Doing Business with IBM Connections

Opportunities for Improving Processes, Driving Results, and Achieving Great Outcomes with IBM Connections 4.5

With social networking becoming an inescapable part of our daily lives, organizations are looking for ways to modernize the tools they provide their employees for connecting and collaborating with their colleagues. At first these new platforms were mainly delivered by small startup companies looking to provide enterprise versions of popular consumer tools, but now the more established software vendors have become key players in what's commonly referred to as the 'social business' market. IBM has always been one of the leading providers of collaboration tools, starting with the pioneering Lotus Notes/Domino family to today's IBM Connections platform. In Michael's book, he harnesses two decades of experience to help organizations see how Connections can be used to enhance the business processes their employees use to get their jobs done. This is not a basic 'To get started click here' type guide, but rather a reference filled with advice and examples of how organizations can leverage IBM Connections to make their businesses more successful.

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Social is transforming how businesses operate both inside and outside the firewall. This book will benefit current and prospective users of IBM Connections as it provides specific examples on how to transform existing business processes and get all the benefits from becoming a social business. The key to implementing social software is to set clear, realistic objectives for your social business initiatives and to embed social tools into existing role-based processes. As organizations infuse social throughout the company, driven by social collaboration platforms such as IBM Connections, they are achieving real business value and benefits as shown in the examples in this book.

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In this book, Michael introduces the 'toolbox' that is IBM Connections to businesses of all sizes. Written in a simple yet comprehensive manner, Michael provides both a quick start guide for businesses new to IBM Connections that are looking to get started and get a quick return of investment, while providing enough challenge and scenario for those businesses well along the collaboration pathway. With his clever exploration of scenarios he provides considerable challenge for ideas, business process change, and better deployment from the use of IBM Connections. Michael's vendor independence and depth of subject knowledge makes this book a worthy owners manual for getting the most out of IBM Connections.

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Changing day-to-day work practices when "no one has the time" requires communicating clearly and quickly how to perform common work tasks in the desired new way. Michael's book provides change and training teams with just that: familiar, real-world scenarios to help rapidly embed the substantial tool kit in IBM Connections into these new ways of staff working together.

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In writing Doing Business with IBM Connections, Michael Sampson has filled a void for those organizations that have already committed to IBM Connections. Michael has created a book that cuts through the technology, and instead focuses on how to unlock the power of IBM Connections through real world collaboration scenarios. By sharing the experiences of other organizations Michael has made it easier to translate these lessons into improved work practices and unlock further innovation. I now have a clearer understanding of how to effectively engage business users when discussing the benefits of IBM Connections.

Daniel Shorten
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This book is a must read for all involved with or looking at IBM Connections. It is not just another manual for the tooling, but food for thought from real life collaboration scenarios. This will help you to more easily find business cases in your own company and implement changes in user behaviour instead of just delivering the software. The book is practical, well-structured and down to earth using a fictional company and real customer case studies.

Roland Driesen
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I have often told our clients that a key strategy in driving user adoption of IBM Connections is to educate their users on the intrinsic business value of the platform. A key part of this is guiding the users in typical business use cases that they can leverage Connections for on a day-to-day basis to get their job done. In Doing Business with IBM Connections, Michael Sampson demonstrates in spades how you can leverage Connections for everyday processes, that can add significant value to how we all work. Once users see these scenarios in action they often have that 'aha!' moment and start to understand Social Business and how it can directly make them more productive.

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All screenshots were taken in IBM Connections 4.5. Some fields and text boxes in the screenshots were reduced in vertical height in order to fit them into the allocated space. Screenshots were captured on a variety of devices:

- Lenovo X230, Windows 8 Professional, IBM Notes 9, and Microsoft Office 2010.
- Apple MacBook Pro, Mac OS X 10.8, IBM Notes 9, and Microsoft Office 2011.
- Apple iPad 3, IBM Connections app.
- Lenovo ThinkPad Tablet, IBM Connections app.
- Apple iPhone 4S, IBM Connections app.
- Samsung Galaxy S III, IBM Connections app.

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For Philip, my son.
Already a leader among men, a dedicated worker, and one who has a heart for people.
You were born at a time when I was deeply into Lotus Notes and Domino;
It's fitting that this book on IBM Connections is for you.

—MICHAEL SAMPSON

Acknowledgements

For as long as I have been running my own business, I have advised clients who were using various IBM technologies as part of their collaboration technology portfolio. In recent years, some of these clients have started using IBM Connections. I wanted a book to help those clients investigating the possibilities of IBM Connections, but the only book available was of a more technical nature on Lotus Connections 2.5.[1] It was also over three years old. This book then is the one I was looking for.

I wanted a book to help those clients investigating the possibilities of IBM Connections, but the only book available was of a more technical nature on Lotus Connections 2.5.

Thanks to the many individuals who shared their stories of success and failure with IBM Connections. I tremendously appreciated the insights they shared, and the time they gifted to this project. Many of these stories are inserted throughout the book, and while I haven't included everything they said, the stories as reported in this book are consistent with the wider context that has been excluded due to the limitations of space. In addition, I feel there is a healthy split between the case studies that have already been made public from firms using IBM Connections, and those firms for whom their story is first told here. Some of the people quoted in these case studies really went into bat for me with their Legal and External Relations groups. I tremendously appreciate the work they did for me in getting official approval to include their stories.

This book benefitted greatly from the input of the reviewers. My thanks to Mat Newman (ISW, Australia) and Stuart McIntyre (Collaboration Matters, United Kingdom) for their review of the technical details in the book, as well as to Eric Mack (ICA, United States) for his conceptual review. I asked Mat and Stuart to look at the book through the lens of the details, and for Eric to look at the book through the lens of the concepts. The feedback from all three reviewers resulted in well-needed changes throughout the book.

The workshop that aligns with this book also proved to be fertile ground for on-target feedback. Workshop participants listened to the draft concepts in the book, and then we discussed their approaches and concerns. Concepts raised during these discussions often stimulated further additions and modifications throughout the book. While I can't name everyone, special thanks is due to Ken, Daniel, Mark, Mat, Victoria, Heidi, Toby, and Tony. Note that those names are in an equivalent set, rather than an ordered rank.

Thanks is clearly due to the many men and women at IBM who have conceived of, developed, supported, and brought to market IBM Connections over many years. Without their diligent work there would be no need for writing this book. Being able to attend IBM Connect in 2012 and 2013 gave me the opportunity to meet—or at least see from afar—a few of these people—such as Jeff Schick, Heidi Ambler, Suzanne Livingston, Luis Benitez,

and David Brooks. I know there are many more, so to each, please accept my thanks for your efforts.

Supporting my family continues to be the driving reason for writing books, and I am grateful to them for the motivation to do such work. Clearly that needs to be balanced against becoming so engrossed in writing that other things are forgotten. I don't always find walking that line easy, and they know the direct costs this book has incurred. Thanks to Katrina for loving me throughout this book project. To our children—David, Matthew, Philip, Daniel, Timothy, Susanna, Jonathan, Elizabeth, Joseph, and Joshua—keep learning to live and love other people, and don't give up on your dreams about how to make a positive contribution in our world.

Ruven Gotz, a friend and colleague active in the SharePoint space, provided some much needed motivation to write this book. When he published his book in May 2012, *Practical SharePoint 2010 Information Architecture*, he did so while carrying a full load of consulting. I had just finished another book in mid-2012, and didn't think I was ready to start on my sixth. Ruven's example of being able to juggle writing and consulting motivated me to start immediately into this one, and while I struggled to juggle both with the grace and aplomb he exhibited, I greatly valued the example he set.

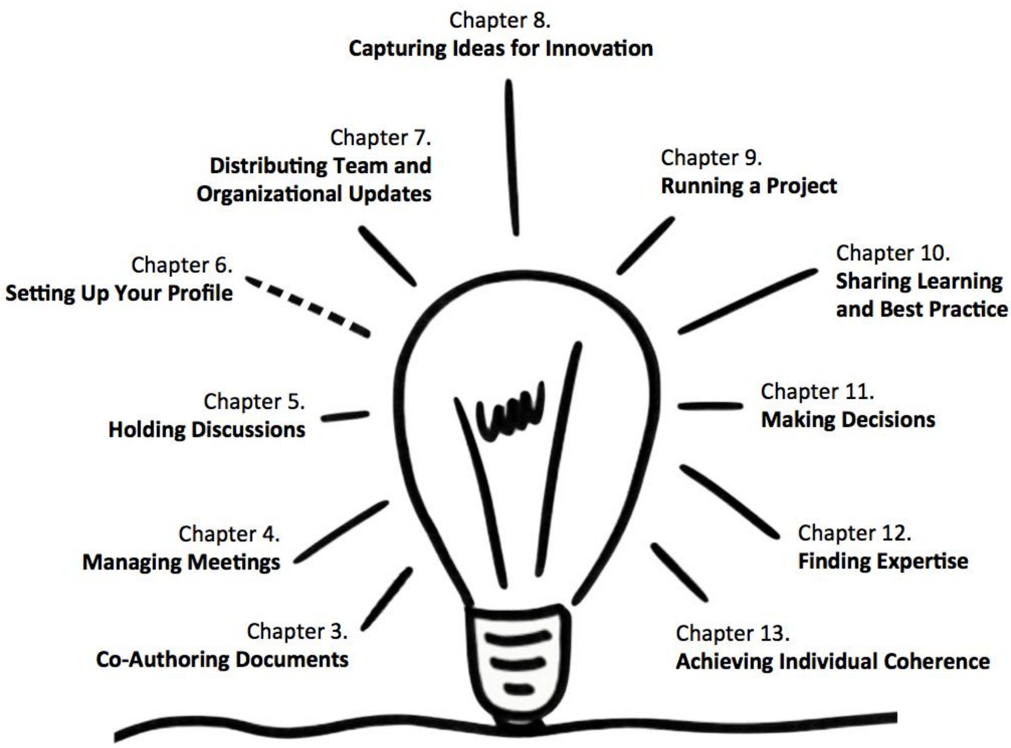
Practically speaking, most of this book was written in my office during the early hours of the morning. Over the past couple of years I've discovered that I "live best" when I have a book inside me that's slowly seeping out. Thanks to Elizabeth (5) and Joseph (3) for sleeping in most mornings beyond 6am. That allowed me to get another hour of writing done before having to get ready for the day. The remainder of the book was written in various hotel rooms around the world, airline lounges, seats at 30,000 feet and above, the Sheffield Pie Shop (while waiting for my 8 year old daughter to come back from ballet), and the Coffee Culture café in Beckenham (while waiting for a couple of sons who were at choir in Christchurch on a Wednesday morning). The variety of locations added spice to my thinking, and the coffee always helped.

Finally, this is the first book for which I have been offered money to not finish writing the book. That is, to stop writing it and receive a payout. Receiving that offer from one of IBM's competitors—who reasoned that the lack of this book would hurt IBM's prospects in the market—was "interesting." I have heard about such underhand tactics in this market space before, but never been directly on the receiving end of them. I guess you can figure out I declined the offer since the book is here. I do hope this book makes a positive contribution to organizations using IBM Connections, as well as to organizations using products from both IBM and the unnamed competitor.

Michael Sampson
May 2013

Visual Overview of Doing Business with IBM Connections

Chapter 1. **Introducing IBM Connections**
Chapter 2. **Collaboration Scenarios**



Collaboration Scenarios with IBM Connections

Chapter 14. **A Million and One**
Chapter 15. **Final Comments and Next Steps**
Appendix 1. **Detailed Table of Contents**
Appendix 2. **Table of Figures**
About the Author

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[1] The older book was published by IBM Press in January 2010, and was written by a line-up of Connections experts from IBM. See *IBM Lotus Connections 2.5: Planning and Implementing Social Software for Your Enterprise* by Stephen Hardison, David Byrd, Gary Wood, Tim Speed, Michael Martin, Suzanne Livingston, Jason Moore, and Morten Kristiansen. Order your copy online at www.bookdepository.com/IBM-Lotus-Connections-25-Stephen-Hardison/9780137000531.

Overview

The majority of my professional career has focused on seeing possibilities for working in a different way. As the messaging strategist for a telecommunications company in the mid-1990s, I worked with the product teams to help them imagine new products and services for our customers. As the principal of a Notes/Domino consulting firm in the late 1990s, I worked with clients to take current ways of working to a new level through the power of Notes/Domino. As an industry analyst with an IT analyst firm for the first part of the 2000s, I researched and wrote about future ways of working together. As the principal of my own analyst and consulting firm for most of the last decade, I've explored, envisioned, written books on, and consulted with clients about this same big idea—how can we see possibilities for working in a different way, and how do we make it happen? The book you hold in your hands is a continuation of this big idea, contextualized for organizations using IBM Connections.

How can we see possibilities for working in a different way, and how do we make it happen?

Overview of Doing Business with IBM Connections

The dream that drove the writing of this book—the possibility I saw—was to provide the business people charged with implementing and using IBM Connections with a broad toolkit for how Connections could be used for doing business in new and better ways. Not a book filled with tips about where to click on the screen to create a new community, but a book that assumes you will teach yourself where to click once you have caught the vision of what a community can be used for. To this end, the book is divided into three segments:

1. Chapters 1-2 set the scene on IBM Connections. Chapter 1 is the history lesson on where IBM Connections came from. Chapter 2 explains the rationale for the approach taken in this book for bringing IBM Connections to life for business.

2. Chapters 3-5 and Chapters 7-13 each explore a specific collaboration scenario, which is a method I champion in my earlier book *Collaboration Roadmap* where I explored how business activities can be improved through new and different collaboration technology. The intent is to start with the scenario and explore where technology makes a difference, instead of starting with the technology and searching for a place to use it. While not a collaboration scenario, Chapter 6 deals with a topic essential to the success of using IBM Connections for business.

3. Chapters 14-15 and the two appendices round out the book with some final words about your continuing journey in using IBM Connections for doing business, as well as providing a quick reference guide to finding your way around this book next time you pick it up.

A Toolbox for Using IBM Connections

IBM Connections is akin to a builder's toolbox—many individual tools are collected together and offered from a single place. Of course, the assumption is that people know which tool to use in any given situation. The skill of the builder is in selecting the right tool for the task at hand, as well as using the tool with deftness, precision, and to the appropriate measure. The purpose of this book is to explore the various tools in the IBM Connections toolbox, and to convey something of how they should be used. To this end the book:

> The purpose of this book is to explore the various tools in the IBM Connections toolbox, and to convey something of the deftness, precision, and appropriate measure with which they should be used.

- Covers all of the different tools in IBM Connections that people could use, doing so within a real-to-life scenario set in a fictitious company called Albreto. Some people at Albreto start using IBM Connections for doing business, and it makes a difference to their work in their first instance, and then more widely across other parts of Albreto.

- Discusses the practical realities in using the different tools for different purposes. For example, the community tool can be used for running a team project, sharing learning and best practice, and when making decisions. There are differences in how the community tool is used in each situation, and these differences are noted.

- Integrates the real-to-life scenario around using particular tools in IBM Connections with a look at how real organizations around the world today are already making use of IBM Connections. While the book casts a set of possibilities to stimulate your thinking and planning around IBM Connections, the case studies show how various organizations are already doing business with IBM Connections. So while there's a bit of blue sky thinking in here, there's nothing that isn't already being done by other organizations.

Why Write Doing Business with IBM Connections?

I wrote this book because the market needs it. Here's what I mean by that pithy statement:

- IBM Connections consistently rates highly in analyst rankings of enterprise collaboration and social business software, but apart from one older book on Lotus Connections 2.5—which is addressed to a business manager and IT professional audience—there are no books to help prospective end-user organizations see the possibilities for using IBM Connections for business. That's a bad sign, and will hurt the product in years to come. I hope this book helps with mitigating that risk.

- IBM Connections is paired with a lot of lofty sentiment about "social business," and while I get social business from a vision perspective, I firmly believe it needs to be made more practical, more real, and more here-and-now in order for people to embrace the vision. Without ruining the social business vision, this book starts with a number of core scenarios in what people do today in their work, and explores where Connections can make a difference. My hope is that when business people experience how Connections makes a real difference in their individual and team work today, that they will have a greater likelihood of getting involved in the more lofty ideas.

- Numerous organizations around the world are already using IBM Connections to great effect. Their stories, however, are hidden in a disjointed set of articles, videos, blog posts, conference presentations, and interview transcripts. I wanted a way to bring these experiences together for prospective and current users of IBM Connections, so as to highlight the benefits real organizations are gaining from the set of tools offered in Connections. Note that not all of the organizations in this book are using the latest version of IBM Connections, but that doesn't negate the validity of their experiences with earlier versions of Connections.

In summary, this book highlights both the possibilities and realities of using IBM Connections for doing business, something which current and prospective users need.

A Few Words on Independent Advice

Let's be very clear about something at the beginning of this book. I'm not vendor aligned. I'm independent—as an analyst, strategist, consultant, and thinker. The intent of my work is to help end-user organizations prosper and do better. I don't serve the vendors as a general principle—be that Microsoft, Jive, Socialtext, Central Desktop, or Huddle. In this specific instance, I haven't written this book for IBM. If you spend money with vendors as a consequence of something you read in this book, I receive no financial kick back. And I want it that way. To state the intent of my work in a different way, while I'm deeply interested in what vendors have to offer because these offerings create opportunities for end-user organizations, it's what end-user organizations do with the technology that interests me. In summary, my "three no's" with respect to vendors are:

- I have no business partnership with any vendors.

- I have no financial stakes in vendor companies.

- I receive no commission from product or service sales.

I believe my approach has a huge benefit for you (and one that my current clients greatly value)—you get truly independent advice. Because my firm doesn't do technical implementations of collaboration technology, nor custom development, my recommendations aren't about driving extra work for the rest of my firm. They are focused on making the best of collaboration technology for you.

Intended Audience

I have written this book with three specific constituencies in mind.

- *Business People using IBM Connections*. End users in an organization who are expected to use IBM Connections need a sense of the extent to which it can help them get their work done. As I describe in *User Adoption Strategies (2012)*, real-to-life scenarios are an effective way of winning the attention of business users, and this book presents a comprehensive set of such scenarios.

- *Internal Collaboration Strategists*. People charged with evaluating the potential of new collaboration software need a sense of what it can become. This book is about showing that potential, by highlighting a set of possibilities grounded in real-world experience.

This book is about showing potential, by highlighting a set of possibilities grounded in real-world experience.

- *Line of Business Managers*. Managers are often expected to support new initiatives because it is "good for the organization" and that's what managers do, but as organizations get larger, they often miss out on the thinking behind why it is good for the organization. This book attempts to redress this oversight, by showing managers how they can put IBM Connections to great use in their business unit.

However, if you fit outside of these core constituencies and want to learn about doing business with IBM Connections, read on. If you are saying—*I don't care what it is; I just want it to work for me*—this book is very much for you.

Let's Talk

I'd love to speak with you about your work with IBM Connections. What you're up to. What you're thinking about doing. What your dream is for your organization if it embraces IBM Connections to its maximum potential. So let's talk, and I really mean that. I answer my own phone (+64 3 317 9484)—you're calling New Zealand—and personally answer my email (michael@michaelsampson.net).

With that introduction stated, and the reasons for writing this book clearly outlined, let's begin. There are lots of possibilities to explore and consider in the pages ahead.

Michael Sampson
May 2013

Foreword—by Jeff Schick, IBM Corporation

I joined the Lotus team in 2006 to create the next generation of collaboration product that IBM would bring to market. The thinking at the time was that it was becoming easier and easier to publish and share information on the Internet and that this same phenomenon, if applied to the business enterprise, would really help people do their work. This meant IBM needed to move beyond email and instant messaging. At the time, fledgling social networks on the Internet were so easy to use that even non-technical people could post and share content. Even young people could do this!

We started the project and gave it the code name of Ventura after a beautiful, artistic, beachfront California community. As we mapped out what we would build, it became quickly apparent that IBM had many of these capabilities internally so we could use these to fast track our development. For example, IBM's BluePages became Profiles, and IBM's Blog Central became the Blogs service, and so on.

