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Assessing the State of Collaboration

Return to Essentials

A study from All Collaboration

March 2010

In collaboration with

Collaborative Strategies
Collaborative Technology Analysts and Consultants since 1990





Preface

Assessing the State of Collaboration: *Return to Essentials* is a study by [All Collaboration](#), in collaboration with [Collaborative Strategies](#) and [Elearning!](#). All Collaboration is solely responsible for the study and the contents of this report. The findings and views expressed in this report do not necessarily reflect those of Collaborative Strategies and Elearning!.

The primary objective of the study was to assess the state of Collaboration among individuals and in organizations. This includes:

- expectations, purpose and level of collaboration,
- use of collaboration tools and their effectiveness, and
- barriers to collaboration.

By collaboration, we mean working jointly with others.

Over 450 respondents participated in the survey conducted by All Collaboration in January and February 2010. Respondents came from all levels within organizations, all functional areas, a wide range of organization sizes, a wide range of industries with some concentration in consulting, and different regions although mostly North Americans. While there are some differences in emphasis, the general findings and conclusions are consistent across most of these groups.

We present the survey results in the main body of this document. We have also included, along the left-hand side, selected open-ended comments from survey respondents that add some color to the findings.

This report is written by Steve Lamont and Lokesh Datta of All Collaboration. For further information or inquiries, contact us at: contact@allcollaboration.com.

We thank Al Schmidt, a contributor to All Collaboration, for ongoing input and feedback throughout the course of this study. We also wish to thank Collaborative Strategies and Elearning! for contributing many of the survey respondents.



Executive Summary

The new era of collaboration. Studies suggest that collaboration is a top priority today for senior executives. Collaboration is experiencing a growth in impact and importance in the enterprise. Numerous driving forces are responsible, which include: trends in globalization and outsourcing, workforce demand for flexibility, critical need for rapid innovation, co-creating value with vendors and customers, technology and tools enabling a networked world, and behavior and expectations of Gen-Y.

We undertook this study to understand and assess current practices in collaboration and future outlook on collaboration.

Key findings. We were struck by three main messages from our survey responses.

1. **Complex collaboration is already a significant work activity for many people, and will only grow in importance.** Most respondents have multiple collaborative projects underway at any given time. The purpose of these collaboration projects spans virtually the entire spectrum of enterprise needs. Collaboration efforts extend well beyond a group/department to include collaboration with other departments, partners, vendors, and customers. Collaboration is viewed as being essential across the board in the future, significantly more than the reality today. Individuals as well as organizations believe that they need to collaborate substantially more than they do currently.
2. **Successful collaboration requires mostly the good principles of project management applied to dispersed teams.** Getting the old-fashioned basics right is critical. Most important advice from the respondents on effective collaboration is to: i) Define goals, roles, timelines and deliverables clearly, ii) Communicate the process and progress frequently and clearly, and iii) Select team members who bring real knowledge and expertise. Key challenges to effective collaboration include organizational culture and priorities, and collaboration process and tools.
3. **Keep it simple on the collaboration tools.** Email, audio and web-conferencing, and file sharing are rated the most effective tools for



collaboration. Wikis, IM, video conferencing and discussion forums rank low on effectiveness for collaboration. Selection of right tools and proper training are identified as potential areas for improvement.

The subtitle of this report, *Return to Essentials*, captures these themes. It helps emphasize that collaboration has become or is becoming an essential for how enterprises get their business done. At the same time we must all be careful about the latest fads in tools and approaches, because our survey respondents point out the importance of time-tested meeting-management practices and well-travelled communications tools as the best way to make collaboration effective.

The balance of this report expands on these three key themes, illustrated by survey findings and quotes from respondents. The appendix provides other survey responses.



Complex collaboration is already a significant work activity for many people, and will only grow in importance

People in our sample mostly have a large number of collaboration projects on the go at any point in time: two-thirds with 2 to 5 projects and one-fifth with 6 or more (Figure 1). And a majority (62%) of respondents participate on collaborative projects on at least a daily basis (Figure 2). Even allowing for some survey sample bias, that those who collaborate more are more likely to complete the survey, we found very few instances of no collaboration (Figure 1).

Figure 1: *How many collaboration projects do you have underway at a typical point in time?*

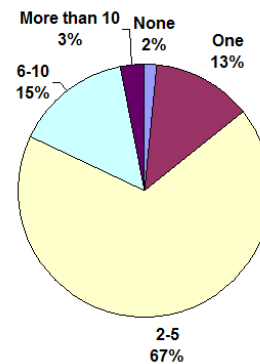
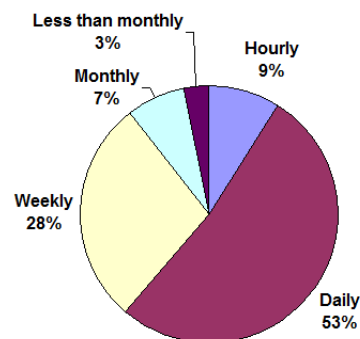


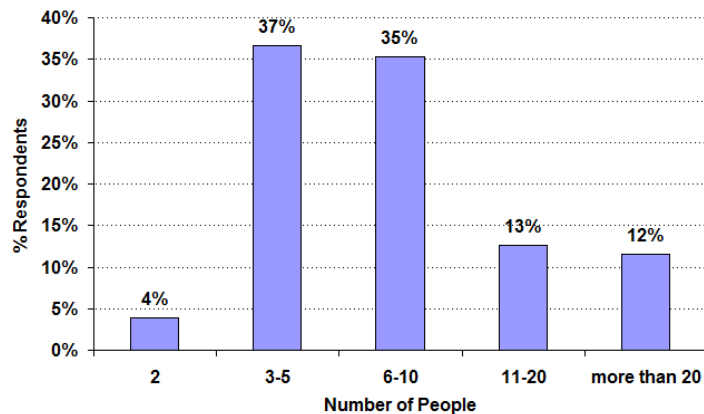
Figure 2: *How frequently do you participate in collaborative projects or activities?*





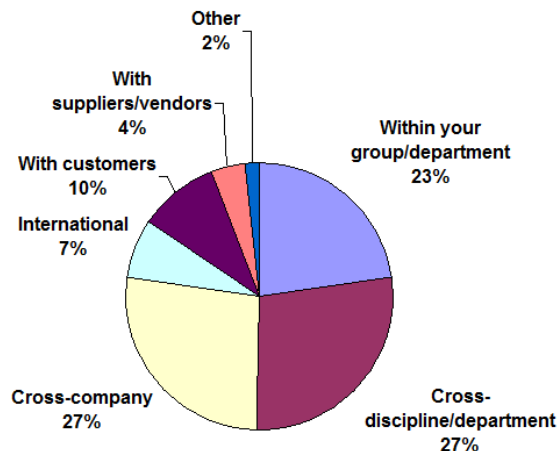
The projects are complex, often with many people involved (Figure 3). Typical team size is 3 to 10 participants (72%). Half the projects span outside the company to partners, customers, and vendors (Figure 4), and few are restricted to the one group or department (23%). This corresponds to how few of the collaboration teams meet face-to-face, with more than half meeting less than weekly or never (Figure 5).

Figure 3. *How many people were directly involved in your ONE recently-completed collaboration experience?*



“It [collaboration] takes longer but the results are better.”

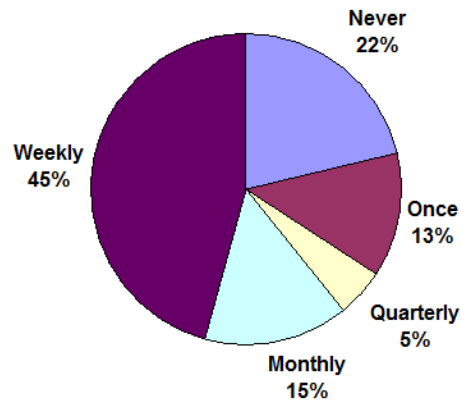
Figure 4. *What was the scope of your ONE recently-completed collaboration experience?*



“The value of collaboration is demonstrated in outcomes.”



