



# Collaboration— Tying Things Together

**Larry Chait**  
**CHAIT&ASSOCIATES**  
**March, 2006**

## Key Success Factors

---

**Nine 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**
- **Rollout process**

## Key Success Factors—*Personal Imperative*

---

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

- Critical to job performance
- Tools must be learned
- Tools must be used
- Work processes must change



---

***What's***

***In***

***It***

***For***

***Me?***

## Key Success Factors—*Mission-critical to Team*

---

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



## Key Success Factors—*Management Commitment*

---

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

- Commit to new patterns of collaboration and tool use in everyday work
- Set unambiguous expectation – enhanced collaboration *will* be “the way”
- Unquestionably “walk the talk”
- Provide to learn new tools and develop new processes
- Empower a qualified moderator



## Key Success Factors—*Committed Moderator*

---

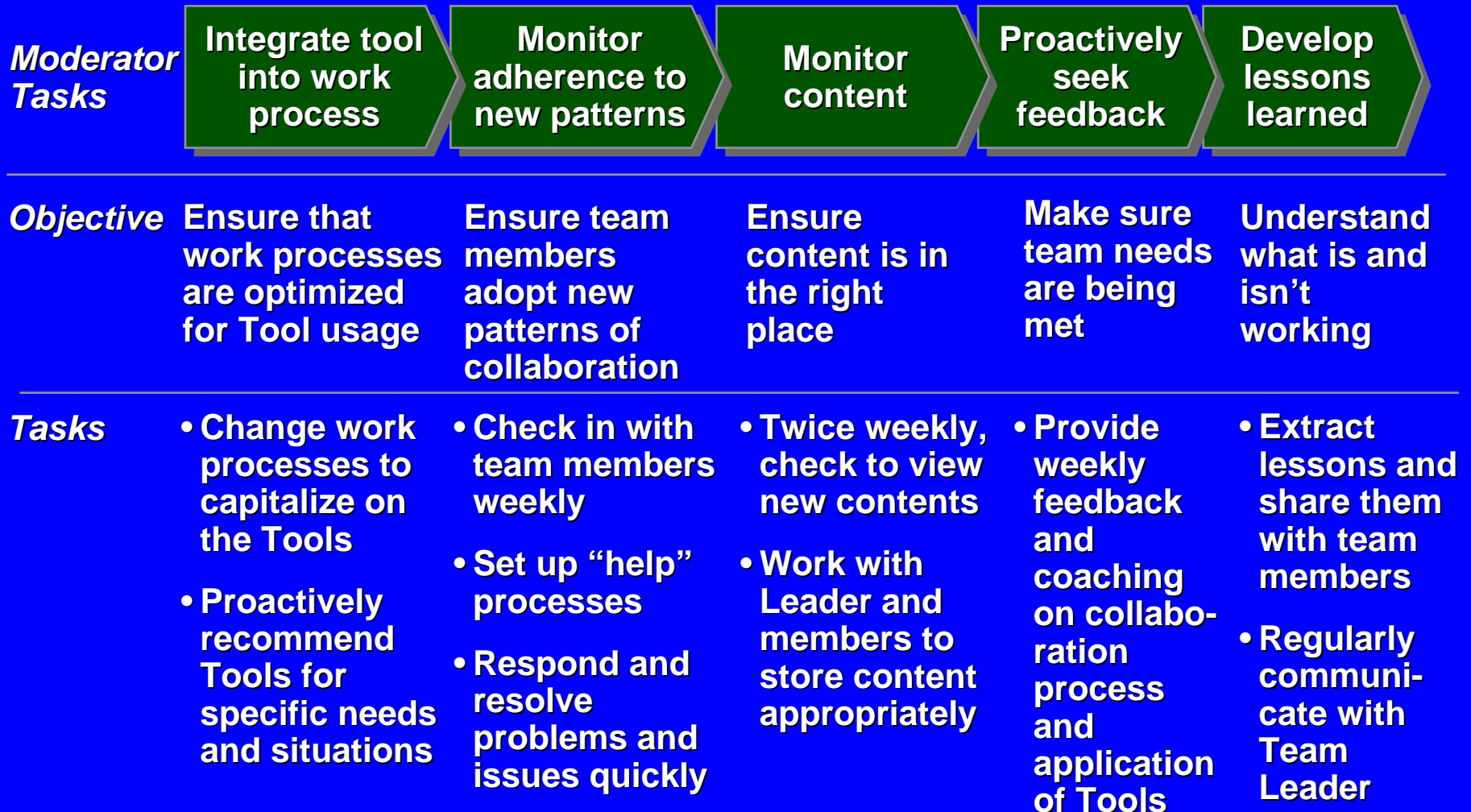
**Teams need a committed and well trained moderator with time available to do the job.**