It was our plan to announce this new product at Lotusphere 2007 and deliver mid-year. By late 2006, we really needed to name the product so we hired an outside branding firm to help us with this effort.

The branding company started out by talking to many people on our team and beyond. They asked questions that they felt could help them come to a conclusion on a great brand name.

> *Is this product hard or soft?* Huh?
>
> *If this product was an animal what would it be—a lion or a bear?* What!
>
> *What does this product do? Does it help you?*

The branding team went away after they surveyed our team and then came back several weeks later.

They said that they had found, in their view, the perfect name for our product.

Drum roll please.

The perfect product name should be—Scove. For them, Scove embodied everything we had built in Ventura because it represented the intersection of Search and Discovery!

I looked at the branding team and told them that Scove sounded like a very bad skin rash and something that you would need special ointment for. We fired them immediately.

The IBM team kicked into high gear. We were getting close to where we needed to solidify the name so we cast our net far and wide asking people for suggestions. None seemed to resonate.

Mike Rhodin, the GM of Lotus at the time, took some of the development, product management, and marketing people, along with our sales executive and locked us in a room. He told us we were not leaving the room until we had a name. After several hours, John Dunderdale our sales executive said: *We talk about this product by describing the way it better connects people with people and people with information. Why don't we call it Connections? Now can you let me out of this room!* This was a eureka moment. We all thought it was a great name and hence Connections was born.

Today Connections represents the #1 social software offering in the market with tens of thousands of customers around the planet. We are in eight of the top 10 banks and retailers. Railroads, cement companies, defense contractors, governments, and many more are using Connections today. There are real customers gaining quantifiable value in every country and every industry.

Michael has written a terrific book that answers the question: *How can my company become a Social Business and gain value from deploying Connections?* His insights and examples provide the foundation for an enterprise that is embarking on this journey. There is an extraordinary amount of practical information in Michael's book. No social deployment should be without it.

Enjoy and learn.

Jeffrey Schick
Vice President of Social Software
IBM Software Group
IBM Corporation

Chapter 1. **Introducing IBM Connections**

> *The most challenging aspect of social networking for the enterprise is understanding the technology as it pertains to optimizing existing workflows. We tend to try to adapt social software to meet our (outdated) business processes, instead of seeing 'how things could/should be' and adjusting processes to take advantage of technology.* [1]
>
> Via Rob Preston, InformationWeek

With all the hype about social networking services on the public Internet—Facebook, Twitter, and LinkedIn to name but three—it is easy to overlook that IBM has been a leader in this game for years. While the current nomenclature is different to that of ten years ago, various IBM research projects were already underway for what would become IBM Connections. Unlike some research projects that never meet the light of day, those early ideas coalesced into a mature product that is widely used by customers around the world and highly praised by industry analysts. As we begin looking at how your organization can make use of IBM Connections for doing business, let's look back at the history of this product, as well as describing what's available in the latest edition of IBM Connections to hit the market.

In this chapter, we will:

- Review the history of IBM Connections and describe the path to Connections 4.5.
- Look at the strategic ideas in the development of Connections 4 and 4.5.
- Briefly note the many and varied capabilities of IBM Connections, which will set the context for our explorations about using Connections for doing business.
- Examine the reaction of industry analysts and customers to IBM Connections over the past few years.

A Short History of IBM Connections

When IBM acquired Lotus Development Corp. in the mid-1990s, in addition to the products—such as Lotus Notes and Lotus 1-2-3—it gained a research group focused on how software could support human collaboration. Since the acquisition, those researchers have pondered many topics, and been highly visible in forward-thinking collaboration conferences. The research papers from the IBM Watson Research group in the early 2000s wrestled with various ways of re-thinking common collaboration tools, including ideas about re-inventing email, using shared objects in activities for collaboration, and supporting communities of practice. These and related research papers informed various internal development projects at IBM, the commercialization of which arrived in 2007.

Lotus Connections 1.0 (June 2007)

IBM released the first edition of a new product, Lotus Connections, in late June 2007. The core idea of Connections was to *empowers users to share and refine innovative ideas and help people execute tasks more quickly by using a dynamic network of coworkers, partners, and customers*.[2] Lotus Connections offered five core tools:

- *Profiles*. For finding people based on expertise and current projects.
- *Communities*. For creating a space to work with people who shared a common interest or did similar work.
- *Blogs*. For sharing details of your work or ideas, to inform other people and invite conversation.
- *Dogear*. For capturing and sharing bookmarks to interesting Web pages.
- *Activities*. For planning and executing "projects"—anything that required multi-steps and a checklist style approach—and that could include other people.

The Connections 1.0.1 and 1.0.2 releases later in 2007 added other capabilities, such as some integration with Lotus Notes, Windows Explorer, and Microsoft Office.

Lotus Connections 2.0 and 2.0.1 (June and November 2008)

IBM released two versions of Connections within 5 months of each other—Version 2.0 and 2.0.1 in June and November 2008 respectively. Both versions delivered new and improved capabilities for end users across the five major areas above. Version 2.0 also introduced integration with IBM Lotus Quickr—a collaborative team workspace product from IBM—for storing documents, and new Home Page capabilities for working with the various tools in Connections.

Lotus Connections 2.5 (August 2009)

Lotus Connections 2.5 introduced two new tools (Files and Wikis), and mobile device support:

- *Files*. A new addition to Connections 2.5, allowing for the sharing of documents, spreadsheets, slide decks and other file-based information with others.

- *Wikis*. For creating single-page and multi-page interlinked content with other people. Wiki pages can be created and edited using only a browser. Wikis could be standalone or integrated into a community. Previously wiki capabilities had to be acquired separately from Socialtext or Atlassian and integrated with Connections.

- *Mobile Device Support*. Users could access Activities, Blogs, and Profiles using a mobile web client. Only specific devices were supported.

As with the 2.0.1 release, all of the original tools received updates and new capabilities, and Dogear was renamed Bookmarks so as to broaden the appeal to international users who did not understand the term.

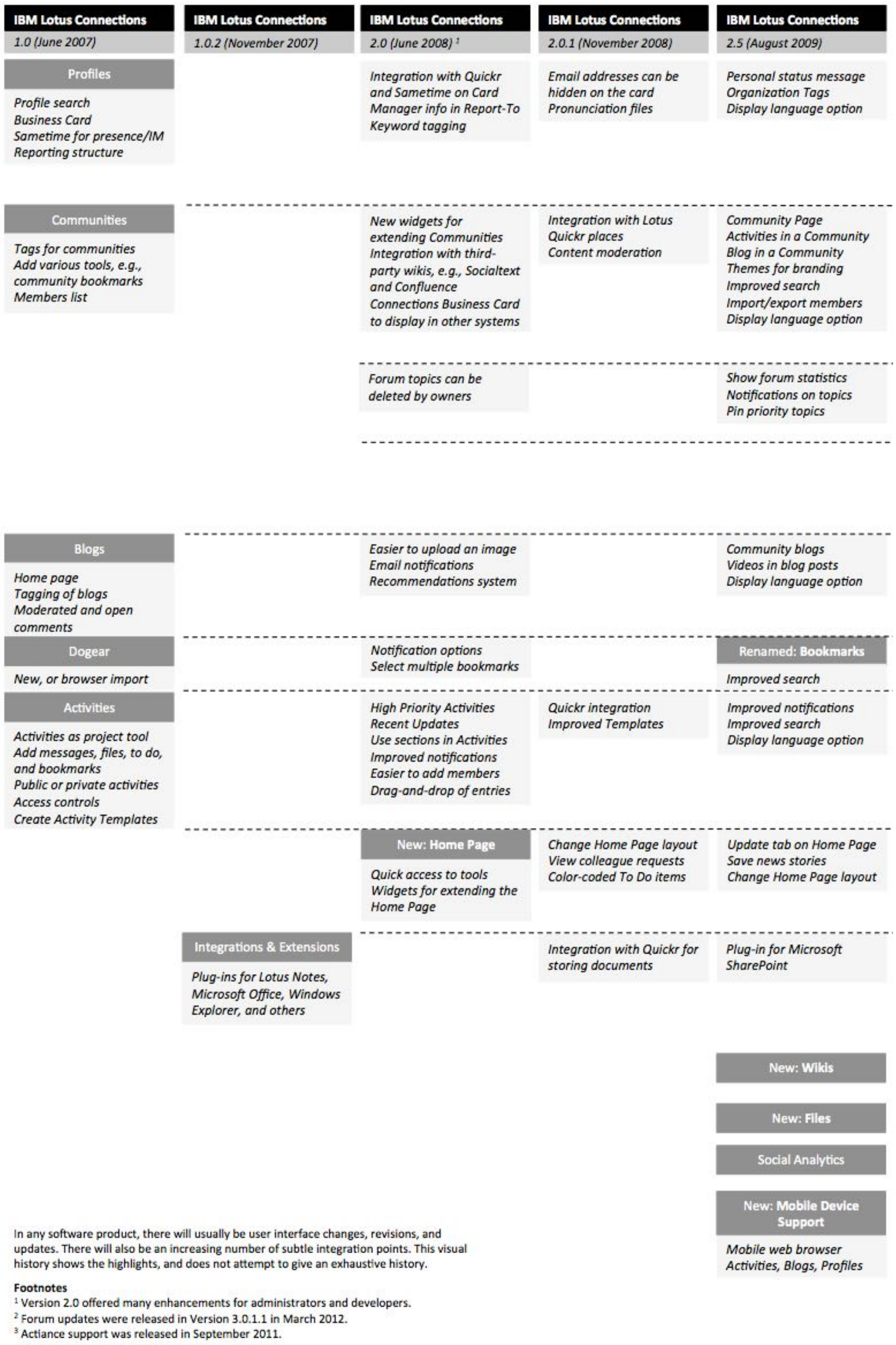
Lotus Connections 3.0 (November 2010)

Version 3.0 shipped in November 2010, with one major change and a plethora of smaller ones. The major change was the introduction of the new Forums application. Prior to Version 3.0, you could have a discussion forum as a tool inside a Community, but not outside one. In situations where the forum was the focal point for a group of people, having to tie it inside a Community was not ideal. Hence starting with Version 3.0, a forum can still be created inside a Community when there is a need to limit access to a list of members, but a Forum can also be created as a stand-alone tool in IBM Connections. In the latter case, there is no concept of a membership list as such. People can decide whether to access the forum or not; membership is not delegated nor approved by a forum owner.

IBM Connections 3.0.1 (April 2011)

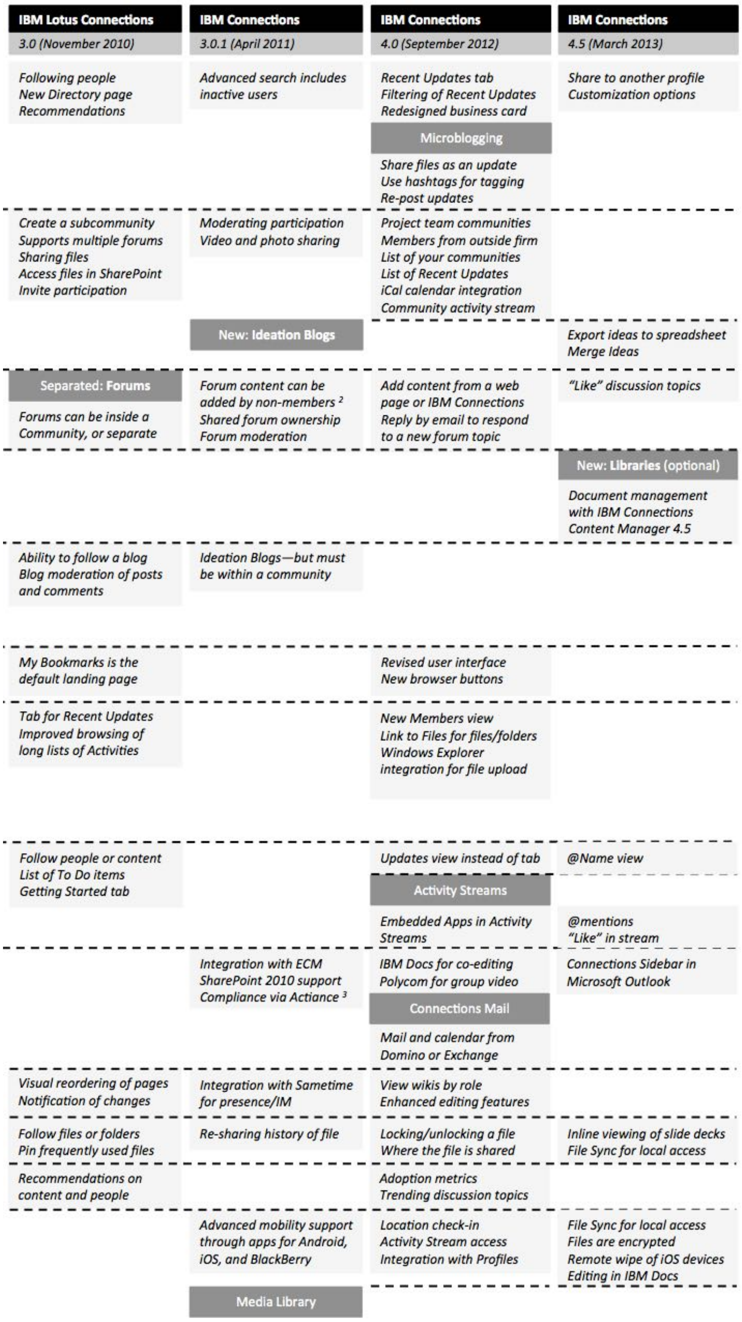
Another update arrived only five months later, in April 2011. Once again a whole raft of updates were delivered across the original and recently added tools. Version 3.0.1 introduced another new application, called Ideation Blogs. This provided a way for people to share, vote for, and comment on ideas in a structured format. Mobility support was greatly improved with the release of device-specific applications—for Android, iOS, and BlackBerry devices. The Lotus brand was dropped from the product name, and the wider IBM brand was emphasized. The product once called IBM Lotus Connections was rebranded as simply IBM Connections.

Figure 1-1. Visual History of IBM Connections to Version 4.5



Version 4.5 builds on and extends the previous versions of Connections since 2007.

Figure 1-1. Visual History of IBM Connections to Version 4.5 (Continued)



This visual history focuses on end user capabilities, and is not intended to be exhaustive.

IBM Connections 4 (September 2012)

IBM Connections 4 was released in September 2012. IBM focused on three strategic themes in Connections 4:

- *Social Platform Evolution*. Adding new and improving current capabilities based on customer feedback and continued research. Version 4 offered improved integration with other IBM software tools, better support for mobile devices, and better ways of staying focused on current tasks.

- *Communities for Teams*. Project teams have different needs with collaboration software than learning communities.[3] Connections 4 added better support for project teams with calendar coordination, team activity streams, and file locking.

- *Communities for Customers*. Linking what happens inside the organization with what's happening on the web and consumer social media channels enables early identification of trends, a focus of Connections 4. Organizations can create customer communities to build relationships, win business, and increase loyalty.

Connections Mail was also added in Connections 4, enabling a user to access their Lotus Notes or Microsoft Outlook inbox and calendar from the Connections browser interface.

IBM Connections 4.5 (March 2013)

The major focus in IBM Connections 4.5 is real document management capabilities.

The major focus in Connections 4.5, released in late March 2013, is the integration of real document management capabilities such as check-in and check-out, approval routing, and nested folders. Social ideas such as liking, tagging, commenting, and download counts are also available. These document management capabilities are available through a separately licensed offering called IBM Connections Content Manager 4.5.

In addition to these document management capabilities, Version 4.5 added updates across many of the current tools—including the ability to export ideas from an Ideation Blog, view slide decks inline, and access Connections through a new Microsoft Outlook sidebar.

Reflections on the IBM Connections Journey

In reflecting on the six year history of IBM Connections, we see three key themes. First, an increasing focus over the years on making Connections work for people where they are at. This translates to better mobile device support, integration with email clients (Notes or Outlook), instant messaging (Sametime), and file systems (Windows Explorer). Second, better support for common work styles, such as project teams in addition to learning communities. Third, a move away from the insistence of only openness and transparency, and the increased support of restrictions, approvals, and private information.

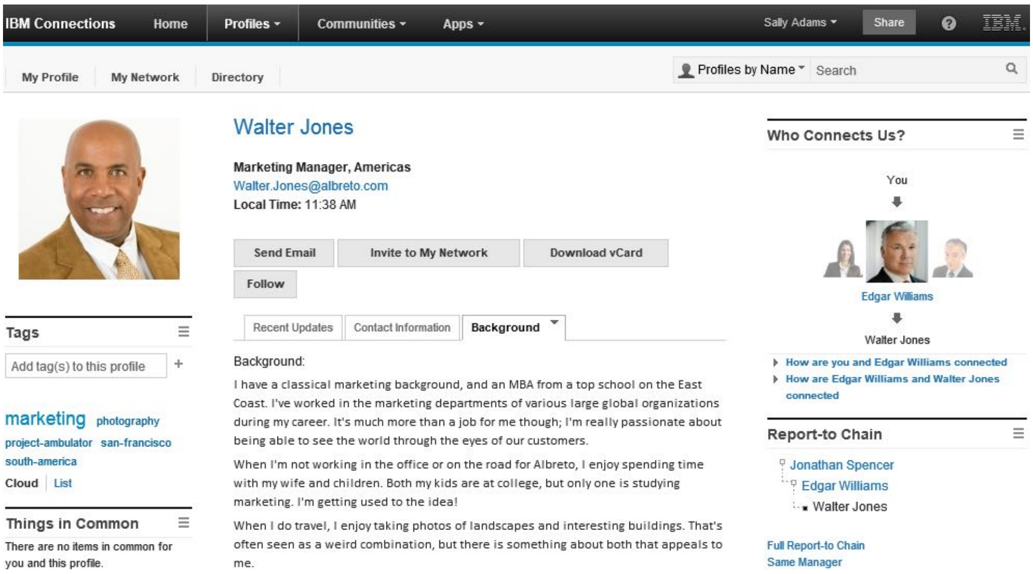
Capability Areas in IBM Connections 4.5

Let's now look briefly at the major capabilities of IBM Connections 4.5.

Profiles—Gaining Insight Into Your People

As organizations grow larger, an individual's ability to know everyone becomes more difficult. Some researchers have concluded that this dynamic kicks in at around 150-200 people, which means there are many organizations with people who don't know what their colleagues can do—which leads to shocking productivity loss and unnecessary duplication of effort. The profiles part in Connections provides a mechanism for establishing links between people who don't know each other by virtue of sharing common office space. By making people discoverable based on their expertise, their interests, their internal social network, as well as other mechanisms, the chance that you can find the right person or group of people to engage with on an issue—or merely to track because they're doing interesting work—goes way up on the probability scale. Profiles are a bit like getting super-human vision to see through the silos and divisional boundaries, and across massive geographical distances to zero in on the right person. With people being so critical to organizational success—or as the all-to-common adage goes, "people are our greatest asset"—being able to make the best use of the people you've got is essential. Profiles provide a way of making that happen.

