Collaboration—
Setting the Stage

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Introduction

What is Collaboration?

Collaboration is two or more people working together to accomplish some objective.

Boston KM Forum
Working Sessions
iCohere has developed a collaborative Community model that can help in analysis.
Through a case example, I will highlight six decision areas in collaboration design.

• How people work
• Their needs that can be supported by collaboration and collaboration tools
• Key barriers and how to overcome them
• Tools requirements – environment, functionality, and technical architecture
• Vendor selection
• Implementation strategy
• In organizations that have sophisticated groupware, what collaboration tool is most used?

• What’s the price tag for purchase and implementation of a sophisticated collaboration-software suite?

• What percent of major Information Technology projects fail?
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 |
<table>
<thead>
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<tbody>
<tr>
<td>Challenge</td>
<td>• Work more effectively in a “different time, different place” environment</td>
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<td>Solution</td>
<td>• Enhanced collaboration, enabled by new Tools</td>
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### How People Work

**We analyzed the four basic ways our teams worked.**

<table>
<thead>
<tr>
<th>Same Time, Same Place</th>
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<tr>
<td>• Electronic whiteboards</td>
<td>• Application/whiteboard sharing: view/create</td>
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<td>• Teleconference</td>
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<td>• Resources</td>
<td>• Videoconference</td>
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<td>– Document repository</td>
<td>• Chat</td>
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We analyzed the four basic ways our teams worked.
We determined that Collaboration Tools could support the four basic ways our teams worked.

**How People Work**

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Let’s track the collaboration decision areas…

✓ How people work

• Their needs that can be supported by collaboration and collaboration tools

• Key barriers and how to overcome them

• Tools requirements – environment, functionality, and technical architecture

• Vendor selection

• Implementation strategy
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
Our teams 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
Users’ needs

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
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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
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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
- Lotus Notes/Domino
- 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 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 evaluated several tools and narrowed the field to five: four vendors and an internal option.

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<td>Binary Tree</td>
<td>eTeam</td>
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<tr>
<td>Lotus</td>
<td>Instant Teamroom</td>
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<tr>
<td>Microsoft</td>
<td>NetMeeting</td>
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<td>Changepoint</td>
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<td>Internoded</td>
<td>CustomerTrack</td>
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<td>Marin Research</td>
<td>Project Gateway</td>
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<tr>
<td>Business Evolution</td>
<td>InteractPro</td>
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<tr>
<td>Imanage Technologies</td>
<td>ProManage</td>
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<tr>
<td>Instinctive Technology</td>
<td>eRoom</td>
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<td>Etc…</td>
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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
We also adopted NetMeeting as our platform for conferencing.

- Applications sharing
- Co-developing documents
- Live chat
- Electronic white boards
Let’s track the collaboration decision areas…

✓ How people work
✓ Their needs that can be supported by collaboration and collaboration tools
✓ Key barriers and how to overcome them
✓ Tools requirements – environment, functionality, and technical architecture
✓ Vendor selection

• Implementation strategy
Implementation Strategy

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*
- Team Directory
- Task Management
- Full e-Email Integration
- Personalization
- Scheduling
- Decision support tools
- Event management
- Workflow management
- Meeting support
- Links database
Implementation Strategy

Our implementation strategy included many other factors.

- Embedded in management consulting activities and tasks
- Started with supportive and committed team leader
- Made use “exclusive,” available only to those who met criteria
- Monitored, supported, and intervened as necessary
- Updated the overall program on an ongoing basis to remain responsive to the business
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