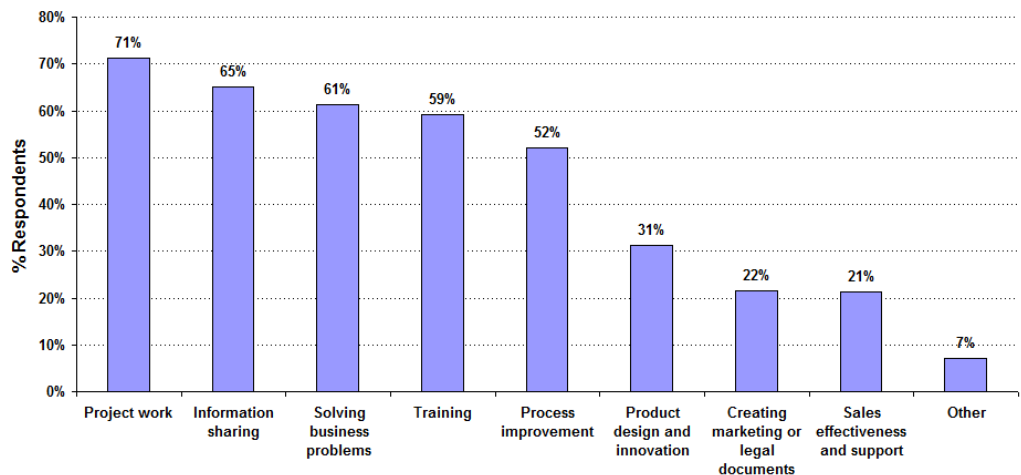
Figure 5. How frequently did your team meet face-to-face during your ONE recently-completed collaboration experience?



We find that the purpose of collaboration is wide ranging in the enterprise (Figure 6). Collaborative efforts permeate throughout the enterprise needs.

Figure 6. What is the purpose of your collaborative efforts?

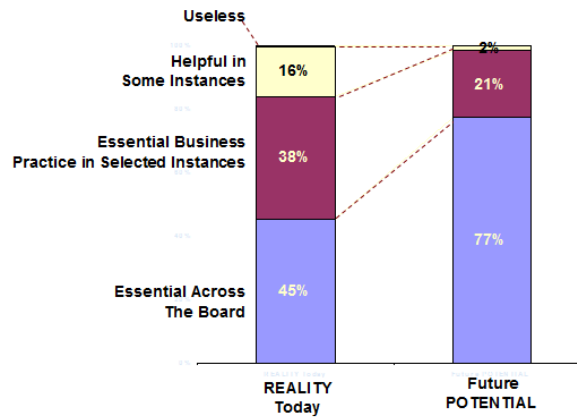
“Collaboration is a key value for our organization. It is introduced in our Onboarding process and reinforced constantly.”



Even more telling is the view of the respondents that collaboration will become even more essential to the success of businesses in the future (Figure 7). As a result people want to be more effective collaborators (Figure 8) to contribute in this environment. Moreover, the respondents say that their organization wants its employees to collaborate significantly more (Figure 9).



Figure 7. How would you rate the value of collaboration to the success of your business?



“Without collaboration across all levels, we lose our best shot at creativity and being competitive.”

“Collaboration is essential for my business.”

Figure 8. Please rate yourself... a) I WANT to be able to collaborate, and b) I am ABLE to collaborate.

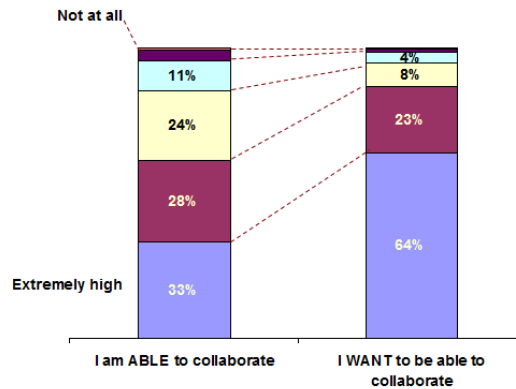
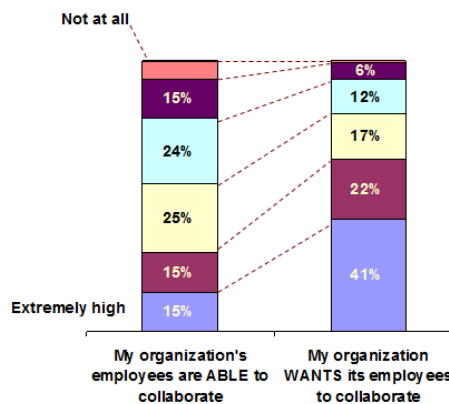


Figure 9. Please rate your organization... a) My organization WANTS its employees to collaborate, and b) My organization's employees are ABLE to collaborate.



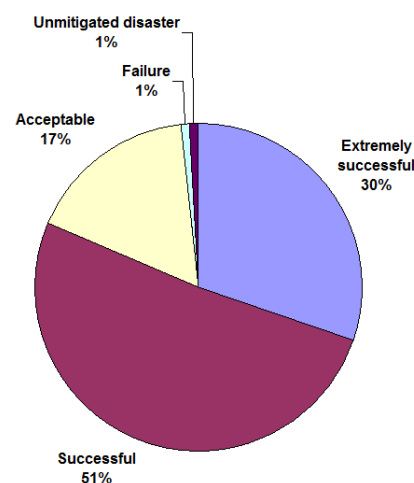


Successful collaboration requires mostly the good principles of project management applied to dispersed teams

We asked the respondents to assess their collaboration experiences and offer guidance on making collaborative efforts more effective.

The good news is that most respondents judged their latest collaboration project a success (Figure 10). Success requires getting a range of old-fashioned basic elements right (Figures 11–13). These findings also reinforce that collaboration requires a holistic approach: shared and valued objectives, right mix of people and skills, basic project management discipline, and collaboration tools that are appropriate for the context.

Figure 10. *How would you judge the success of your ONE recently-completed collaboration experience?*





“The quality of project management is probably the most important factor of all.”

“Trust is vital for collaboration to be effective.”

“You have MISSED an ingredient that Gen-X and younger wouldn't dare admit is necessary: leadership ... cut through the bullshit of working 'in groups'; that is the domain of salaried employees!!”

“Tools are secondary. Having the right team with the same vision and goals is key. Timelines/deadlines also are critical.”

“There is great value in this practice and with good project management, clear expectations and good communication.”

Figure 11. Which of these elements contributed to the success or failure of your ONE recently-completed collaboration experience?

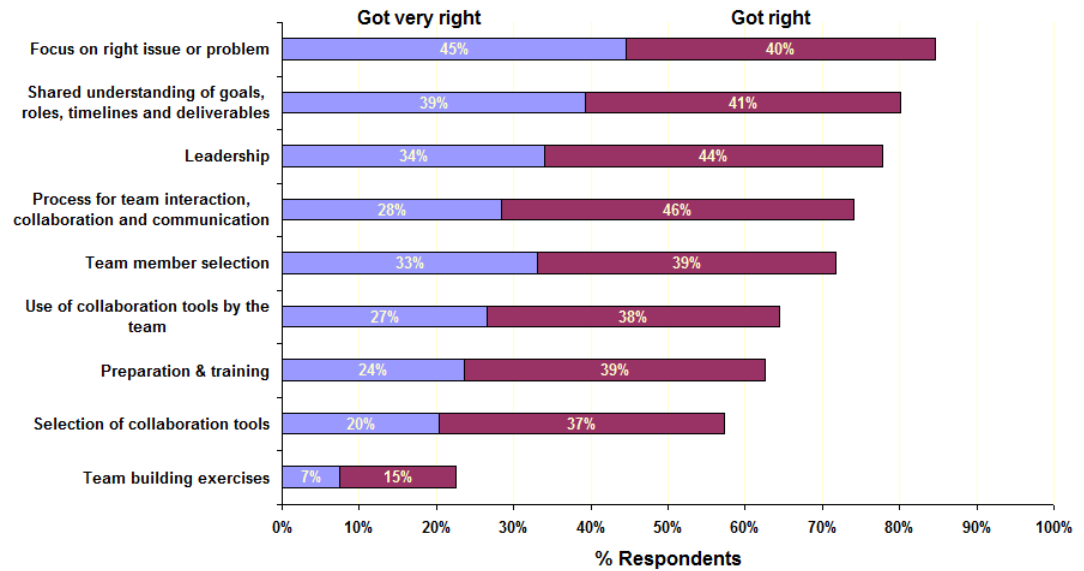


Figure 12. What weighting points would you assign (must add to 10) to each of the following to improve effectiveness of collaboration in your organization?