Figure 1-2. Profiles in IBM Connections 4.5



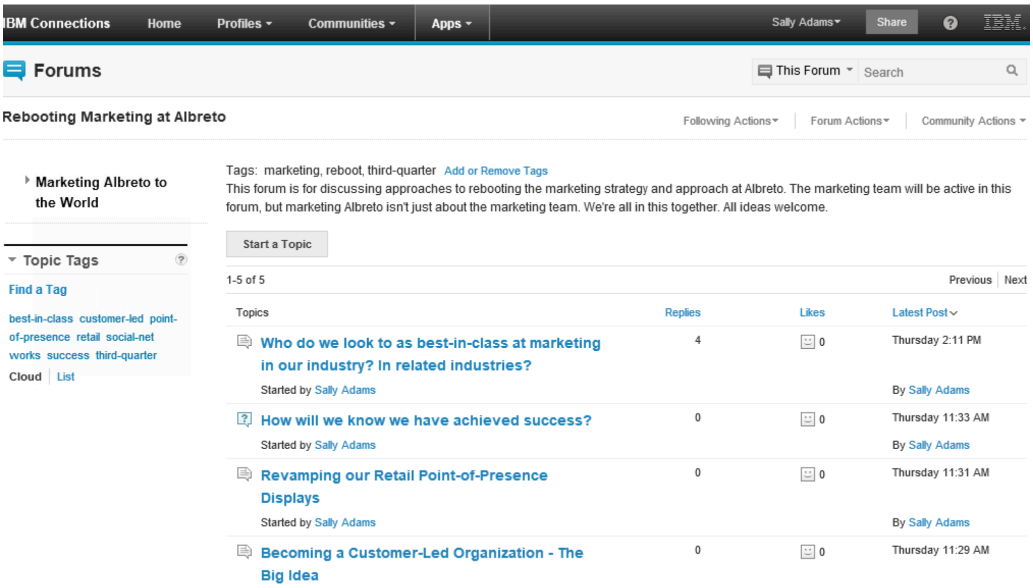
Profiles give a context-rich way of describing the people in your organization. Much more than a mere directory entry, a profile gives descriptive, connective, and social network data.

Forums—Engaging People on Current Topics

Focused discussion on a particular topic allows you to tap the wisdom of your people wherever they're located, explore the nuances of decisions, and highlight the differing perspectives that exist in your organization. The Forums tool in Connections is a place for holding discussions on any variety of topics. In an open forum, anyone with access to Connections can ask a question, and anyone with access can leave an answer. Answers can be threaded, which allows people to reply with pinpoint accuracy to particular issues. Forums in Connections can stand alone providing a place for open discussion, or alternatively can be integrated inside a Community to provide a place for community members to hold focused discussions. In a community, forums can be moderated to limit access to the discussion.

There are very significant benefits of holding discussions in Forums rather than by email. Benefits include the ability to gain perspectives from people who would otherwise have been excluded from the discussion, the capability to search past conversations for relevant insights, and the ability to analyze discussions to identify people with expertise to share. While a similar conversation could take place in email, it's hidden to everyone who wasn't involved, and it makes it very difficult for a new discussion member to get up to speed with the history of the conversation.

Figure 1-3. Forums in IBM Connections 4.5



Forums provide a way for people to ask questions and gain input from other people in their organization. Forums can be part of a Community, or stand alone for focused discussion.

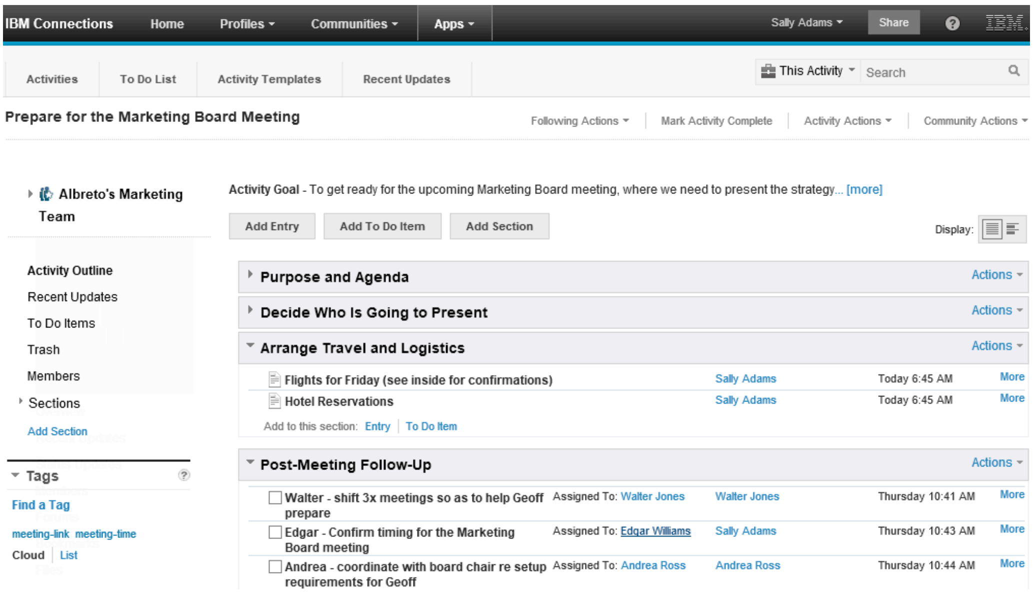
Activities—Streamlining Repetitive Collaborative Tasks

Checklists are a good way of remembering what to do for tasks that must be done right, and apply in many circumstances—from travel checklists, to shopping lists, and even through to surgical intervention. Checklists are a great way of forcing yourself and others to remember what to remember, and to ensure the right things get done at the moment of packing, purchase, or procedure.

> Activities provides a way of establishing a checklist for the modern age.

In Connections, Activities provides a way of establishing a checklist for the modern age. Major tasks to complete or information to collect can be defined, and then filled out by including email messages, instant messaging chats, and documents. Rather than leaving these discrete communication events in Notes, Outlook, Sametime, or a file folder, they can be brought together due to their inherent commonality. Activities can be private to an individual, or shared for collaborative effort among a team. Activities can be saved as a template, so that the next time a similar effort is required the major tasks and information requirements are already laid out—which helps to increase efficiency, reduce errors, and forestall major decision oversights. Activities can be surfaced inside IBM Notes, among other applications, thereby bringing the capabilities to where people work.

Figure 1-4. Activities in IBM Connections 4.5



Activities offer a way of ensuring the right tasks are completed, and necessary information is gathered for a decision, task, or project.

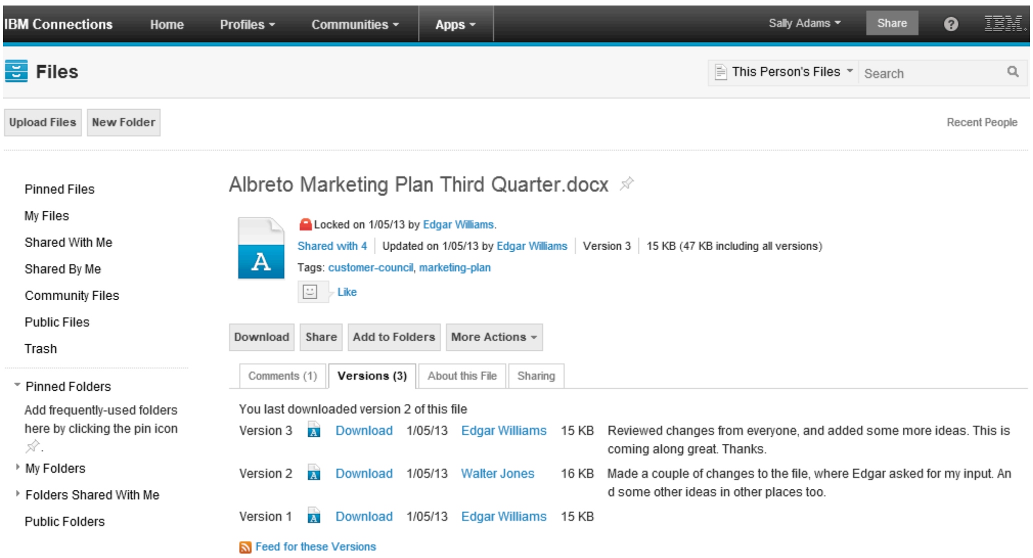
Files—Sharing What We Know

The Files tool in IBM Connections provides a way for sharing files with other people, either in a team situation, or across the wider organization. The features in Files offer a significant leap forward over using a traditional file server. Commenting allows people with access to the file to advise other people about what they have used the file for, any caveats that should be noted, and any updates that are required. New people discovering the file don't have to try to understand what the file is for, because the comment history is shown immediately in the context of the file.

Versioning enables people to update a document with new information, context, or explanations—and Connections will seamlessly advise those people who have expressed an interest in the file that an update is available. Files can also be added to Folders (in the plural), meaning that a single file can be shown in multiple folders at the same time. Having to manually duplicate files so they can be placed in multiple folders—as well as having to remember to keep all of the copies updated—is an approach of the past. Files can be tagged with keywords to simplify findability and enable the discovery of related files. Finally, it is possible to see who has shared the file with other people, giving new visibility to the impact of specific files.

Versioning enables people to update a document with new information, context, or explanations.

Figure 1-5. Files in IBM Connections 4.5

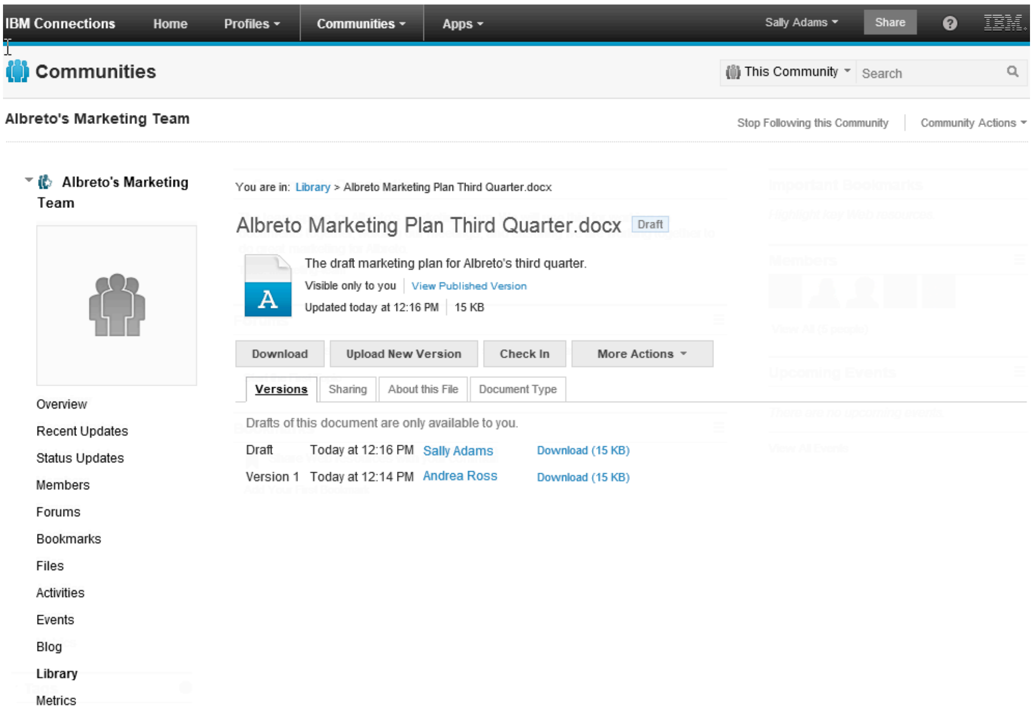


The Files tool enables people to share files with co-workers, and for comments and versions to be captured and displayed together. Descriptive data about each file is tracked by Connections, to help people find and make use of the right file.

Libraries—Document Management in Connections

The new Libraries tool in Connections 4.5 adds traditional document management capabilities, such as check-in and check-out, approval routing, access control for setting permissions (down to the file level), nested folders, and taxonomy via metadata. Social capabilities from Connections are integrated with these traditional document management ideas, providing likes, comments, tags, sharing options, and download counts. Multiple libraries can exist side-by-side in a single community, to allow different ways of segmenting documents and targeting them at particular users and user roles. Updates made to documents in a library will be pushed through to the community activity stream, giving community members a quick way of staying up-to-date with what's going on with the content in their libraries.

Figure 1-6. Libraries in IBM Connections 4.5



The optional Libraries capability in IBM Connections 4.5 adds traditional document management capabilities for files and documents, including approval routing.

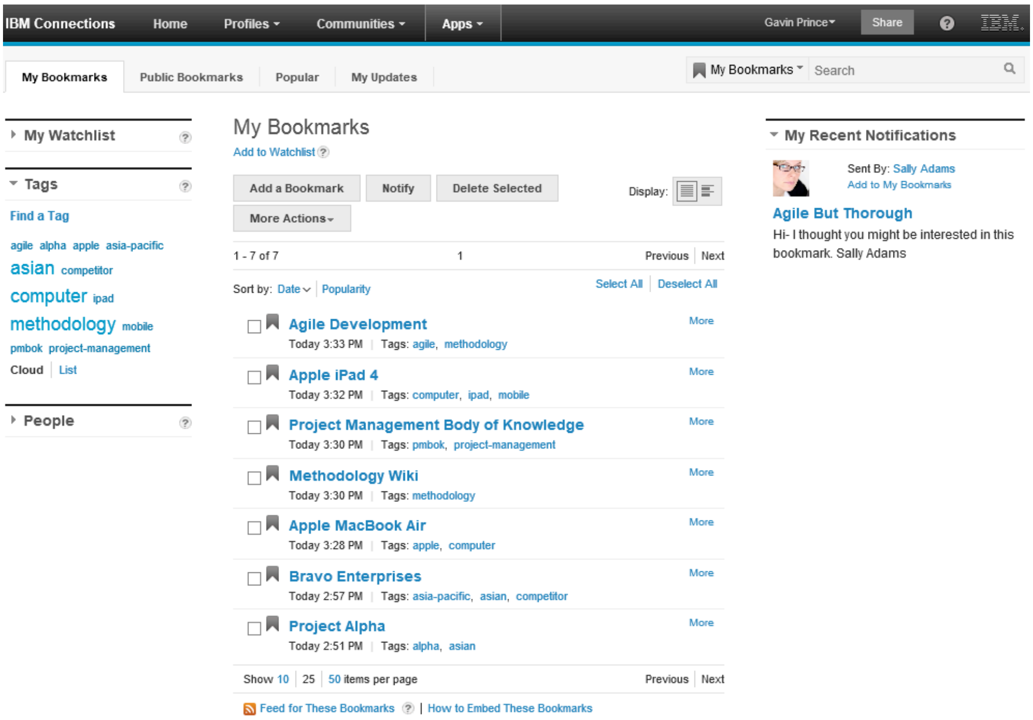
Libraries are only available to organizations that have also licensed IBM Connections Content Manager 4.5, which is a separately licensed product but is designed to seamlessly integrate with IBM Connections 4.5.

Bookmarks—Creating a Collective Pool of Links

What do you do with all of the interesting links you find on the web or your organizational intranet? The common approach is to save them as bookmark favorites in your web browser, create a folder of pending reading, or save them to a bookmark sharing site. It's the latter approach that offers a collaborative way of collating links of interest, as well as learning from other people who have saved similar links.

The Bookmarks capability in IBM Connections allows people to use a browser add-in to quickly save and classify links of interest to a common place. From the Bookmarks page, other people can access a stream of link updates, or can discover links by exploring a tag, what someone has bookmarked, or through a variety of search approaches. The underlying concept is that by giving individual people a new way of saving and classifying their own bookmarks for future reference, there will be positive flow-on effects for everyone. If Sally from marketing is saving bookmarks about marketing theory in a social media world, and Walter from marketing is also interested in that topic, the two of them can help themselves and each other through what they bookmark. Spread across an entire organization, it's an approach with a large upside.

Figure 1-7. Bookmarks in IBM Connections 4.5

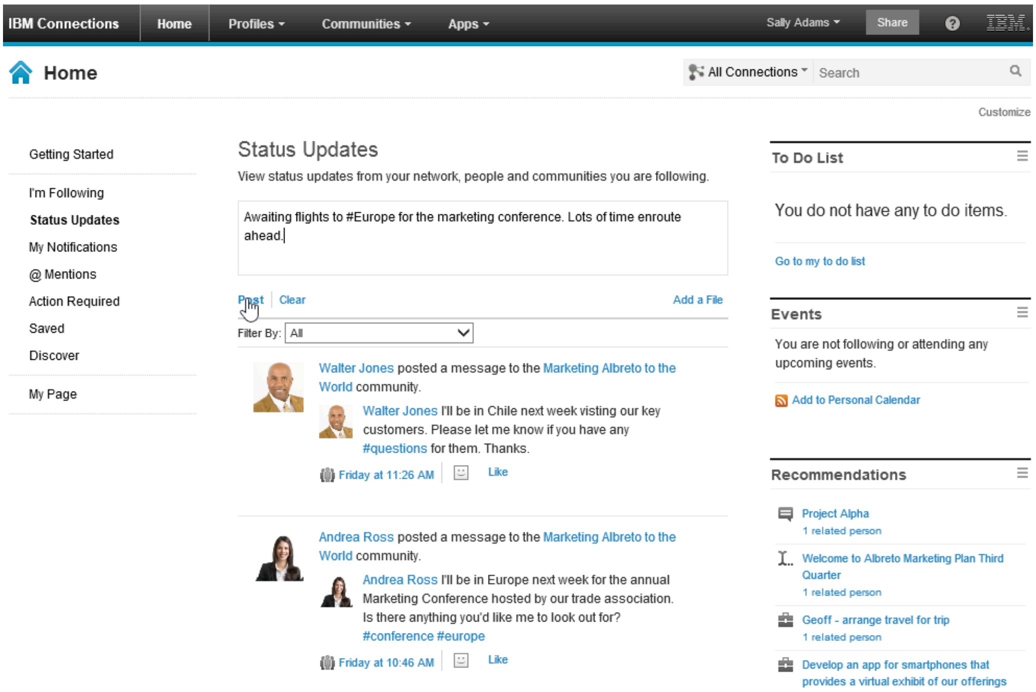


Bookmarks give people a way of saving and classifying links in a common place, creating a repository of insight for the individual and other relevant people.

Activity Streams and Embedded Apps—Seeing What's Going On

Activity is happening all the time throughout your organization—people are working on projects, reading articles, talking about market share, brainstorming on new product features, getting prompted to approve a leave request, completing a workflow task, updating a document, and looking for a critical report, among many others. The Activity Stream brings together all of the relevant activities for an individual, and offers the ability to complete particular tasks directly from the individual's Activity Stream—using what IBM calls Embedded Apps. Rather than just getting a notification to complete a task in another system and having to open the other system to take action, the required action can be taken directly from the individual's activity stream.

Figure 1-8. Activity Streams in IBM Connections 4.5



The Activity Stream lists all of the updates and happenings of relevance to a user, across the people and content in Connections. Requests from applications can be embedded, and people can complete the required work directly in the Activity Stream.

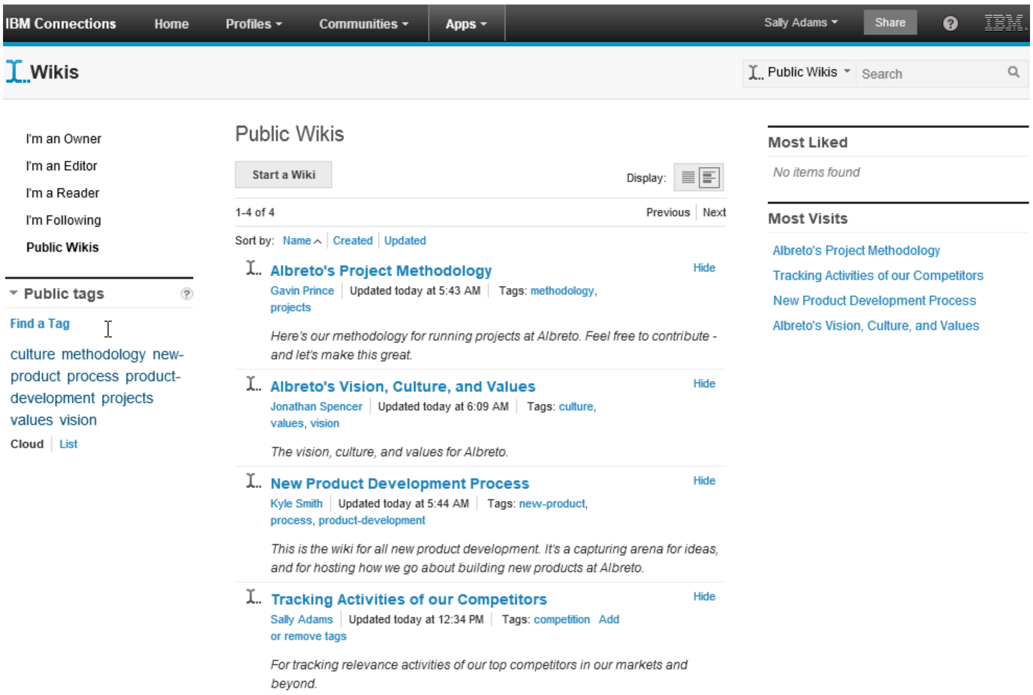
Beginning with Connections 4.0, there is also an Activity Stream in a Community. Activity updates within the community are displayed in the stream, so that community members have a quick way of viewing recent changes contextualized in the community. The Embedded Apps concept is also supported in a community, so that business process activities of relevance to a community can be posted directly to the stream.

