



# Working Together

Making teams work

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## Introduction

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There is a strong possibility that you are reading this between meetings. Right now someone is looking at your office calendar and having found an unallocated hour has invited you to a meeting. As humans we love meetings. We are sociable creatures. We like the pleasure of being in a group meeting that enables us to show off how much we know. At the end of a meeting we look forward to one-on-one meetings to solve the problems that the group meeting has not resolved, even if all we do is set up another meeting with a different group. We call that 'progress' towards resolving the problem.

One current growth sector is the creation of schematics about how collaboration should be organised, with arrows flying around stakeholders in a way that seems rather reminiscent of the Bayeux Tapestry. The objective of most of these schematics seems to be persuading organisations that adopting 'collaboration technology' will solve all known business problems.

But there seems to be a problem that can't be solved. The adoption of collaboration technology is not as rapid and widespread as was predicted. Obviously the organisation has chosen the wrong technology vendor and finds another one. Many organisations now have multiple collaboration technology solutions and are proud of the fact. Fortunately they do not have any means of assessing whether there is a return on the investment or they would be very worried. The reason for the low adoption levels of collaboration technology is that the technology is not able to solve the problems of poor meetings.

## The pleasures of a good meeting

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Meetings are so much a part of our working day that we rarely sit down and work out the level of effort and time we have expended in preparing for them, attending them and then taking action on the agreed outcomes. If we did it is probably reasonable to suggest that many of them were not as productive or engaging as they should be. This could be because of poor leadership, poor meeting space and facilities, a lack of clarity in scope and objectives, a lack of engagement from some team members and the inability of attendees to make a commitment to an action without a further meeting. There are so many ways that a meeting can go well or go badly!

Sebastian Thrun distinguishes between horizontal and vertical meetings in an excellent analysis of the [role of meetings](#)

First, let me distinguish between horizontal and vertical meetings. Horizontal meetings are team or project meetings, set up to coordinate individual activities. When I worked in a large tech company, those meetings just popped up in my calendar by the dozen. Because they usually took place on a weekly cadence, they were mostly devoid of a clear agenda or clear decision items. Meticulous notes were often sent around that no one really read.

I often asked myself, why do people actually go? Do they have nothing better to do? I suspect we all have an innate fear of being left out. It takes guts not to show up. And co-workers are often dismissive of others who don't attend. So many of us become quite religious about attending our meetings, even if we have no clue what they are all about.

Vertical meetings are not much better. They take place along a chain of command. A team or an individual might meet with their manager, their manager's manager, etc. Often these meetings serve the role of coordination and determining access to resources. ....Since managers thrive on taking credit they often add new ideas or loop in new people. What better way to claim credit than changing a plan? I have seen this over and over again. Vertical meetings make things more complex.

Good meetings stand out in the memory even if the outcomes were not in line with our own views. The quality of leadership and discussion will have given us adequate time to present our case before the meeting comes to a consensus on the decision to take.

Meetings are at the heart of collaboration. There is no way in which people can collaborate without having a meeting with other members of the team. There seems to be a view that the more people collaborate together (i.e. take part in meetings) the better will be the performance of the organisation. This may be one reason why no one is willing to commit to a decision at a meeting; they are members of many other teams and feel they have a commitment to check with everyone else first. The right decision might be made eventually but what has been the impact of the time spent on the meeting and the duration of the process to achieve an outcome?

Over the years there has been a significant amount of research into meetings. In 2016 this research was synthesised in [The Cambridge Handbook of Meeting Science](#). This book has 790 pages, with 31 chapters written by 60 authors in which several thousand research papers are reviewed. In the introduction, meeting science is defined as the study of what happens before, during and after meetings in the workplace.

Chapter 30 by John Kello on the 'Science and Practice of Workplace Meetings' sets out how science can inform good practice. He suggests that for every meeting the following eight questions need to be asked:

1. Why? Do we really need this meeting?
2. Who? If the meeting is justified, who really needs to be there (and who does not)?
3. How many? Size matters.
4. How? What agenda steps will we follow to achieve the objectives?
5. When? What is the best time and time frame for the meeting?
6. Where? What is the best location for the meeting and how should the meeting space (or virtual space) be configured?
7. How managed? What is the process by which the meeting will be managed?
8. How concluded? What are the action items, was the meeting constructive and what lessons can be learned?

Perhaps in the future we will all have AI-based applications that will ask these questions and help us push back on the invitations that arrive, often somewhat mysteriously, in our desktop calendar.

Even in a relaxed meeting around a table technology can get in the way. Common problems are poor wifi connectivity, the complexity of arranging 'guest access' for visitors and video projectors that do not support the increasingly common 16:9 aspect ratio for presentations. These and many other issues can quickly turn what should be a productive and pleasurable meeting into a meeting that everyone wants to bring to an immediate halt.

