor is the relationship between tools and work processes.

Simply dropping new tools on top of old processes inevitably fails to achieve the potential of either the tool or the process.

Tools enable **new** processes, and processes can leverage the use of tools.

So, the relationship of the tools and processes to the ultimate objectives of the team must be understood, and then “rewoven” into a new, more effective fabric.

Key Success Factors—*Culture and Behavior Change*

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*, *Computer-aided Engineering*, August, 2001

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Number six – possibly the greatest challenge – is the domain of behavior and culture.

“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.

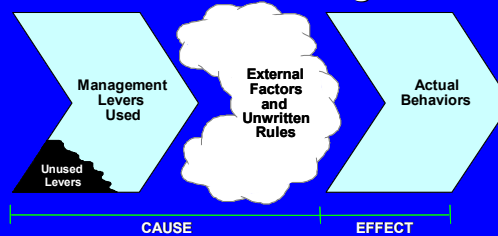
“Groups that formerly operated independently may resent having to coordinate their activities with others who are often located around the world in areas where work styles and customs may differ significantly from their own.”

Ed Miller

Key Success Factors—Culture and Behavior Change

Inevitably, Collaboration Tools require changes in culture and behavior.

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



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

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A whole “Home Depot” kit of tools exists to work on behavior and culture issues.

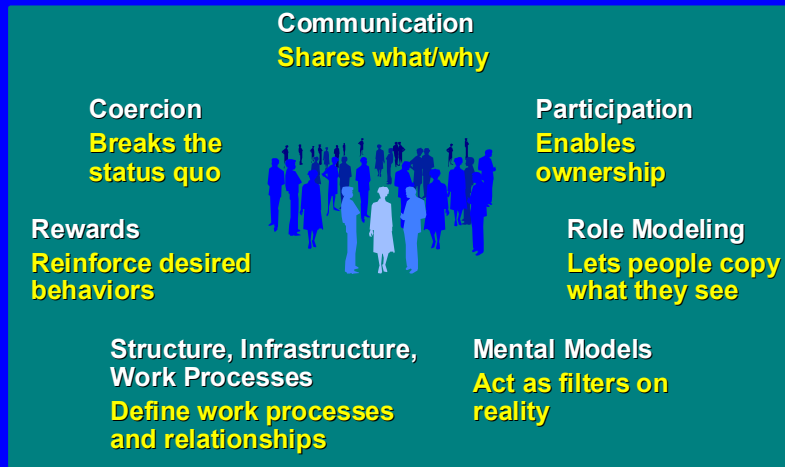
For example, one is the “Unwritten Rules” methodology developed several years ago by Dr. Peter Scott-Morgan.

This methodology holds that there are unwritten rules that often cause unintended negative consequences as managers push and pull the levers they have available to them.

These rules can be identified, and enablers and triggers can be realigned to foster desired behaviors.

Key Success Factors—Culture and Behavior Change

One solution is to realign, monitor, and readjust the seven streams of behavioral influence.



Adapted From: Nevis, Lancourt & Vassallo, *Intentional Revolutions*, Jossey-Bass, 1996

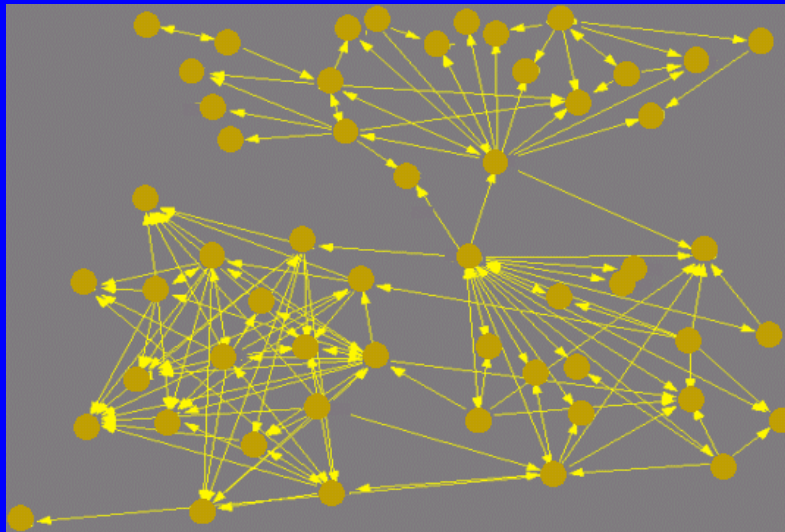
Another tool that I find especially useful is the “seven streams of behavioral influence.”