Wikis—Writing Documents and Building Know-How Together

When Ward Cunningham developed the idea of a wiki, his design goal was to create the simplest possible way for multiple people to work on a web-based document together.[4] Wikis are now widely used for writing documents, creating a "single-version-of-the-truth," building know-how, sharing updates, and even writing and publishing encyclopedias.

The wikis tool in IBM Connections continues this tradition, and allows anyone with access to Connections to read what other people have said on a topic, and if appropriate, to make changes. Wikis can be classified using tags, to make it easy for people to discover and participate in wikis of interest and relevance to their work. Whenever someone edits and saves a wiki page, their new edit becomes the current edition of the document, but the wiki also keeps a complete history of changes to all pages, allowing people to see how the wiki page has developed over time. As with Forums, wikis can standalone for widespread access across your organization, or be integrated into a Community for more selective sharing and participation.

Figure 1-9. Wikis in IBM Connections 4.5



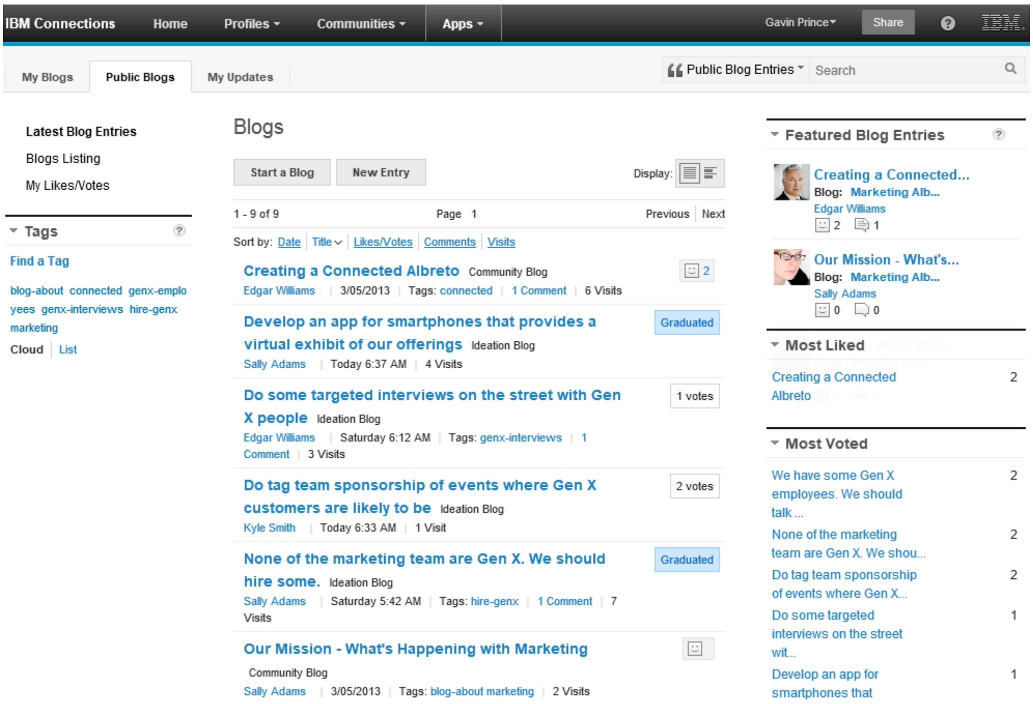
Wikis offer a simple way for people to write documents together. But while the tool is simple, the resulting collection of interlinked documents can be used to support critical business processes and make use of everyone's expertise.

Blogs—Keeping Everyone in the Loop

While blogging is a well-established idea on the public web for people keeping a diary of what's going on in their lives, the technology can be just as easily turned to business use. For an individual inside an organization, a blog can be used for discussing their current tasks, reflecting on what's working well and not so well, and for sharing thinking about current events relevant to their job. For a collaborative team, a blog can provide a forum for updates, discussion about the health of their project, and current thinking about next steps, allowing team members to stay abreast of what's going on. It's likely that these updates would have happened before anyway, but they were locked in email which caused difficulties in following the resulting discussion.

IBM Connections offers a blogging tool for use both inside and independent of a community space. Blog posts are aggregated in a tag cloud for easy discoverability, and the social analytics capabilities in Connections can recommend blogs and blog posts for each user. Search also provides a way for people to look for specific topics of interest.

Figure 1-10. Blogs in IBM Connections 4.5



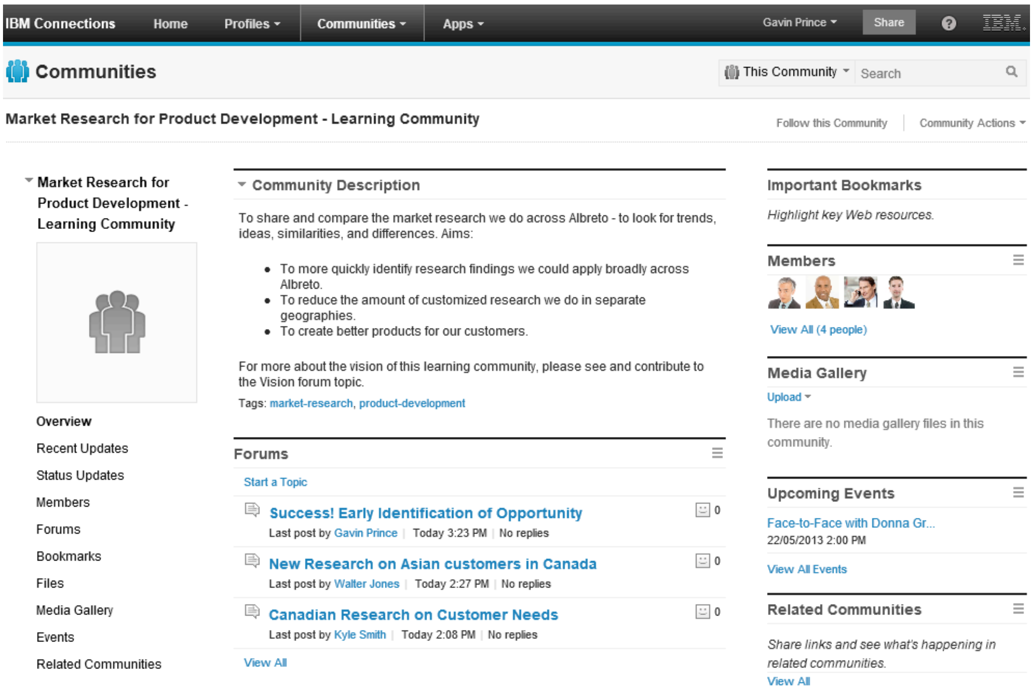
Blogs offer a way for both individuals and groups to post on current tasks, projects, and learning activities, and for other people to contribute their point of view. Entries in Ideation Blogs display in the blog listing too.

Communities—Bringing People Together

A community in Connections is a defined place for a group of like-minded people to work together on a common issue, topic, challenge, or opportunity. Earlier versions of IBM Connections did this for general groups of various types, and while that's still the case, Connections 4.5 adds new capabilities to support collaborative project teams. The community construct is a way of packaging up a list of individual tools from Connections that the group uses while it's working together. By putting the tools together and displaying them in a defined community place, members don't have to navigate through separate tools and try to keep everything lined up in their minds. In the community below, for example, members can hold discussions (using the Forums tool), share links of interest (using the Bookmarks tool), and share documents of common interest (using the Files tool). The owner or manager of a community can add and remove tools at any time depending on the needs of the community.

Communities in IBM Connections can be used for both collaborative projects and learning.

Figure 1-11. Communities in IBM Connections 4.5



Communities provide a way of bringing together a group of people to work on a common issue, topic, challenge, or opportunity. Multiple tools from Connections can be used in a community space.

Other Capabilities in IBM Connections

We have briefly investigated the main capabilities of IBM Connections in the previous ten pages, but to finish this chapter here are a few more:

- *Home Page*. Facilitates access to aggregated lists of items that are relevant to the specific user. The key concept is to provide quick access to a list of things that have changed or been updated, rather than forcing users to click into each tool manually and one-by-one. The user's Activity Stream is accessible from here.

- *Connections Mail*. Integrates a user's email inbox and calendar into Connections, and can hook into either IBM Domino or Microsoft Exchange. While Connections has supported integration with email clients for some time—for example, by allowing a user to drag an attachment from an email message in Outlook directly into the Files tool—Connections Mail surfaces email and calendar information inside of Connections. For people who live in Connections, this integration is a welcome addition.

> Connections Mail integrates a user's email inbox and calendar into Connections, and can hook into either IBM Domino or Microsoft Exchange Server.

- *Ideation Blogs*. Offers a structured way of exploring ideas on a particular topic, gathering initial ideas, comments, and votes from people in a community. Highly rated ideas can be moved to action by automatically creating an associated activity. The ideation process can be free-form, or controlled through specific settings.

- *Social Analytics*. Provides a new way of helping people discover what they didn't know but may benefit from knowing.[5] If you are a member of a particular community, social analytics will recommend other communities that are related or potentially helpful. On your home page, content in blogs, wikis, forums, and other places throughout Connections that may be useful are displayed. When looking at a profile, the social analytics capabilities highlight things you have in common with that person—so as to facilitate the initial conversation—and also recommends people you should explicitly know based on your existing network of colleagues, community involvement, and content-based activities in Connections. In essence, social analytics provides a personal coach to observe what you are working on and coach you on getting better.

As we explored the capabilities of IBM Connections 4.5 in this chapter, it should have become clear that the product creates many opportunities for organizations. There are many such products on the market, however, so let's briefly look at the reception given to IBM Connections from industry analysts and organizations.

The Analyst and Customer Reaction to IBM Connections

Both industry analysts and customers have reacted positively to IBM Connections. Here's three examples of the analyst reaction:

- For the four consecutive years of 2010-2013, analyst company IDC rated IBM Connections as the top product with respect to revenue and market share for social software in enterprise organizations.[6] The years 2010-2011 were particularly noteworthy: compared to the second-placed vendor, IBM almost doubled its lead in revenue terms from 34% in 2010 to 61% in 2011. That's a significant increase for the first-placed vendor year-on-year. In its comments about Connections 4, the authors in the 2011 report write, *IBM has placed considerable focus on the user experience of Connections, with the primary goal associated with raising employee engagement in order to validate the investment in enterprise social software.*[7]

IBM deserves kudus for just how aggressively they've brought this product to market—they brought it out early, they continue to invest very heavily in it, and they've been very entrepreneurial.

- In its third-quarter 2011 report on the use of social media tools inside organizations, analyst company Forrester Research rated IBM as one of the top four vendors.[8] The author of study, Rob Koplowitz, made this comment on IBM: *To me, the story here is IBM .... In this type of emerging market, where we're just starting to see leaders emerge, a company like IBM you might assume would be a laggard. IBM deserves kudus for just how aggressively they've brought this product to market—they brought it out early, they continue to invest very heavily in it, and they've been very entrepreneurial.*

- In a blog post about the release of version 3 of Connections (then called "Lotus Connections,") MWD Advisors' Angela Ashenden wrote about the shock it gave the market.[9] She says, *When it was first launched in June 2007, Connections provided a sort of electric shock for the enterprise collaboration software market, showing that an industry giant can indeed be innovative and market defining .... With its combination of communities, social networking and task-based activities, as well as a host of supporting social capabilities, Lotus Connections is unusual in that it spans both the people-centric, social side of collaboration and the ... project-centric side which is more commonly associated with document-focused team workspaces.*

There are many examples throughout this book of how customers are using IBM Connections, but one snippet will suffice for now. The Bayer Group, the global pharmaceuticals company, made the decision to switch from Lotus Notes/Domino to Microsoft Exchange and SharePoint a few years ago. Bayer MaterialScience, one of its subsidiary companies with 14,500 employees across 30 locations, needed a way of bringing its researchers together. After an evaluation of alternative technologies, Bayer MaterialScience proceeded with Connections. The positive results that this move created inside of Bayer MaterialScience won the attention of the wider Bayer Group, and a new decision was made to use IBM Connections across the whole Bayer Group for a particular set of functions, instead of solely relying on Microsoft SharePoint for that purpose. We will examine the Bayer story in more detail later in this book.

> IBM Connections created such positive results inside Bayer MaterialScience that the wider Bayer Group adopted Connections instead of relying solely on Microsoft SharePoint.

Summary

In this chapter we have looked at the origins of IBM Connections 4.5, tracing its history over the past decade. It's a product with well-established roots, backed by a vendor with a history of delivering collaborative software to enterprises around the world. We then looked at the major themes that have informed the development of Connections 4.5 specifically, and drilled briefly into each of its main capability areas. We concluded by looking at the analyst and customer response to Connections over recent years, which has been stellar.

In the context of this history and current state, we turn our attention in the next chapter to setting the scene on this book. We will be taking a scenario-based approach to considering the applicability and value of Connections 4.5 in organizational life, and Chapter 2 explains what that means.

[1] In his blog post *Social Collaboration: A Work in Progress* (May 2012), Rob Preston says that this quote came from a respondent to the InformationWeek Enterprise Social Networking Vendor Evaluation Survey. See www.informationweek.com/global-cio/interviews/social-collaboration-a-work-in-progress/240000626.

[2] *IBM Lotus Connections delivers social software for businesses*, IBM United States Software Announcement 207-112, May 15, 2007. See http://www-01.ibm.com/common/ssi/cgi-bin/ssialias?infotype=an&subtype=ca&htmlfid=897/ENUS207-112&appname=isource

[3] In *Collaboration Roadmap (2011)*, I analyze how the needs of collaborative teams differ from collaborative groups. There's also a section on collaborative organizations, which addresses the beyond team/group requirements. See www.michaelsampson.net/collaborationroadmap.html.

[4] Ward Cunningham developed the first wiki software, as part of an attempt to find the simplest way of creating an online database. See en.wikipedia.org/wiki/Wiki.

[5] While I didn't call it social analytics, this concept of expecting the software itself to help people improve is core to both of the technology frameworks I developed for supporting collaborative teams and collaborative groups. For collaborative teams, it's called collaboration auto-discovery (Pillar 7). For collaborative groups, it's called Surfacing of Related Groups and Conversations (Connector 4). For more, see Chapter 2 in *Collaboration Roadmap (2011)* at www.michaelsampson.net/collaborationroadmap.html.

[6] Two of the IDC papers are available free of charge at the IBM web site. For the 2010 report by Erin Traudt, entitled *Worldwide Social Platforms 2010 Vendor Shares*, see ibmtvdemo.edgesuite.net/software/lotus/whitepapers/worldwide_social_%20platforms.pdf. For the 2011 version by Michael Fauscette and Vanessa Thompson, published with a slightly different name of the *Worldwide Enterprise Social Software 2011 Vendor Shares*, see ibmtvdemo.edgesuite.net/software/lotus/pdf/idcvendorshares.pdf. For IBM's press release on the 2012 rating, see www-03.ibm.com/press/us/en/pressrelease/38066.wss, and for its press release on the 2013 rating, see www-03.ibm.com/press/us/en/pressrelease/40875.wss.

[7] See page 3 of *Worldwide Enterprise Social Software 2011 Vendor Shares*, by Michael Fauscette and Vanessa Thompson. ibmtvdemo.edgesuite.net/software/lotus/pdf/idcvendorshares.pdf.

[8] David Carr at The BrainYard wrote about the Forrester report in August 2011. See *Forrester Names 4 Leading Enterprise Social Platforms*, at www.informationweek.com/thebrainyard/news/social_networking_private_platforms/231600271/forrester-names-4-leading-enterprise-social-platforms. Forrester subscribers can get access to the complete report as part of their subscription.

[9] MWD Advisors is an industry analyst firm in the United Kingdom, focused on providing independent industry insights that show how leaders create tangible business improvements from IT investments. See Angela's November 2010 blog post on Connections at www.mwdadvisors.com/blog/2010/11/lotus-connections-matures-with-version-3.html.

Chapter 2.
Collaboration Scenarios

> *Groupware will .... not mysteriously transform organizations from collections of highly competitive loners into well integrated, cooperative groups of collaborators. Without careful planning for its introduction and the changes that this will entail, the impact of groupware will likely be quite limited. Successful groupware implementation will require both a careful assessment of the fit of the technology to the organization and a well designed training program to introduce this new technology and its potential to the organization members.* [1]
>
> Betty Vandenbosch and Michael Ginzberg

IBM has a history of introducing paradigm-breaking, game-shifting software in the collaboration space. Lotus Notes was way ahead of its time, and it took a special person to be able to re-imagine the way work got done using Lotus Notes. Written for a conference in 1996, Betty and Michael's quote above highlights the need to examine how the technical capabilities in groupware could be used for getting work done. Fast forward to the current wave of social collaboration tools—such as IBM Connections—and the story is no different. In this chapter we think about why we might actually be interested in using a tool such as IBM Connections for doing business.

In this chapter, we will:

- Examine the significant business and organizational changes of the past ten years, and why they have an implication for the information systems we use today.
- Analyze the concept of collaboration scenarios, and how it provides a lens for looking at improvement opportunities in line with new collaboration technology.
- Meet Albreto, Inc., the fictitious organization about to embark on using IBM Connections for doing business.

The Changing Landscape for Businesses and Organizations

The last ten years have ushered in a number of significant changes for organizations.

- *The relentless drive for innovation*. Innovation has become a strategic differentiator for winning in the market. Organizations need the ability to create new products and services quickly, that address unmet and unfulfilled customer needs. The rules of competition have been re-written though, since organizations that previously only had to worry about their competitor down the road now have to worry about international players with local delivery capabilities. A key enabler for innovation is the ability—not to mention the individual and corporate willingness—to unlearn old ways of creating products and services in order to learn newly-crafted and more effective ways of doing so. A related enabler is being able to get new employees up-to-speed quickly with the way the organization currently works, and connect them to other employees with specialist knowledge.

- *The always-on highly-connected workforce*. While more widespread adoption of laptops started the transition away from a desk-bound, partially-connected workforce, the exploding adoption of smartphones and lightweight tablets has taken it to a new level. Current devices support multiple near-ubiquitous wireless networks, and feature in-built video cameras for face-to-face-like interaction. People who carry a laptop, smartphone, or tablet with them have everything they need for connecting with other people—down the hall or around the world. When combined with the billions of dollars / pounds / euros spent on deploying ever faster broadband and mobile networks, you have a potent combination allowing the re-thinking of decisions on organizational design and business relationships.

- *The rise of social networks*. Social networks on the public internet—including but not limited to Twitter, Facebook, Google+, and LinkedIn—have created massive sources of new data on consumer sentiment, purchasing preferences, and brand loyalty. These have introduced new opportunities for organizations to engage directly with their customers, prospects, and even potential business partners. Social networks have had a second impact too: they have demonstrated other approaches for collaborating beyond a flurry of email messages, and educated tens (or hundreds) of millions of employees on the possibilities of a new way to work. The concepts of working openly, sharing more freely, and creating explicit social connections, among others, are being demanded more often in the business world.