## Cross-border meetings

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Cross-border meetings are very common in Europe. Inevitably they are also cross-culture/cross-language meetings. Meeting styles change, largely a result of both the extent to which the management style is hierarchical and cultural norms within the company. Language becomes a major issue. Even if English is used as a de facto common language attendees have different capabilities to speak, understand and read English. Move out to the Gulf States and then on to Japan and China and the differences are even greater. In Japan, junior managers in a meeting will wait for the senior manager present to take a position, and the Chinese ethos is not to criticise anyone in an open meeting. It is also not uncommon for people in some cultures to say 'Yes' when in fact they are not supporting the decision but are saying that they understand the issue and will refer it back to a more senior manager.

Social conventions also need to be recognised. How do team members wish to be addressed? UK members of these teams are often concerned about whether to use given names or more formal surnames when meeting senior colleagues from Germany and France for the first time. In many countries (especially in China, Korea and Japan) it can be difficult not only to determine the family and given names of employees also how the names (e.g. Xiaojin Zhu) should be pronounced. To add to the confusion it is not uncommon for Chinese employees to adopt an English nickname to get around both issues at the same time.

Not only may job titles and roles differ across an organisation but so does the level of authority to make decisions and commit the organisation to a course of action. Does a Senior Vice-President in the USA outrank a Divisional Director in the UK? A virtual meeting of 'Marketing Managers' across the world may end up with some members of the team having no authority to take action without reference to their manager.

## Measuring meeting performance

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Most organisations pay little or no attention to the quality of physical meetings, which at least have rich back-channels to sort out whatever was not discussed or agreed at a meeting. How many meetings end up with a number of one-on-one meetings at which points of detail are discussed which arguably should have been covered in the meeting. If the time for these individual meetings is added to the meeting duration then the impact on productivity on all participants is going to be quite significant.

When we attend a conference we expect to be able to comment on all aspects of the event. A meeting is a small conference but there is very rarely any attempt to evaluate meetings at either an individual, leader, department, division or corporate level. Only in this way can the organisation identify poorly performing meetings and work out the reasons for this lack of performance. Perhaps all performance reviews of managers should include a consideration of how well they design, lead and make use of meetings, based on surveys of attendees and not on a self-assessment by the manager.

The table below sets out some of the aspects of a successful meeting that can be used in a survey.

Meetings start on time, are clearly introduced, focus us on the agenda and have energy around productivity.
Participants come to the meeting prepared, having reviewed materials, thought through agenda items, and are focused on meeting objectives.
Participants are engaged in the meeting process and actively participate in the discussions, and have a voice in every decision.
The decision-making process is clear for all participants and is followed for all decisions.
There is a balance of power in meetings where all team members have roughly an equal voice and are empowered to advocate for positions in opposition to the majority view.
Meetings are facilitated well in that they use specific tools and processes to ensure that discussions are focused, productive and outcome oriented.
Most agenda items are allotted the appropriate amount of time so that thoughtful decisions are made, while keeping the meeting on time and on task.
Meetings actions, assignments and accountabilities are clearly captured at the end of the meetings so that we clearly know what we decided, who is doing what and how we will be accountable for the decisions.
When considering meeting to meeting, there are tangible accomplishments and substantive progress that reinforces the sense that these meetings are effective and productive.
Meetings are well documented so that we have clear accountability, a reference point when we have questions, and a history that keeps us from revisiting territory we have already covered.

**Table 1 – Quality of meetings survey questions**

[www.facilitationprocess.com/documents/MeetingQualitySurvey.doc](http://www.facilitationprocess.com/documents/MeetingQualitySurvey.doc)

## Going virtual

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Virtual meetings are fast becoming the default meeting format. The RW3 consulting firm, based in New York, undertook a pioneering survey in 2010 to discover the extent of global virtual teams and to identify areas of challenge faced by virtual team members. The survey is now undertaken every two years. The Executive Summary of the 2016 report notes

*“Corporate teams are now almost entirely virtual, and 41% never meet in person. What is significant is that virtual teams are now even more global with members located in even more countries. In this year’s survey 48% of respondents revealed that more than half of their teams include members from other nations. In 2014, that figure was only 41%, and in 2012 it was only 33%.”*

Virtual meetings are so different from physical meetings that almost nothing in the way of good practice can be transferred. The exception to this is the importance of gaining feedback about the way in which the meeting was managed. If an organisation has not taken steps to optimise physical meeting performance then it is almost certain that virtual meetings will not be successful. It is important to appreciate that even having just one participant joining remotely creates a virtual meeting. This is because dynamics of the team will change in response to the way in which the remote participant can contribute to the discussions and outcomes. If the majority of the participants are in one location then they will be a dominant force in the discussion, especially if the leader of the meeting is also present at that location. They will also have the benefit of being able to see the body language of their colleagues and to time their contributions to the discussion.

Perhaps the most challenging finding from the RW3 survey is that team leaders believe they are better prepared to lead intercultural teams than do those who are members of their teams. RW3 asked respondents who self-identified as leaders of teams to rate their own ability to lead effectively across countries and cultures. Nearly all of them (96%) rated themselves as either effective or highly effective! Moreover, 98% of respondents said they are comfortable leading multicultural teams (vs. local teams). Almost the same percentage (96%) said they are comfortable leading virtual teams (vs. leading co-located teams).

