

Alister Webb with Andrew Pope

DESIGNING COLLABORATION

An Essential
Handbook for
Today's Digital
Workplace

The handbook
you need when
you need a
manual!

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Who should read this book, and why

Those in intranet and knowledge management roles

Intranet Managers and **Knowledge Managers** are deeply invested in building a collaboration culture, embedding knowledge sharing behaviours, and driving employee adoption of collaboration or information-sharing tools.

This book provides a dip in/dip out resource for building and maintaining collaborative behaviours, both for local teams and more broadly across the organisation.

It can also be used to produce a cohesive and comprehensive collaboration strategy, outlined in a later chapter.

Newer digital workplace roles

We're seeing an increasing number of roles with titles like **Collaboration Manager**, **Community Manager**, **Adoption Specialist** and **Employee Experience Manager** being created, often on the fly, to handle the new technology environments being rolled out across organisations.

Accountability for the success of new technology can present a confronting, even overwhelming challenge. The book lays out clear steps to break the challenge down into simple, do-able tactics.

Middle managers and team leaders

Closer to the shop floor, **middle managers** and **team leaders** represent the everyday face of collaboration, setting expectations and embodying the required behaviours. No matter where in an organisation this role sits, you are vital to the building and sustaining of a collaboration culture.

There are very few step-by-step, hands-on guides on how to embed great collaborative behaviours (not just tools) at the team and workgroup level. This was a significant motivator for us in producing this book.

Executives

Collaboration accountabilities are increasingly entering the ambit of senior executives. Across Human Resources, Communications, Information Technology and other key organisational areas, collaboration needs to be understood and actioned.

There are many simple and highly effective levers that can be pulled at the executive level. This book outlines in detail what they are, their importance, and how to apply them.

Change Managers

The introduction and adoption of collaboration tools, and the development of collaborative behaviours, involves significant workplace culture change.

Those in Change Management roles will benefit from the breakdown of good collaborative culture into clearly defined elements, each of which contain a raft of everyday 'how-to' tactics.

Information Technology (I.T.) leaders / Collaboration platform owners

We'll talk more about what 'collaboration platform' means in a moment, but in this context we mean roles that carry an accountability for the provision and support of collaboration tools and the technology platforms they run on.

For these roles the book provides a world of insight into how 'the business' (meaning, the non-I.T. part of an organisation) goes about applying the tools to their processes and workflows to produce the greatest possible benefit to the organisation.

Some of the greatest 'a-ha!' moments in our workshops come from I.T. participants who are introduced to the depth, complexity, and importance of collaborative behaviours in a business context.

Industry sectors and vertical markets

- Public and Private sectors
- Not-for-profit sector
- All vertical markets
- Government agencies

DESIGNING COLLABORATION

This SAMPLE CHAPTERS version of Designing Collaboration includes a selection of chapters and pages from various sections of the book in order to give you an indication of the content breadth and style.

The early chapters set the scene and provide insights into the underlying elements of collaboration, which are not always as obvious as one might assume.

They set the scene and context for the hands-on chapters that make up the core of the book.

Chapter 1

Introduction: Collaboration in the digital workplace

No matter whether you're a CEO or you work on the shop floor, everyone is equal when it comes to using social apps in our personal lives. We stay in touch with family and friends, we share photos, we indulge in hobbies and outside interests, we buy goods online. For many of us, across all age groups, it's now second nature, part of our lives. We're comfortable with it, it has purpose.

At work, the story is different. Porting the social app experience to the workplace as a vehicle for collaboration has been anything but seamless. What is second nature at home is not second nature at work. The meteoric take-up of social apps is not being replicated in the workplace.

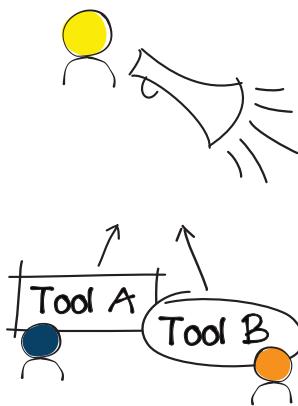
Not that there isn't plenty of upbeat rhetoric and excitement about. Every week vendors push out newer and better collaboration tools. On the other side, organisations of all sizes and across all sectors agree that digital workplace collaboration is now critical to their success. For good reason. People intuitively understand that collaboration greases the wheels of knowledge. Teams, projects, business processes, they all stand to benefit as knowledge speeds more quickly across an organisation, potentially turbo-charging work practices and executing existing business strategies faster and more effectively.

We also expect these tools to provide workers the ability to go ahead and create knowledge collaboratively, to release the latent creativity we know lies within any given workforce.* Organisations are throwing large sums of money at collaboration. Or, more specifically, collaboration tools.

But as the case studies begin to stack up, the news from the front is sobering. Organisations are realising that 'switching on' collaboration is not as simple as just rolling out a set of collaboration tools that roughly mimic those in our personal lives. Fulfilling the promise is harder than at first thought. Fundamental errors are being made. For example, we can now be fairly certain that attempts to implement a new, across-the-board

* Keith Sawyer: '*Group Genius. The Creative Power of Collaboration*', 2007, Basic Books.

collaborative way of working is doomed to fail when initiated in the following ways:



A top-down initiative, when senior management announce a tool deployment and mandate a change in how people work. All too often accompanied by a lack of behaviour modelling, and little guidance. 'We've given you some great new tools. Now we expect you to collaborate!'

A groundswell, bottom-up initiative. Local enthusiasm by individual teams adopting a tool, or range of tools, to get a job done. Typically this is not coordinated or strategic, and results in headaches for I.T.

There are no searing insights here. What they point to is a disconnect between the rhetoric of collaboration and putting it into practice.

To start to understand collaboration in the digital workplace, let's go back to first principles and ask ourselves a fundamental question:

 What exactly is collaboration?

According to just about every dictionary and business manual, it's this:

 Working jointly with others in pursuit of a common goal

... or words to that effect.

This carries an assumption that collaboration is a single thing controlled by an On/Off switch. We either collaborate or we don't. As though all we have to do to create a culture of collaboration is find the magical On switch. And the most common place people look for that is the tools.

This book presents a different view.

Collaboration in the modern digital workplace is not a single thing. It has different facets. It can range from improved cooperation and knowledge-sharing between teams, to actively building the intellectual capital of an organisation. It's less about a suite of fancy new tools than the collaborative behaviours of the people who use them. Rather than be magically switched on like a light, these behaviours need to be developed

and eased tactically into a business environment, then nurtured and supported so they don't fall away.