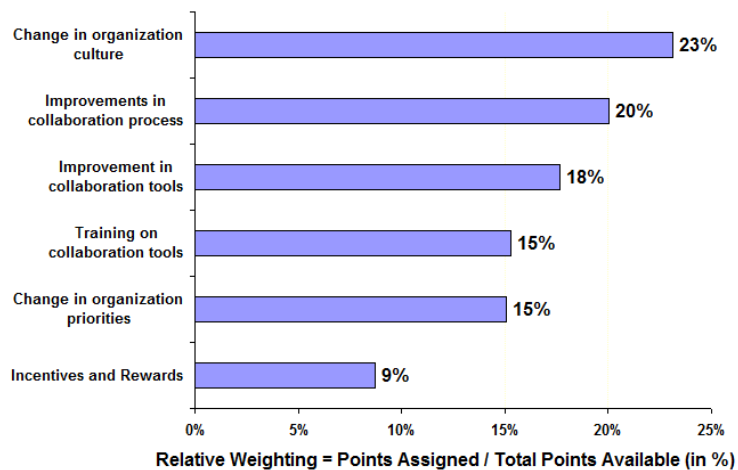


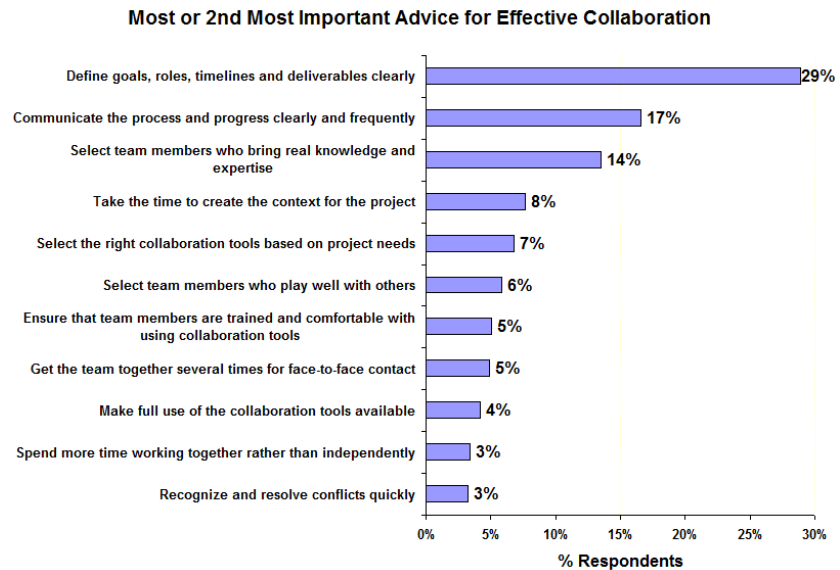


Figure 13. *What is the most important advice you would give to someone who is about to lead a major collaborative project? What is the 2nd most important?*

“The biggest impediments to collaboration are poor planning, ineffective communication skills, and politics.”

“The desire to collaborate and focus on an objective organizational goal is often impeded by ‘hidden Agendas’.”

“Time, resourcing and rewards are critical to creating a context for collaboration. The younger generation is highly interconnected so their collaboration challenge may be the quality of the output and ownership for results.”



The most or 2nd most important advice for effective collaboration (Figure 13) corresponds with our view that teams must balance the [4Ps for effective collaboration](#), namely: Purpose, People, Process and Place (Figure 14).

Figure 14. *Most or 2nd most important advice for effective collaboration in the context of the 4 Ps Framework for Effective Collaboration.*

Purpose	<ul style="list-style-type: none"> Define goals, roles, timelines and deliverables clearly (29%) Take the time to create the context for the project (8%)
	<ul style="list-style-type: none"> Select team members who play well with others (6%) Ensure that team members are trained and comfortable with using collaboration tools (5%) Recognize and resolve conflicts quickly (3%)
Process	<ul style="list-style-type: none"> Communicate the process and progress clearly and frequently (17%) Spend more time working together rather than independently (3%)
Place	<ul style="list-style-type: none"> Select the right collaboration tools based on project needs (7%) Get the team together several times for face-to-face contact (5%) Make full use of the collaboration tools available (4%)



It is interesting to note that the elements of Place (including tools) received 16% relative weighting for the most or 2nd most important for effective collaboration, out of proportion to the hype. This confirms that collaboration is a whole lot more than the tools and meetings. Undue emphasis on tools – looking for the most sophisticated collaboration tools – to enable collaboration is not necessarily a recipe for effective collaboration, as we shall see next.



Keep it simple on the collaboration tools

“ ‘Collaboration’ software sucks. It’s too complex, and people don’t trust it (either to work, or to be secure). That’s why email is so popular.”

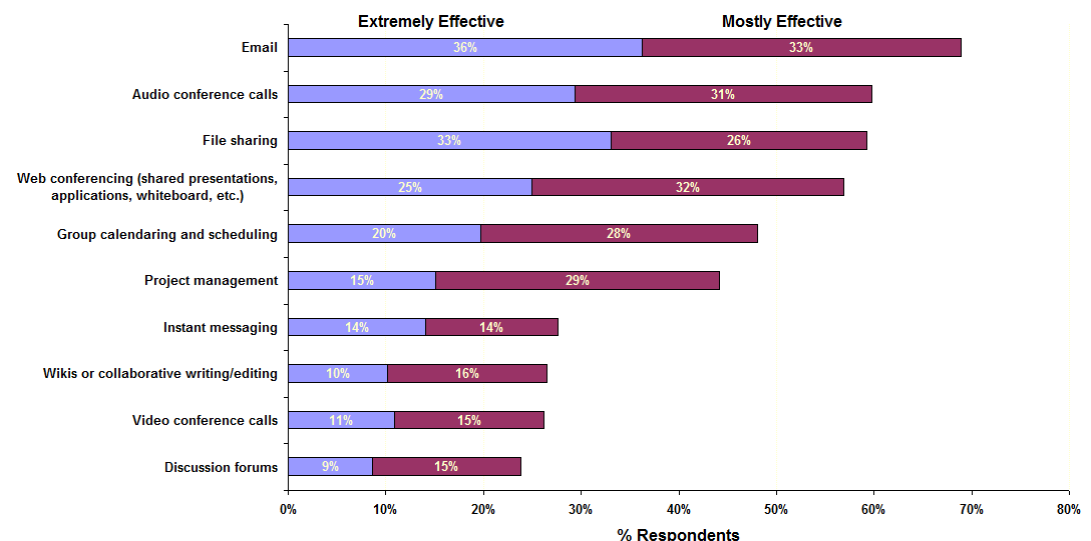
“The best collaboration tools in the world have little value if they are not relevant to success, whereas even the simplest tool, well-used and linked to productivity, is a godsend.”

“In my experience, it is not the tools that are the issue. It is the constant distractions (often brought on by tools).”

There is much emphasis in the media about the power and need for collaboration tools. It seems like a new one is announced every few weeks, as if the tools alone will make collaboration more effective. Such emphasis on tools misses the most fundamental point: Collaboration is about people doing things together, rather than the technology they use!

Our survey respondents are not impressed by the hype. They judged email, audio conferencing, file sharing, and web conferencing as being the most effective (Figure 15). Despite the perceived potential, instant messaging (IM), discussion forums, wikis, and video conferencing all rate among the least effective for collaboration (Figure 16). Tools also drew the sharpest comments in the open-ended question in which we asked respondents to comment on any or all aspects of collaboration.

Figure 15. How effective are collaboration tools?