When RW3 asked participants, 58% of respondents indicate that global team leaders are not adequately prepared to lead multicultural teams. An interesting difference in opinion.

RW3 also identified three particular findings related to virtual team performance. To quote from the report

- Only 22% of respondents have participated in virtual team training, and only 34% in formal global leadership training.
- While 98% of self-identified global team leaders were happy with their intercultural leadership skills, only 19% of team members felt that the great majority of their team leaders were well prepared for the challenge.
- 68% reported that cultural challenges were the biggest hurdle to global virtual team productivity. Although only 18% of respondents (still an unacceptable level) reported that their companies have lost business opportunities because of cultural misunderstandings, we nevertheless believe that this figure is severely understated.



RW3 also asked respondents if their virtual teams have any sort of “team charter” or used a set of guidelines for high performance. Only 28% of respondents used such guidelines to achieve high performance. By failing to use these kinds of guidelines, companies cannot establish expectations or assist employees in achieving measurable productivity improvements for their virtual teams.

## Core skills for virtual team leaders

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One of the world’s most successful pharmaceutical companies provides managers with a two-day course on the management of virtual teams. The course description states that by the end of the course participants will:

- Know the critical success factors for leading virtual teams and be able to apply them to their own situation.
- Know the appropriate strategies to implement leadership practices to support virtual teams.
- Be able to handle difficult leadership situations, interpersonal conflicts and lack of motivation.
- Become aware of the unique leadership requirements which occur around a virtual global environment in a matrix organisation.
- Realise the influence of regional and company culture issues and learn how to handle them.
- Become a member network of virtual team leaders and thereby support each other.

This is a two-day course, not a one hour course. Managers who have been on the course say that it has transformed the way in which they collaborate globally and yet the technology slot of the course is only an hour long and focuses mainly on the corporate audio and video-conferencing services.

## How virtual teams work

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The major mistake that most organisations make in virtual team management is to just make an existing co-located team into a virtual team.

Building a virtual team takes a lot of care and effort. The considerations of language, location, time and culture all need to be taken into account in not only the selection of the team members but also in setting up and managing each meeting. Virtual teams with members from across the organisation certainly have the benefit of bringing a wide range of expertise to the meetings but often the attendees report to a wide range of different managers. The attendees may make commitments at the meeting in good faith that they will be able to deliver on them but their manager may have a different view of priorities.

A team leader who is excellent in managing physical meetings may not be equally as proficient when managing virtual team meetings. Some companies have built a certification process into virtual team participation so that employees (and managers) initially build up expertise in single country/same time zone virtual meetings and then progress to managing complex multi-national multi-cultural teams in due course. Because of the importance of effective virtual teams the performance of leaders and participants should be included in annual performance appraisals.

There is evidence to suggest that team development needs to be a two-stage process. In the initial stage a core group of experts and stakeholders are identified and estab-

lished as a team. The group then considers who else should be in the team, a practical if small-scale example of the wisdom of crowds. This takes away the challenge that the team leader faces in deciding who, on a global scale, should be on the team. It also avoids people who feel they should be on the team but have not been selected blaming the team leader for their omission.

## Time zones and meeting planning

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The RW3 report identified time zone issues as the primary challenge in virtual team management. It is never as simple as checking Outlook calendars to find a mutually convenient time. This assumes that team members maintain a very current view of their daily schedule. The schedule on Outlook may well be inconsistent with how they spend their working day. We all want to manage our own diaries and feel uncomfortable when someone calls a meeting at an unsuitable time without prior consultation. Even if we participate in the meeting we may do so in a less-than-constructive way. Setting a meeting time and duration also requires a knowledge of:

- Different working weeks (e.g. in the Middle East)
- Different times to start and end the working day
- Public and religious holidays
- Different date formats (is 10/04/2016 10th April or 4th October?)
- Whether it is reasonable to expect team members to take calls outside of normal working hours

It often comes to a surprise to US-based or US-owned companies that colleagues in Europe have much longer holiday periods and that the main vacation period for Scandinavian countries is not the same as for France. There could be periods when for three months in the middle of the year it is very difficult to find dates for meetings.

One of the reasons that London has emerged as a financial trading centre is that its time zone position means that it is possible to have real-time conversations across most of the globe. By comparison San Francisco has a very limited working window with the rest of the world. By 09.00 in San Francisco the working day for countries to the east of the UK has ended. Managers in the USA expect team members in Europe to stay late or take a conference call at home in the evening but are usually very unwilling to take a call themselves at 04.00, the start of the working day in the UK. A good practice in virtual team management is to cycle meetings through time zones so that the pain of a very early morning or late evening is shared amongst the team members.

## Which language?

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At the 2017 Intrateam Event in Copenhagen there were a number of presentations from managers in multi-national companies (such as Siemens and ING) that showed very clearly that employees wish to communicate in social network groups in whatever language best suited the group. In Europe it is difficult to travel more than 300 miles from a city centre without entering a country with a different language. In meetings with attendees from different countries it is often easier for them to understand English spoken as a second (or even third) language than English spoken by a native speaker because of the use of idioms and inadvertently complex sentence constructions. An important point that is often overlooked is that native speakers of English need to allow time between sentences to give others a chance to 'translate' the concepts being used (rather than words) into their own language. Most non-native speakers of English experience considerable difficulty in translating the [British use of irony](#) into reality!