When we talk about a collaboration strategy in this book, we're not talking about the planned rollout of platforms or tools. A collaboration strategy is the blueprint we design for building employee connections and relationships, growing knowledge, breaking down the walls of hierarchies and silos, fitting collaboration tools to business processes (and not vice versa), and ensuring the sustainability of it. All the while circling back to check that it's improving the experience of the end customer.

A level of improved workforce cooperation is only a part of it. Collaboration design, in its totality, seeks to create an environment in which employees feel free to exercise their natural inclination towards working together. Where collaboration starts with business needs and a desire to collaborate, not the rollout of new technologies.

Collaboration is a complex, multi-layered process, very different from just switching on the light or handing over the keys to a new set of tools.

As we progress through the chapters you'll see that there are many levers that can be pulled or pushed to design sustainable collaboration and embed it into your digital workplace. Some are strategic, and may take some time. Mostly, though, they are things you can do today using the tools you already have.

Section by section we will introduce them in small, manageable steps.

Over the next few chapters, different modes of collaborating are identified, as well as distinguishing between collaborating in the analogue domain and collaborating in the digital domain.

Chapter 4

Collaborating in the analogue domain

We'll be spending a lot of time over the course of this book talking about the digital world, but a great place to start the discussion is to ask: what do we currently do in the analogue world? What are the natural human behaviours that we're porting across to the digital domain?

So let's unpack a real-life collaborative event. The meeting room. Here we're talking about a good meeting – not one of those time wasters where we take turns making up what we know will sound good. This is a meeting that actually achieves something, that solves a problem, builds knowledge, takes the team forward.

When we collaborate well in a meeting room, a number of different human interactions typically occur to make it work. These are shown here in Figure 4. Let's break them down.

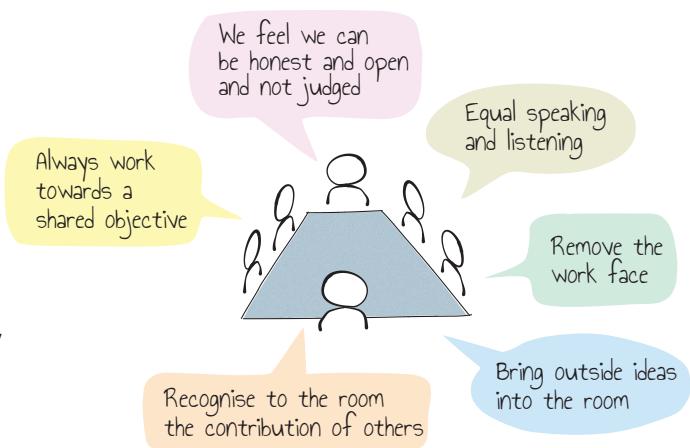


Figure 4. Collaborating in a room.

① We feel we can be honest and open and not judged

Most of us have experienced it. That fear of speaking openly and honestly about the team's activities lest we be judged in some way or it feels like a bad career move. Motivations in such a room are dominated by self-interest and harm-avoidance, a toxic environment for collaboration. We say what is expected of us, not what actually is needed to be said.

In a good meeting room, where the eyes on us are not judging but instead showing a keen interest in what we say, good or bad, we feel safe and are motivated to collaborate. We focus on candidly raising and solving problems rather than justifying our existence. Our instinct turns to revealing knowledge, not hiding it.

⌚ Equal speaking and listening

Equal speaking and listening sounds self-evident, but isn't. Predefined agenda slots for reporting back to the team is not collaboration. (Like me, you may have been in meetings which start with the team leader placing a watch on the table to manage the agenda slots.)

In a collaborative meeting, a general discussion is allowed to ebb and flow depending on the content, and participants make a point of listening as much as speaking. This way, dominant personalities don't hijack discussions and those who are less confident quickly develop the courage to contribute.

Effective collaboration occurs when listening is rated as just as highly as talking.

⌚ Remove the work face

It's curious how we change who we are when we begin work each day. We strap on the work face and become a role, careful not to reveal too much of ourselves. Paradoxically, it's been shown that empathy and human understanding are a hallmark of highly functioning teams*.

Removing the workface doesn't mean revealing one's innermost secrets. It just means starting the day as the person you are. Bringing with you the same understanding and leeway that you bring to those outside of work. Not seeing them as a 'role'.

No one can collaborate effectively with people they perceive as a cardboard cut-out. Removing the workface, being human, connects us more closely with the others in the meeting room.

⌚ Bring outside ideas into the room

Meetings with the same input from the same people is unlikely to produce surprising, forward-thinking results. Whereas meetings that inject new perspectives, fresh thinking, bring in outside speakers and reference conversations from outside the group, kick us forward and increase the chances of prompting something new.

There is no better way to spark new approaches than learning something new and applying it to the challenges and opportunities at hand.

Bringing outside ideas into the room is what keeps the focus on getting better.

* Charles Duhigg: 'Google High Performing Teams: What Google Learned From Its Quest to Build the Perfect Team', *New York Times*, February 25, 2016

⌚ Recognise, to the room, the contribution of others

Like participants in any activity, good collaborators are energised by recognition of their contribution. Not necessarily by being given a prize (which is usually counter-productive) or even recognition by management, but by their peers in the room acknowledging the value of the contribution. Anything that leads a conversation in a new direction is valuable, and should be affirmed as it happens.

Recognising the value of contributions keeps collaboration levels high. We all like a pat on the back.

⌚ Always work towards a shared objective

As we've discussed, a good collaborative meeting doesn't waste time on formal round-robin speaking slots. People are there to focus on a problem to solve, to explore ideas. They implicitly trust their colleagues not to be judgemental. They respect one another's contributions and are keen to bring in outside thinking.

When all of the above occurs around a single point – the team's objective and vision – the conversation is intuitively aligned to purpose. Why we're doing it. There is no confusion. Collaboration isn't just easy, it feels like the most natural way forward.

• • •

This is collaboration in the analogue domain. The (good) meeting room.

Think of some good (or not so good) collaborative meetings you've experienced yourself. Which of the above elements were or weren't present? Were there other elements?

Now we'll compare this to what happens in the digital domain.

Chapter 5

Collaborating in the digital domain

Collaboration in the digital domain typically starts in a very different place, and with a much narrower focus: the rollout of collaboration tools.

All too often the script resembles what we see here in Figure 5.

