Creating a Collaborative Organization

An Action Plan for the Performance Phase

As organizations move through the initial phases of establishing their collaboration goals, aligning their efforts with business objectives, and assessing readiness, they begin to identify the many ways in which their workforce finds and uses information. Capturing knowledge in a person's mind can be difficult, but the range of Web 2.0 tools, such as blogs, virtual workspaces, wikis, desktop video, telepresence conferences, web conferencing, presence communications, and instant messaging offer new ways to tap crucial information.

As you move into the performance phase of implementing a collaboration strategy, you can expect to encounter challenges associated with creating a structured approach and shifting your emphasis from deploying collaboration tools for individuals to engaging larger groups. Moving from experimental, impromptu use of social networking capabilities to strategic, organization-wide implementation requires close attention to cultural and procedural changes.

The Cisco Collaboration Framework

The Cisco® Collaboration Framework can guide you through managing people, processes, and technology as you advance your collaborative capabilities through Phase 2, the performance phase.

Performance Phase: Implementing A Structured Approach

To achieve organization-wide benefits from new collaboration tools, organizations must make a big shift to the performance phase. In the performance phase, you will turn from strictly organic and opportunistic efforts to a more structured and prescriptive approach for developing collaboration capabilities. In addition, your focus will expand beyond the technology aspects of collaboration to the people and process components of change management.

A Shift from Individuals to Groups

In the performance phase, collaboration becomes a foundational element for organization performance. The performance phase takes the lessons learned by individuals and small groups during the investigative phase and
applies them to broader management processes and operational goals. Therefore, it will be crucial to move beyond individual goal-setting and performance management to measuring group units of performance.

**Building in Three Dimensions**

After benchmarks are established in the investigative phase, your organization will be building collaboration capabilities in your technology, people, and processes. The goal is to gain early successes that demonstrate how improved collaboration can help your business. These successes will help build adoption momentum and provide how-to examples to guide subsequent efforts. The main focus will be on improving the reach, richness, openness, and speed of the critical collaboration impact zones identified through your investigative workshops.

**Cultivate Adoption**

During the investigative phase, you likely began to recognize that only a certain segment of your workforce proactively learns and uses new collaboration tools. The rest of the employee population asks, “What’s in it for me?” These proportions vary widely among organizations, and your answer to this question may vary depending on the culture of your organization. In addition, once early adopters have achieved the gains that they were looking for, adoption plateaus and ceases without broader support and well-defined benefits.

**Support Collaboration**

Much of the work in the performance phase lies in developing the most fruitful ways to cultivate adoption. A mix of incentives is likely to be needed for overcoming traditional barriers to collaboration among various groups. Campaigns to create awareness and educate users will help sustain momentum. In addition, you will need to help collaboration tools evolve by integrating them into the organization’s business processes and existing IT architecture. Fortunately, new collaboration technologies are easier to integrate into a corporation than ERP systems and other IT initiatives of the past. At the same time, organizations need to develop collaborative business processes and create the tools and support services that facilitate collaboration improvement.

**Help Ensure Executive Leadership**

Although strong incentives, such as bonuses based on collaborative efforts, are important, Cisco has seen that adoption hinges most on leadership and on whether collaboration is made relevant to employees’ lives. Executive examples of collaborative behavior provide role models and clearly assert collaboration as an organizational priority. If executive leaders do not adopt the new collaborative methods, then employees will not see these changes as important. With good examples to follow, employees will understand what behaviors they need to emulate for their professional success.

**Align Technology**

The performance phase depends on aligning collaboration technologies with business processes. Any significant business process will have multiple collaboration points requiring different types of collaboration tools. To best support the operational processes, an organization needs a holistic collaboration architecture. The IT architecture must be able to orchestrate the mix-and-match integration of various tools into collaboration hubs or process centers while also supporting these tools across multiple devices, operating systems, and networks, such as wired, Wi-Fi, mobile, and others. These capabilities will make it easier to include partners, customers, and suppliers into your new collaboration processes.

You can begin implementing your chosen collaboration tools by systematically applying them to these critical business processes. The goal is developing a collaborative work environment that encourages and rewards collaborative participation. One way to achieve this is through building team workspaces and process applications that harness multiple tools to facilitate multistep workflows and multiple types of collaborative information, expertise, and interaction.
Steps that you can take to support workspaces and collaborative participation:

- Help ensure that content is stored in and made available through a central workspace that supports the logical workflow of your processes
- Provide visible schedules for workflow
- Create visible and logical content areas
- Create group editing and document management mechanisms

**Reward People**

Aligning employees with collaboration initiatives depends heavily on creating the right environment. Rewarding teaming and sharing activities will help create a more collaborative environment. Cross-functional collaboration hinges on active information sharing. Employees need incentives to share, especially with other groups outside of their current reward systems. Busy employees will typically give far less priority to people who do not directly influence their jobs or compensation. Organizational reward systems need to make cross-functional or other new collaborative interactions primary to professional success.

**Steps to Improve Reach and Richness**

- Identify and make visible internal and external expertise across your organization.
- Recognize and reward expertise and the proactive sharing of knowledge.
- Cultivate visible communities of knowledge focused on sharing best practices.
- Develop management skills for managing a matrix of collaborative resources.
- Promote a culture of trust and proactive, open, and respectful sharing of ideas.

**Steps to Improve Openness and Speed**

- Help ensure team alignment through management and stakeholder video messaging and blogging.
- Communicate from senior leadership the sense of urgency in building new collaborative capabilities for improving the speed of operations.
- Create plans to help partners and suppliers build their communication and collaboration capabilities.

**Align Processes**

Much of the performance phase focuses on improving collaboration impact zones: the hubs of interactions that influence the quality of major business and operational processes. The investigative phase exists to prepare an organization to enact major changes to these crucial activities. If your organization is not making changes to these interactions, you are still in the investigative phase.

**Steps to Improve Reach and Richness**

- Remove organizational barriers preventing alignment of expertise with strategic priorities.
- Design workflows to use “click-to-link” virtual expertise at critical points in processes.
- Implement collaborative decision-making processes that require and reward participation.
- Design and cultivate communities of, and a process for, innovation and idea sharing.
- Design processes that promote the use of visualization (video, pictures, physical representations, etc.) to achieve business goals.
- Develop and promote content templates that logically support the phases of your processes and the desired outcomes of your phases.
Steps to Improve Openness and Speed

- Establish centralized forums for discussions and comments.
- Help ensure that the interactions needed to support your processes are as engaging, interactive, and effective (visual and content rich) as they need to be to promote and reward inclusion and knowledge sharing.
- Build cross-functional teams that represent every facet of the collaborative business processes that you want to improve.
- Make improvements in process speed a corporate priority.
- Identify critical inputs, decision points, and outputs where partners, suppliers, and customers can influence the speed of collaboration for a given process.
- Choose a speed dimension that is a stretch but attainable for your enterprise.

Next Step: Transformation

The performance phase of a collaboration initiative focuses on alignment and operationalizing strategy in order to advance to the transformation phase. Our hope is that this information will help you create your own collaboration framework and inspire you to new ways of thinking about collaboration in your own business.

For More Information

For assistance with your collaboration initiative, refer to the entire Cisco Collaboration Framework at www.cisco.com/go/collaboration_framework. On page 38, you will find a How to Begin checklist that will get you started. We hope that our collective work contained in the guide will help you create a successful collaboration framework and inspire you to new ways of thinking about collaboration in your own organization.