> Social networks have demonstrated other approaches for collaborating beyond a flurry of email messages, and educated millions of employees on the possibilities of a new way to work.

- *The changing background of new graduates*. New graduates joining the workforce have a different background in how they have worked with fellow students and kept up with friends. Twitter, Facebook, Google+, LinkedIn, and a host of other social networking services have set the scene. Open sharing and the possibility of serendipity are key expectations. Email doesn't cut it for this group—email is "for old people"—and top graduates in high demand will shop around for more progressive employers.[2] Organizations that have embraced the philosophy of social business and provide suitable tools to boot have a big advantage. Note that while I don't advocate unnecessarily pampering to new graduates, there is something to be said for evaluating new ways of working, especially when current ways are groaning under their own weight.

- *The need to know what we know*. As organizations grow larger, more diverse, and more geographically distributed, the ability to personally know everyone disappears. This carries with it tremendous negative implications. These include being unable to tap the expertise of employees, recreating the proverbial wheel (although it's more common to have to recreate knowledge, methodologies, and approaches in today's world), and unnecessary duplication of effort. The latter can occur by hiring new employees for skills your organization actually already has, or by outsourcing specific competencies to consulting firms for actions that could be taken internally if only one knew who to talk to. Lew Platt, a former CEO of HP once said that HP could be three times more profitable if only HP knew what HP knows.

> As organizations grow larger, more diverse, and more geographically distributed, the ability to personally know everyone disappears.

- *The aging of the workforce and the coming exodus of skilled managers*. Workers of many years standing are approaching the age of retirement, and organizations face the exodus of skilled managers. These manager and their many years of experience about "how we do things around here" are about to walk out of the door. Organizational leaders are waking up to the challenge of how to capture and retain what people know, so it can be used for the good of the organization even after they've left. Previous attempts in the wave of formal knowledge management systems demanded knowledge capture as a separate, artificial activity to the flow of work, and largely failed. That approach is not an option, and what's needed is a new way of helping employees do great work and capture or structure what is known for wider organizational benefit.

These changes have had many flow-on implications—too many for our purposes here—but one implication is that the tools we use on a day-to-day basis to get our work done and collaborate at work are insufficient to the demands now presented. Ten years ago the best approach for rapid communication and collaboration was email, with wireless email services on a BlackBerry for those that required updates in real-time. We got a lot done with those tools, but the world has changed and it's time to move on.

Collaboration Scenarios

The major concept that drives how a book is structured is one of the most significant conceptual decisions for an author. In many books on informations systems, the major concept of “explaining features” is embraced. The author takes each feature one-by-one, and explains in precise detail how to use this particular command, or what happens when you click here, or why you should never ever click this other command. And then you turn the page and the same is done again and again for 400-1000 pages. There is a place for such books, and an audience that needs to read 1000 pages of feature-rich instruction. But I’ve come to believe that business people and managers need something different. Instead of talking about features, talk about something that person does already in their work, and then explain how the new information system can extend, enhance, and enrich what’s happening. This brings us to the major concept of this book: collaboration scenarios.

About Collaboration Scenarios

The core idea of Collaboration Scenarios is to create a lens through which to look at the common activities that take place when people are collaborating—in your organization. It is firmly entrenched in the idea of looking at what work is done in your organization today, and then evaluating new technology and its impact on the scenario. Collaboration Scenarios is based on two assumptions:

The core idea of Collaboration Scenarios is to create a lens through which to look at the common activities that take place when people are collaborating—in your organization.

1. The introduction of new collaboration technology does not force a change in the work of the organization. For example, teams that respond to proposals will still need to respond to proposals after IBM Connections has been installed—the overall intent remains unchanged. The introduction of IBM Connections doesn’t remove the need to write proposal responses, but it could change the way they get written.

2. The “way” teams work together—the routines they follow and the technology they use—become invisible to them over time. In the pursuit of efficiency, this is an excellent development. In the pursuit of effectiveness, it can be less so. When new routines and technologies are available to increase the team’s effectiveness, continuing the old way means the team is effective only at being inefficient.

There are many Collaboration Scenarios that form the basis of collaborative work, and the idea is to select the ones that represent the work being done at your organization. The approach puts the emphasis on what collaboration means in your organization today, rather than on “cool features” in new collaboration technology. It keeps the consistency of intent in focus, even while examining technology-enabled opportunities for change.

Ten Collaboration Scenarios with IBM Connections

In this book we are going to explore ten collaboration scenarios as a way of investigating how IBM Connections can be used to usher in new ways of working that are more suited to the nature of work and organizational life today. The intent is to talk about activities that end users are empowered to do in Connections. The ten collaboration scenarios are:

- Co-authoring documents.
- Managing meetings.
- Holding discussions.
- Distributing team and organizational updates.
- Capturing ideas for innovation.
- Running a project.
- Sharing learning and best practice.
- Making decisions.
- Finding expertise.
- Achieving individual coherence.

The order of these collaboration scenarios is important. The earlier scenarios emphasize the beginning moves—the small changes in behavior—that will collectively aggregate to major change over time. As people become comfortable with the earlier scenarios in IBM Connections, it lays the foundation for embracing the more advanced ideas—such as running a project, or finding expertise. Let's briefly touch on each of these scenarios, before devoting a chapter to each one.

Co-Authoring Documents (Chapter 3)

Working on a document with other people is a common collaboration scenario in organizational life. Document co-authoring encompasses a range of activities, from the initial planning, drafting, writing, editing, and through to the final polishing. In Chapter 3, we look at how IBM Connections provides a new way to support document co-authoring.

Managing Meetings (Chapter 4)

When people meet to discuss ideas, explore possibilities, make decisions, and otherwise communicate "in the now," we usually say they are having a meeting. Like working on documents together, attending meetings is a very common way of spending your day in organizations—and sometimes those meetings can be collaborative events. In Chapter 4 we look at how IBM Connections supports a range of meeting activities.

Holding Discussions (Chapter 5)

When teams or groups discuss ideas, challenges, problems, and opportunities, with the view to exploring the boundaries of what's known, they are engaging in the process of discussion. Discussions provide a way of bringing many people's experience, understanding, and preferences to bear on an issue of common interest. In Chapter 5 we look at the capabilities in IBM Connections for support discussions, and examine how to use discussions effectively.

Setting Up Your Profile (Chapter 6)

While not a collaboration scenario itself, the issue of setting up your profile in IBM Connections needs to be addressed in order to avoid particular undesirable side effects in the use of IBM Connections. In this chapter we look at the steps involved in setting up your profile. The steps outlined can be completed by each user in 15 minutes or less.

Distributing Team and Organizational Updates (Chapter 7)

An organization is a collection of people working together—loosely-defined—towards a common objective. The actions of any one group of people will have flow-on effects for others in the organization, and keeping the appropriate people informed about what's going on, what's coming up, and what's holding up progress is an important part of keeping everyone aligned. In Chapter 7 we look at ways in which IBM Connections can help with distributing these team and organizational updates.

Capturing Ideas for Innovation (Chapter 8)

In the face of a long list of options for how to innovate products, services, processes, relationships, and other aspects of organizational life, the approach to selecting which ideas to implement can best be described as ad hoc. Perhaps a manager takes a wild stab. Or one team decides to embrace a particular idea. Or the problem is too difficult and so nothing of substance ever gets done. The wider issue is how to gauge the level of support for new ideas, along with how to bring together the best thinking in advance of making an implementation decision. In Chapter 8 we consider how IBM Connections enables organizations to take a more open and collaborative approach to capturing, examining, and exploring ideas for innovation.

Running a Project (Chapter 9)

When people work on a project together—an initiative with a particular outcome, a set membership, and a definite end signal—there's a lot of moving parts to coordinate across the team. There are documents to create. Discussions to have. Decisions to make. Other people to interview for information. Meetings to hold. It can get chaotic very quickly, and such chaos doesn't usually contribute to delivering a great final outcome. In Chapter 9 we explore how to use IBM Connections to support teams running a project, and reducing the chaos in the process.

Sharing Learning and Best Practices (Chapter 10)

When multiple people are involved in carrying out similar work, the innovations and new ideas created by one person could benefit other people in the organization. In the same vein, other people could have related experiences that could enhance the original idea. But how does each person know about innovations in work practices that are taking place in another country? How do people trade ideas, share concepts, and learn from each other? In Chapter 10 we look at how IBM Connections can be used for sharing learning and best practices.

Making Decisions (Chapter 11)

Making effective decisions is a critical key to success in organizational life—both for small teams and for the wider organization as a whole. Deciding to pursue new products, to innovate a current service, or to change an organizational policy are the raw materials from which the future of the organization is crafted. Making decisions involves forming decision options, evaluating the appropriate options, and then committing to a particular course of action. In Chapter 11 we investigate how to use IBM Connections to support the decision making process.

Finding Expertise (Chapter 12)

When people need to locate others who have expertise or special knowledge in a particular topic, how do they find them in your organization? It's often left to who you know, or to casting around in a frantic craziness to track down anyone who could help. In Chapter 12 we examine how IBM Connections provides a new way of finding expertise, without the frantic craziness.

Achieving Individual Coherence (Chapter 13)

The final collaboration scenario we will investigate looks at the impact of introducing new collaboration technology on an individual—how they track and coordinate everything they are involved in and have to do. Adding IBM Connections to an individual's toolset brings with it many new possibilities for storing information and tracking deliverables, and yet there's a dark underside that needs to be addressed. Feelings of overwhelm, confusion, and being lost in a giant system are not beneficial. There are some specific actions individuals can take to minimize these feelings, and we tackle these in Chapter 13.

Making the Collaboration Scenarios Work for Your Organization

In laying out this list of ten collaboration scenarios, the intent is to provide clear insight into the possibilities of how IBM Connections can be used for doing business. Equally, the intent is not to dictate that you must move ahead with all ten scenarios. The scenarios are options that may have applicability within your organization, or they may not. There are three steps in making the collaboration scenarios approach work for your organization:

1. *What Work is Done Today?* Select the Collaboration Scenarios that represent the common work activities of your organization. You should have a sense of this based on your prior observations, but if not, start talking to people.

2. *How is Work Done Today?* Develop an understanding of the routines and technologies that are used today in carrying out these Collaboration Scenarios. For example, shadow a couple of teams and watch how they manage their projects. Or talk to a team manager about how they manage meetings.

3. *How Could Work Be Done Better?* Look for new technology that could be applied to the scenario, and evaluate the differences that could be made to the way the scenario is carried out.

For more on the thinking behind the Collaboration Scenarios approach and its role in the process of forming collaboration strategy, see my other book—*Collaboration Roadmap: You've Got the Technology—Now What?*[3]

Welcome to Albreto, Inc.

Our exploration of IBM Connections through the lens of the Collaboration Scenarios approach is set in the context of a fictitious company, Albreto, Inc. With offices around the world, Albreto is finding it increasingly difficult to keep its people aligned, working together, and doing the great work that originally characterized the Albreto brand. Senior leadership were aware of their business problem as they watched expenses climb quarter-by-quarter, in step with declining customer satisfaction, flatlining revenues, and nose-diving profits. After doing a root-cause analysis with a strategy consulting firm, one of the recommendations was to re-think the way Albreto's people worked together. The only software tools that were made available were a traditional email system, phones, and a direct line to a corporate travel agent.

Following an evaluation of the various collaboration and social business software products on the market, senior leadership decided to deploy IBM Connections. The leaders were attracted to Connections due to its pedigree, its good reputation in the market, and the availability of global-local support through IBM's business partner channel. IBM's wider vision for Connections and related offerings also stood out to the leaders.

Accessing IBM Connections

This book assumes you have access to IBM Connections in your organization. In many cases this will be due to your IT department having installed IBM Connections internally, either using in-house IT expertise on IBM Connections, or in conjunction with one of the many IBM Business Partners around the world.

Another approach to gaining access to IBM Connections that has growing appeal among organizations is as a cloud-based service. This means that another organization—a service provider—installs IBM Connections in their data center and makes it available to your organization for a monthly or annual fee. IBM makes Connections available following this model through its *IBM SmartCloud for Social Business* offering, but they are not the only service provider. Others include:

- *Phase 2 International*, who provide security hardened cloud servers for both Microsoft and IBM technologies. See www.phase2.com.
- *AVNET, Inc.*, who offer a wide range of IBM technologies through a cloud model. Enterprise Blue for Connections is its IBM Connections offering. See www.atech.com.
- *ISW Australia*, an IBM Premier Business Partner. ISW offer IBM Connections and other IBM technologies in hosted mode. See www.isw.com.au.
- *Prominic.NET*, a long-time provider of hosting for IBM products, offers IBM Connections in both shared and dedicated models. See www.prominic.net.

If you are contemplating a hosted approach to gaining access to IBM Connections, talk to your local IBM office or IBM Business Partner for their recommendations.

Thanks to Phase 2 International

The installation of IBM Connections 4.5 used in this book was provided by Phase 2 International. The team at Phase 2 graciously created an instance of IBM Connections for the fictional Albreto, Inc., with user accounts for the people you will meet in the pages ahead. As an author who didn't want to get into the task of installing IBM Connections 4.5, I was extremely grateful for their help.

If you are considering a cloud-based instance of IBM Connections, make sure you check out Phase 2's offering. See www.phase2.com/connections.

Summary

In this chapter we have recounted recent changes in the world of organizations, businesses, and government agencies that challenge the status quo in how people work together. This contextual discussion sets the scene for why new technologies such as IBM Connections may offer value and applicability to our organizations, and why current ways of working together may need to be sidelined.

We have also laid out the methodological approach of Collaboration Scenarios. This approach provides us with a particular way of looking at how new collaboration technology can improve the way work is done in our organizations. It starts with the various enduring activities that people do when they are working together, instead of listing a litany of features from the particular tool. From here we dive into ten chapters—Chapters 3 to 5, and 7 to 13—each explaining one of the collaboration scenarios we have briefly touched on in this chapter in the context of IBM Connections. To add a bit of spice to the various collaboration scenarios, we also introduced Albreto, Inc. as the organization about to embark on the journey with IBM Connections.

> Collaboration Scenarios provides an approach for looking at how new collaboration technology can improve the way work is done in our organizations.

There's much to do. Let's get going.

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[1] Betty Vandenbosch and Michael Ginzberg, *Lotus Notes and Collaboration: Le plus ca change*, Proceedings of the 29th Annual Hawaii International Conference on System Sciences, 1996. See http://www.computer.org/comp/proceedings/hicss/1996/7330/00/73300061.pdf.

[2] That "email is for old people" is a common idea among the younger generation, reflected in the much higher use among this demographic of text messages, Facebook, and other newer tools. That young people take into consideration the tools available for working together at a prospective employer is a concept I have heard from numerous clients.

[3] *Collaboration Roadmap: You've Got the Technology—Now What?*, by Michael Sampson. See www.michaelsampson.net/collaborationroadmap.html.

Chapter 3.
Co-Authoring Documents with IBM Connections

> *Documents are an integral part of every business and institution, and organizations that cannot manage the production of documents effectively and efficiently risk a great deal more than poor business performance. Today, employees spend up to 25 per cent of their working day on non-productive, document collaboration related tasks.*[1]
>
> Butler Group

A document can state a position, make an offer, lay out the rationale behind a decision, capture explicit knowledge, or perform a whole host of other purposes in organizational life. Writing a document is a common activity, and working with other people on a document is a very common collaboration scenario. The nature and quality of the tools we have available to us when working on documents together impact greatly on the effectiveness, efficiency, and social dynamics involved in the co-authoring scenario.

In this chapter, we will:

- Evaluate the options for re-thinking how documents are authored in a team or group setting.
- Consider how to use IBM Connections to improve document co-authoring.
- Learn about firms that are using IBM Connections to enhance the way people work together on documents.
- Look at the risk of early-stage collaboration, along with other advanced concepts.

The Theory of Co-Authoring Documents

Documents state a position, make an offer, or outline an argument at a particular point in time. Some documents in organizations are created by a single individual, but it is more common for documents to contain input from multiple people. Currently, the most common way of working on a document together is by email and attachment—the document (or spreadsheet, or presentation) is drafted by a lead author and sent around for review and input by others. In response to the initial document distribution, the lead author receives an ongoing stream of email messages with new versions of the document—replete with in-document comments and direct edits to the text—and must decide how to integrate these into the overall master document. Document co-authoring in this way is an error-prone process:

The most common way of working on a document together is by email and attachment—the document is drafted by a lead author and sent around for review and input by others.

- *Poor Timeliness*. Key reviewers may forget to send their edits back in a timely fashion, holding up the process for everyone. The lead author needs to keep chasing them.
- *Duplicate Comments*. Reviewers may make the same comment as everyone else, but because the input is invisible to everyone but the lead author, there is duplication of effort.
- *Comparing Documents Multiple Times*. The lead author has the nightmare task of comparing multiple versions, and then merging input into the master document.
- *Heightened Risks*. Under tight deadlines, developing a document in this way introduces significant risks—including the possibility of including an old version of one part of the document. The author might miss a more recent version in their inbox. There are also practical problems, such as inconsistent formatting throughout the document.

If document co-authoring is a common activity at your organization, and an email-enabled approach is the dominant strategy, there are new approaches that can be applied to reduce the risk of errors. In looking at these new approaches, you can sort the differences into two overall categories:

1. *Shared Storage, Single Author at Time*. Providing a means of shared storage, where the document is stored in a place that everyone can get to. However, the the approach is still limited to allowing only a single person to work on the

document at any given time. Switching from email to shared storage for document co-authoring can result in process efficiency savings of up to 50%.

Switching from email to shared storage for document co-authoring can result in process efficiency savings of up to 50%.

2. *Shared Storage, Multiple Simultaneous Authors*. Extending the shared storage concept from the first category, one new approach in IBM Connections supports multiple simultaneous authors. This means that more than one person can open the document at a given time and work inside it. Multiple simultaneous authoring can result in savings of up to 60% compared to email.

Figure 3-1 looks at the capabilities in IBM Connections 4.5 to support co-authoring.[2]

Figure 3-1. Document Co-Authoring in IBM Connections

Category	Tool in IBM Connections	Description
Shared Storage, Single Author at a Time	Files	Store documents in Files, and share the document without email. Documents can be locked during editing. View history of sharing activity.
	Wiki	Requires moving away from Microsoft Word and "track changes." Will need to spend extra time on presentation once the document is written, if it is going to be provided externally.
	Libraries (new with IBM Connections Content Manager 4.5)	Check-in and check-out capabilities, along with approval routing.
Shared Storage, Multiple Simultaneous Authors	IBM Docs (released in December 2012)	Browser-based authoring and editing of documents, spreadsheets, and presentations. Multiple people can work on a document at the same time.

New tools in IBM Connections improve the document co-authoring scenario.