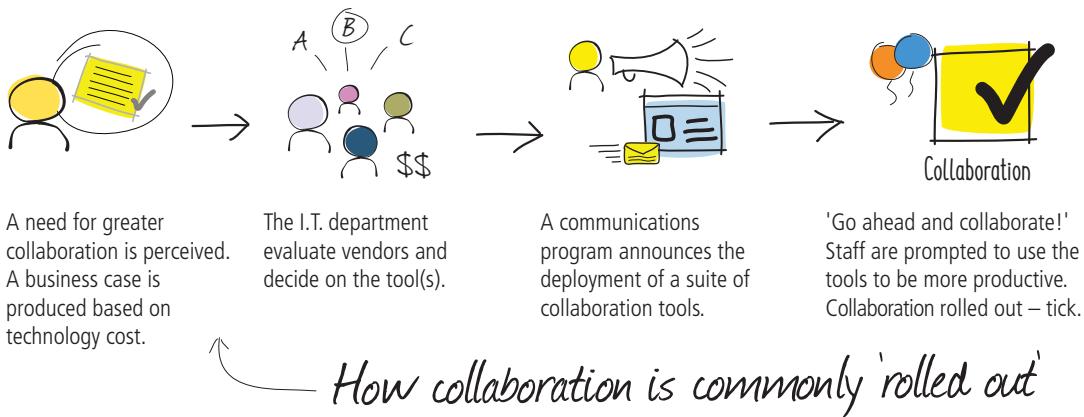


Figure 5. A common collaboration rollout script.

It assumes that somehow, by osmosis, employees will as one apply the new toolset smoothly and efficiently to the business activities they undertake every day. After all, the tools are similar to the social media apps most people use at home (hence the term 'social collaboration'), so why not?

There is an accompanying expectation from senior leaders that the rollout will of itself make collaboration part of the fabric of the organisation. That by simply having the tools people will find ways to collaborate.

They're encouraged to use the new collaboration tools to:

- seek answers to work questions;
- supply answers for work questions;
- tap into the existing knowledge pool to complete tasks more effectively.

The intent is good – make sure the right knowledge gets to the right people at the right time. With conversations occurring out in the open*, knowledge will spread virally and be available to others who might benefit from it. Staff are encouraged to transition to this new way of working in preference to phone calls and emails, where knowledge transactions are locked away in closed channels and invisible to others.

To help initiate conversations, staff are also invited to blog about their outside interests and, well, anything else they want to blog about. But with no context or guidance, and fear of being the first to do so, that part of the communication is a much harder sell.

Overall, though, it's positive. People understand, intellectually at least, that the new tools have the potential to increase knowledge velocity, i.e. the rate at which knowledge moves across the organisation. They understand the potential to flatten the organisation's hierarchical rigidity, and reduce the difficulty of geographical dispersion.

People's interest levels, early on at least, tend to be fairly high. Not surprising, given the promise of tools that will help them do their jobs more effectively and give them a way to tap into colleague networks. A way to speed up their current work practices and enable them to get quick answers when they need them.

But let's think back to our analogue meeting room for a moment and ask a question: how effectively would the people in the room be collaborating if all we asked them to do was:

- ① seek answers to work questions;
- ② supply answers for work questions;
- ③ use the meeting to tap into the existing knowledge in the room just to complete their tasks more effectively?

This wouldn't be considered a good collaborative meeting. It would demonstrate a very narrow understanding of what collaboration is.

In the analogue meeting room many more interactions occur. Briefly go back to the previous chapter to remind yourself what these high value interactions are. An emphasis on listening, a focus on the richness of the conversations rather than the formal mechanics of the meeting, a drive towards bringing in new and lateral thinking. Building on and extending the knowledge we already have, applying it to problems.



* A concept expanded by John Stepper in his book 'Working Out Loud', *Ikgai* Press 2015

For collaboration in the digital domain to be a game changer, it must enable us to bring the behaviours and values that make us great collaborators in the analogue meeting room across to the digital world. We need to aim higher than the narrow ambition of collaborating solely to do our jobs faster.

Great collaboration involves a broader ambition: introducing new knowledge, enhancing and extending existing knowledge, collectively assembling smart solutions to business needs. Discovering solutions we might not know we even had. Questioning our current work practices rather than passively accepting them.

Just as we do in the (good) analogue meeting room.

To better understand the difference, let's put these two modes of collaborating side by side.

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We go on to talk about two very different modes of collaboration, Passive and Active, and how important the latter is.

Having set the scene, we now introduce the book's core chapters: the seven #elements of collaboration design.

Chapter 7

Introducing the seven #elements of collaboration design

As I hope we've begun to show you, collaboration has many moving parts. So where does good collaboration design begin? How do we even start to pull such a complex thing together and connect it to what the organisation does every day? Where do we turn the first clump of earth?

As with any business problem, we break it down into its constituent parts. In this case, the seven #elements of good collaboration design which we collectively term the Collaboration Designer. They will get us to our end game of a multi-layered, mature, collaborative culture.

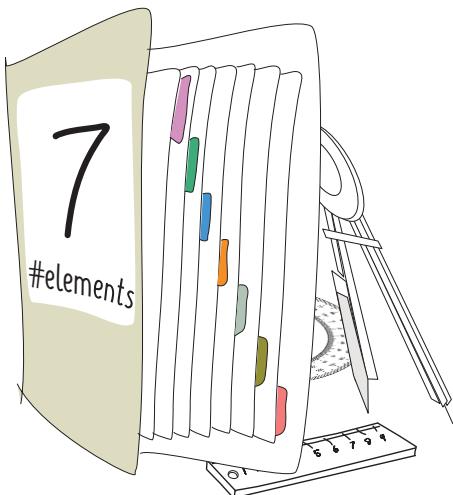
They represent clusters of behaviours which, over the years, we've observed to be the most effective and essential for a highly functioning collaborative ecosystem.

We will tackle each element with common sense, not much budget, and clear lines of action. We will cover what to do to get it going, and what to do to keep it going. Each element is a vital part of the whole, but you have the freedom (with one qualification we'll cover presently) to tackle any part of any element at any time, the dip in/dip out approach we mentioned earlier. We

encourage you to work at first with those elements and tactics that you feel you can achieve today in your organisation.

The seven elements are not designed as steps that follow one another in a particular order. However, the first few represent the foundations on which others need to be built in order to make the changes sustainable, even in the medium term.

Let's take a quick, high level look at the seven #elements of the Collaboration Designer before we dive into each one more deeply, in the chapters to come.