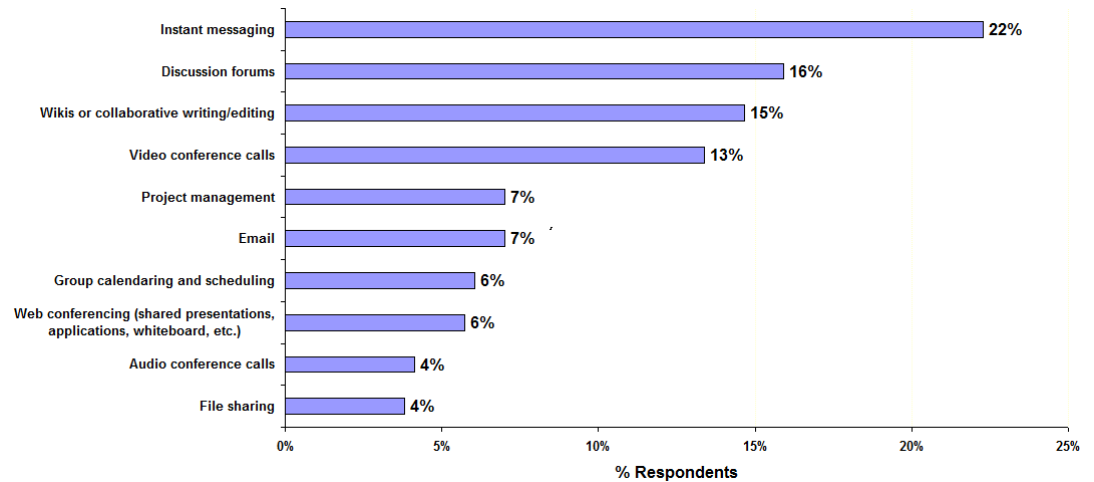




“Although I think that IM is a great communication tool, it does not fit well in collaboration situations because it is one on one ... want to share ideas and retain them for the entire group to see and utilize.”

“IM can be a real distraction. I know people who don't use it because they get too many IM's or who always have their status as "unavailable"... There were situations where it was really useful; for example, ad hoc conferences where problems could be solved.”

Figure 16. *Of the collaboration tools you use, which tool is the LEAST EFFECTIVE?*



There appears to be little connection between current widespread use of a tool and its effectiveness for collaboration. The case in point is IM. IM has a great deal of familiarity among the masses and it is fairly easy to use, yet it scored low on the effectiveness measure for collaboration and highest for being least-effective.

There may still be some upside to proper tool selection and training on how to use them. For improving collaboration effectiveness, the respondents assigned 33 points out of a possible 100 to “improvement of tools” and “training on collaboration tools” (Figure 12). This may be a cry for help, sensing that the right tools, properly used, might improve rather than harm the collaboration effort. From our related experience and commentary in this study, this training needs to go beyond the functional “how you use the tool” to include setting the rules and norms to make productive use of the tools.

In a recently released study, [Managing Virtual Teams: Taking A More Strategic Approach](#) by the Economist Intelligence Unit (EIU), more than one-half of executives say that their virtual teams use video conferencing. Respondents score video conferencing fairly low in our survey for being an effective tool for collaboration. We suspect that the variance is due to cultural differences. The EIU study conducted surveys with only European executives. While our study included respondents for 5 continents, the concentration of respondents was from North America.



Commentary

“In most organisations collaboration is a whole-lot of lip-service. The reason is two fold; a) people don’t see their supervisors as promoters and activists of collaboration... culture of collaboration doesn’t emerge from delegation., and b) the context is not created mostly... the 'what is in it for me' is not established and hence team members don’t mostly see the reason to 'let go' and collaborate.”

“Collaboration requires a win-win perspective. Our culture is more about win-lose as we have a great lack of trust and compete internally.”

“The corporate culture is the main reason for what seems to be reluctance ... we more or less learn to keep our knowledge to ourselves to increase job security.”

Keeping it simple and applying business-meeting fundamentals is the clear message that comes through loud and clear from this study. This message is applicable for business leaders, collaborators at large, and tool makers alike.

As the importance of collaboration continues to grow, challenges remain; the human element in collaboration far outweighs technology and tools. To get this balance right, we believe collaborators must address what we call the **Four Ps of Collaboration**.

- **Purpose.** What is the collaboration effort trying to achieve? How should the team measure success? How will they know when they are done, and when it is time to “pop the champagne cork”? Make sure your collaboration effort has a clearly-defined purpose and is more than a set of meetings and activities.
- **People.** Who needs to be on the team, and in what roles? Which departments or functions need to be represented? Which suppliers, partners, or customers need to have a voice? What types of skills does the team need to be effective -- to look at the problem from the right perspectives and to develop buy-in around the solution? Avoid picking the people who are most convenient or who have worked together on a recent project, and instead think about who is needed for this project. Go beyond the usual limitations of time zones, email access, international travel, and sharing of proprietary data -- and instead think of who is needed to do the best job.
- **Process.** What is the overall process to define the problem, analyze the current situation, gather data, analyze options, and gain input and support from other people? What are the necessary behaviors among the team members and interacting with others to get to the best solution. Some collaboration projects need to be relatively closed to protect secrecy, and others deserve to be out in the open. Some need to be



"I've found that collaboration works best when team members are given a goal and the members are clear about their duties which will help to achieve the goal. There must be a deadline and frequent updates/ deliverables in order to keep track of progress."

"It is absolutely essential that time is spent by management to engender a genuine 'buy in' to the process which assists collaboration, contact and sharing experience and expertise between employees therefore supporting improved productivity."

"I feel the biggest obstacle to collaboration is a department's fear of losing control. People are very territorial."

"Everyone talks about collaboration. But collaboration requires shared goals, trust, and a good process."

"Senior Management must use and endorse!"

"Culture is key."

streamlined to find the best solution fast (think of the crisis on the Apollo 13 space flight), and others require a slower pace to arrive at the best solution. Some need to be driven from the top-down to fix a particular problem, while others are better to be bottom-up to create new and workable solutions.

- **Place.** How and where will the team conduct their interactions? What is the mix of face-to-face meetings versus virtual teams? What is the mix of real-time meetings (physical, phone, or web) versus non-real-time interactions (message boards, wikis, email exchanges, etc.)? How might the mix of interactions or "place" change over the course of the collaboration project -- perhaps kicking off with more direct contact, separating into more virtual interactions, then coming back together with direct contact to converge on the solution? Collaboration tools can be effective to help a team work together, but only in the broader context of "place" and how the team members will interact.

There are many ways to drive effective collaboration. At the same time, explicitly agreeing on the Four Ps of what is best for each situation helps ensure an integrated and holistic approach, as well as helps align all the people on the team.

Message to leaders. We have seen a good bit of debate on whether collaboration is a strategy or tactic. The simple answer? Who cares! When collaboration is a key to creating value for business success, it must become a core capability – something you intentionally and deliberately nurture, develop and practice. It requires culture change aimed at flattening hierarchy, increasing transparency, allowing right talent to naturally flow to right endeavors without organizational barriers, establishing open communication, ensuring recognition commensurate with contributions, firing know-it-all's and gate-keepers, and so on. You will know you have succeeded when leading companies are trying to steal your employees because of their collaboration skills.

Message to collaborators at large. Collaborators must have a shared understanding of: i) goals and their impact and rewards for the business and self, ii) roles and responsibility, and expectations iii) collaboration process including decision-making process, and iv) selection of collaboration means and tools.

No two collaboration efforts are alike, as we know. Seemingly little things can become big, especially when it comes to the human element. It helps a great deal to pay close attention to communication styles and needs, cultural differences, personal desires and constraints, and recognition and rewards.



“Must have business purpose and processes. Too many projects focus on the collaborative technology and ignore the processes (and people!)”

People are eager to learn these tools and excited about the prospect. They worry though because the training to use them and the ‘learning curve’ is not always allowed.”

When it comes to tools, choose the right horse for the course! Choosing the right, agreed upon tools for the project is important. Tools must be effective. Bear in mind that some apparently inefficient and looked-down-upon tools may be more effective for a collaboration effort than feature-rich tools that collaborators do not use for various reasons such as lack of reliability, difficulty in access, complexity of use, poor control of alerts, or general lack of training. And whatever the chosen process and tools – either use them consistently or change them.

Message to tool makers. It is not what a collaboration tool can do for collaborators; it is about what collaborators do with the collaboration tool. Features/functionality of tools must translate into addressing real-life needs and expectations of collaborators. The product roadmap may entice or lead the end-user but it must never lose the end-user. Bring the end-user along.

Helping collaborators with selection of right tools and offering proper training are the areas of opportunity.

And the end, keep it simple!



About the authors



Steve Lamont is a co-founder of [All Collaboration](#) and an entrepreneur with 30 years of experience in marketing strategy for technology companies -- as both a consultant and a senior executive. He is now an angel investor, leading several start-ups, and trying to anticipate what will happen next for the web. Contact Steve at: steve@allcollaboration.com. Follow Steve on Twitter @SteveLamont.



