



Effective On-line Collaboration

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by

Noam H. Arzt, Ph.D.
HLN Consulting, LLC®
7072 Santa Fe Canyon Place
San Diego, CA 92129
858/538-2220 (Voice)
858/538-2209 (FAX)
info@hln.com
<http://www.hln.com/>

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Introduction

Collaboration – working together to achieve a common outcome or objective – is becoming a pervasive challenge to organizations. As workers become more geographically dispersed, management structures get strained, and employee inter-dependence becomes even more pronounced. Consider the following:

- ◆ Business processes are getting more complex, spanning more functions, vertical flows, and information sources.
- ◆ Increasing globalization and mobility place colleagues in varied time and location
- ◆ The ease of use of many information technology products, coupled with a decrease in training, has *increased* the "signal to noise" ratio: with many more messages and contacts, fewer are often found to be of substantive value.
- ◆ Most knowledge workers find their residences are as "wired" as their offices making it difficult to separate home from work.
- ◆ The cost of fuel and increasing concern about greenhouse gasses has made excessive travel uneconomical and dangerous for the environment.

Collaboration is essential to meeting many organizational and personal objectives. The issue is not *whether* to collaborate, but how to collaborate *effectively*. Increased physical dispersion, inter-organizational reliance, and information overload all conspire to strain our natural collaborative tendencies. We become frustrated trying to figure out *when* to collaborate and when to just get our work done.

Technology's Role

Organizations need to support two key styles of technology-assisted collaboration:

1. **Asynchronous** – These activities do not presume that participants are interacting at the same time. Examples of asynchronous collaborative communications are email, group authoring, and voicemail. The disadvantage is that more elapsed time may be necessary to complete a task or operation, but this approach recognizes the differences in availability, interest, and style that some group members may have. Since asynchronous interactions are more likely to be computer-based, the record of their occurrence tends to persist with little additional effort.
2. **Synchronous** – These are activities that occur in real time. The participants are interacting and reacting to each other's contributions as they occur. Examples of synchronous collaborative communications are audio and video conferences, online chat, and real-time online conferencing. The advantage to this approach is that it tries to approximate the currency and timeliness of true face-to-face interactions without the need for all the participants to be in one room. The major limitation is the difference in the "feel" of the interactions. Real-time collaboration through the keyboard lacks the flair of most conversation. While audio or video conferencing can restore the personality of a speaker's voice, visualization can be quite limited depending on the equipment available.

In addition, synchronous experiences tend to be less persistent; once the real-time interactions are over, little record is often left that they occurred unless special steps are taken to capture the events electronically. Even if one records a conversation (audio or video), it is often tedious to replay the event.

	Face-to-face	Virtual
Asynchronous	<ul style="list-style-type: none"> • Video clip 	<ul style="list-style-type: none"> • E-mail exchange • Group authoring • Voicemail
Synchronous	<ul style="list-style-type: none"> • Meeting 	<ul style="list-style-type: none"> • Audio conference • Video conference • Online "chat" • Online, web-based conferencing

Making Collaboration Effective

A collaborative experience is a stream of events linked together to achieve a common purpose, a system. To make the most effective use of technology requires a **systems approach** toward understanding how a collaborative experience is organized. It is often useful to construct a diagram, or **map**, that plots the events and the activities that need to take place between events to make the collaborative experience successful. Even a single, discreet collaborative moment – a telephone call, conference call, e-mail exchange – often occurs within a larger frame of events and activities.

How do you ensure an effective collaborative experience? In order to be effective, designers of both asynchronous and synchronous experiences must be keenly aware of the **collaborative system** they are setting up. They must look beyond the specific collaborative event and map out the series of events necessary for the participants to reach their objectives. An **event moderator** ensures that a specific collaborative event is conducted and supported properly. A **collaboration coordinator** is responsible for the entire stream of events and activities that make up a collaborative experience.

While some studies show that electronic interactions can be de-personalizing, online collaboration has advantages that can be exploited if leveraged properly. Here are some useful tips:

- ◆ If possible, begin a collaborative experience with a face-to-face meeting. If necessary, conduct this session via video conference. This is especially necessary when participants do not know each other well or have never met. An initial face-to-face meeting puts a face and a voice to each participant.
- ◆ Online collaboration can have some distinct advantages over face-to-face interactions. One study shows that in brainstorming exercises more ideas were generated with a technology-assisted, anonymous process than a face-to-face session where politics and personalities were at play.

- ◆ One good way to make material available to participants, and make their interactions persist after specific events, is to construct a website to capture the events, products, and background material about an interaction. A website can fulfill these specific objectives:
 - **Increase openness** – Web technology is flexible, easy to use and pervasive in most computing environments. Its use allows information to be targeted as widely as appropriate for specific projects and to promote open, collaborative processes.
 - **Reduce the burden of document distribution** – Distribution of paper-based documents can be expensive and at times difficult to achieve efficiently to multiple destinations and individuals. Web technology allows documents to be "published" and accessed by the target audience (large or small) inexpensively.
 - **Improve the speed of document distribution** – Documents delivered using Web technology are available immediately to targeted recipients with no delays introduced by surface carriers, FAX machines or even electronic mail. In addition, web authoring is very supportive of rapid document turnaround and easy, flexible modification.
 - **Create a self-documenting history** – Web technology allows for the creation of a persistent, self-documenting history of a project or process. Even after phases of a project are completed others will be able to take possession of the material and continue building the site forward.
 - **Affect perceptions** – It may be important to have participants perceive that your organization is able to work in an information technology enabled world.
- ◆ Use new media effectively. Many workers are overwhelmed by information overload, caused in part by ineffective use of electronic media and in part by sheer volume. Corporate networks, and the Internet, are seeing exponential growth in traffic as the exchange of documents through e-mail becomes easier. An organization's technical architecture must include guidelines for the role of email and the web in support of collaboration. Use these techniques to try to reduce this load and improve effectiveness:
 - **Publish, don't email** – Whenever possible, especially for mass communications to large groups, publish a document on the web rather than sending it via email. Send a short message including a brief synopsis and the URL for viewing the full text. While this adds an extra step for the recipient, it significantly reduces overall bandwidth use and does not clog busy e-mail servers with additional large messages that need to be processed. Encourage your organization to facilitate your ability to post information on the company intranet or the Internet as appropriate. Also, if your organization supports it, use online an online database, ticketing, or issue tracking system to better organize and manage frequent communications on specific topics. The stream of messages can be organized by the tool making it easier to reconstruct a flow of communication later.
 - **Choose file formats carefully** – While distributing documents as word processing files is easy, it may be difficult for some recipients to open and view the files since