- Moderator training
- Team training
- Content management
- Monitor, troubleshoot, coach, facilitate, intervene, enforce



## Key Success Factors—Committed Moderator

**The Moderator has responsibilities across the life cycle of a collaboration initiative.**





## 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.**

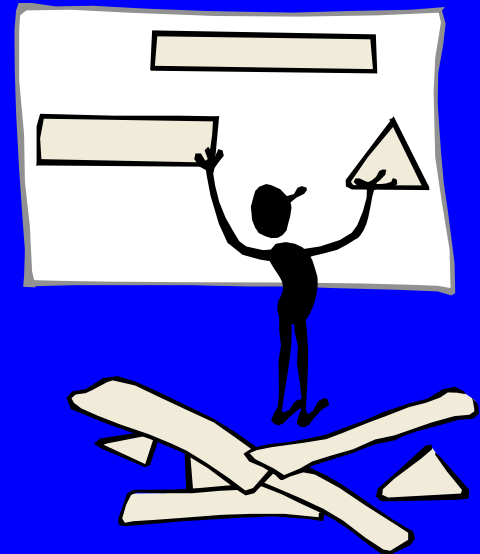
Roles	Responsibilities
Team Members	<ul style="list-style-type: none"><li>• Personally commit to need for change</li><li>• Change processes to adopt processes / tools</li><li>• Take the time to learn and use new tools</li></ul>
Team Leader	<ul style="list-style-type: none"><li>• Commit unwaveringly to the program</li><li>• Set clear expectations and “walk the talk”</li><li>• Appoint and empower the moderator</li></ul>
Moderator	<ul style="list-style-type: none"><li>• Train and coach team members and leader</li><li>• Manage content</li><li>• Monitor patterns and ensure effectiveness</li></ul>

## Key Success Factors—*Embedded into Work Processes*

---

**Collaboration Tools must be embedded into work processes.**

- Understand work processes
- Identify tool opportunities
- Redesign processes
- Embed tool use into work processes



## Key Success Factors—*Culture and Behavior Change*

---

**A thought leader in collaboration says that culture is the greatest challenge.**

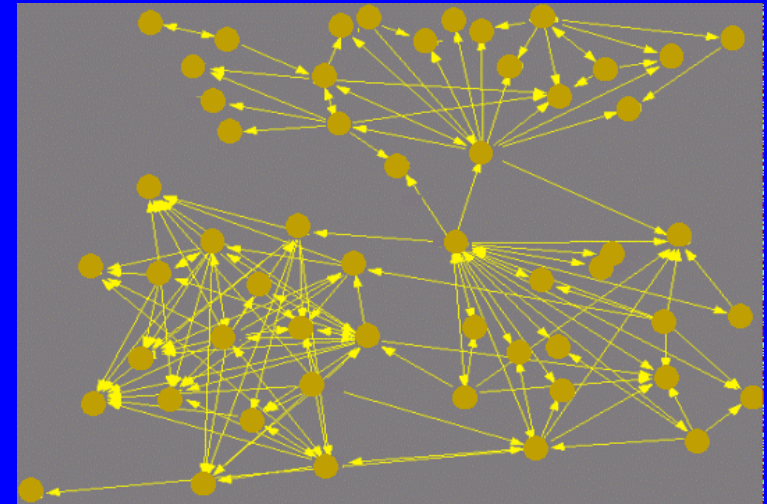
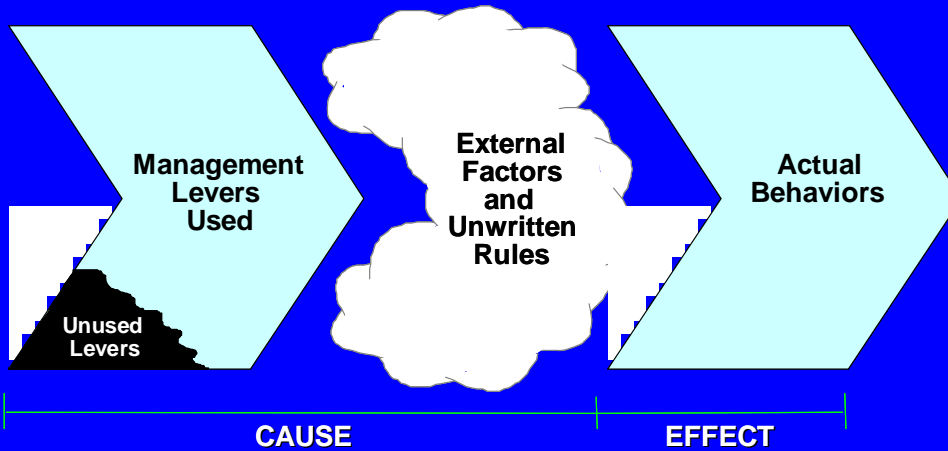
**“People accustomed to doing their jobs a particularly way for years may be hesitant to change, viewing new collaborative processes as a threat to their status in the organization and fearing they lack the skills and expertise to operate within the unfamiliar environment.**