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About [All Collaboration](#)

Focusing on collaboration, we offer points-of-view, original research, reviews of products and services, interviews with industry luminaries, and the “best of” articles on the web. We have a companion [Discussion Group on LinkedIn](#).



Appendix: Survey Findings

The survey instrument was composed of primarily four parts:

1. Current Practices in Collaboration
2. Recent experience in Collaboration
3. Viewpoint on Collaboration
4. Demographic Information

Here we provide a graphic representation of responses to survey questions.

Current Practices in Collaboration

Figure 17: *How frequently do you participate in collaborative projects or activities?*

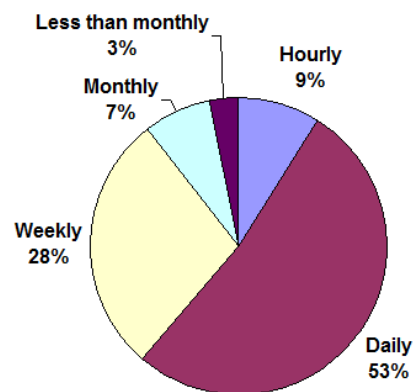




Figure 18: How many collaboration projects do you have underway at a typical point in time?

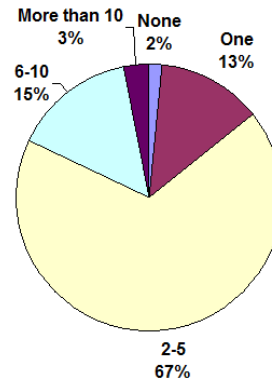


Figure 19. What is the purpose of your collaborative efforts?

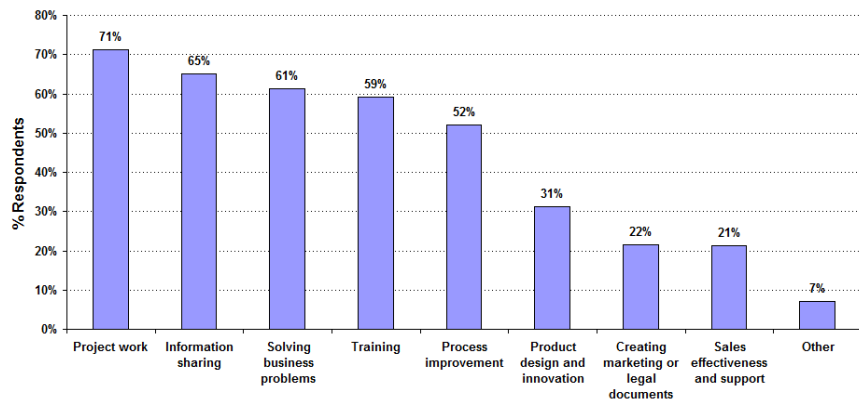
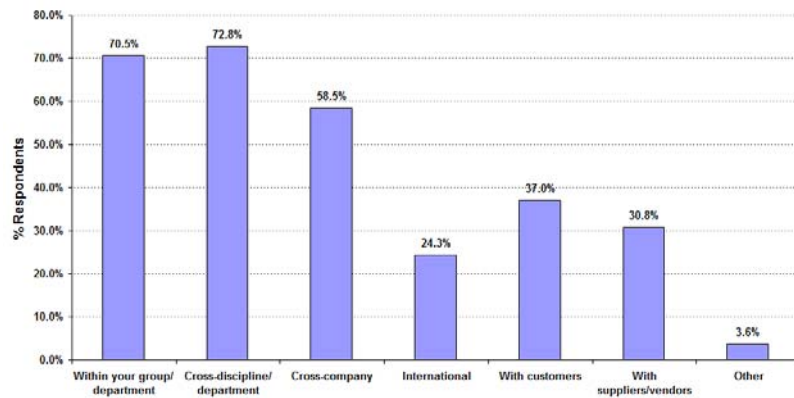


Figure 20. What is the scope of your collaborative efforts?





Assessing the State of Collaboration: *Return to Essentials*

Figure 21. Which of the following collaboration tools do you use for your collaborative projects?

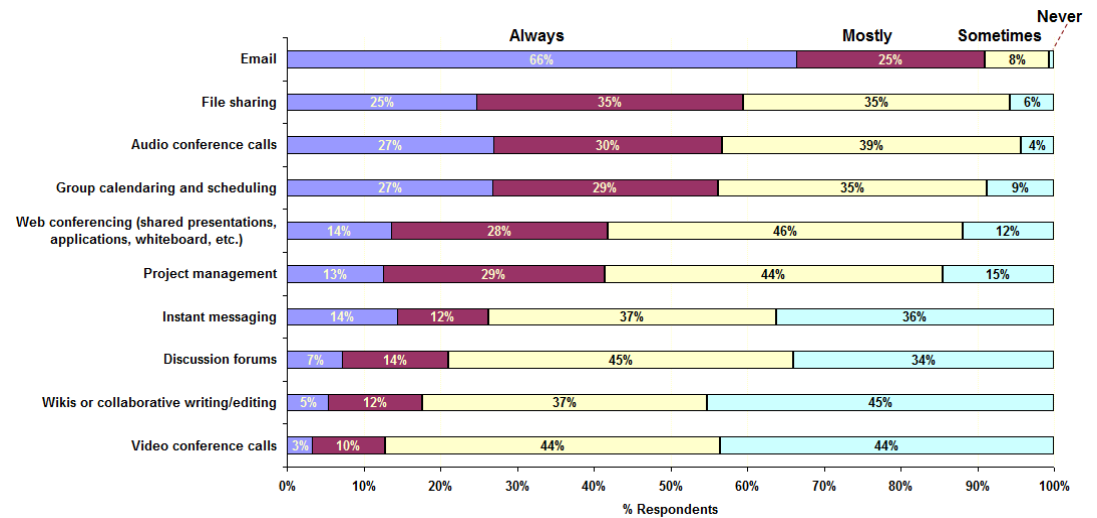
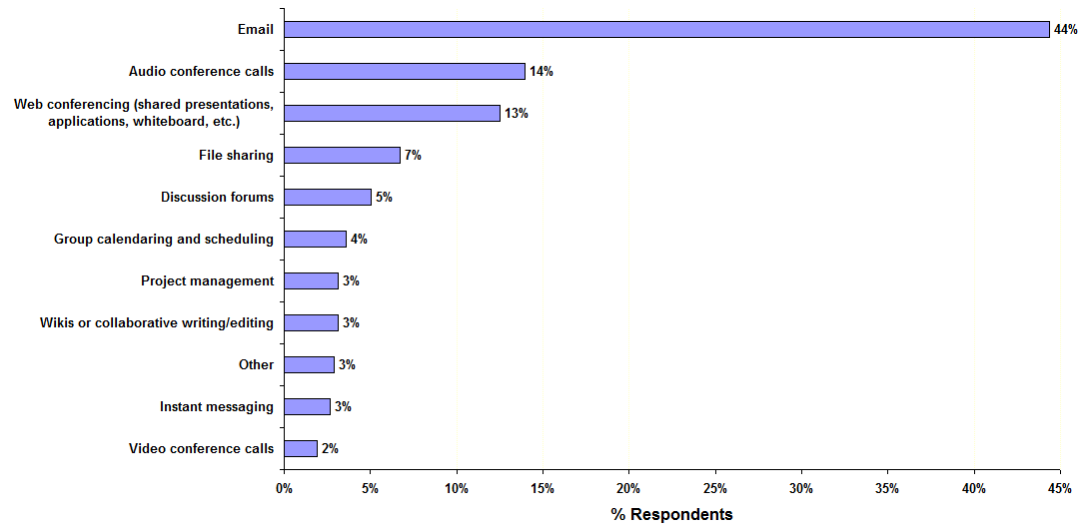


Figure 22. Which collaboration tool do you use the MOST for your collaborative projects?