How to Co-Author a Document in IBM Connections

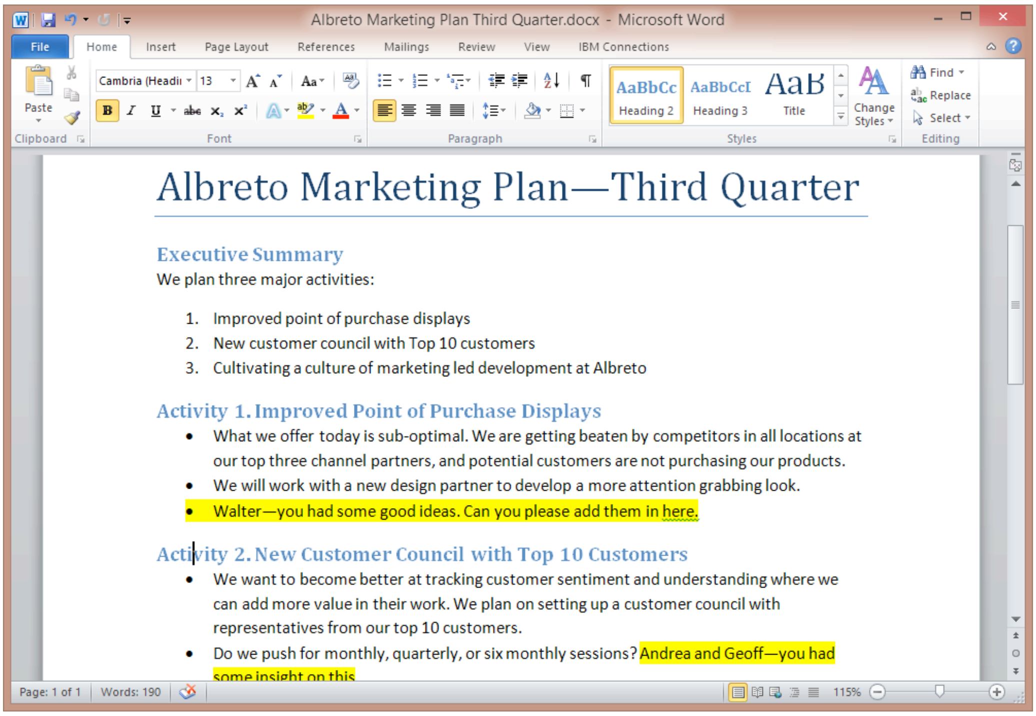
Edgar looked at his watch, shook his head in disbelief, and then glanced up at his annual calendar on the wall. "How am I going to get everything done?" he wondered to himself. "We've got to get this plan finished and ready for the Marketing Board meeting. And that's only two weeks away. There's so much to do between now and then." As the VP of Marketing at Albreto, Edgar was responsible for the marketing department, and had line responsibility for an annual budget of $30 million. It was a great role, but not without its challenges. He knew he had a group of really good people working for him, but the team's performance was suffering. Of his core marketing group, only Walter worked in the same office building, while Andrea, Sally, and Geoff were all spread across different Albreto offices. It wasn't an ideal set up, but it was a situation he couldn't do much to change. He didn't want to lose any of them, but did need to improve performance somehow.

> *"Hey Walter," he called across the office, unintentionally disrupting a few people in the process. "Can we talk for a couple of minutes?"*
>
> *Walter got up and walked into his boss's office. "Sure, what's up?" Walter asked as he took a seat.*
>
> *"We've got to get this marketing plan finalized for the third quarter," Edgar started, "and then agree how to present it at the Marketing Board. I'm just not sure I can handle a repeat of the disaster we had last time."*
>
> *"Which disaster do you mean?" asked Walter with a rueful grin. "The disaster with the presentation, or the disaster with pulling a few all-nighters to get the marketing plan finalized?"*
>
> *"The all-nighters, mainly," answered Edgar. "Clearly that was the start of the problem, because since we were so exhausted from those, the meeting didn't go great. Is there a better way of doing it, or are we stuck with another couple of terrible weeks?"*
>
> *Walter paused for a moment. "You'll remember that on our last marketing group call Sally talked about this new Connections thing that is coming to Albreto," he said. "I think she said it could support new ways of working on documents, holding meetings, and a variety of other collaborative tasks."*
>
> *"Yes, you're right," said Edgar, "she did. I'd forgotten about that. Or more accurately, I hadn't linked what she said then with the problem we've got now."*
>
> *"Why don't you give her a call?" suggested Walter. "See if she has some ideas on how we can avoid a repeat of last year's problems. As you know, I'm out of the country for most of next week, so all-nighters aren't going to work for me."*

Step 1. Draft the Document

You need a starting place to begin a document co-authoring activity. An initial draft gives other people something to evaluate and provide input on, and it also sets the scope for the specific document. That said, it is vitally important to make it a draft, not a beautifully polished piece of literature. The point is to stimulate thinking, request input, and gain other perspectives—to put a stake in the ground as it were, not finish the entire building.

Figure 3-2. Draft the Document in Your Word Processing Application



Write a first draft of the document in your word processing application, usually Microsoft Word or IBM Lotus Symphony. But leave lots of scope for other people to contribute.

Install the Plug-in for Microsoft Office
To eliminate manual processes for uploading documents from Microsoft Office to IBM Connections, IBM has released plug-in software to connect the two. Designed for people using Microsoft Windows, the plug-ins enable you to upload a document to IBM Connections from inside Microsoft Word, PowerPoint, and Excel. There are also plug-ins for Windows Explorer and Outlook. To download, search the web for *IBM Connections Desktop Plug-ins for Microsoft Windows*, or ask your IT team for help in getting these installed on your computer.

Step 2. Upload to IBM Connections, and Set the Metadata

With the document drafted, you need to put it in a place where other people can access it and provide their comments. There are three discrete tasks required to make this happen:

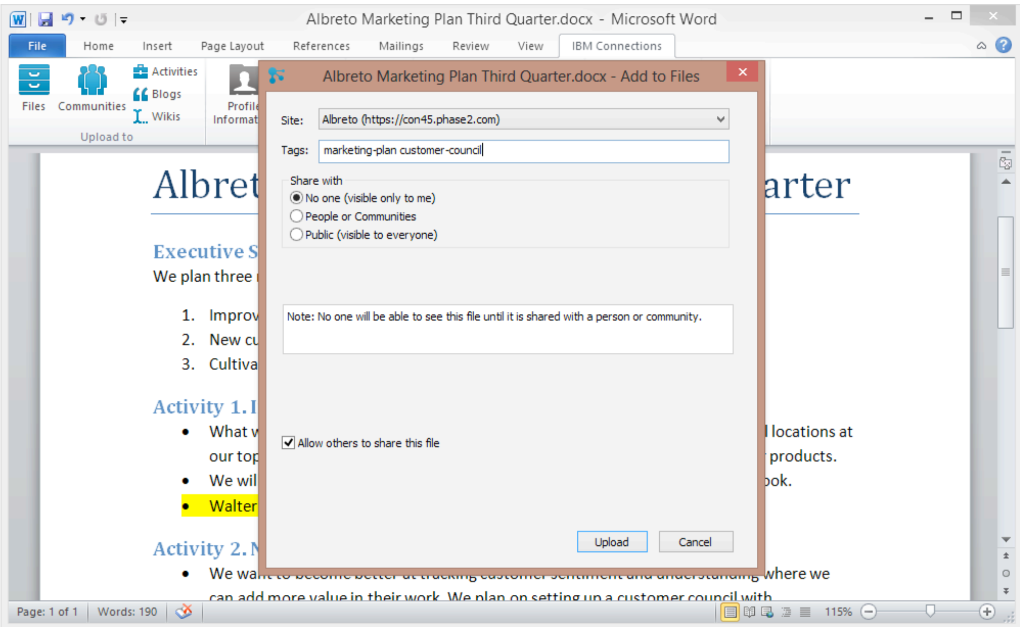
1. *Save the Document*. Use the Save command in your word processing application to save a copy of the document to your local computer.

2. *Upload it to Files in IBM Connections*. In Microsoft Word (assuming you have installed the Plug-in), click on the *IBM Connections* tab, then click the *Files* button. Add one or two tags—more on tags in a moment—and click the *Upload* button.

   If you have not installed the plug-in, open IBM Connections in your web browser. On the top menu bar, click *Apps*, then *Files*. When the Files page opens, click *Upload Files*. You will be presented with a pop-up dialog box for uploading the document you have just drafted. Find your draft document on your local computer, write a couple of tags, and leave it as sharing with no one for now.

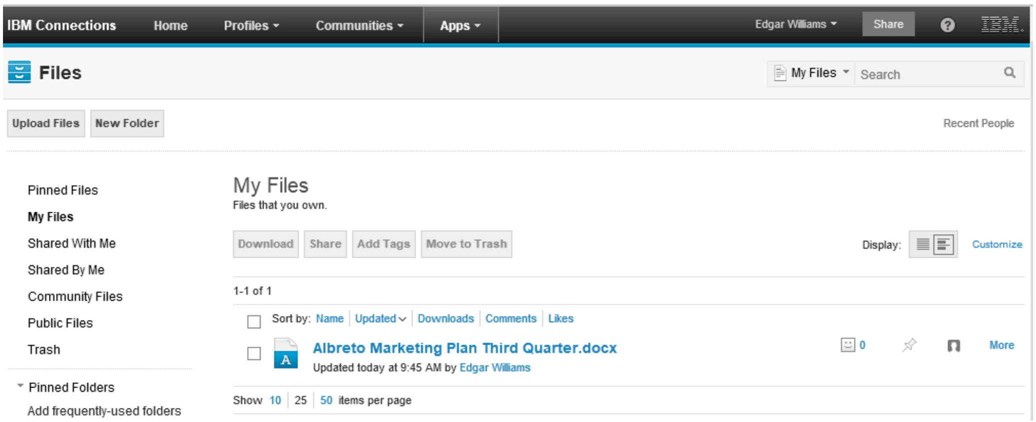
3. *View the Document in IBM Connections*. Once the document is uploaded, view the document in the Files tool in IBM Connections. See Figure 3-4.

Figure 3-3. Upload the Document into IBM Connections from Microsoft Word



Upload your draft document from Word into IBM Connections to start the co-authoring activity. Tag the document with a couple of phrases, and leave it visible only to yourself at the time of uploading.

Figure 3-4. Your Document in IBM Connections



After uploading the document into IBM Connections, it will show in your list of Files. Since you haven't shared it with anyone else yet, no one else can see it in their list of Files. Clicking the file name doesn't open the document for editing but instead opens the properties view.

About Tags

Tags are a way of classifying documents to simplify the process of finding them in the future, differentiating documents from other similarly named documents, and highlighting other documents that may be similar and beneficial to review. For this document, tags such as "Marketing" or "Marketing-Plan" would be appropriate.

Tags are a way of classifying documents to simplify the process of finding them in the future, and differentiating documents from other similarly named documents.

About Naming Conflicts

If you have previously uploaded a document with the same name as the current document, IBM Connections will ask you to confirm what you want to do. You have two choices: continue uploading the file as a new version of the existing document, or renaming the file you are trying to upload so it is saved as a new document in IBM Connections.

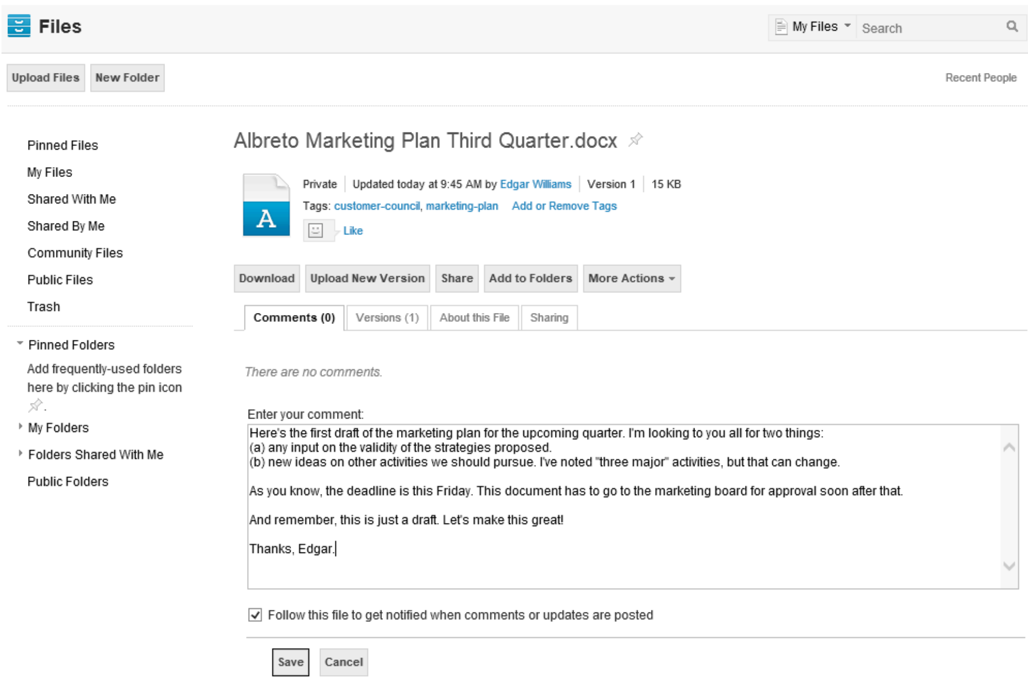
Step 3. Delete the File on Your Desktop

When you have confirmed that your document is in your list of Files, delete the original file you saved to your computer. If you don't delete it from your local computer, you will never know which version is current. Get rid of the local copy; you don't need it anymore.

Step 4. Write a Comment to Set the Scope on the Document

It is very important to clearly see the purpose of a document, and if you are asking other people for their input and perspective, it is equally important to state the contribution you want them to make. While you know what the purpose of the document is at the point of uploading it, give it a couple of weeks and tens or hundreds of other documents later, and it will become a bit fuzzy. It is a good practice, therefore, to make the purpose of the document as clear as possible in order to remind yourself and set the context for other people who happen to view your document. In IBM Connections, you can achieve this by writing a comment on your newly uploaded file. Click the name of your document to open the full properties view, and then click *Add a comment* on the Comments tab. When you have finished writing your comment, click the *Save* button.

Figure 3-5. Write a Comment to Set the Document's Scope



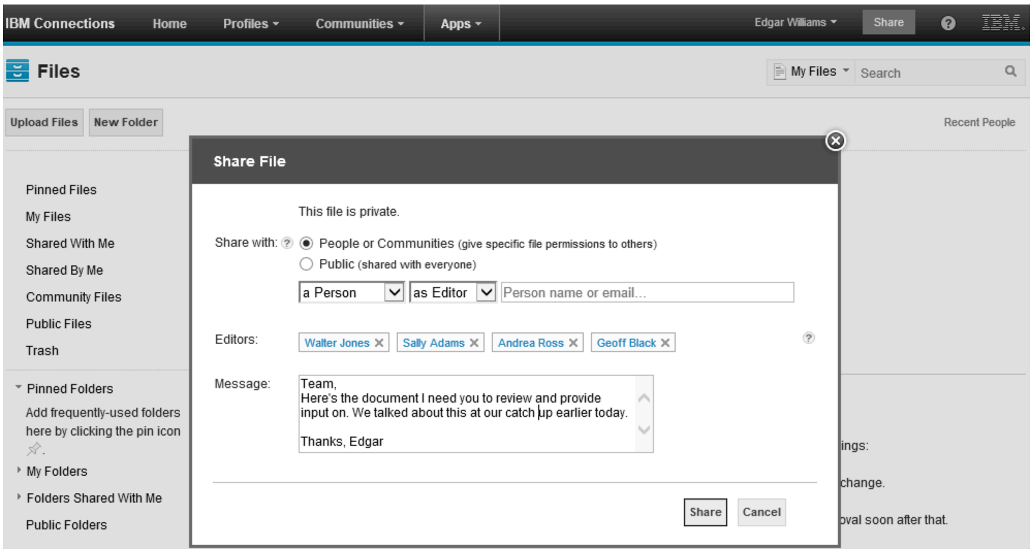
Write a comment on the document to set the scope for what the document should accomplish, and in a co-authoring situation, the input you are seeking from other people.

The document is now ready to share with other people. It is in IBM Connections. It has appropriate metadata to help identify it now and into the future. And the document has a comment to set the scope for requested input.

Step 5. Use the Share Tab to Share the Document with the Co-Authors

With the document in IBM Connections, it is time to share it with your co-authors. Click the *Share* button when looking at the document properties page in Connections, and enter the names of the people who will be working on the document with you. Start typing their names, and Connections will offer type-ahead completion options to help you share the document with the right people. Since you are inviting people to work on the document with you, give them Editor rights. If you only give them Reader rights, they will be able to view the document, but not make any changes.

Figure 3-6. Share the Document with the Co-Authors

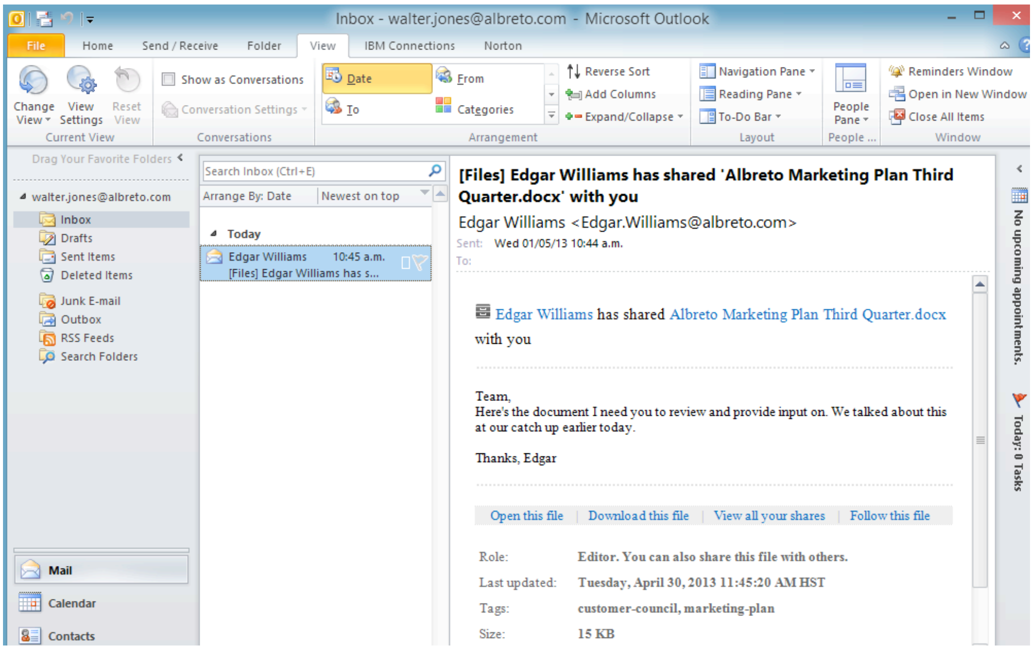


Use the Share option to give access to the document to your co-authors. Since they will be working on the document with you, make sure you give them Editor rights.

The message field in the sharing dialog box is important. Use it to briefly explain why you are sharing the document with your various co-authors. Each of your co-authors will have other responsibilities to complete, and by writing an appropriate message here you can give them the information they need to prioritize when they will work on the document. You would have done this anyway when sending the document by email; this is the place to put that text now.

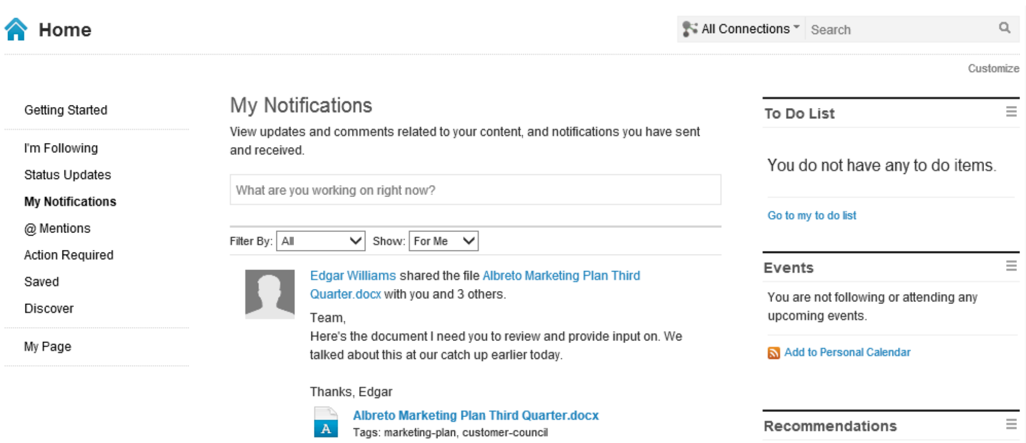
In essence, what we have done here is to send a workflow request to your various co-authors. Once you have shared the document with them, each co-author will receive an email notification for the document that requires their attention (Figure 3-7). The newly shared document—along with the message you entered in the sharing dialog above—will also show in each co-authors *My Notifications* area in IBM Connections (Figure 3-8).