***Ed Miller***

Source: Ed Miller, *Facing Collaboration Challenges*, Computer-aided Engineering, August, 2001

# Key Success Factors—*Culture and Behavior Change*

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



<b>Communication</b> Shares what/why	
<b>Coercion</b> Breaks the status quo	<b>Participation</b> Enables ownership
<b>Rewards</b> Reinforce desired behaviors	<b>Role Modeling</b> Lets people copy what they see
<b>Structure, Infrastructure, Work Processes</b> Define work processes and relationships	<b>Mental Models</b> Act as filters on reality

Adapted From: Nevis, Lancourt & Vessotto, *Intentional Revolution: Learning to Lead*, 1996

## Key Success Factors—*Infrastructure support*

**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

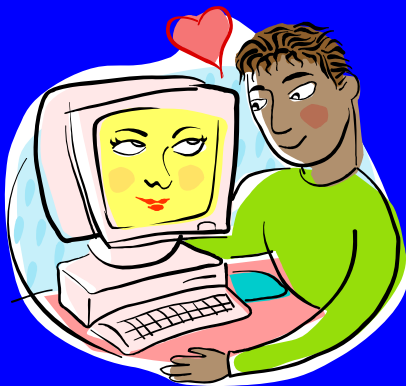
To access the latest version of the Guides, click on the appropriate documentation link under **Help** on the Home Page of the intranet

## Key Success Factors—*Appropriate Technology*

---

**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 processes and work styles**

## Key Success Factors—*Rollout Process*

---

**Last but not least, how collaboration is rolled out will directly impact on its success or failure.**



## **Key Success Factors—*Rollout Process***

---

**Last but not least, how collaboration is rolled out will directly impact on its success or failure.**

- **Address real business needs**
- **Prototype and pilot**
- **Ease it in – don't try to go from zero to sixty**
- **Teach and train**
- **Moderate and facilitate, coach and cajole**
- **Coerce only under duress, and then only with cunning**
- **Recognize it will first be perceived as an intrusion, then tolerated, and ultimately a habit**
- **Monitor, measure, and improve**



# Lessons from DEC NOTES

- Committed project manager
- Fit with work tasks and project mission
- Single tool set, integrated with email and file system
- Shared behavioral norms
- Supportive culture
- Empowered moderator
- Management support and commitment



# Lessons from Notes

- **In companies that are not culturally ready to collaborate, groupware on its own is unlikely to engender collaboration.**



# Lessons from Pilots with eRoom and SharePoint

- Capability development and training are critical
- Integrating tools into work practices isn't intuitive
- Team norms, practices, and commitments are key
- IT/KM infrastructure issues can be complex



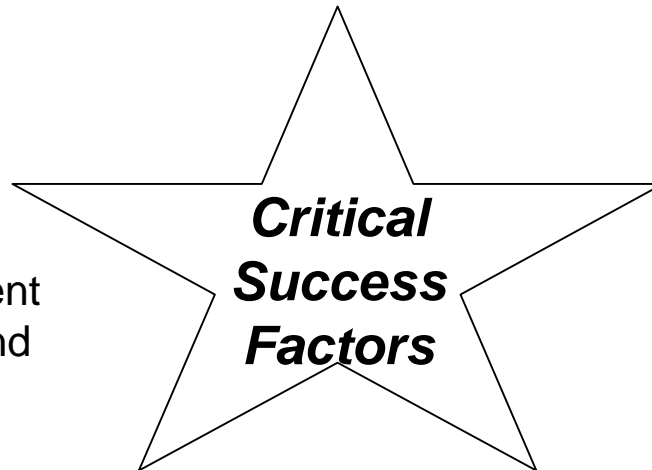
# Critical Success Factors

## ***People***

- User acceptance
- Participatory design
- Understand cultural factors
- Ongoing learning and support

