

## IT Executive Exchange

Friday, February 11, 2011

**The Collaboration Challenge:** For every team that has mastered making platforms such as SharePoint the heart of efficient and effective collaboration, many others are mired in emails, flattened by perpetually circulating files, and amazed that empowering technologies are now imprisoning. Come to the ITEE and share your successes and challenges in using collaboration software to manage documents and knowledge, improve team communication and productivity, and ultimately, to affect the bottom line.

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To make SharePoint friendlier at UA, we need to upgrade it. Creating a standard is a real challenge at UA because we're using the free version and it is very limited in its features.

eRoom is currently being successfully implemented at one organization. Providing the collaboration tools for employees to use has been the easy part—getting people to actually use them is much more difficult. From experience, they have found that it is best to assign someone to teach work groups and define the rules of engagement; in doing so, there has been a phenomenal success rate. The dedication of one person from the IT department is critical. As the word spreads, other people want to try eRoom. This company has many workgroups that deal with the same subject matter, so they use data mining to integrate the groups, and then the focus is on project management.

SharePoint can be used for expense reports, as well as all contracts and proposals. Everyone has their own system that they find to be most efficient, so how can we go about unifying? At the university, should we have alerts go out to students' inboxes so they know things have been posted? One of the first steps that should be taken is defining the workflow—what does it look like? How can you replicate a particular workflow with SharePoint? Version controlling is an added benefit of using collaboration tools such as SharePoint because all persons involved can have access to the most recent document, inboxes aren't being flooded, and

it is easier to keep track of who has done what and when.

When asked about using SharePoint for expense reporting, one participant explained that it was not mandatory to implement the tool at first; even today, many people still use Excel although SharePoint is easier to use and involves fewer steps.

To begin to make using SharePoint mandatory, small, focused groups of people who have a common set of "pain" and are sick of using email should be instructed to use collaboration tools. If the "pain" can be eliminated, the use of SharePoint will ultimately become mandatory without the employees realizing it.

It was speculated that perhaps SharePoint has been poorly accepted as a result of the wide variety of technology understanding in the user population. If one says we're not going to use email anymore—only SharePoint—some users will dump everything into the site and it'll eventually become a chaotic mess of documents. The users will eventually get frustrated with trying to find what they're looking for and will rely on email to collaborate. By keeping the site small and only posting 10% of the most active documents, the adoption curve is likely going to be higher. When working with international offices, collaboration tools work well, particularly due to time zone differences and language barriers. Clients and customers are accustomed to "improved individual productivity"—don't understand how we can improve group productivity; this is a big challenge for CIOs and IT groups.

EMC acquired eRoom and is a partner with Microsoft, who is pushing SharePoint—don't want conflict. Companies should never get married to a technology in IT, but always keep the concepts alive.

One participant learned, as he was setting up a conference call, that sending out a bunch of emails to try to find a time, never gave favorable results.

He learned about doodle.com to set up meetings; it is very easy to use, and you won't get tons of emails. Genius is another similar tool. Meetingwizard tends to send messages to the junk mail. These collaboration tools typically work better than online calendars, although one professor admitted that he still uses Excel to manage his schedule.

Question: Are there other stories that haven't worked with collaboration or do work? Has anyone found that in terms of collaboration tools, you really need to have someone fulltime to manage?

There are five different strategic business units at a particular company; it is too hard to get authorization to use SharePoint internally, thus all divisions have different degrees of participation (some are more successful than others because they have a SharePoint coordinator). Basically, they need to have one person heading the operation to make things run more smoothly, but the company has not made enough commitment just yet.

One attendee recommended using a "self-service approach"—teach employees to do 3 things (post, chat, sign-in/out), and then instruct them to teach themselves the rest by using help functions and the internet. Employees seemed to like this approach. Ultimately, this technique may fail but the adoption curve for using SharePoint at this company is very high.

Question: How can you cost justify using collaboration tools?

At one participant's former job several years ago, it was estimated that using SharePoint would result in nearly a seven figure investment. Is it worth investing that much money? SharePoint is continuing to grow, adding more tools, and trying to be everything. One company saves approximately \$122M/year as a result of using collaboration tools; ultimately, this is probably a case-dependent question.

Microsoft provides exchange and SharePoint for \$10/month per person, so the cost is much lower now. Additionally, you don't have to buy a license now; there is no governance—it's a free for all.

Thus, posting confidential information or sensitive information should not be done. One can get any level of protection, depending on how much they want to pay. One of the biggest conveniences is the ability to dial up and dial down, especially if you don't have a set server.

There is less and less asset ownership and more of a move towards cloud space—that's how IT grows—it is business process integration. Cloud space is very competitive in terms of pricing; one could easily pick up their code and take to Google, Amazon, etc. Computing, storage, and networking costs are merely pennies—it's all about the data. If the costs are kept down in areas such as these, then the company does better and can hire more positions.

A big concern for many companies is security. How do you get some commitment from a company you're doing business with that they're taking measures to keep themselves from getting hacked and protecting your information? What is the quality of security? Is it PCI compliant? Third party consultants can be hired to verify the quality by doing different levels of penetration testing. At UA, all faculty laptops are now encrypted because they might have students' personal identifiable information on them. Encryption may ultimately crash a machine and then it's rendered unrecoverable.

Question: If we have all these tools, things are attractive, productivity will increase, how do we put together this suite? How do we know that we'll end up with a group of tools that will work well together (not going between 10 tools) so we'll increase our productivity? Or if we have to work with a bad login or something else, how do we ensure that we have the INTEGRATED set of tools so the user's experience is what we hope it will be?

