



Collaboration— Setting the Stage

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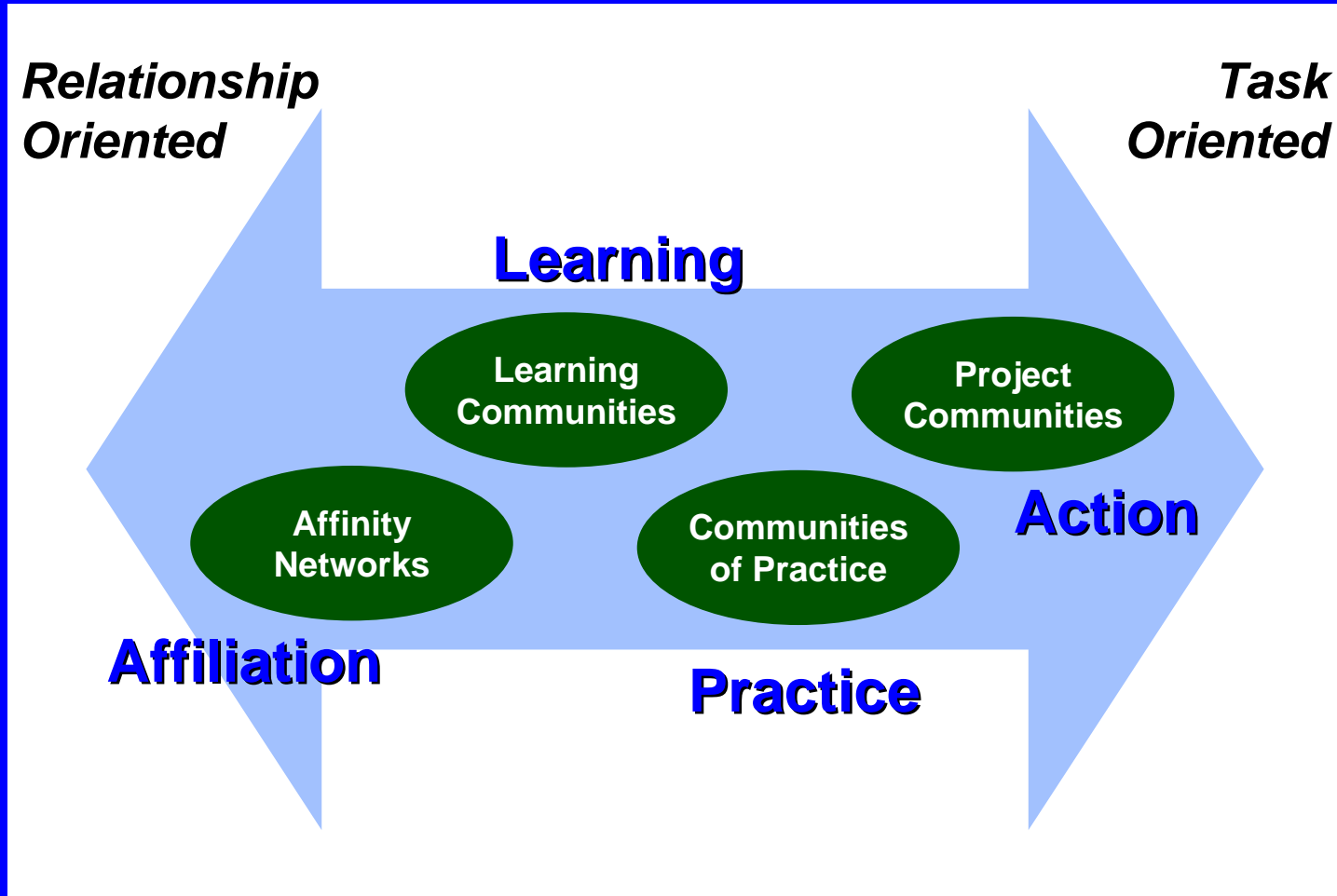
What is Collaboration?