Collaboration Designer

#1 Granting permission to collaborate

Collaboration can only exist in an environment where people feel absolutely safe contributing, trusting that their participation won't negatively rebound on them, trusting that their voice will be heard. We need to overtly grant them permission. It's a fundamental requirement, a bulwark, of successful collaboration.

#1

#2 Vision

Why a vision for collaboration is crucial, and how to arrive at one no matter where you are within an organisation.

#2

#3 Get people talking

Collaboration is powered by conversations. What motivates and initiates a workspace conversation? Do we need to adjust our view of what a 'business conversation' actually is? This chapter will look at conversations from many angles and provide ways you can get your people talking.

#3

#4 Aligning with work – understand your collaboration touchpoints, and then map the tools

Let's flip the logic. Instead of scratching our heads about how to apply the tools to our work, let's figure out who we need to be collaborating with and, once we get that right, look at how the tools can help us achieve that.

#4

#5 Guidance – avoiding tool confusion

The most common question for staff in the digital workplace is 'What should I use when?'. It's a fair question in what can be a very complex digital landscape. We address this question by transforming a traditional governance approach into one of guidance – ways that people can be guided through the complexity.

#5

#6 Taking collaboration to the next level

– Active collaboration

We've already touched on the differences between Passive and Active collaboration, and the higher business value of the latter. This chapter focuses on ways to generate high levels of Active collaboration.

#6

#7 Managing ongoing progress

– making the design sustainable

Tracking progress on your collaboration journey is important. Usage stats, no matter how detailed, do not measure the progress of collaborative behaviours. In this chapter we present ways that you can.

#7

DESIGNING COLLABORATION

The chapters that immediately follow look at each of the seven elements in a high level of detail.

Chapters are broken into five identical sections, listed at the top of each introductory page.

Following are some randomly chosen examples of how this content is presented and written.

The first is from the chapter titled 'Granting permission to collaborate'

Chapter 8

Granting permission to collaborate

- Why it's important
- How to do it
- Who is involved
- What it looks like when it's working
- Ongoing maintenance required to sustain it

1.1 Why it's important

Let's be blunt: this is the foundation of successful collaboration. It creates an environment of trust. Trust that we can participate without repercussion or risk. Without that trust, your collaboration initiative will never gain traction. Can't be any clearer than that.

When people are given tools but not also given permission to interact openly, honestly and candidly when using those tools, all that's achieved is a slightly improved but otherwise unchanged workplace. New tools, old habits. The best we can hope for is an uplift in Passive collaboration, whereas our ultimate goal (as we will see in a later chapter) is a workforce of Active collaborators.

We all have instincts towards collaborating, but they are very easily undermined in the workplace. Largely through fear (Figure 8).

We fear, consciously or subconsciously, that honesty and candour expose us to risk. Anything from fear of looking stupid to the much deeper fears of damage to our reputation, our job prospects, our confidence. Especially when what we have to say is negative, or conveys bad news. And so we shut down our natural collaborative instincts. The arrival of shiny new collaboration tools doesn't remove this risk.

Figure 8. The predominance of fear.



In fact it can exacerbate it by opening up more opportunities to expose ourselves to risk.

Nor are middle managers and team leaders immune to fear. Their fears are different but no less real. Fear of not meeting targets, fear of their staff wasting time, fear of being seen by *their* managers as being slack, ineffective or simply not focusing solely on their duties. Sometimes these fears are imagined, based on expectations of how we think we *should* be working. But this makes them no less present.

To counter these fears, we need to give clear and overt permission to be open, honest and candid – three of the most important behaviours in a successful collaboration environment. We need to acknowledge that doing so may well expose organisational weaknesses and stress points, but that this is what our leaders want. A good leadership team is just as interested in what needs improving as what's going well, if not more so.

Tacit or implied permission ('Surely they realise they can do that already!') is not enough. Permission must be clearly voiced, highly visible, and carry appropriate authority.

Attraction v Fear*

There are two very strong emotions that drive our attitude to work participation: attraction (to an idea, an objective, a leader), and fear (of damage to career or confidence). For great collaboration, we need the first to be the stronger. The reality is that the second, fear, will prevail and drive our behaviours whenever risk is present.

The visible and overt granting of permission to collaborate is how we remove fear from the act of collaborating. It's how we make the workplace feel like a safe place to open up and be candid. A place employees feel they can be authentic and contribute fearlessly, without risk. Where their attraction to the vision and purpose is unthreatened by a fear of participating.

1.2 How to do it

We can give permission in different ways, which we will outline. The aim should always be to have it led from the top, at the C-suite level (CEO, CIO, COO, etc). Permission to collaborate should be granted from as high up the food chain as possible.

We know first-hand that this is not always achievable or realistic. In the absence of senior leadership, permission to collaborate can still be granted by middle managers in isolated business areas, workgroups or teams.

* David Rock: 'SCARF: A brain-based model for collaborating with and influencing others', *NeuroLeadership Journal*, Issue One, 2008.

Just bear in mind that the smaller the footprint, the lower the impact on organisational culture.

Clear and strong statements from leaders – a communications strategy

The starting point for this step is a clear Communications Plan built around the strategic objective of Granting Permission. It involves clear statements from senior leaders covering the points we list below.

Statements should be cliché-free and conveyed in plain language with no corporate-speak. Scepticism will kick in at the first suggestion of anything that lacks authenticity. Employees take great pride in ignoring anything that sounds like typical management guff.

These messages must – yes, *must* – be accompanied by action, by clear and conspicuous behaviour modelling. Walking the talk. Announcing to your workforce you're supporting and sponsoring the change isn't enough. To gain most impact and set an example for the behaviours you want to see in your organisation, as a senior leader you should present yourself as a participant in the change. It powerfully underlines its importance. Otherwise, the message comes across as 'Here is something new that we are doing to you.' Never a great starting point for deep change.

Taking this into account, here are the key elements to build into a Communications Plan for a collaboration platform rollout or refresh:

- A clear explanation of the business context – why collaborating is highly valued, what it means to existing practices, what it means to the future success of the organisation.
- The announcement of, and a link to, the Collaboration Constitution (see below)
- A strong statement that this is how the leadership team now expects the organisation to work, for the organisation's future success
- A strong closing statement that the leadership team themselves will be, or already are, working in this way.
- Consider a light-hearted admission from the sender (the senior leader whose name is on the communication) that he/she is definitely not a digital native* and will, like everyone else, be learning to adapt to the new way of working. This suggests camaraderie with the workforce and a shared breaking down of walls.