Variations in styles of speaking the common language could decrease communication effectiveness when audio and video-conferencing is used. Email and enterprise social networks (for example) provide the format and tools (spelling check) to formalise communication. This possibility does not exist in telephone conversations or videoconferences.

When planning virtual team meetings it is important to understand that there are four elements of language skills:

- The ability to speak
- The ability to understand what is being said
- The ability to write
- The ability to read

The [Council of Europe](#) has developed a set of self-assessment grids which would assist individual team members to define their levels of competence in each of these four areas. Managers of virtual teams should look at these grids to see whether they are making assumptions about competence levels of team members that could have a serious impact on their ability to contribute to team meetings.

## Feedback from virtual team members

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When members of a team are working in the same location feedback about a meeting is easy to make, perhaps over lunch in the company restaurant. With virtual teams much more attention needs to be paid to making sure that there are effective feedback channels, both through line-reporting but also through the personnel and training departments.

Some of the questions you might want to ask are:

- How were they brought into the team?
- What were the initial impressions of the team membership?
- What are their views on team relationships?
- How well defined and supported are the processes?
- Were their training needs identified and met?
- Were the applications used appropriate?
- How well they think the team has performed?
- How they approach participating in a virtual team in the future

It is also valuable to look at responses of other virtual teams to see if there are patterns in the ways that issues have been identified and addressed and so spot issues of leadership and/or process at an early stage.

## Maintaining momentum

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It is easy to focus only on the logistics and management of virtual team meetings. The greater and arguably more important challenge is to maintain the cohesion of the team between meetings. Effective collaboration on a major business-critical decision may require a series of meetings. If the initial meeting is not successful for any reason, improving the outcomes of further meetings will be very difficult. One certainty about meetings is that bad news travels fast. People expect managers to run high-performance meetings, so if the meetings work well there is no news to report. When they go badly everyone knows about it within hours.

At the end of a virtual meeting it can be difficult to determine the outcomes and actions. One factor in this is that virtual meetings tend to end at a specified time rather than when the meeting has reached a natural conclusion. As a result there can be a rush to complete the agenda and agree who is taking the actions in order that attendees can move on to their next virtual meeting! The other factor is the lack of body language which is so valuable to the team leader at the end of a meeting in judging who is on board and who has concerns about the outcomes.

## Virtual teams and 'collaboration'

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The core purpose of collaboration is to arrive at a consensus. Although this could be achieved through multiple emails or social network messages these are all asynchronous and the process could take far longer than is acceptable to maintain the momentum. The act of collaborating necessarily involves meetings, either physical or virtual. However, when good practice in collaboration is discussed the focus is on the utility of the technology and not on the utility of the meetings. In 2011 Wendy L. Bedwell and her colleagues at the Department of Psychology and Institute for Simulation & Training, University of Central Florida published a very comprehensive review of research undertaken to understand the processes of collaboration in business.

They proposed the following definition:

*“Collaboration is an evolving process whereby two or more social entities actively and reciprocally engage in joint activities aimed at achieving at least one shared goal.”*

It is worth looking at this definition in some detail.

*Collaboration is an evolving process* – this conveys the fact that as an act of collaboration is undertaken there will be changes to the team dynamics, changes to schedules and even changes to the scope.

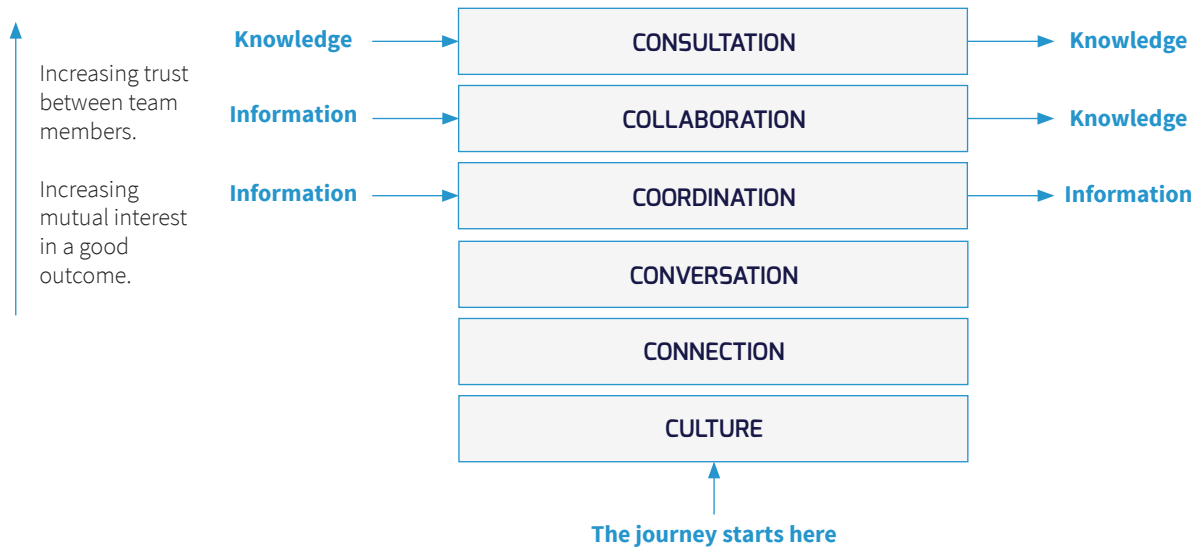
*Whereby two or more social entities* – we tend to see collaboration as taking place between a group of individuals but it could also be between two groups, or a few individuals and several groups.