they may not have the appropriate software. In addition, word processing files are subject to easy alteration, intentional or inadvertent. Whenever possible, use a common interchange format like Adobe Acrobat (pdf files) for distribution. Not only are files typically at least *half* the size of their original format, but they are much less subject to alteration. Most software can be easily configured to "print" documents in Acrobat format.

- **When you do use email, use it effectively** – Email can be a great help, or a great burden, to your friends and colleagues. Be sensitive to their needs when you write your messages. Here are some tips for staying on the "good side" of your prospective correspondents:
 - Try to keep your messages short and to the point. Many people will not read long messages carefully. Use short paragraphs and skip lines between paragraphs to improve legibility. Consider using separate messages for separate topics even if addressed to the same individual(s). This makes it easier to respond to specific issues.
 - Only use email attachments when you need to, and recognize that not all recipients may have the software necessary to read your attached file. If your attachment contains simple text consider pasting it directly into your email message.
 - Check your email configuration. Many email programs, especially those tied to web browsers which are extremely popular, send new messages by default as web-enabled (html) documents. Some recipients may not be able to read your messages easily, so be sure to change your default setting for new messages to ASCII if you feel this is a concern for your intended recipients.
 - Use folders to sort messages you have read into topical groups. Usually, this makes it much easier to find a message at a later date, though as message searching and sorting technology gets more and more efficient the limitations of a large, single inbox diminish. Consider using your inbox as you would an inbox on your desk – as a place to keep messages that relate to things outstanding or in process only and not as a "date file" of all the correspondence you have received.
 - Some users find it effective to store *outgoing* messages into topical folders to make them just as easy to retrieve. Many email products can be configured to ask you each time you send a message where you want to save the outgoing item.
 - Using email filters to help sort through your increasing stream of new messages. Filters (supported by most email products like Outlook, Thunderbird, and most web-based products) allow incoming mail to be "sorted" into various folders before you have read them to help identify those which might need your attention sooner and place them in identifiable locations.
- ◆ Be sensitive to the activities that need to happen *between* collaborative events. This is where much of the action takes place in a collaborative system. Careful documentation and follow-up by the collaboration coordinator are required to ensure the most successful outcome. It is common for

workers to "pulse" between individual and collaborative work. An effective collaborative system builds upon these natural work cycles. The coordinator or group leader should assign work, explicitly if necessary, to ensure that the momentum of the group experience is maintained while the group is apart.

Creating a More Favorable Experience

For synchronous, or real-time events, these conditions help create a more successful experience:

- ☑ **Clear Agendas** – Events need to have clear agendas, circulated in advance if possible, so that participants can be prepared for the topic(s) to be discussed.
- ☑ **Well-orchestrated participation** – Just like a face-to-face experience, technology-assisted events need careful moderation and orchestrated participation. Participants need to know the rules that are in play and what is expected of them during the event.
- ☑ **Communicated Notes and Summaries** – Events need to be documented as soon as possible after they occur with meeting notes and summaries. Participants need a chance to correct the official record if mistakes or misinterpretations occur.
- ☑ **Clear Action Plan** – Clear action plans, with time lines, deadlines, and responsible individuals identified, need to emerge after the event and be circulated to all participants and managers.

While asynchronous collaboration may appear on the surface to be disorganized, streams of communications, it needs to be understood and managed as a series of events nonetheless. These events are simply characterized by more fluid participation over more extended periods of time. To be successful, they need:

- ☑ **Clear agendas** – Events need to have clear agendas, circulated in advance or at the beginning of the interaction, so that participants can be prepared for the topic(s) to be discussed.
- ☑ **Clear membership and participation** – All participants in asynchronous events need to be clear about membership in the collaborative group. If individuals are permitted to lurk (monitor the interactions without active participation) that should be made known as well.
- ☑ **Clear deadlines** – It may be less clear during an asynchronous interaction when the event is beginning and when it is ending. The event moderator needs to be explicit about the deadlines for participation and timetable.
- ☑ **Clear responsibility for action and response** – Unlike synchronous events, it may be less clear during an asynchronous event (or after) who is responsible to take action or follow up on a comment. The moderator needs to be sure these responsibilities become explicit.
- ☑ **Appropriate etiquette must be defined and maintained** – Participants in an asynchronous interaction, even more so than a synchronous interaction, need explicit rules defined for the interaction. This includes everything from agreed-upon meaning for punctuation and syntax of typed messages to presumptions about turnaround time and lack of response from a participant.

When choosing between synchronous and asynchronous activities, pick the strategy which matches your circumstances. If there is a need for immediacy of interaction and feedback, use synchronous communications. If the work style and organization culture support a less immediate level of response consider asynchronous activities instead. Remember to "mix and match" to ensure the best fit.