Follow-up messages

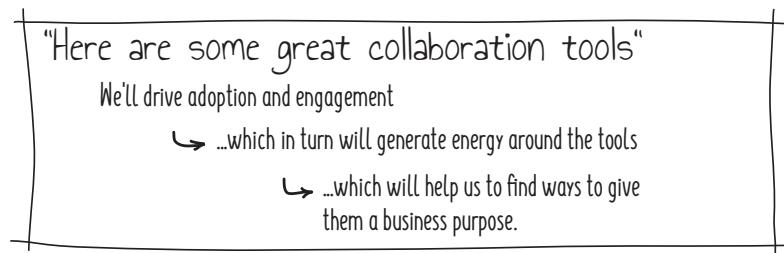
Reinforcement of these initial messages with follow-up messaging is

* 'Digital native': a younger person who has grown up with digital technology, as opposed to those who have had to learn how to use it as an adult. Although coined earlier, it gained currency following the publication in October 2001 of an article by education consultant Marc Prensky: 'Digital Natives, Digital Immigrants' (On the Horizon, MCB University Press, Vol. 9 No. 5).

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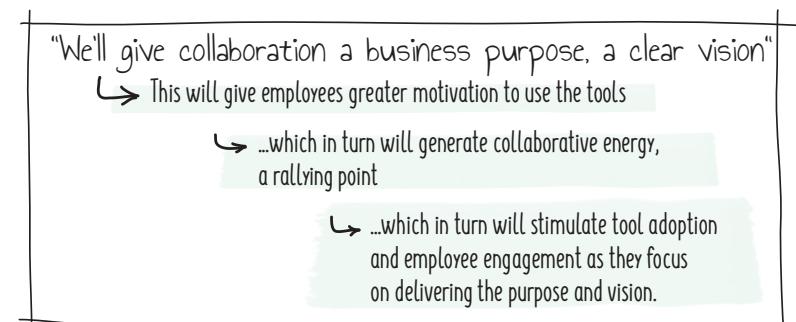
From the chapter titled 'Vision - the reason we do it'

This is how the logic generally flows:



#2

When we flip it, it runs more like this:



In this version we put purpose and vision at the *start* of the equation – where it should be – and not at the end as an outcome.

There is nothing unusual about this. Without a clear and strong purpose, any business initiative will struggle. Knowing why we do things is one of the best ways to drive participation and reduce resistance to change.

A vision or goal for collaboration as loose as 'to collaborate better', or even 'to transform the digital workplace' does not articulate a purpose. It doesn't directly guide or drive people's actions. It articulates an ideal. It sounds nice, but it's never going to prompt a surge in the uptake of collaboration tools. Worse still, it makes it appear as if collaboration itself is the end goal. Collaboration is never the end point. Collaboration is an enabler to help us get to an end point.

So for this element of collaboration design, we need to start by asking a single fundamental question:

What is the primary compelling reason we should change the way we work?

Yes, *change the way we work*. In italics. We aren't just asking employees to start using a set of new collaboration tools. We're asking them to



A strong way to communicate a vision is a simple image or picture. John F Kennedy gave us the image of a man in a space suit walking on the moon.

Non-Government Organisations and Not For Profit organisations are good at conveying the human experiences they are working to improve by showing us what we ignore when we do nothing.

Whatever level your vision is targeted for, ask: can it be expressed via an image or picture? The word vision, after all, comes from the Latin *videre*, meaning 'to see'.

fundamentally change the way they work. To disrupt the patterns, habits and behaviours that have worked for them in the past. We're asking them to embrace the tools as the new default pathway to everyday work.

To facilitate such a fundamental change, we need that reason, that business purpose, to be explicit and clearly understood. It needs to be much more compelling than 'to collaborate better'.

2.2 How to do it

Every organisation has goals. They come from the top and, for most workers, simply serve as a set of background ideals. To have bite at the local, everyday level, to provide something to push towards, they have to be given meaning. A more practical relevance.

Teams and workgroups typically translate them into goals that can be connected to the specific work they do, while still relating it back in some way to the high level goal and end customer. In Figure 9 we show some examples of how common organisational goals can translate to local work groups.

Figure 9. Translating goals at the local level.

'Improve customer Net Promoter Score'	→	● Never allow a customer enquiry to go cold ● Learn from war stories and adjust processes
'Reduce complexity'	→	● Constantly re-evaluate my team's processes ● Redesign accountabilities
'Sell innovative products'	→	● A smarter customer feedback loop ● Run internal innovation campaigns

Collaboration is no different. To give it energy and drive, we need to set a high level goal which can in turn be translated into meaningful goals at the local level.

How to set a vision for collaboration

AT THE EXECUTIVE LEVEL

Much of what we talk about in this book involves senior leaders. They have a significant role in any collaboration design. A vision for collaboration (as distinct from the broader organisational vision) is no exception.

A global vision for collaboration sets the standard, defines a direction, and demonstrates a vested interest by senior leaders in collaboration becoming a pillar of organisational success.

At the executive level the vision doesn't need to be detailed, but it does

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From the chapter titled 'Get people talking - initiating conversations, harnessing naysayers'

staff. By nature it exists to facilitate conversations – which is why it's called 'social'!

Unless you're prepared to test people's responses and accommodate debate, put the big one-way megaphone-type announcements on the formal intranet, or on a home page.* Maintain a clear separation between announcements and conversations. Broadcasts down conversation channels muddy the purpose of the channel. People start to feel sceptical about its real purpose, which in turn decreases their willingness to participate.

Patience

Don't expect an explosion of conversations overnight, even with careful mentoring, guidance and content-seeding. Be patient. The conversations will grow organically. People will start to talk as you reduce the barriers and they become more confident. Allow for a little testing of the water before they let their natural collaborative instincts out.

Think of it like any other social gathering. People need to explore their own comfort and confidence levels, to check out the landscape, before they feel ready to interact with complete freedom.

Weaving conversations into everyday work

A common question people ask is, "How many hours a day/week should I spend on the platform, how much should I post and comment?"

The answer is that there is no answer. Conversational tools – posting, commenting, liking, @mentioning, etc – need to be woven into the fabric of everyday work, just as phones and email are. It's there when you need it.

How exactly we weave it into everyday work is the subject of the next chapter.