*Actively and reciprocally* – this conveys the high level of dynamics within the act of collaboration, and that there need to be very good feedback loops. Collaboration is not a linear process.

*Engage* – the engagement among all the participants has to be at a high level. There is no room in a collaboration process to have observers and lurkers.

*One shared goal* – a team may be working collaboratively about both shared and conflicting goals. It could be that in considering the conflicting roles that it is recognised that the scope of the collaboration activity has to be changed.

The reason for considering this definition is that almost invariably collaboration used as a label and (together with associated technologies) is applied to situations which are not truly collaborative.



**Figure 1 - Working together © Intranet Focus Ltd**

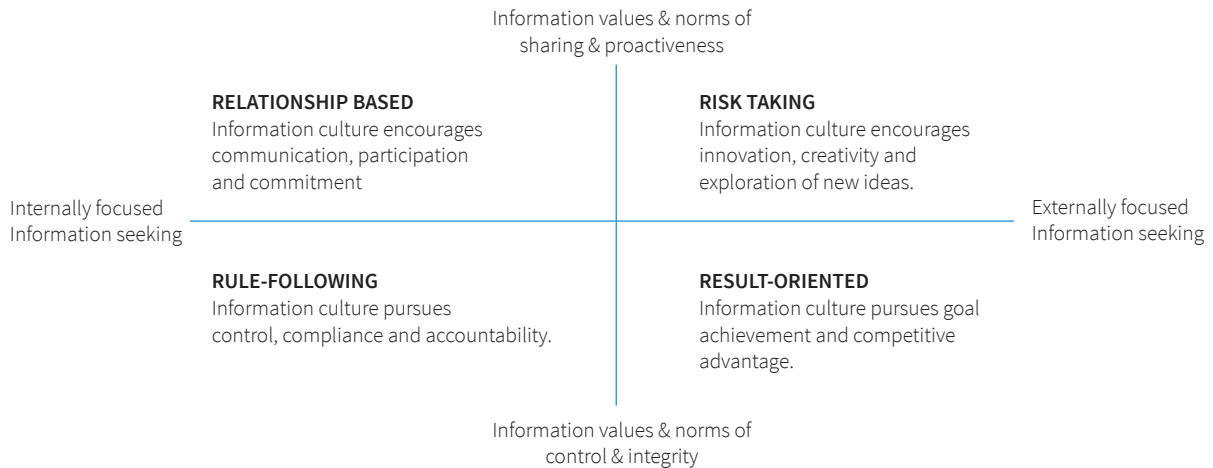
Another way of looking at the elements of working together is to consider the steps in Figure 1.

- **Culture** – is the organisational culture supportive of team working?
- **Connection** – how can people make connections with others across the organisation to establish teams?
- **Conversation** – how can trust and effective communications be established between team members?
- **Coordination** – what projects or tasks might be used as proof-of-concept tests where the aim is just to be able to work independently and yet together?
- **Collaboration** – how will the readiness of a team to work under some degree of stress be assessed?
- **Consultation** – although team work is important is there still the opportunity for 1-on-1 knowledge exchange, mentoring and training?

## Information culture and collaboration

At the bottom of the 'stack' featured in Figure 1 is 'information culture'. The importance of this is invariably overlooked in the development of effective collaboration processes.

Chun Wei Choo is a world authority on organisational culture. Figure 2 comes from his book *The Inquiring Organization*.



**Figure 2 - Types of organisational culture - © Chun Wei Choo 'The Inquiring Organization', p164, Oxford University Press, 2016**