Recent experience in Collaboration

Figure 23. *What was the scope of your ONE recently-completed collaboration experience?*

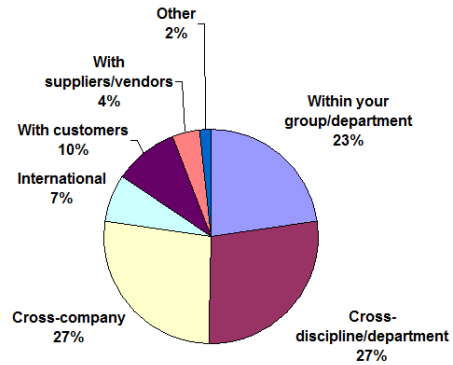


Figure 24. *How many people were directly involved in your ONE recently-completed collaboration experience?*

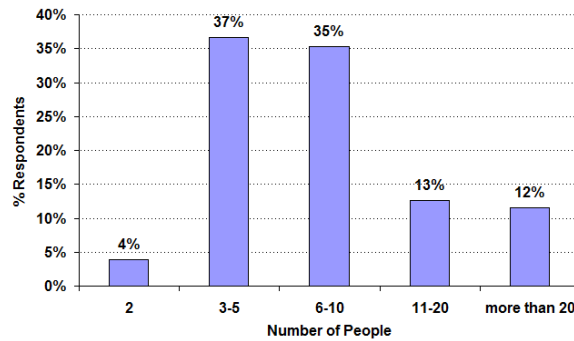


Figure 25. *What was your role in your ONE recently-completed collaboration experience?*

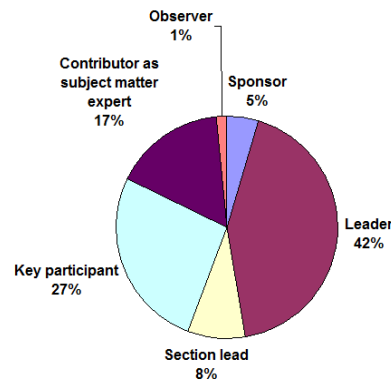




Figure 26. How frequently did your team meet face-to-face during your ONE recently-completed collaboration experience?

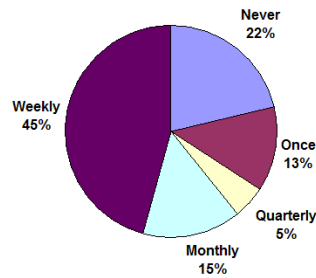


Figure 27. How would you judge the success of your ONE recently-completed collaboration experience?

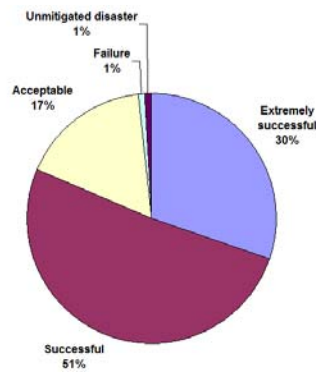


Figure 28. Which of these elements contributed to the success or failure of your ONE recently-completed collaboration experience?

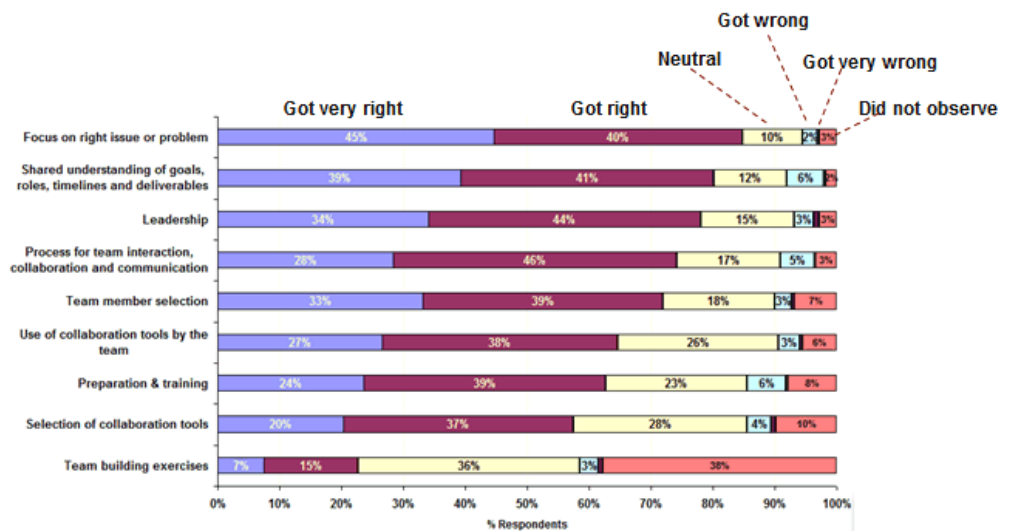




Figure 29. How helpful were the collaboration tools you used in your ONE recently-completed collaboration experience?

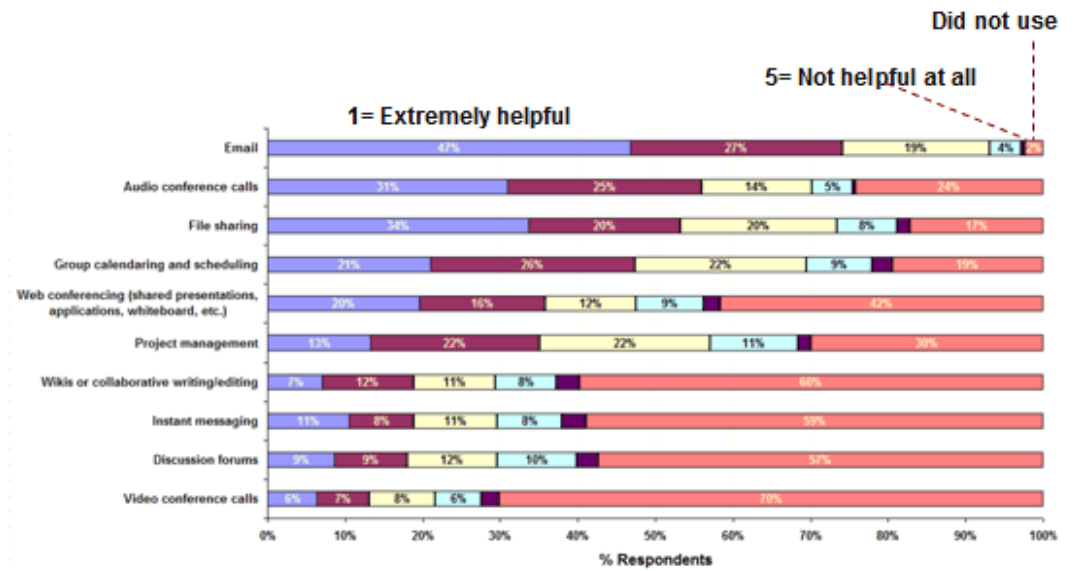


Figure 30. Of the collaboration tools used in your ONE recently-completed collaboration experience, which tool was the MOST HELPFUL?