3.3 Who is involved

Community Manager



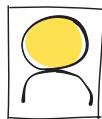
The Community Manager should be all over this one. It is a core component of their role – the development of a strategy to get people talking, and the selection of tactics that will drive it. No person is better positioned. Not to put too fine a point on it, it's the heart of the Community Manager's role.

For more on the Community Manager's role in this design element, see the Ongoing Maintenance section below.

** Caveat: pushing out controversial or unpopular management announcements via the intranet and turning off comments (and with it your one means of answering legitimate questions) is not a good idea when you're trying to foster a culture of openness and honesty. It can be perceived as heavy-handed, stifling conversation, setting a poor example. 'Do as I say, not as I do.'*

#3

Senior leadership

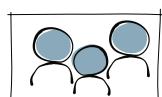


The role of senior leaders – ‘trickle down leadership’ – is a critical success factor in developing conversations. Some senior leaders may need to be mentored in the use of technology in order to do this well. The best mentors in the use of tools are young employees, a strategy that's been very successful in some organisations.

There is no better voice to harness naysayers than a senior leader who listens to criticism and, far from shooting the messenger, thanks them and turns the criticism into positive action that addresses the issue.

It is also important that senior leaders instigate and are genuinely engaged in leadership-sponsored events like YamJams and Hackathons.

Human Resources team



HR comes into play if senior leaders are uncomfortable with the technology or, more crucially, the listening aspect of trickle down leadership. It's not uncommon for senior managers to need coaching in the difference between the analogue and digital domains.

Middle managers and team leaders



Their contribution is always important. Here it can be summarised as:

- creating a team environment where naysayers are encouraged to be open and air their gripes;
- understanding the importance of conversations as a relationship building channel, and giving appropriate latitude to their people as a result;
- modelling the tone for digital conversations, setting the bar;
- bringing in outside experts to extend and diversify conversations and give them new energy;
- Developing themselves as good T-shaped managers – more on this in section 3.5.

An ear for conversations

Earlier on we touched on the importance of equal listening and talking when it came to conversations.

Here's a musical analogy. Several musicians are gathered in the same room to jam, to experiment with different musical ideas with the express purpose of pulling together a piece of music they can later play to an audience. All of them are expert at their individual instruments.



If each musician was to try to dominate the others with their individual talent and skill they would never slot into a well-balanced groove. It would just be a bunch of individuals, well, showing off. Trying to make a point, gain attention.

The way good musicians pull music together is by listening. Sensing. Jamming isn't about everyone trying to dominate, it's about understanding what others are playing and fitting one's expertise and ideas into the overall groove, everyone contributing their part to the final result.

That's why they talk about 'the musician's ear'. Getting to the best possible outcome through listening as much as leading.

3.4 What it looks like when it's working

In team meetings, it becomes the norm for a significant chunk of time to be set aside for addressing gripes and turning them into solutions and actions.

Conversations that are initiated during events like YamJams and Hackathons continue well past the event and become an ongoing conversation.

Staff share stories about the time the CEO commented on and liked one of their posts.

In time, the Net Promoter Score rises as it becomes common for customer problems to be aired and solved in open internal discussions.

Example

An employee at our client's organisation had encouraged her next door neighbour to purchase their company's



DESIGNING COLLABORATION

From the chapter titled 'Aligning with work: understand your collaboration touchpoints, and then map the tools'

Chapter 11

Aligning with work: understand your collaboration touchpoints, and then map the tools

- Why it's important
- How to do it
- Who is involved
- What it looks like when it's working
- Ongoing maintenance required to sustain it

4.1 Why it's important

Every organisation, small, medium or large, relies on processes to function effectively and grow.

So it follows that the stakeholders who sign off on collaboration tools want to see those tools supporting business processes. The most common message they push out at the time they roll out a collaboration platform is 'Here are some great tools, now let's put them to work!'. Meaning, on your everyday processes.

#4

Unfortunately, there are as many different ways to put these feature-heavy tools to work as there are people using them. Before you think that's a good thing, consider this: dumping tools in people's laps and assuming they will intuitively understand how to use them effectively is a great way to decrease efficiency rather than increase it. It causes confusion, resistance, and, worst case scenario, can result in changes to processes to accommodate the tools. A slippery slope indeed.

Aligning a collaboration toolset to business processes isn't about enthusiastically throwing tools at them. It's about getting the logic in the right order. First looking at what we're already doing, how we collaborate today as part of our business processes, and then – and only then – 'smart-fitting' the tools.

Get this right and the collaboration tools will give you the uplift you're looking for. Miss the opportunity, and the tools can actually slow you down.

4.2 How to do it

There is a short term way to start, and a longer term way. Most of our attention in this chapter will be directed towards the latter.

The short term way

The short term way to introduce collaboration tools into business processes is a migration program. Migrate simple things like phone calls, emails, meeting agendas etc across to your collaboration platform. Get people using it that way.

How's the collaboration program going?

55 teams are now running team meetings online in their own Groups. 

It's a common starting point for organisations keen to see their social platforms put to work quickly, an approach with low barriers and easily reportable progress.

The down side is that it ignores the importance of developing good collaborative behaviours that make collaboration sustainable over time. It's just a way of, well, putting the platform to work and looking for short term gains without a longer term strategic view.

The long term sustainable way

Instead of looking at how we encourage people to adopt the tools and put them to work, we'll start at an entirely different place – a simple, common sense statement.

**No one produces anything in isolation.
Everyone is part of a collaborative entity, a team.**

Hard to contradict. It might not be called a 'team', it might just as easily be called a project, or a business-as-usual workgroup. Some employees work individually as specialists, but even they, ultimately, belong to a team.*

Those teams need to interact with each other in order to deliver the processes that power organisations and enable them to produce products and services viably.

Typically the interactions between the teams delivering these processes involve the movement of knowledge, information, and documents.

So far, nothing we don't already know. Let's dive more deeply into the interactions by posing some questions.

1. What's the entity that I belong to?

You might think this is a redundant, even foolish question to start off

* Teams, not individuals, are now considered the fundamental unit of organisation. Charles Duhigg: 'Google: High Performing Teams: What Google Learned From Its Quest to Build the Perfect Team', *New York Times*, February 25, 2016.



with. But it's not always obvious.

Which process (or processes) is your team a part of? What is your function in that process, what are you expected to deliver, and why? What is your *raison d'être*, your primary business purpose?

This question helps to define your collaboration boundaries. The perimeter. The extent of your part in a process and how widely or not you need to connect with other teams. This sets the scene for the next question.

