

Defining and Measuring Enterprise Collaboration¹

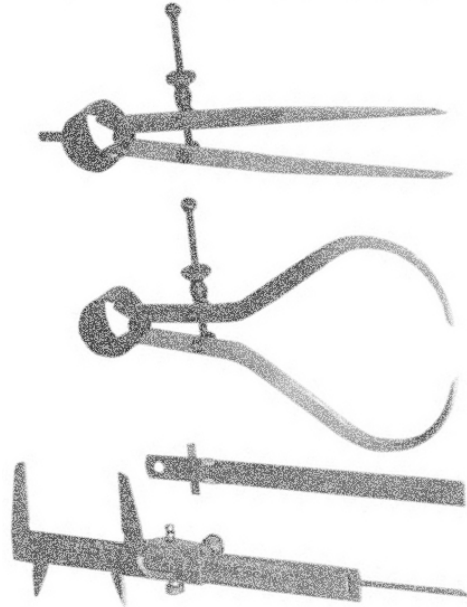
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While consulting on a collaboration metrics project for the World Bank Group in Washington D.C. recently I provided a high-level definition of **collaboration**:

Collaboration: people working together and sharing information to achieve a common objective.

Here's a discussion of the definition's different components:

- **People.** The main focus of this definition is on people and processes. While people can use technology to support the communication that occurs when they collaborate, collaboration is usually something that takes place among people, not software.
- **Working together.** People who work together can be located in one location or distributed organizationally (e.g., in different departments or institutions), geographically (e.g., in different cities), and temporally (e.g., their activities are separated by minutes, hours, or days).
- **Sharing information.** Information can be shared on a one-way basis (e.g., from one to one or one to many) or interactively (e.g., via a real-time conversation or via conversations or discussions carried out over a period of time). Note that the concept of "sharing" is important here, i.e., information can be said to be "shared" when, after Person A communicates something about Topic X with Person B, Person B then possesses the same information about Topic X as Person A.
- **To achieve a common objective.** When a group of people share a "common objective" they have reached some level of agreement on the what they are trying to accomplish. But it's not necessarily true that everyone involved in a project needs the same motivation and the same information as everyone else for that project to be a success, nor is it always true that collaboration



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is always centrally managed as in a traditionally-defined project. True, as the number and variety of people who need to collaborate increases, it can become more difficult for management to ensure that all have the same information and the same motivation. What usually happens then is that management works with different groups of collaborators in different ways and takes into account that different types of motivation are needed — even though all may share the same end objective.

The above definition is relevant to answering at least two important questions about collaboration:

1. What is the best way to apply technology to facilitate the communication and collaboration that are needed when people need to work to a common objective?
2. If you do (1), how do you then measure whether or not you're actually succeeding?

Regarding the first question, you need to acknowledge, even before you think about technology, that you need to understand how people in your organization are collaborating now. For example:

1. What types of job situations, decisions, or processes require people to collaborate and share information?
2. Who are the people involved?
3. Where are they located, e.g., are they all part of your organization, or are some external to your organization?
4. Are there any barriers or impediments (legal, cultural, political, etc.) to collaboration that need to be documented or understood?
5. What types of information need to be shared and worked with?
6. What types of tools and technologies are currently available to support collaboration and information sharing? Are they being used? If not, why not?
7. Are there currently any organizational processes, projects, or operations that explicitly require people to collaborate?

Regarding your organization's current technology: you need to understand how existing tools such as telephones, audio and video conferencing, email, documents and presentations, intranet, network folders, and web based services are currently used to support your organization's objectives, even if these technologies are owned or operated by outside organizations. That means, for example, that if your staff members are already using externally-hosted tools such as Google Docs or BaseCamp to collaboratively develop official documents, you need to be aware of

this. The same goes for audio and video conferencing via tools such as Skype. Are people using these tools because you aren't providing them? Or are people using these tools instead of the ones you provide?