This tool holds that we are constantly bombarded by intended and unintended messages emanating from seven primary sources in organizations – and that unless the messages are all aligned both with each other and with the organization’s objectives, change is difficult or impossible.

Through using this tool, the streams and their impacts can be analyzed, and the messages can be aligned.

Key Success Factors—*Culture and Behavior Change*

Social Network Analysis can help identify where change may be most needed.



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A third tool is Social Network Analysis, which can be used to understand how sharing occurs – or doesn't – in a team, department, or larger organization.

This chart shows the interactions of the individuals in a unified global consulting practice. Note that the practice really consists of three semi-connected groups, and that each of the groups has its own pattern of communication. By studying such patterns, we can identify likely points of failure in collaboration and thus the need for intervention.

Change management is tough – probably the toughest area of management – and the role of the Change Manager can be thankless. Which brings me to another book that might be of special interest to those of you responsible for change in your organizations...

Key Success Factors—Infrastructure support

A high level of infrastructure support is required.

- Teaching and training
 - Train *community*—they are *community tools*
 - Train in electronic mediation of community 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

The Company Intranet



**Collaboration Tools:
Overview**

A Tools “Cheatsheet”

A Quick Reference Guide

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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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Which brings us to the seventh factor, infrastructure support.

What you see at the right is what we called a “cheat sheet,” **[hold up]** a tri-folded brochure that served as a basic guide to **use** the tool suite.

The cheat sheet was just one element in a program of training courses, documentation, coaching, measurement, and so on – all designed to give individuals, teams, managers, and moderators all the support they might need.

Key Success Factors—*Infrastructure Support*

In fact, we provided a *wide* range of materials to support the use of Collaboration Tools.

Support—Materials

We have various materials available to support the use of Collaboration Tools.

- Introductory materials
- User
 - Initial indoctrination
 - Guides, self-training modules, "cheatsheets"
- Community Leader
 - Continuing coaching
- Moderator
 - Individual training and ongoing support
 - Quick access to help (on-line and human)

At ADL, we provided teams with lots of support – from documents – to mini-courses – to active coaching for leaders and moderators.

In a sense, what the moderator was to a team, my ***own*** team was to the overall program.

Key Success Factors—Appropriate Technology

Last but not least, Collaboration Tools require an appropriate technology infrastructure.

- 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 community members' work styles

Last but not least is appropriate technology.

That means not only an appropriate **tool** kit, but also one that **works** effectively in the work environment of the team. In this case, that meant stability, universal access, ease of use, and ease of adoption.

Key Success Factors—*Appropriate Technology*

An MIT research team identified five factors critical to deploying collaboration technologies.

Availability
Reliability
Capability
Supportability
Usability

Source: MIT News, November 5, 2001

A research team at MIT looked into the requirements for successful collaboration deployment.

Their five features matched our own experience:

- Availability
- Reliability
- Capability
- Supportability
- Usability

 **[WILL APPEAR ONE AT A TIME ALL BY SELVES!!]**

Lessons Learned

Our experience says to avoid a “big bang” approach—achieving success takes time.

- Members must become fully committed
- Tools must be mapped to unique community 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

I think those lessons are right on target; they – especially the need for time – were echoed in our experience.

lick → It takes time to build deep commitment to any program.

lick → The tools must meet the need; for some teams, email or even paper will suffice

lick → Training—rather, education—in electronic mediation of team functions is required for the leader and the moderator

lick → The leader must be a true role model

lick → The team must have a committed and trained moderator with enough time allocated to do the job

lick → Team members must take the time to learn new tools, and to be patient with their low level of maturity

lick → Content and usage must be (or become) mission-critical for the accomplishment of the team’s mission

lick → Finally, leave enough time. Cakes simply don’t taste very good if you take them out of the oven too soon.

Key Success Factors

Eight factors are key to the success of Collaboration Tools.

- Personal imperative
- Mission-critical to community
- Management commitment
- Committed moderator
- Embedded into work processes
- Culture and behavior change
- Infrastructure support
- Appropriate technology



My eighth and final thought:

If you understand and address these eight key factors, your collaboration program will be well on its way to success.

Contact information:

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I thank you for your time and attention.