2. Who do we need to collaborate with?

Here you begin to identify and list your collaboration touchpoints. The other teams or entities that you interact with.



At this stage we're only interested in listing who they are, for the moment ignoring the nature of the interactions. It doesn't have to be a long list. Focus on the significant ones. For example, don't include ancillary functions like I.T. Support and Human Resources if they're not part of your core process workflow.

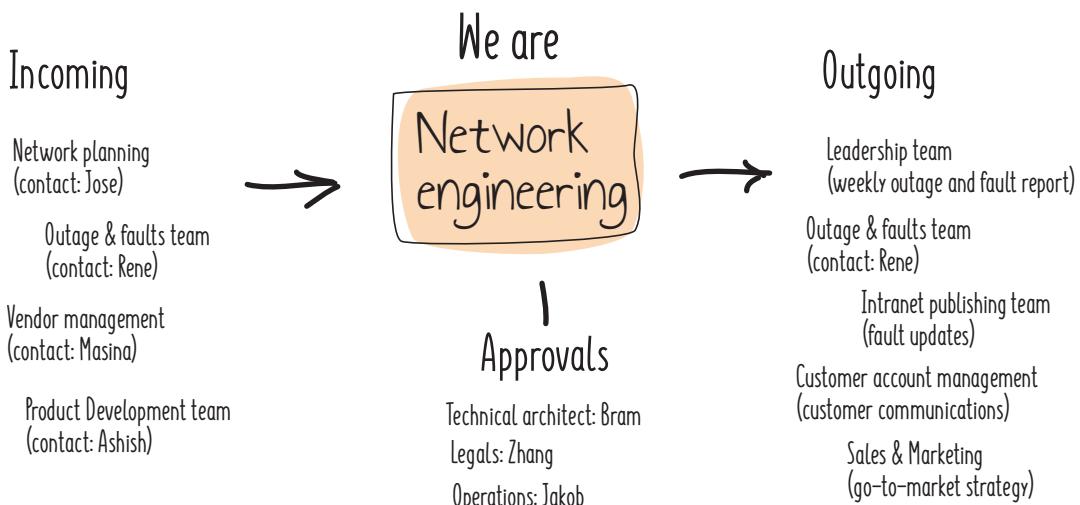
Ways to identify the 'who' of your collaboration touchpoints

The newbie diagram.

Imagine you're onboarding a new member of the team. What diagram would you draw for them to illustrate who the team collaborates with? What's the incoming traffic, what are our outputs? It might look something like Figure 13.

#4

Figure 13. The new starters diagram.



DESIGNING COLLABORATION

From the chapter titled 'Manage ongoing progress - make your design sustainable'

Chapter 14

Manage ongoing progress – make your design sustainable

- Why it's important
- How to do it
- Who is involved
- What it looks like when it's working
- Ongoing maintenance required to sustain it

7.1 Why it's so important

"How do we measure success?"

"How can we tell if our culture is improving and our people are becoming more collaborative over time?"

"How do we know whether our design is producing long term, sustainable collaboration and isn't just a one-shot injection of energy?"

These are all fair questions, and we need to have answers for them. One thing is certain: a collaboration culture isn't something that magically self-perpetuates once the design elements have all been ticked off. Behaviours that we've worked hard to instil can very easily lapse if we take our eyes off the ball.

Historically there have been two approaches to quantify the ongoing success of knowledge management and collaboration initiatives:

1. Work efficiencies. People take less time on common workflow tasks, like seeking answers to questions, authoring or approving documents, completing process steps. Average out the hours saved per person, multiply it by their wages per hour, and presto, we have the potential savings to the organisation.
2. Stats. Our social collaboration platform stats show us that more and more people are using the system. People are collaborating. Box ticked. All good. 

Measuring work efficiencies has always been dubious at best. Who's

#7

to say that the time saved will be effectively spent elsewhere? It's rare for a collaboration business case to be given a green light on this basis, even though it does still surface occasionally in conversations about collaboration metrics. Even assuming it has some merit, at best it would only cover Passive collaboration, the transacting of knowledge. It can't and doesn't measure the embedding of good all-round collaborative behaviours.

Let's focus on the second one. During one particular engagement, we looked at the activity report of a collaboration platform. The data, pulled from the system's standard reporting system, showed that over 90% of staff were regularly logging into the platform and using it. (It had been deployed as the intranet, so no shocks there.) The stats happily showed that documents were being uploaded, people were posting, and the number of Groups was growing steadily.

Then we interviewed a number of staff from different parts of the organisation. The interviews told a very different story. They told the story of people confused about using the tools. Not sure exactly where to place documents so just putting them somewhere, anywhere. Not sure why or when they should be posting and commenting but doing so because they were expected to. (In one case, because their manager was factoring raw post numbers into the team's performance reviews.) Group proliferation was already an issue. Multiple overlapping Groups were being created because there was no guidance around ascertaining if a similar Group already existed. People would join each one, just in case.

Yes, people were using the tools, but very ineffectively. They were frustrated by the lack of guidance, what to use when. In short, a textbook case of Digital Workplace Chaos. All the while, the raw stats were giving the thumbs up.

Stats tell us about activity, but not the quality of that activity or the behaviours or intentions that are driving it* – and, ultimately, the value of all this effort to the organisation. These things require human judgement.

Our task in this chapter is to apply human judgement and derive measures for collaborative behaviours. Not by measuring every single behaviour that we've covered in this book, but enough to track the overall health of our collaboration design and expose any glaring gaps or weaknesses, which we can then target with the right tactics.

Are people buying into collaboration through everyday actions? Do staff feel safe participating? Are our leaders leading? Are we reducing tool

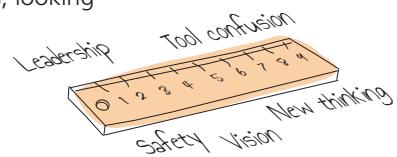
* There are statistical packages available now that apply analytics and even sentiment analysis to the basic stats provided by platform vendors. See the section below, **Advanced statistical solutions**.

confusion? These are the indicators of behavioural change, something that activity statistics can't easily tell us.

Sustainable change

Sustainability. Making our collaboration design stick. This is the holy grail of any collaboration program, and the end game of what we cover in this chapter.

The cycle of measuring and monitoring collaborative behaviours, looking for dips and peaks and remediating them, is what makes collaboration vibrant and ongoing. It enables us to work on the dips, build on the peaks, and absorb organisational stresses such as structural changes and process re-engineering.