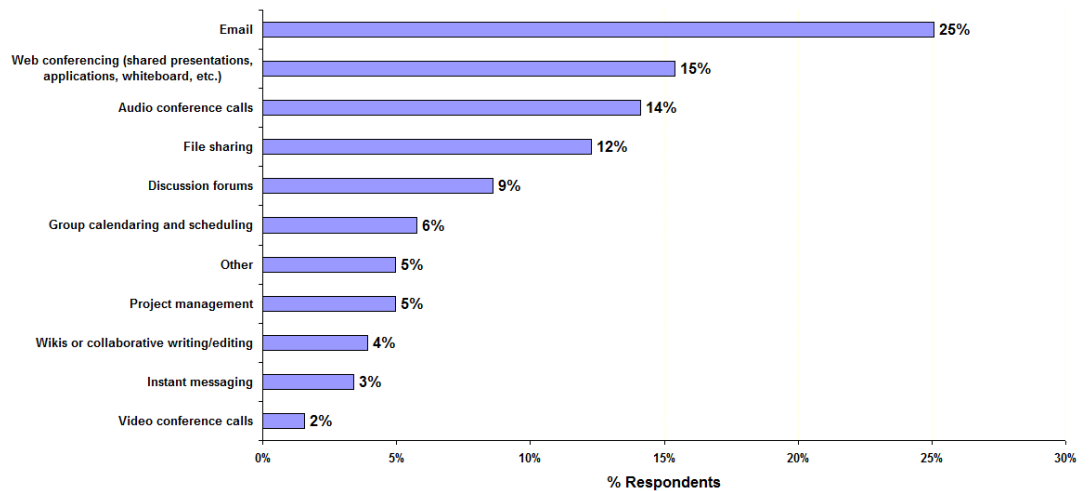
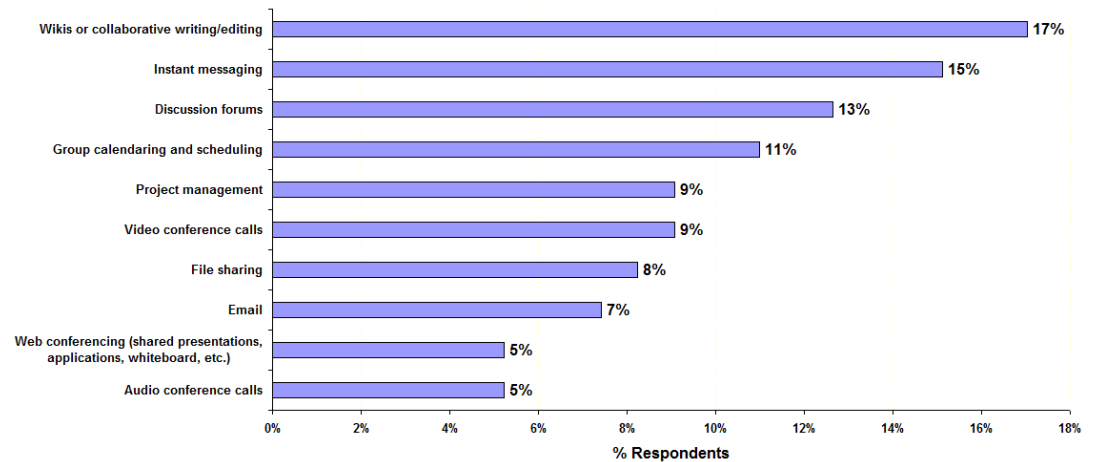




Figure 31. *Of the collaboration tools used in your ONE recently-completed collaboration experience, which tool was the LEAST HELPFUL?*



Viewpoint on Collaboration

Figure 32. *How would rate the value of collaboration to the success of your business?*

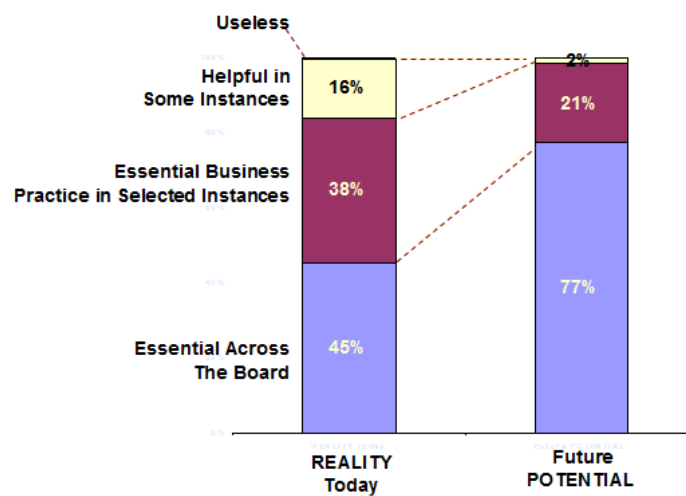




Figure 33. *What weighting points would you assign (must add to 10) to each of the following to improve effectiveness of collaboration in your organization?*

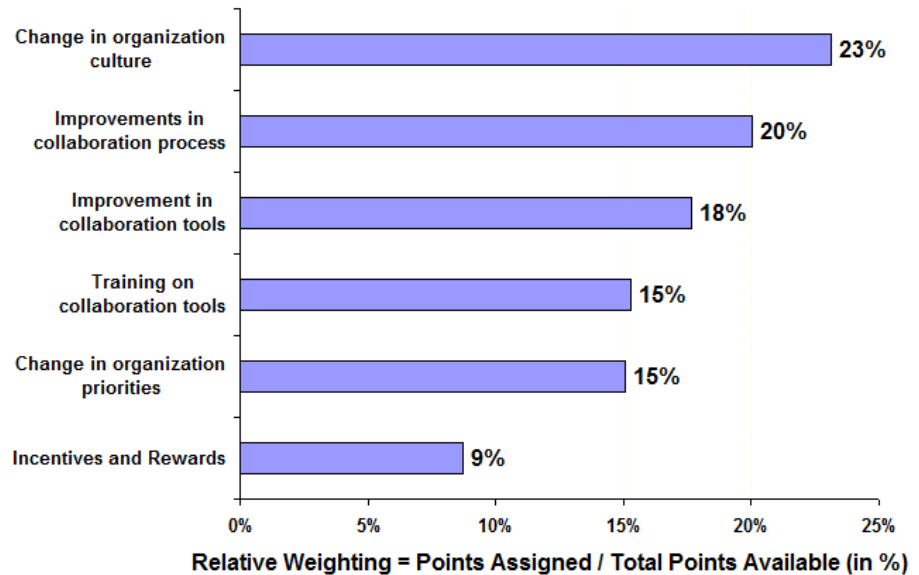
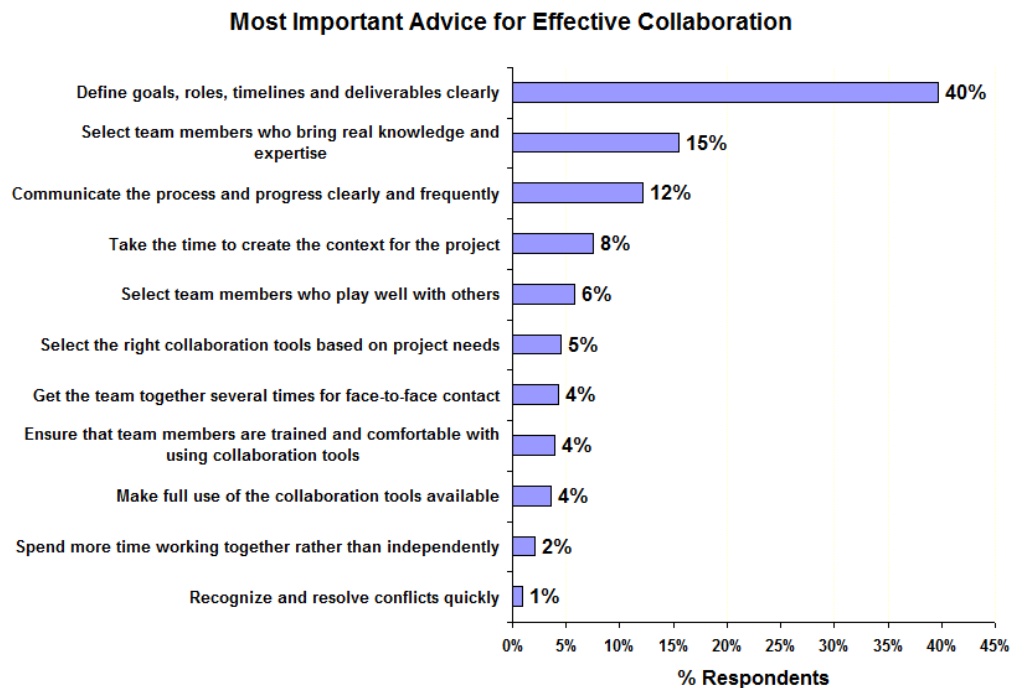


Figure 34. *What is the most important advice you would give to someone who is about to lead a major collaborative project?*





Most or 2nd Most Important Advice for Effective Collaboration



Figure 35. How effective are collaboration tools?