Why should you care about the answers to these questions? The answer is simple: people already have to collaborate to do their jobs. Even if you are already providing "official" tools and/or processes to support this, you may need to address the need for people to change existing behaviors they currently find effective. Being aware of the need for such behavioral changes prepares you for the time and resources required to implement new tools, policies, and processes, should you need to do so.

Concerning current processes that explicitly require collaboration: you need to understand these, e.g., what are they, who manages them, what resources do they require, and how do you know if they are effective or successful?

How these current processes are performed — and changed — after you introduce new technology and supporting business processes will be key indicators of the success of your efforts to improve collaboration. Understanding how processes change will also drive your understanding of how collaboration initiatives might impact or even reduce your operating costs. For example, moving from time-consuming paper-based collaboration to realtime electronic messaging or conferencing might require major adjustments by some of your staff.

For example, you may introduce a new networking tool to make it easier for people to share expertise and work together on shared tasks no matter where they are located. Your new system might automatically generate data on usage of the system (e.g., who is communicating with whom, how frequently, and about what), but without knowing how this usage impacts your target processes, you'll have a difficult time telling, without some kind of "before and after" data, whether your investment is worthwhile and whether the time or cost involved in doing a task is actually reduced.

One example of this might be the introduction, into an email-dependent environment, of a networking tool that provides individual projects and activities with a central location for relevant files, discussions, and information sharing. Moving away from multiple email based attachments and proliferating "cc" messages should have an efficiency impact, at minimum. But will this really impact the time it takes to accomplish a task? Will you have data to help you answer this question?

Another example: let's say your organization has a rigorously-defined approval

process for complex projects that go through successive design stages requiring a series of formal group-conducted reviews and approvals. In the past you may have conducted these reviews in person in face to face physical meetings. Now you're considering using internal blogs, file sharing, and conferencing software to reduce the number of face to face meetings you actually need to conduct. Aside from easily measured reductions in travel costs, how else will you know if the process actually runs more efficiently, unless you have some sort of before and after measure of how resources, including staff time, are consumed differently?

The above are just a few of the things to consider when you decide to improve how people in your organization communicate and share information. It's also useful to be specific. While it's possible to encourage concepts like "knowledge transfer," "information sharing," and "collaboration" without being explicit about the behaviors that need changing, you really do need to be clear about what behaviors you're trying to facilitate — and what you're trying to measure. For example, it might be useful to consider two types of collaboration when thinking about measurement, as I wrote in [Can Collaboration Technologies Help the Government "Shrink Smart"?](#):

Type 1 collaboration is project- or task-specific and involves collaborators in performing a specific task or accomplishing a specific goal. The linkage between the costs and resources associated with collaborative behaviors (e.g., sharing information, making decisions together, meeting to review and discuss issues, etc.) and the defined task or goal supported by collaboration is relatively clear and can be documented. Here traditional concepts of efficiency can be introduced as the basis for metrics that track the relationship between collaboration and supported work.

Type 2 collaboration is more background oriented and involves people working together normally on a day to day basis and sharing information and knowledge in a more social manner. The classic example is "gossip around the water cooler." The linkages between costs and resources devoted to "networking," and the eventual ability the organization has to take advantage of these relationships and the information and solutions that can traverse them, are more difficult to articulate.

When you're trying to convince "old dogs to learn new tricks" by moving to more collaborative processes built around information sharing tools that compete with standard email and meetings, you need more than just platitudes about the value of collaboration to convince people to change. You need concrete evidence and specific measurements. To do that, you need to be specific about the collaborative behaviors you're trying to change. And if those behaviors aren't important, or if

you're focusing on low priority activities or problems, nothing you do to improve collaboration is going to amount to much.

Finally, keep in mind that collaboration can't always be planned and managed the way more production-oriented processes can be. Sometimes collaboration emerges in response to a crisis or because some one had a great idea that he or she pushes with the help of others. Systems and procedures for managing and measuring collaboration shouldn't be burdensome or restrictive.

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