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

*Boston KM Forum
Working Sessions*

Introduction

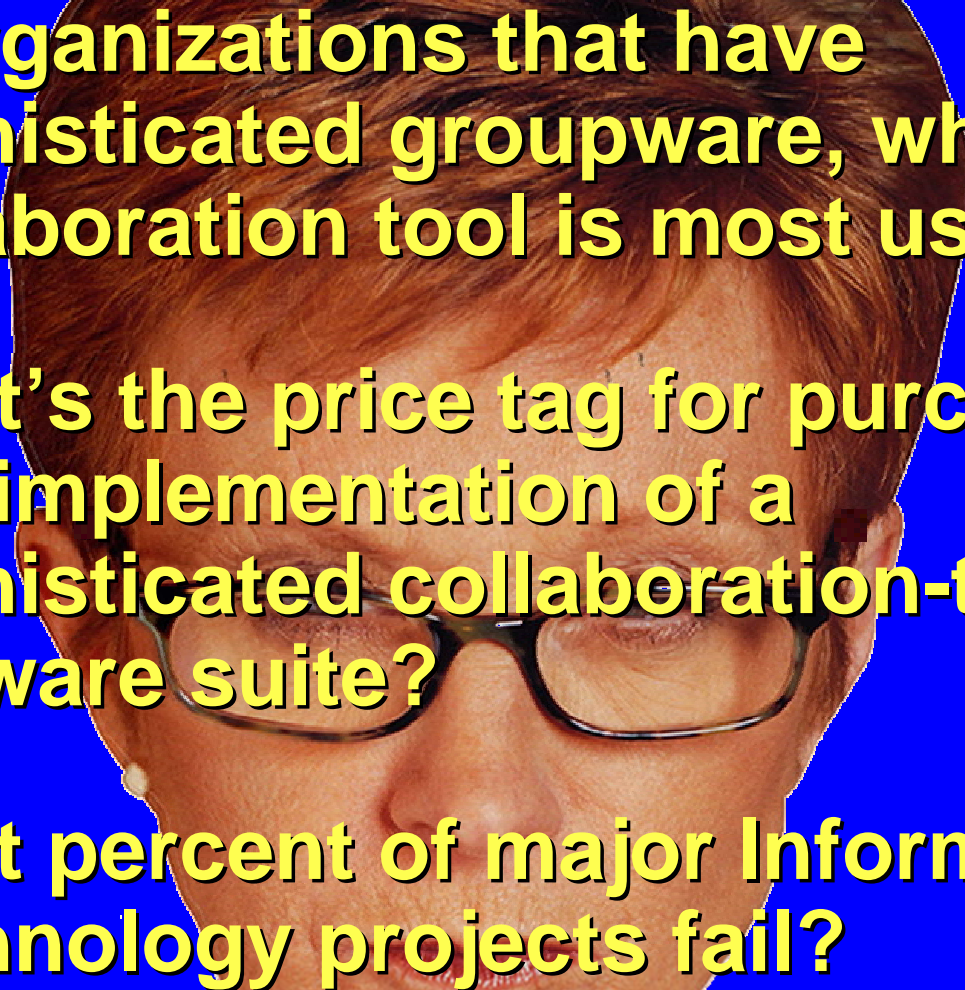
iCohere has developed a collaborative Community model that can help in analysis.



Source: iCohere Web site

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**

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- **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-tool software suite?**
 - **What percent of major Information Technology projects fail?**



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">• Work more effectively in a “different time, different place” environment
Solution	<ul style="list-style-type: none">• Enhanced collaboration, enabled by new Tools

How People Work

We analyzed the four basic ways our teams worked.

Same Time, Same Place

- Electronic whiteboards
- Electronic meeting rooms
- Resources
 - Document repository
 - Rosters of multiple types
 - Calendaring/scheduling
 - Project/task management
 - Voting tools

Same Time, Different Place

- Application/whiteboard sharing: view/create
- Teleconference
- Videoconference
- Chat
- Broadcast (with participation)
- File transfer
- Resources

Different Time, Same Place

- Desktop computers, kiosks
- Blackboards
- Group rooms
- Resources

Different Time, Different Place

- Discussion databases
- E-mail
- News feeds
- Voice mail and Fax
- Resources

How People Work

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

Same Time, Same Place

- *Electronic whiteboards*
- *Electronic meeting rooms*
- **Resources**
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Same Time, Different Place

- **Application/whiteboard sharing: view/create**
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Different Time, Same Place

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Different Time, Different Place

- **Discussion databases**
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- *News feeds*
- *Voice mail and Fax*
- **Resources**

Let's track the collaboration decision areas...



How people work

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Users' needs

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



Users' needs

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**

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**

Decision areas

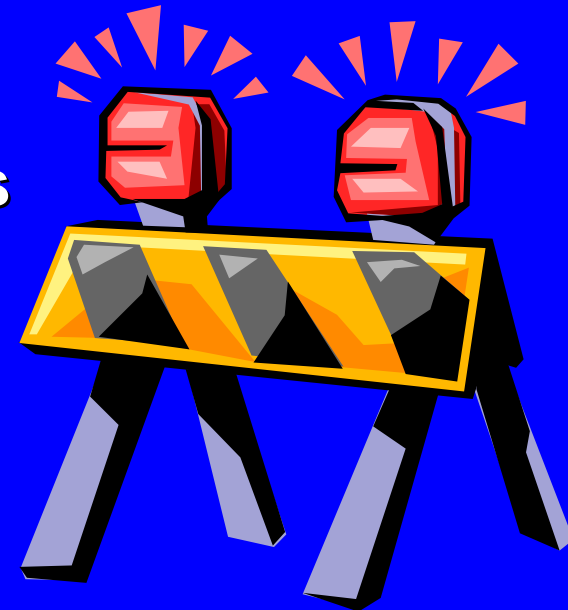
Let's track the collaboration decision areas...

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Barriers

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



Decision areas

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Tools

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**

Tools

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**

Tools

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

Tools

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

Decision areas

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Vendor selection

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

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- *Internoded*
 - *Marin Research*
 - *Business Evolution*
 - *Imanage Technologies*
 - *Instinctive Technology*
 - *Etc...*

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- CustomerTrack*
 - Project Gateway*
 - InteractPro*
 - ProManage*
 - eRoom*

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

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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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