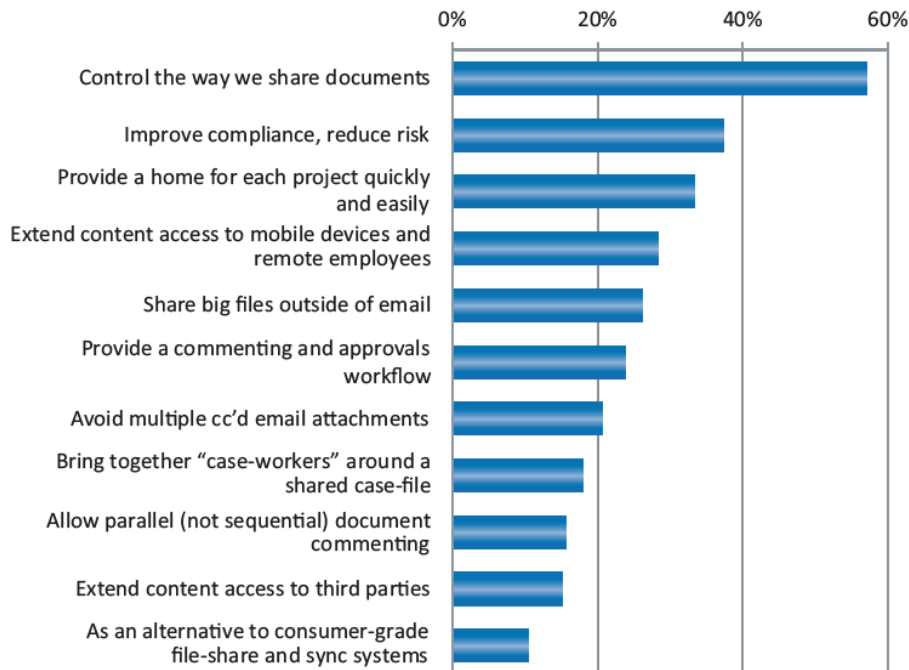
Almost every organisation has a mix of all four cultures. It could be argued that the Relationship-Based and Risk Taking cultures could be where collaboration would flourish. Rule-Following and Result-Oriented may not be so accommodating.

The reason for introducing this schematic is that within an organisation full enterprise-wide collaboration may be counter to the internal culture. This could be especially the case for the Rule-Following culture where compliance with regulatory requirements precludes an extensive use of free-form collaboration. It is important not to consider any of these cultures as either preferred or to be dismissed. They all exist, and the challenge for enhancing the use and value of collaboration is to focus in on where benefits can be achieved and not try to shame people into not using the technology. Another implication is that the target for the adoption will not be 100% of employees because many may work in a culture where free-form collaboration may be counter to the regulatory environment.

Most books on how to collaborate successfully tend to approach it as though all organisations have the same opportunities and challenges. That this is not the case is exemplified by Heidi Gardner in her book *Smart Collaboration*. The focus of this book is about how professional services firms, and especially law firms, can break down practice-related silos to bring in additional revenues and margins. What is also unusual about this book is that it is based on the author's own experience working for McKinsey and also more than a decade of research work at Harvard Business School.

## Technology - fit for purpose?

So what is the role of 'collaboration technology'? It has no role to play in optimising physical or virtual meetings. Its only role is to maintain information flows between meetings, managing the artefacts of meetings. This chart (Figure 3) from an AIIM survey is almost a statement of requirements for a collaboration support system. None of these eleven requirements are about managing meetings but about sharing information.



**Figure 3 - Drivers for adopting a collaboration support system © AIIM Content Collaboration and Processing in a Cloud and Mobile World, 2014**

[http://www.aiim.org/Resources/Research/Industry-Watches/2014/2014\\_March\\_Collaboration](http://www.aiim.org/Resources/Research/Industry-Watches/2014/2014_March_Collaboration)

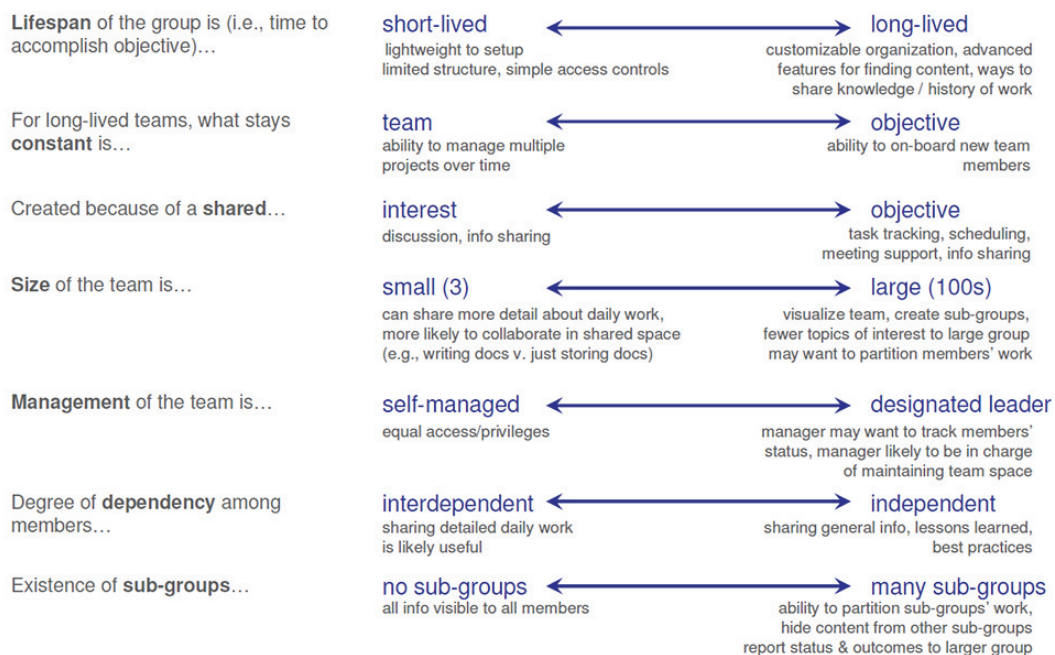
It can be a major challenge to agree where documents related to the meeting are to be stored. Organisations now have multiple storage options, which might include document management systems, SharePoint, social media, email folders and cloud-based storage. It is not uncommon for documents to be stored in a project area (for example on SharePoint) which may not be easily accessible to other members of the team. Even if they can download documents they may not be able to edit them or upload them to the project space. These capabilities are of course basic to any team but need to be more carefully considered and communicated in a virtual team setting, especially when the team extends to other countries with perhaps different approaches to document management. The use of the term 'document' in this paragraph is a convenience.