This section on measurement should not be an afterthought, a nice-to-have, an 'if we have time' activity. While the other chapters cover the framework of a collaboration design, this is the section you will keep returning to in order to maintain continuity, momentum and purpose.

7.2 How to do it

Throughout this book we've identified sets of behaviours across a number of roles which collectively give us the foundation for a well-rounded and well-grounded collaboration design.

In this section we'll bring together a condensed, rolled-up version of these behaviours and turn them into a simple-to-use tool called a Collaboration Diagnostic. When run regularly, it shows us whether the behaviours we're trying to embed are really sticking or not, and gives us clear direction on where we need to focus our efforts for those that aren't.

At a very high level, the measurement cycle runs this way:

1. Prepare the diagnostic: a set of aspirational statements, in plain language, embodying the behaviours we want to embed;
2. Run the diagnostic regularly across a team, a project, a process or other well defined but smallish work area;
3. At the middle management and team leader level, hold Discussion and Action (D&A) sessions at regular intervals, using the diagnostics to identify problem areas. Then collectively devise short-to-medium-term tactics to address them;
4. Document the tactics in a short term Remediation Program Of Work (RPOW): what tactics will be actioned, and when.

Collaboration Diagnostic cycle

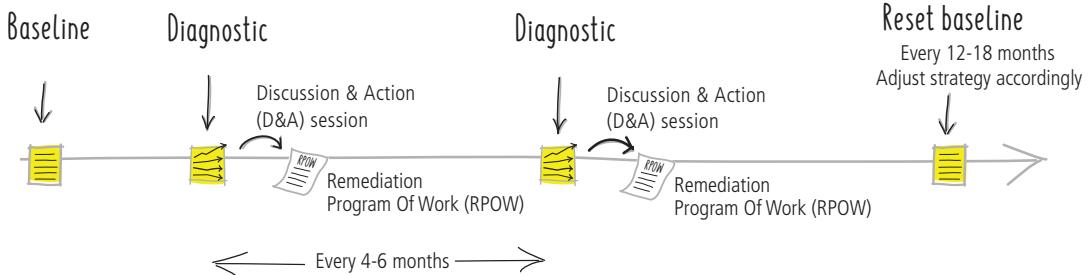


Figure 23. The full Collaboration Diagnostic cycle

Figure 23 shows the full Collaboration Diagnostic cycle. To fully understand it, we'll work through the four steps above.

STEP 1: Prepare the diagnostic

The diagnostic is no more than a series of simple, plain-language statements that distil all the great collaborative behaviours we've covered in the book into a summary list. We then rate each one.

Trying to include every individual behaviour across all the design elements would be impractical. What we need from the Collaboration Diagnostic is sufficient insight into how the behaviours are generally tracking without the exercise becoming too onerous.

Here's an example of one we've used at Innosis:



- Senior leaders regularly reinforce the message that they want a more open, conversation-based way of working – and walk the talk
- Staff have a clear understanding of why collaboration is so important for success
- Staff feel safe posting and commenting, even if what they say is negative
- Senior leaders use social channels with a 'light touch', listening and once in a while engaging positively
- By default, leaders allow their staff time to connect or work with others outside their immediate team or process on topics not specifically work-related
- Teams are actively encouraged to bring outside thinking into their circles, or contribute expertise to others

EXERCISE

Go back to the previous chapters and identify which of these statements come from which design elements.

TIP: A statement in the diagnostic can reference more than one design element.

DESIGNING COLLABORATION

We close out the book with chapters on how to apply what we've learned to typically thorny collaboration problems and blockers, as well as linking great collaboration behaviours to the development of a culture of innovation.

Chapter 17

Wrapping up

Over the course of this book we've covered large swathes of territory.

We asked you to think deeply about your collaboration blockers and ask some telling questions. We've taken the microscope to collaboration and observed that it has two very distinct faces, that it's not just a single activity that can be magically turned on by fitting people out with new tools.

We've provided a framework designed to break down the monolithic challenge of collaboration into grip-sized elements, putting you in control of your collaboration outcome.

We've looked in detail at the part played by those in key organisational roles, including senior leaders.

We hope the journey has convinced you that collaboration can be designed and built. That collaboration blockers *can* be overcome by applying the Collaboration Designer framework and using it to dismantle the blockers, brick by brick.

The road ahead

This is a good time to reflect on your short term goals versus your longer term goals. The book is designed to be there at your side for both.

In the short term – fixing an immediate problem, beginning the complex task of building collaborative behaviours, putting the basics in place – the book serves as a dip in/dip out resource, a guide to what you can do right now to start making inroads.

Over the longer term, we hope you keep the book on hand as an end-to-end blueprint for delivering the robust collaboration capability every organisation needs in order to perform at its best in the modern world. Come back to it often, use it as reference point for the peaks and troughs that will inevitably occur over time. Remind yourself of the many levers

you can pull in order to keep your collaboration culture as highly tuned and functioning as it can possibly be.

Our greatest hope is that as you journey towards that end, you'll be able to say with full confidence that collaboration is your most valuable business tool.

DESIGNING COLLABORATION

One of the four Appendices is a collation, sorted by role, of the key activities required to achieve a highly effective collaboration design. It focuses as much on senior leadership's contribution as the contribution of those further down the line.

Another is a highly detailed breakdown of the activities of a Community Manager, a key role in any collaboration design.

Collaboration is being talked about everywhere. Social collaboration tools are being rolled out daily, yet they are struggling to deliver on the promise of seamless cross-organisational collaboration. Poor adoption. Confusion. Change stress. Uncertainty. These are just some of the challenges that come with the proliferation of social collaboration tools and their expansive feature sets.

To find answers we need to look past the tools. We need to understand that tools don't switch on collaboration, people do. We need to change the conversation from 'collaboration tools' to collaborative people.

Based on fifteen years' hands on experience, *Designing Collaboration* sets out a framework of seven elements designed to evolve and build the behaviours necessary for people to become great collaborators in the digital workplace.

Collaboration tools don't create collaboration just by being present. Collaboration occurs when the tools are used by collaborative people.

Designing Collaboration puts people and collaborative behaviours back at the centre of the discussion, where they should be.

'Designing Collaboration should be on the bookshelf of every professional where information is a competitive advantage.'

Vanessa DiMauro, CEO, Leader Networks

'Alister and Andrew present clear methods and models to upgrade your organization to the digital age.'

Mike Fraietta, Product Manager – Collaboration, BNY Mellon



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