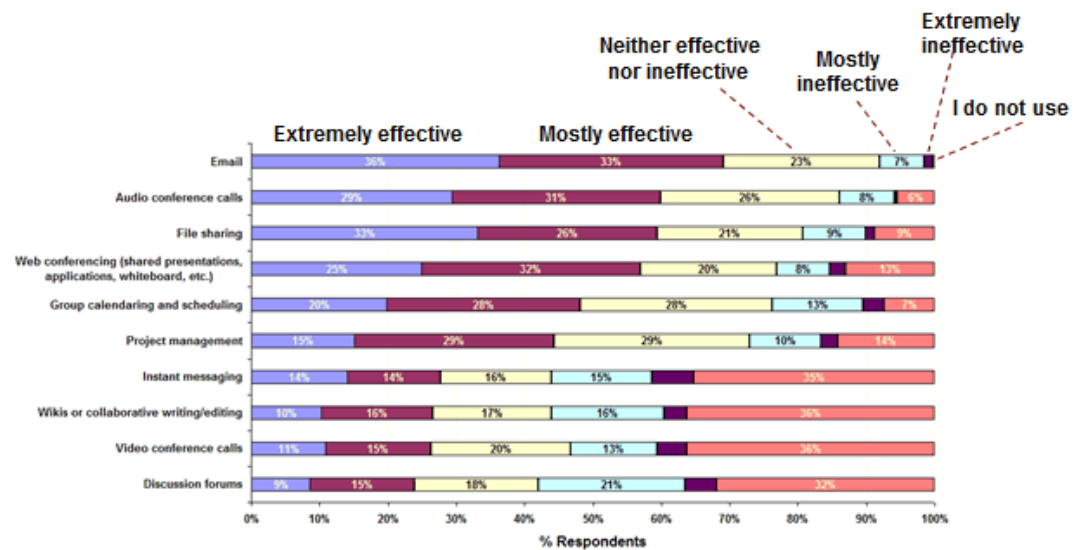




Figure 36. *Of the collaboration tools you use, which tool is the MOST EFFECTIVE?*

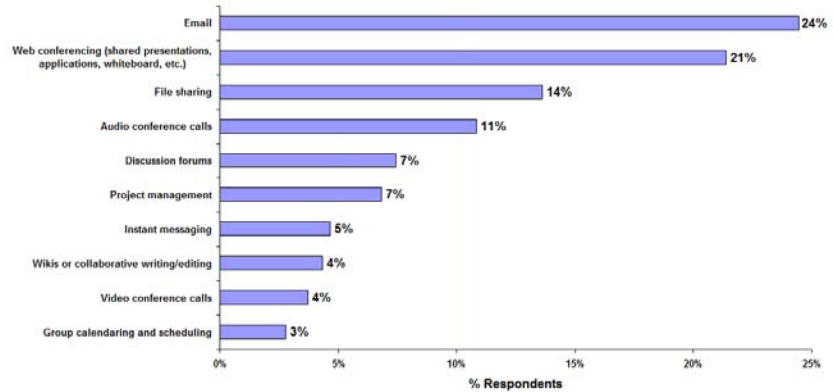


Figure 37. *Of the collaboration tools you use, which tool is the LEAST EFFECTIVE?*

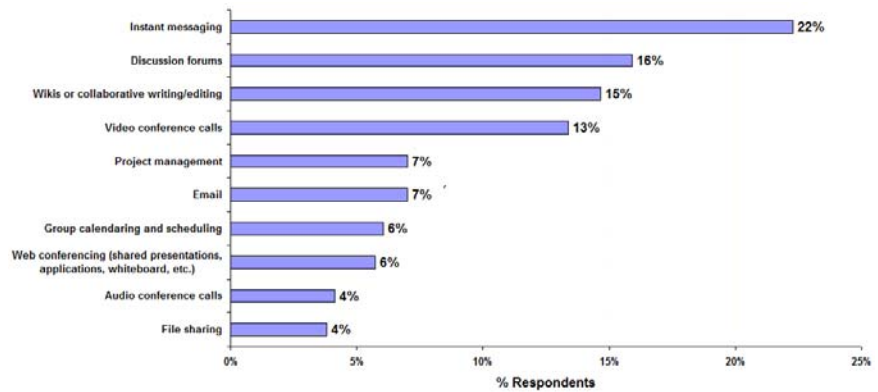


Figure 38. *Please rate yourself... a) I WANT to be able to collaborate, and b) I am ABLE to collaborate*

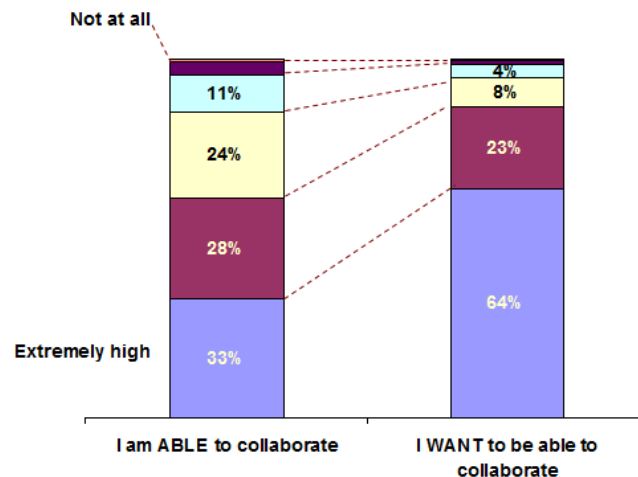
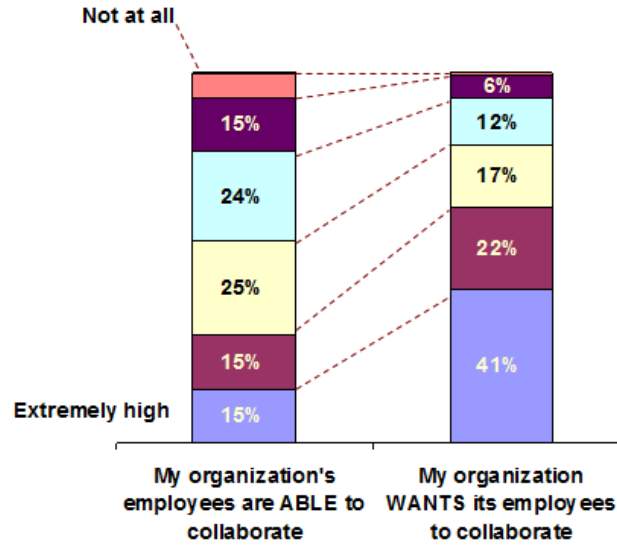




Figure 39. Please rate your organization... a) My organization WANTS its employees to collaborate, and b) My organization's employees are ABLE to collaborate



Demographic Information

Figure 40. How many people does your organization employ?

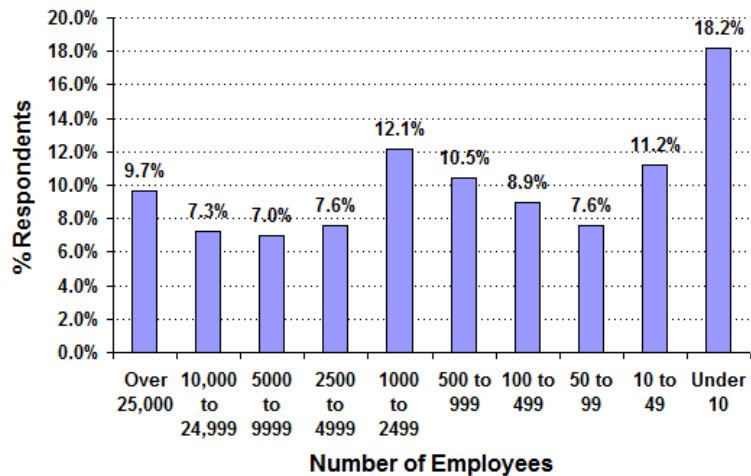




Figure 41. *In which functional area do you work?*

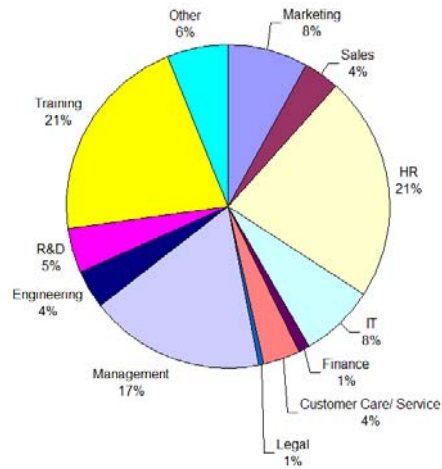


Figure 42. *To which age group do you belong?*

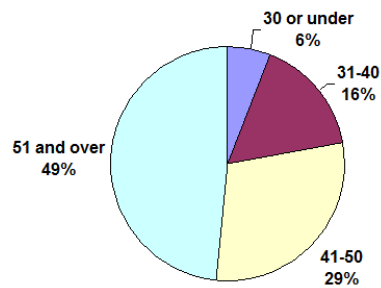


Figure 43. *Where are you located?*