This chart illustrates an overall view of the requirements, but for a particular organisation the balance of these requirements needs careful analysis. Over the last few years 'collaboration' has become a word of convenience to describe a range of tasks. Without an appreciation of these tasks and how together they support the outcomes of a collaboration process it is very likely that the requirements will not be adequately defined. Some very valuable research has been undertaken by IBM on social collaboration at a

number of its research laboratories since 2008. In particular the research that led to the concept of collaboration personas provides some valuable frameworks for all aspects of collaboration. The IBM team of Tara Matthews, Steve Whittaker, Thomas Moran and Meng Yang make the point that there are four phases of a collaboration activity

- Starting involves forming the team, setting the goals for the collaboration, agreeing upon conventions (e.g., which tools to use and how), and setting up any tools.
- Planning involves setting the agenda or work plan for the collaboration. This can include brainstorming, forming sub-groups, assigning tasks, scheduling, and so on.
- Executing involves doing the work necessary to accomplish the goals.
- Reporting involves sharing intermediate status and final outcomes with stakeholders, handing off any deliverables, and continuing the education of stakeholders about any deliverables.

Each of these elements requires careful consideration of the technical support requirements. Collaboration benefits from a well featured technical platform. This is primarily because unlike teams that meet together and report on what has been accomplished since the last meeting collaboration is a real-time activity invariably with groups of two or more people working in parallel and individual members contributing as they feel is appropriate.



**Figure 4 - Taken from Collaboration personas: A framework for understanding and designing collaborative workplace tools. Tara Matthews, Steve Whittaker, Thomas Moran and Meng Yang (IBM Research, Almaden, USA)**

<https://pdfs.semanticscholar.org/484c/55b36f0047b3f5c0406c16151be3402fa436.pdf>

The process of finding people to be members of a team will almost certainly benefit from an effective search strategy that locates expertise in a range of different ways, not just through short self-promoting profiles.

Another issue to consider is the importance of being able to collaborate outside of the IT-imposed security wall. Companies see this as very important but when it comes to technical support it is clear that support for these external partners is generally poor.



In the AllIM survey referred to above 71% of respondents said that there were gaps in the support for external partners, with nearly 40% reporting that the experience was poor. The requirements for external collaboration support seem rarely to be included in the statement of requirements for a collaboration application, and this could well be because the extent of this external collaboration is not visible to IT. Where it is taking place, employees may be using work-arounds, such as email and file sync and share using personal cloud accounts because the priorities are such they cannot wait for the organisation to take an active role in this support.

There is no lack of technology solutions available. [The Real Story Group](http://www.realstorygroup.com) (RSG - www.realstorygroup.com) is a US-based consulting firm providing vendor-independent assessments of software products. Its report on Enterprise Collaboration and Social Software Products profiles the solutions from 23 vendors in over 400 pages of analysis and there are many more solutions available that are not yet covered by RSG.

## Measuring collaboration success

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A lot of attention is being paid to measuring collaboration success with a focus on justifying the return on investment in the technology. It matches the way in which enterprise search logs and intranet logs are scrutinised for signals that demonstrate this return. However search has moved on and the emphasis now is on assessing search satisfaction through a blend of qualitative and quantitative measures.

Measuring levels of adoption and use of collaboration technology miss the point that adoption and value are not related. The importance of collaboration technology is that it supports the work processes between meetings. The focus should therefore be on assessing the quality of the meetings and the outcomes of them and along the way checking to make sure that the collaboration technology is being supportive and not a barrier.

## Writing a collaboration strategy

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Set out below is a possible structure for a collaboration strategy.

Business objectives – what challenges need to be addressed and how will better collaboration ensure that the objectives will be achieved

Stakeholders – who are they and why

Ownership – who holds the budget, the vision and the strategy

Information culture and its impact – the workplace is heterogeneous

Employee skills and capabilities - are they appropriate and how can they be improved

Language support – what languages work best for organisational knowledge sharing

Meeting management – setting out good practice and establishing feedback channels

Virtual team management – training, mentoring and satisfaction monitoring requirements.