Figure 3-7. An Email Notification of a Document to Review



Once you have shared the document with your co-authors, they will receive an email alerting them to the document, and highlighting what you are requesting of them. They can click to open the document in IBM Connections, even from Microsoft Outlook and other email clients. Email becomes a conveyer of notifications, not a means of distributing documents.

Figure 3-8. A Connections Notification of a Document to Review

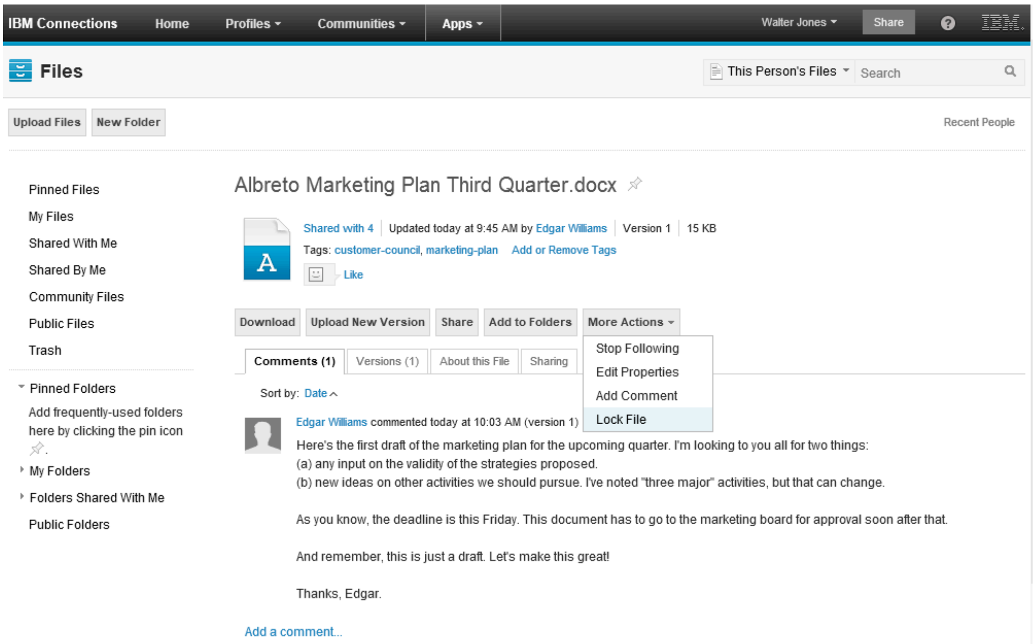


When opening the My Notifications area in IBM Connections, each co-author will see the new tasks and activities they have to complete.

Step 6. Each Co-Author Locks the Document, then Downloads It

After receiving notification that the document is ready for their input, each co-author should work on the document at a time that is convenient to them, although with regard to the deadline for giving input on the current document. Before downloading the document, lock the file to prevent other people from making changes while you are working on it.

Figure 3-9. Lock the Document Before Downloading



Locking the document signals to other people that you are working on the document, and prevents them from making changes at the same time.

After locking the document, click the *Download* button. The document will download to your computer immediately so that you can edit it. Since you have locked the document, no one else can make edits to it until you have uploaded your changes in a new version.

The whole co-authoring process hinges on one simple reality: each subsequent author is working on the document that earlier authors have already worked on. The edits and comments from earlier authors display in the document, meaning that subsequent authors do not have to recreate the same edits and comments time and time again. When the document is handed back to the original author, he or she has everyone's comments in a single document, not spread across many versions.

Step 7. Make Your Changes, and Then Upload a New Version

Open the document using the appropriate application—such as Microsoft Word or IBM Lotus Symphony—and make your contributions inside the document. There's a couple of essential points to keep in mind as you work on the document:

- *Focus on Structure and Content*. If you will see the document a few times before it is finalized, focus your initial comments on the document's structure, main content areas, and the big ideas the document is trying to portray.

- *Ignore Spelling and Grammar for Now*. In the initial co-authoring rounds, don't get hung up on spelling, grammar, and whether every sentence flows perfectly. That can come later with subsequent versions—and edit rounds—of the document.

- *Note Agreement and Disagreement*. If someone has already made a major comment you agree with, note your agreement in the document. If you disagree with a major comment, note that too. Your input will help the lead author decide which comments to keep.

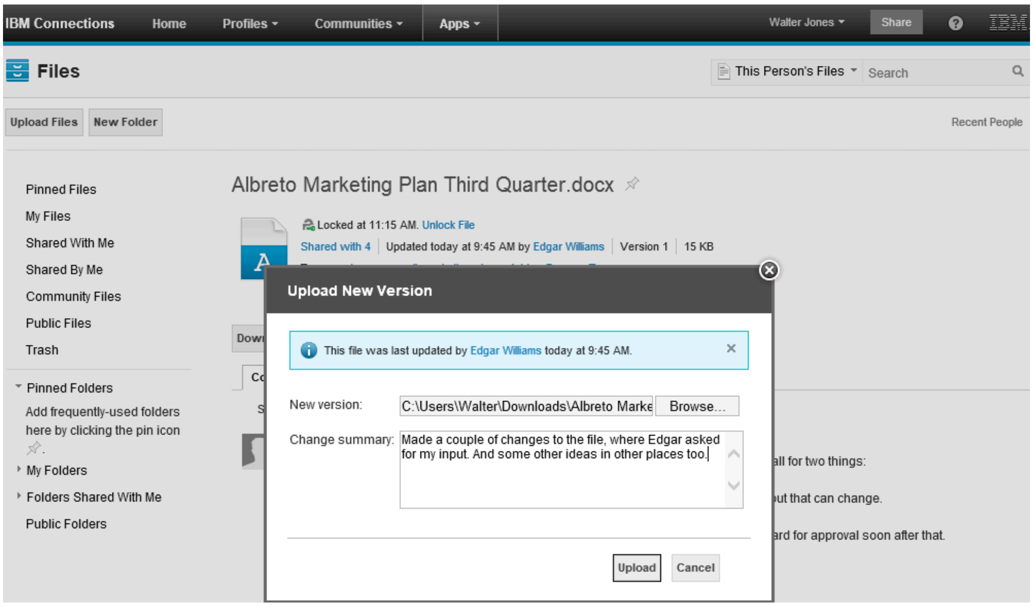
Once you have finished making your contributions, save the file to your computer, and then upload your version back to IBM Connections. Unless you are the original owner of the file, you need to do this from your Web browser (if you are the original owner, you can use the plug-in within Microsoft Word). Using the properties page in your Web browser for the file, click the *Upload New Version* button. You will be prompted for your new version (the file you saved to your computer), and also to summarize your changes to the document; it is essential that you write at least a sentence (see Figure 3-10). As the list of versions gets longer, that one line summary will help other people see what was changed as they scan the list. When you have done this, click the *Upload* button.

Once you have uploaded the document to Connections, unlock the file so subsequent co-authors can make their contributions as well. If you keep it locked, they will be unable to upload their new versions.

Anyone with access to the document in Connections can view the list of versions, using the Versions tab (see Figure 3-11). The list of versions shows the latest version at the top of the list, along with the change summary that was entered when uploading each version. On viewing the list of versions, the lead author can see who has completed their review of the document, and by virtue of their absence from the list, those co-authors who have not yet made any changes. If input is still required from specific people, the lead author can reach out by email, phone, instant message, or some other way to request their input.

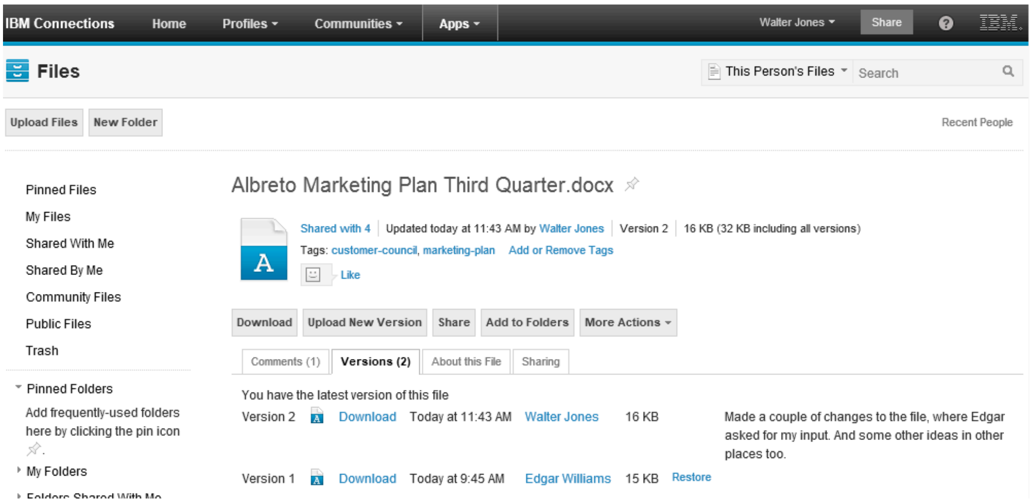
The list of versions shows the latest version at the top of the list, along with the change summary that was entered when uploading each version.

Figure 3-10. Upload a New Version and Summarize the Change



Upload the document you have edited into Connections, and write a comment to summarize the change you made. The comment greatly helps when scanning the list of versions.

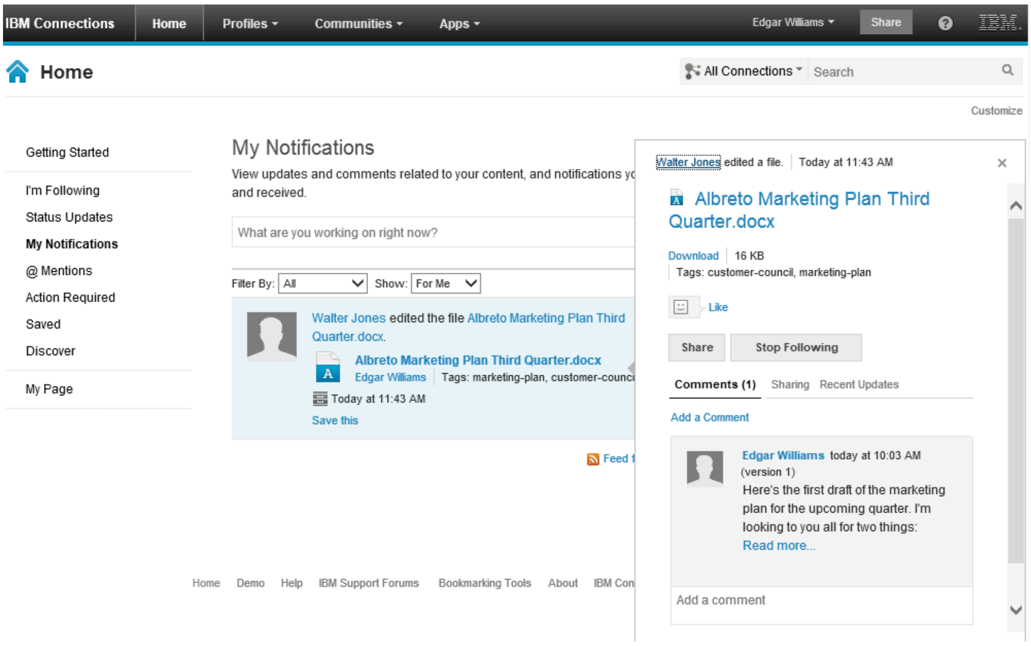
Figure 3-11. Scanning the List of Versions



In reverse chronological order, the list of versions tracks the history of the document over time, and notes who made changes when.

IBM Connections provides ambient awareness of the updated file through the notifications area for the lead author, and also by default the lead author will receive an email when the document has been updated.

Figure 3-12. Ambient Awareness of the Updated Document



The My Notifications area shows when other people have updated a document you own. You can click directly to view the document page in IBM Connections from this list, and also pop-out the information pane to the right-hand side of the notification.

Step 8. Finalize the Document

Once you have received the required feedback from your co-authors, lock the document in IBM Connections, download it, and work through the suggested structural, content, and other editorial changes. With the new master document in hand, you will need to choose whether to request another round of feedback from your co-authors, or finalize the document as is. This is going to depend on several factors, such as the number of co-authoring rounds you have already been through (two should be the absolute minimum; one round is not enough), how complete you think the document is, and whether further co-authoring rounds will add sufficient new or revised information to justify the time and expense. If you choose to seek another round of input, be specific about what you are asking your co-authors to focus on—perhaps its the structural integrity of the document, or specific areas that need more content. If you choose to finalize the document without another round of input, be sure to thank your co-authors for their input and assistance, and to make the finalized document available for their records.

Closing Comments on Co-Authoring Using the Files Application

In this section we have looked at how the Files application in IBM Connections allows a new way of co-authoring documents. Some parts of the process are the same as what teams experience today when using email and attachments—such as when the lead author writes the document, and when co-authors work on the document at their computer. What's very different, though, is where the document is stored. With email, everyone has their own copy, it's very hard to corral all the different versions, and it's basically impossible to see where everyone is at with the document. In comparison, by centralizing the storage of the document in IBM Connections, and inviting co-authors to access the document when they are ready to make their changes, everyone can see the list of previous versions, and it's clear who has to take the next action to move the document forward.

By centralizing the storage of the document in IBM Connections, all co-authors can see the list of previous versions, and it's clear who has to take the next action to finalize the document.

Before finishing our discussion of co-authoring using the Files application, let's examine a couple of other capabilities that may be useful.

- *Deleting Past Versions*. When the document is finished and the final version has been accepted, the document owner has the option of deleting the list of draft versions. If the intent is to make the document public in IBM Connections, it's often a good idea to delete the working versions to remove any prospect of confusion for subsequent readers of the document. The downside is that you—and your organization—lose the sense of who contributed what to the document over time. If you have specific regulations that prevent the removal of earlier document versions, you won't be able to take that approach.

- *Sharing to a Community*. You can share the document with a community in IBM Connections, without having to move it from where it is. Look back at Step 5 (on page 55) to see that you can share the document with people or communities. The beauty of this capability is that you never again have to create duplicate copies of a document to share with multiple people or communities. There's just a single version of the document in IBM Connections, displayed in many different places. That makes any subsequent updates to the document much easier.

- *Updating the Document Description*. When the document is finalized, it is good practice to update the description of the document to make the intent and scope of the document clear to future readers. No one is left fumbling around trying to figure out what the document is for.

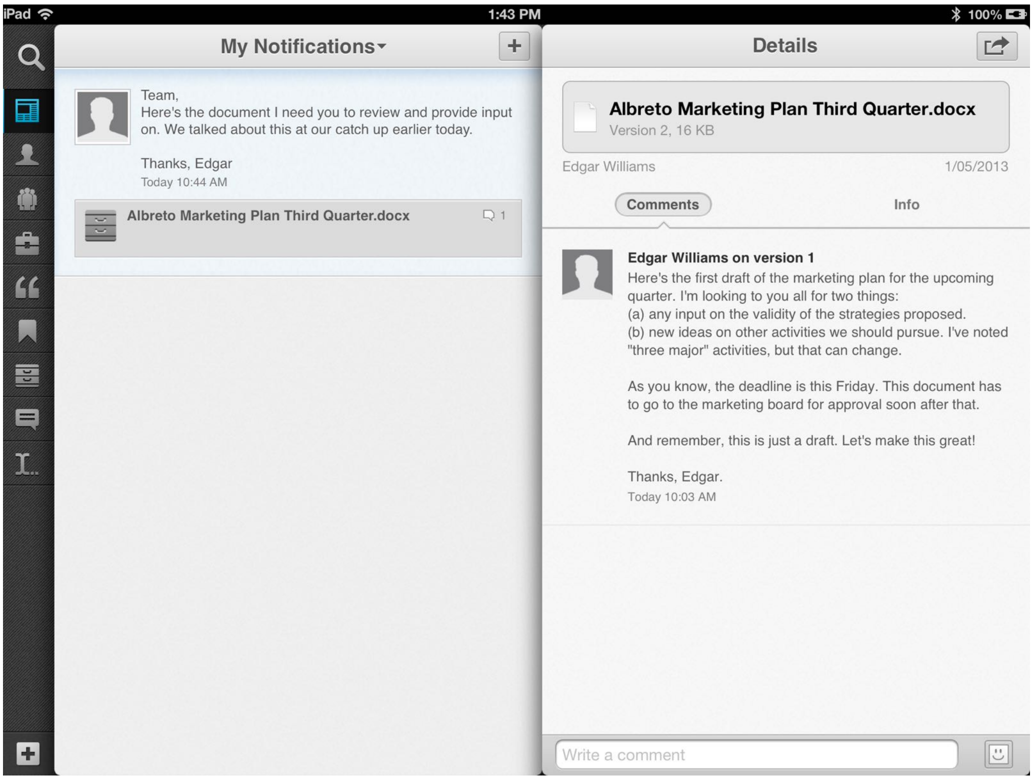
Let's now examine some of the options for co-authoring documents on mobile devices.

Sidebar: Working with Files on a Mobile Device

With the increased proliferation of smartphones and tablets, people want to be able to access IBM Connections from more than a desktop or laptop computer. IBM has released apps for IBM Connections for iOS, Android, and BlackBerry devices, and these are available free-of-charge from the respective App Stores.[3]

Once you have installed the app appropriate for your mobile device, and have configured your login details, you will see a range of navigation options down the left-hand side of the app. Reviewing the *Updates* option gives a list of recent changes, and for the document co-authoring scenario, you will be notified when someone has edited the document. Click on the document name in the Updates list to open the Details view.

Figure 3-13. Viewing the Document Details on an iPad



Open the Details pane for the document you want to view. From here you can download it to your iPad for viewing.

To open the document for viewing on an iPad, touch the jumping arrow in the top-right corner. In the pop-up menu, touch *Open* then *View*. You can now read the document on your iPad.

If you are the owner of the file, you can also edit the document on an iPad and upload a new version. If you are not the owner, while you can edit the file, you can't upload a new version from your iPad. As the owner wanting to edit the file, touch the jumping arrow, then touch *More*, then *Lock*. Once the document is locked, touch the jumping arrow again, and choose *Download*. When the document has downloaded, touch the document's name in the list of downloaded files, and touch *Open*. You will be prompted with a list of appropriate apps in which to open the document—Docs To Go is suitable on an iPad. Make the required edits to your document, and save it inside Docs To Go with a new file name.

To add the new version back into IBM Connections, touch the icon with the up-arrow in the bottom left-hand corner of Docs To Go, and then touch *Open In*. Choose *Open in Connections* from the app list, which will bring back the Connections app. Change the file name to the name of the original file in order to upload a new version. Enter a summary of your changes, and touch *Upload*. Once the document is in Connections, unlock it so your other co-authors can make their changes.

Figure 3-14. Uploading a Revised Document from Docs To Go on the iPad

Upload your revisions to IBM Connections. Start in Docs To Go, click the sharing button, and open it in IBM Connections. Use the original file name, write your change summary, and click the Upload button. Don't forget to unlock the document once it is in IBM Connections.