A bit of productivity can be sacrificed for an integrated environment. It always seems to be the question: do you want an integrated tool set or best of breed? Before deciding on a tool, try out pilot products and if they work well, then find one that is part of the supportable solution suite. Saying you're going to start someone out as the corporate standard before trying their product doesn't work so well.

For a company that has never used collaboration tools and works with engineers who cut and paste, email back and forth, what would be first step to adopting a collaboration tool? Should a free or paid for tool be utilized? Can the company host it themselves? Is there a big license? Start with a single work group that you think would benefit the most and talk to the project lead—look at a workflow then try to automate it. A workflow can be mimicked exactly the same way with SharePoint. The team lead can communicate between you and the team, but once the team is up and running, you won't have to be the salesperson. This is not an easy automatic process. How much training is needed? Hands-on teaching, not instructional, close one-on-one lessons with one person, and then a few short lessons for others should provide solid coverage of material. This is great business process reengineering—one can see unnecessary steps in a current workflow by working through the automation process. Once a few templates have been built, it is much easier to use collaboration tools and the adoption curve is exponential.

Students and professors communicate with a course management system—UA had previously used WebCt, but now Desire2Learn (Springboard) is utilized. Professors have customizable options with Springboard (like discussion thread, quizzes, chat, surveys, blog, calendar, grades, upload homework), but many still use email a lot as well. Another great feature is recording and posting audio clips; this is very handy if lectures are canceled due to inclement weather. Students don't know this, but professors have access to see who looks at material. How well does it work? Not too bad. Adoption rate? Most instructors use Springboard because the former shared drive was taken away, however, some refuse to use it. One of the biggest setbacks of using Desire2Learn is that it will not export grades to PeopleSoft.

How does the university deal with proliferation of stale documents—is there a “custodian” who sweeps old stuff out? The system will be wiped out every three years, but only stuff that hasn't been accessed in three years will be “archived”. Three years is thought to be a sufficient length of time because professors don't always teach the same classes every semester. Thus, it is still recommended to have copies on a hard drive. As

far as curriculum is concerned, the university is far away from adopting workflows.

To the students in attendance: we [the students] are so adept to change and we post stuff all over Facebook. However, today's adults are struggling to adapt to change and organize material; are we making it way too hard? One graduate student responded that the same problems exist among students. You can make a Googledoc, but you still end up emailing things around and too many versions of things make working together very difficult. For the most part, people aren't concerned with trying to work well in group—no one wants to make the actual work any easier. Also, nobody wants to standardize—everyone wants to do it their own way. As one professor pointed out, we don't provide students with collaboration tools, but we expect them to work in groups. At least now we have Gmail and discussion/dropboxes can be created on Springboard for group work; however, students don't want to use some of the Springboard features because faculty have access to all of the material that students share with each other. To get better class participation, professors can take virtual attendance by telling students that they know who has/has not looked at slides.

Question: Do people in industry have feedback that people are reluctant to post on collaboration tools because they think IS or their boss is watching?

Policies say that we have the right to look at mail; basically, there is no employee privacy. Every employee must electronically sign the company's ethics policy, but you don't advertise the fact that big brother can watch. It would be ideal to have a private focus for every team.

What governance do you put on what people can post with social networking tools? Someone needs to double-check before they can post something on a company's blog. Leaving it wide open, it will almost police itself, like Wikipedia.

Are there any international operations that you need to collaborate with in major time zone differences? Or language barriers? Are there any collaboration tools that translate for you? In most cases, English is pushed as the official language for doing business worldwide. International

companies are required to translate the English themselves. Unfortunately, some translation tools garble the meaning so much; they're good, but not good enough. Slang and colloquialisms are bad. SAP has multiple languages. When trying to communicate in real-time for troubleshooting purposes, there are companies where you can call a third party representative and they will translate directly on the line with you.

Electronic brainstorming—Nominal Group Technique—gives a voice to those who feel powerless. It is more efficient to brainstorm simultaneously. Is there software to do this or is it all manually done? Nowadays, we don't need big meeting rooms; it is much more convenient to sit in your office and contribute.

“Getting Things Done,” by David Allen is a great book that really helps with increasing productivity and prioritization, particularly with managing inboxes. The author describes a “one and done” approach to sorting email; if you open a message, you must do something with it at that moment. The strategy is all about context; in the car, at a

computer, etc., these are standard events in your life, so organize activities around them. For example, return calls primarily when you're in the car, not during other parts of the day. Have one trusted source where all to-dos go, whether it's a notebook, a tray on the desk, or an email account. It is possible to get 40 hours of work done in a 20 hour period. If an entire work group does this and is better off, is the company also better off?

If you evaluated your company on where you are in terms of collaboration, from 0-10, where are you? We will say 0 is no use at all and 10 is can't be better. Participants gave the following responses: 1 for workgroup (but the company would be at 7 or 8 and corporate at 4), 0 (hopefully 2-3 by next meeting), 7-8, 3, 1, 1-2, 1-2 (small company), 4, 0, 6 (too many tools), 1, 1-2, 1-2, 4 (too much governance), 3, 7 (have one completely unmoderated site/unstructured discussion), 0. There is a lot of room for improvement, seeing as the average is around 2. This group has a lot of aspirations and we will definitely revisit this topic in a few years to see how much things have changed.

**Topic for next meeting:** bring your own technology to work/consumerization of IT/new tablets/virtual desktops

**Next meeting:** April 15, 2:30-4:30 in the Murphy Room