## ***Collaborative Infrastructure***

- Provide framework for consistent use
- Integrated with document management, email, and intranet



## ***Mission and Purpose, Alignment***

- Pilot with strategic, business-critical projects
- Strategic messages to support adoption

## ***Organization***

- Provide framework for consistent use
- Integrated with document management, email, and intranet

## ***Work Practices***

- Coach team leaders
- Bring in best practices
- Integrate the tool into daily work practices



## Lessons

- Most successful when used for a specific use case or business process
- Less successful for “loose collaboration”
- Customized applications
- With scale, issues of integration and security

## Lessons

- Quandary 1
  - Feature-rich – “Advanced” collaborators want more
  - Instinctively easy to navigate
- Quandary 2
  - Trust and collaborative culture
  - Management access



# Lessons



- It is often important to uncover, understand, and defuse mental models
- Differences local workplace culture (age, experience, et al) are more important than differences in national cultural



# Lessons

---

- Organizations should build a social environment that encourages personal relationship building – that leads to trust and team cohesiveness
- People can learn to better exchange personal information, which expands personal knowledge, develops shared interests, and establishes intra-group relationships.





# Lessons

---

- Use social software
- Help workers to find common ground
  - ✓ Encourage chit chat
  - ✓ Train workers on popular culture
  - ✓ Workers should learn to reciprocate
- Replace cross-cultural training with relationship building training
- Hold face-to-face meetings at neutral sites

# Web 2.0 Basics



- How we collaborate is undergoing a major transformation
  - The network as platform
  - The network as means for publishing and creating
  - The social network
  - RSS as the new language
  - Aggregators as the new desktop

# Networked Learners

- Larger, deeper social networks
- More people outside their organizations in their networks
- More aware of who and where to go to in order to get critical information
- Invest significantly more time in their networks
- More productive and innovative

# Learnings

- “Research” can be seen a very new light
- I can create an upstream network to make me as wise as possible with the least amount of work
- Podcasts are incredibly easy to make, standardized globally, portable, and incredibly inexpensive

# Tomorrow's Collaboration Environment



# The Power of US

- Empower people to personalize their spaces online
- Provide cultural environments where people and ideas can bump up against one another.
- Build culture of “linkology.”
- Enable “countercultures” where power, policy, and politics can be put aside.

# Collaboration Rules



- Common task and interaction disciplines
- Granular communication
- Visionary leaders who connect others
- High levels of trust
- Formal structures that enable, not disable

# Lessons

- Trust is at the core of true collaborative behavior
- Trust, semantic development, and social norms are intimately involved
- Everyone must do his/her why/whys – and require interaction



# Lessons on Enhanced Network Learning

- Consult for free to suppliers – process knowledge – with the understanding that there are no secrets
- Establish nested networks and learning groups to work on “projects” – which develop relationships and shared language
- Build a dynamic collaborative system for support in good times and bad

# Lessons

- Go from controlling the knowledge flow to making the right handshakes
- Build a succession plan for your collaboration network

## What's the purpose in doing it?

- Produce a deliverable
- Coordinate activities
- Innovate/invent
- Socialization
- Plan
- Solve a problem
- Share knowledge

## What tools might they use?

- Search
  - Semantic search
  - Expertise management
  - Social network analysis
- Technology (to support co-located and non-co-located teams)
  - Electronic Bulletin Board
  - Inter/Intranet Discussion
  - Document Repository
  - Web Site
  - E-Mail
  - Conferencing and chat
  - Team Directory
  - Scheduling
  - Links database
  - Decision support tools
- Event/meeting management
- Workflow management

## Who is doing it?

- Two people
- A team
- Workgroup/department
- Task force
- 10-100-1000 people

### Collaboration

*Two or more people working together to accomplish an objective.*

*Sharing Knowledge must be a part of collaboration*

*Source: Multiple KMForum sessions on Collaboration in Burlington, Boston, and Waltham.*

## What's needed to make it work?

- Enlightened self-interest
- Supportive culture
- Personal imperative
- Team-critical
- Embedding in to processes
- Leadership
- Unifying principle (vision)
- Clear, tangible objective
- Well-defined process

## How can the effort be supported and enhanced?

- Give them time and "space" to collaborate - i.e., supportive management
- Teach them how to do it effectively
- Provide or train a committed moderator
- *Really* help them get answers
- Provide suggestions proactively
- Store work artifacts in a structured, accessible way
- Provide human intermediaries
- Align behavioral influencers
- Foster knowledge sharing
- Provide supportive technology
- Ensure at least one face-to-face meeting