Process optimisation

- Connection – people and expertise search
- Conversation – social, voice and video technology
- Coordination – meeting planning and project management
- Collaboration – end-to-end process support

Current technology availability

Technology requirements

- Better value from existing applications
- Gap identification for additional technical functionality
- Selection and procurement criteria and management

Training and support for collaboration optimization

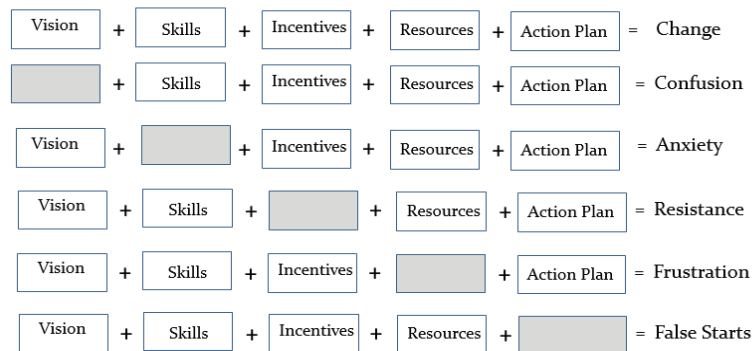
Legal and compliance requirements – personal data management and GDPR

Key performance indicators – quantitative and qualitative

Adoption planning

### A framework for thinking about systems change

An effective way of understanding what it takes to manage a programme that will change the way that collaboration takes place is presented in the schematic diagram below.



**Figure 5 - Adapted from T.Knoster, R Villa, and J. Thousand “A Framework for thinking About Systems Change.” In R. Villa and J. Thousands, eds. Restructuring for Caring and Effective Education: Piecing the Puzzle Together. Baltimore: Paul H. Brookes Publishing Co., 2000**

Vision – what is the organisation seeking to achieve through improving the way in which employees collaborate inside and outside of the organisation.

Skills – what does it take to be an effective team leader and member of a virtual team.

Incentives – are the contributions to working together recognised openly across the organisation and privately in performance reviews.

Resources – are the requirements for technology support well defined and delivered.

Action plan – is everyone in the organisation aware of the way in which working together will be regarded as a key element of the culture of the organisation.

## Recommendation

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Working together happens in meetings, and increasingly in virtual meetings. Between meetings momentum can be maintained by the effective use of collaboration technologies that support message exchange, document storage and schedule management. But no collaboration technology can improve the dynamics and success of a meeting. If you have concerns about whether collaboration is not as effective as it should be, start with assessing the conduct and outcomes of meetings. The probability is that by improving these two factors the overall improvement in working together collaboratively will be significantly greater and faster than introducing more technology into the process.

## Resources

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### Books

- [Smart Collaboration](#), Heidi K. Gardner, Harvard Business Review Press, 2017
- [Collaborating in a Social Era](#), Oscar Berg, Intranätwerk, 2016
- [Leading Effective Virtual Teams](#), Nancy M. Settle-Murphy, CRC Press, 2013
- [A Manager's Guide to Virtual Teams](#), Yael Zofi, Amacom, 2012
- [Virtual Team Success](#), Darleen Derosa and Richard Lepsinger, Jossey-Bass, 2010
- [Leading Virtual Teams](#), Jessica Lipnack and Jeffery Stamps, Harvard Business School Press, 2010
- [Culture.Com. Building Corporate Culture in the Connected Workplace](#), Peg Neuhauser, Ray Bender and Kirk Stromberg, Wiley, 2000
- [Collaboration](#), Morten Hansen, Harvard Business Press, 2009

### Survey

The Challenges of Working in Virtual Teams, RW3 Culture Wizard, <https://www.rw-3.com> 2016.

### Other resources

[Cambridge Handbook of Meeting Science](#), Joseph A. Allen, Nale Lehmann-Willenbrock and Steven G. Rogelberg (Editors), Cambridge University Press, 2015

The Insider's Guide to Better Meetings ([download pdf](#)) Citrix  
<https://www.themuse.com/advice/how-much-time-do-we-spend-in-meetings-hint-its-scary>  
<https://quality.wisc.edu/effective-meetings.htm>  
<https://jell.com/blog/productive-meetings-science>  
[http://www.huffingtonpost.com/sebastian-thrun/kill-our-meeting-culture\\_b\\_8273410.html](http://www.huffingtonpost.com/sebastian-thrun/kill-our-meeting-culture_b_8273410.html)  
[Developing Real Skills for Virtual Teams](#), Meena Dore and Kip Kelly, UNC Business School, 2011

## The author

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Martin White is an intranet, enterprise search and information management strategy consultant. He founded [Intranet Focus Ltd](#) in 1999.

He has undertaken projects or managed business operations in nearly 40 countries. Martin has been managing global virtual meetings since the mid-1970s. He began his consulting career in 1979 and has participated in several thousand meetings in around 500 projects carried out in 40 countries. Not all have been good meetings but it is from the meetings that don't go to plan that the most valuable lessons are learned. An information scientist by profession, Martin has been a Visiting Professor at the [Information School, the University of Sheffield](#) since 2002. He writes a monthly column on enterprise search for [CMSWire](#).



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