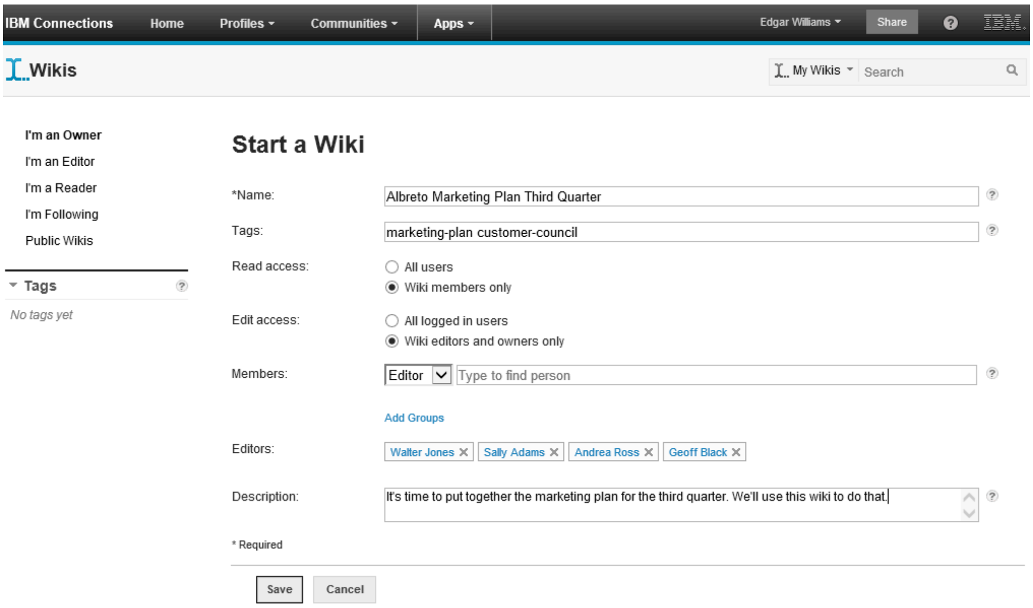
An Alternative Approach—Use the Connections Wiki

Information workers are very used to thinking about a document as a file. A file is self-contained, can be sent or distributed to other people, and is associated with a particular application—for example, Microsoft Word. In the first part of this chapter we have continued with this paradigm, and considered how to use the Files application in IBM Connections to support co-authoring. But there is a second option, and that involves the use of the wiki application. Let's look briefly at how to use the wiki for co-authoring.

Step 1. Create the Wiki

The first step is to create a new wiki. From the menu bar in Connections, choose *Apps*, then *Wikis*. Click the *Start a Wiki* button, and fill out the form to name, tag, secure, invite people, and describe the wiki (see Figure 3-15). In a co-authoring situation for a specific document, steer away from open access to all users, unless you are very clear that you want to open contribution to everyone. When you make someone an Editor, they'll receive an email alert, and an alert will appear in their notifications area in Connections.

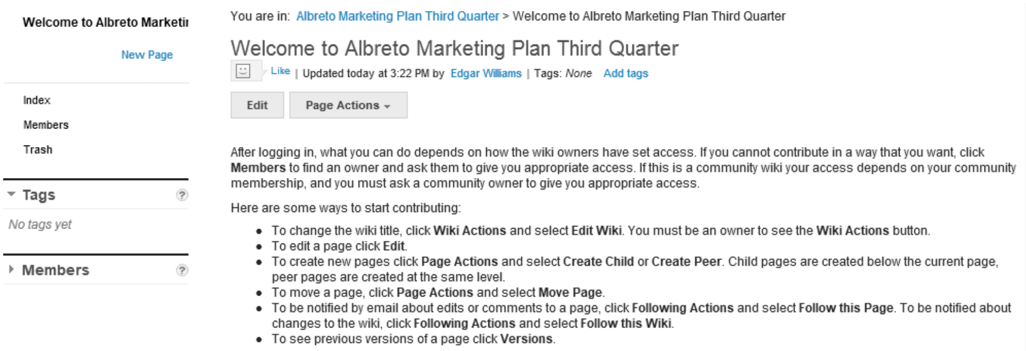
Figure 3-15. Start a Wiki for Document Co-Authoring



Name, describe, and detail the wiki to be used for working on a document with other people. Instead of treating the document as a file, a wiki treats it as one or more online pages.

Once you have completed the form, save the setup for your new wiki. Connections will then display the default opening page for the wiki, with IBM's explanatory text about how to use it (see Figure 3-14). Edit the page to get rid of IBM's default instructions.

Figure 3-16. IBM's Default Opening Page in Your New Wiki

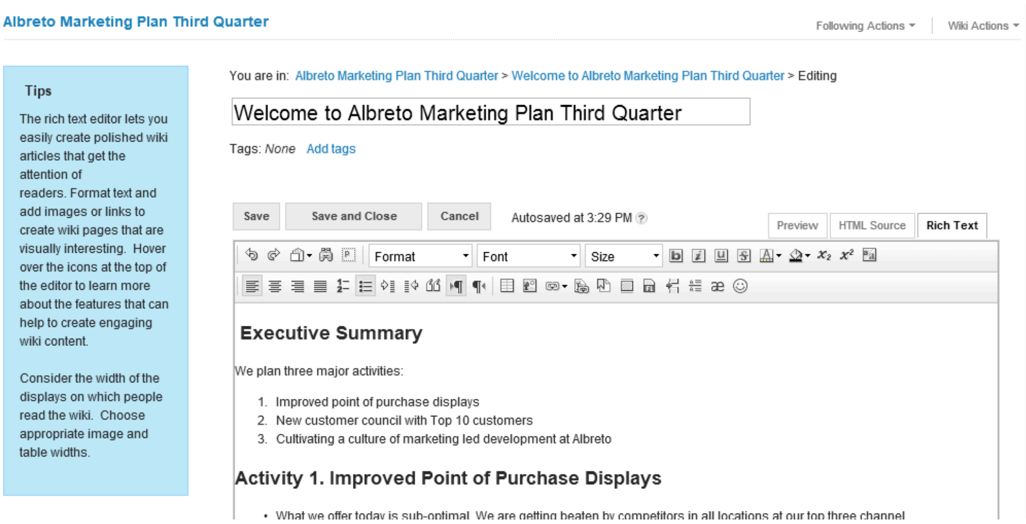


After creating the wiki, edit the opening page to delete the default opening words. Click Edit, select the text, and delete it.

Step 2. Write the First Draft of the Document

The beauty of a wiki is that you don't need anything but a web browser to write your document. A browser is sufficient. Using the newly created page in your wiki, write the first draft of your document, keeping in mind the advice given earlier in this chapter about making sure it is a draft. Your intent with the first edition is to stimulate thinking, request input, and gain other perspectives. Don't write a document that's so articulate that it leaves little room for others to make a contribution.

Figure 3-17. Write the First Draft of the Document

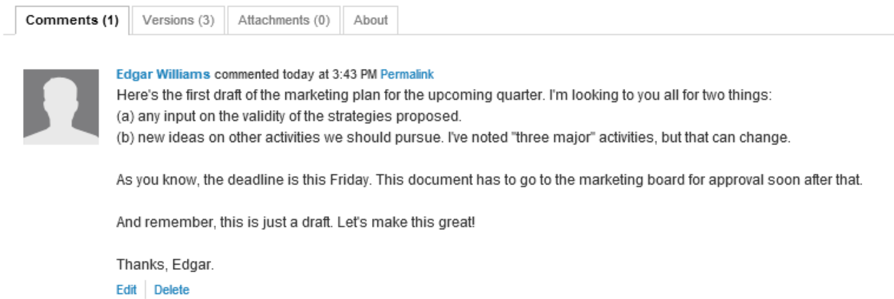


Draft the first version of the document using the new wiki page, and save your edits when you are done. Make sure it is a draft though, not a final version.

Step 3. Write a Comment to Set the Scope of Contribution

In asking for input to the document, it is good practice to clearly state what you are looking for from your co-authors. Click *Add a Comment* on the Comments tab at the bottom of the wiki, and write a succinct statement.

Figure 3-18. Write a Comment to Set the Document's Scope

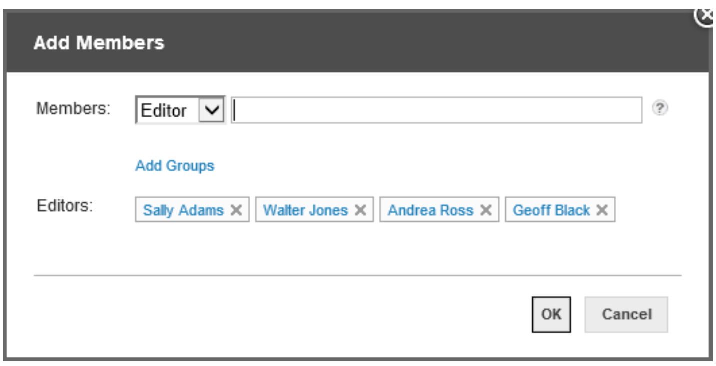


Write a comment on the wiki to set the scope for the contribution you are hoping for from your co-authors. If there's a deadline, be sure to state that too.

Step 4. Invite Your Co-Authors to Contribute

With the draft of your document now created in the wiki, invite your co-authors to contribute their thoughts, perspectives, comments, experience, and other input. If you didn't add them as members when you were setting up the wiki, click on *Members* in the left-hand navigation pane, and then click the *Add Members* button. Ensure that you add your co-authors as editors (not readers), so they can edit the wiki page.

Figure 3-19. Invite Co-Authors by Adding Them as Editors



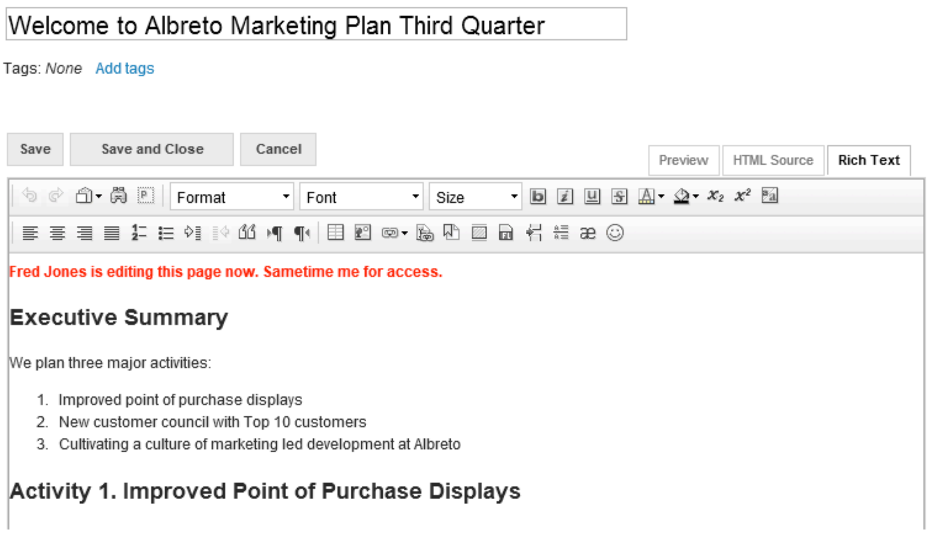
Add your co-authors as Editors to the wiki, so they can edit the wiki document. If you add them as a reader, they can see the document but not change it.

Each co-author will receive an alert notifying them they have been added to the wiki.

Step 5. Each Co-Author Edits the Wiki

On being alerted they have been invited to the wiki, co-authors should work on the document at a time that is convenient for them, but mindful of the deadline for completing the document. To work on the document, open the wiki and click the *Edit* button. This opens the document in edit mode directly in your web browser. Along the top of the editing window—as long as the editor is in Rich Text mode—you have access to paragraph styles, font styles, and other text layout effects just like in a word processing application.

Figure 3-20. Edit the Wiki to Make Changes



Edit the wiki document to make your changes. In Rich Text editing mode, you can use paragraph and font styles, just like in a word processing application.

There is no ability to lock a wiki document before editing it, so the risk is that another co-author will attempt to make changes at the same time you are. If two people edit the wiki at the same time, the first co-author to save their changes wins the editing cycle, and the other co-author will be told that there is a conflict when they attempt to save the document. While they can overwrite the changes made by the other co-author, that has the potential to upset people and will greatly damage the collaborative spirit in the group.

The simplest way to deal with this problem is the following: when you open the document to edit it, write the following line in red at the top of the page, and immediately save the document: *Fred Jones is editing this page now. Sametime me for access*. If another co-author visits the wiki, they will see the alert on the page and will know not to start their edits yet. If they have an urgent change to make, they can contact you quickly through IBM Sametime instant messaging. When you have finished editing the page, remove the first line and click *Save and Close*. And if your name isn't Fred Jones, please use your real name.

Step 6. Coordinate the Co-Authoring Process

While the wiki provides a way for working on a document with other people, there are a three coordination processes that need to be taken into consideration. These are notifying other co-authors that it is their turn to edit, working on very long wiki documents, and using Comments to summarize the changes you have made. Let's take each in turn:

- *Notifying Other Co-Authors*. Whenever one co-author saves the wiki page, an alert is generated for the other co-authors and is displayed on their Home Page in Connections. This is an ambient form of alert, and the idea is that other co-authors pick up on the alert and take their turn editing the wiki page. That is not always going to work, and also in time-crunched situations, something more will be required. The easiest way to deal with notifying other co-authors in a more intentional and direct form is to send them an instant message in Sametime. If the document has to be completed quickly, an instant message that says "*I'm done, it's your turn*" will greatly speed document completion.

- *Working on Very Long Documents*. Using a single page wiki is fine if the final document will be one to two pages in length, and is being written by three to four co-authors. For long documents with many co-authors, it would be better to split the document into multiple wiki pages. This would allow individual co-authors to work on their page in the wiki without the nagging sense that another co-author is awaiting their turn, or having to constantly scroll through a 50-page wiki document to find the section to comment on. To add a new page to the wiki, click the *New Page* link in the left-hand navigation pane. This will create a new top-level page in the wiki. To add a sub-page to a current page, click *Page Actions*, then *Create Child*. The page hierarchy of the wiki will be updated in the left-hand navigation pane, to allow for immediate access to specific parts of the long document.

Using a single page wiki is fine for short documents and where only a few co-authors are involved. It would be better to split the document into multiple wiki pages if there are many co-authors.

- *Summarizing Changes with a Comment*. If you have made substantive changes inside the document, it is good practice to write a short comment to note what you have done and to summarize the changes you made. To leave a comment, scroll to the bottom of the wiki page you have just edited, and click the *Add a Comment* link on the bottom of the Comments tab. When co-authors next visit the wiki, they will have a quick way of reading through the changes that have been made to the wiki, without having to compare different versions of the page.

Once you and your co-authors have completed the document, either make the wiki more widely available, or copy-and-paste the text into a layout application for finalization.

Closing Comments on Co-Authoring Using the Wiki Application

A great question to ask is when a team should use the wiki application for co-authoring documents instead of the files application in IBM Connections. While there doesn't have to be a hard line between the two options, as there are situations where both approaches are complementary, here are some ideas on when it makes sense to start co-authoring a document using a wiki:

- When you want the initial focus to be on content instead of layout. A wiki is designed to be a simple way of working on a document—or collection of documents for that matter—with other people. Wikis support simple ways of presenting information, and steers clear from precise detailing in paragraph styles, in-line sidebar comments, and other advanced capabilities. Most wikis have improved significantly over the past five years in terms of the visual richness they offer document authors, but they are still not equivalent to a rich document authoring application like Microsoft Word or IBM Symphony. So it makes sense to use a wiki when those rich and advanced capabilities are not needed, or are not needed immediately. Create the document in the wiki in the first instance, get the content right, and then do the required layout in a dedicated application.

> It makes sense to use a wiki when rich and advanced layout capabilities are not needed. Create the document in the wiki, get the content right, and then do the required layout in another application.

- When the finished document is not going to be sent outside your organization. If it is going to be a document for other employees to read (and maybe comment on) inside your organization, but doesn't need to be distributed to customers, business partners, or other external parties, the document could start life as a wiki page, and continue as such until it is no longer required. There's no reason for it to be a file as such.

- When the document will be a collection of pages and sub-pages, but the document doesn't have to be read from beginning to end. A wiki allows you to create long documents that are broken up into multiple pages and sub-pages, and to use an index list of pages to enable the reader to jump immediately to what they want to read. A document as a file takes a more linear approach, of starting at page one and finishing at the end. Sometimes that's needed, but not always.

In closing, in keeping with the versioning capabilities of the Files application, the wiki will display the list of versions of all pages. If you start with a small group of editors and readers and then plan to make the wiki available to many people, you have the option of deleting previous edits.

Case Studies

Organizations are already using IBM Connections to support the document co-authoring scenario. Let's look at a couple of organizations taking different approaches.

Genesis HealthCare System, United States

Genesis HealthCare System, based in Ohio, offers health care and related services across a number of facilities, including a not-for-profit hospital operated on two sites in Zanesville, Ohio. Genesis uses a range of IBM software, such as Lotus Notes and Domino, IBM Connections, IBM Sametime, and Lotus Traveler (for mobile access). With respect to IBM Connections, it is being used among IT staff and various business units, with Communities, file sharing, Wiki documents, and discussion forums the main areas of emphasis.

One group that has achieved a significant benefit from using IBM Connections involves a collaboration between the Billing Office, Medical Coders, and the Health Information Management (HIM) group. The three groups are using a private Community to collate information regarding the billing details of a patient's visit. Kyle Woerner, an IT Business Consultant in the Information Technology group, explains it this way:

> *The Private Community connects our Billing Office, Medical Coders, and Health Information Management teams together (about 20 staff) to review missing information needed to complete the billing process. Before they were sending emails, sending spreadsheets and making phone calls to each other and it was nearly impossible to know the real time status of any one account that needed correction. Now each of the HIM team members have their own Wiki page that the Coders and Billing Office can access, update accounts and see other needed information. Content in the Wiki pages is always current and it has dramatically cut down on the time it takes to process a correction. I don't have any hard numbers on the time savings, but the group has shared examples of what would typically have taken weeks to resolve is now down to days.*

Before they were sending emails, sending spreadsheets and making phone calls to each other and it was nearly impossible to know the real time status of any one account that needed correction.

It's worth noting that the change is fairly simple—using Wiki pages to collate information from multiple people in order to gain a single view of the patient's bill—and could be implemented quickly. No custom development is required. The essential task is to agree in the wider group how the wiki and its various pages will be used to support the current business process. But the benefit has been significant; as Kyle said above, there are examples where what used to take weeks to resolve can now be resolved within days.

Ricoh

The Business Development Center (BDC) of Ricoh, the global document and printing solutions company, focuses on building new businesses that can be delivered on a global scale. The center needed a better approach to collaborating with global staff, external contractors, and other third-parties.[4] Current ways of working, including email, face-to-face meetings, and teleconferences, were proving increasingly insufficient to meet its needs for collaboration and information exchange. Ricoh adopted IBM SmartCloud Engage, a hosted version of IBM Connections, to address these shortcomings.

The BDC started using files and activities in Connections in its New Product Release Process, which required coordination across its global marketing teams spread over five locations. Moving away from the old way of working and re-imagining the process in Connections resulted in a 20% reduction in workload. Here's what was involved in achieving that efficiency benefit:

Moving away from the old way of working and re-imagining the process in Connections resulted in a 20% reduction in workload.

> *Previously, before a new product was introduced to the marketplace, BDC marketing staff would create materials containing information about the release and send the materials to overseas global sales companies. Once feedback was received, staff members would respond to questions or implement change requests. Often the process was repeated several times, resulting in increased workload for the marketing staff and complaints from staff members who were upset their requests could not be properly implemented because of time restrictions. The company resolved these problems by reengineering the work process so that staff can publish documents in rough form using the SmartCloud Engage platform's Connection capabilities that also allow global sales companies to collaborate on revisions. This change was partly motivated by a desire for a more proactive method of assimilating the market and customer information available to the global sales companies to more effectively provide products tailored to local needs.*

In addition to its success in improving document co-authoring, Ricoh is also using Connections in other areas. Two of those are:

- Improving communication with sales engineers, by using a community. This is allowing problems to be resolved faster.

- Holding discussions with Ricoh employees and non-Ricoh partners to gather ideas and opinions.

While the use of IBM Connections at Ricoh is still in its early days, the initial successes it has achieved are laudable.

Advanced Concepts

As we draw this chapter to a close, let's explore three advanced concepts:

1. How social dynamics work in early-stage collaboration.

2. Modeling the benefit of co-authoring using IBM Connections.

3. Exploring multi-person, simultaneous, real-time co-authoring using IBM Docs.

Social Dynamics Risk in Early-Stage Collaboration: Conformity Takes Hold

Social scientists report that if group members are told or exposed to what the other people in a group think about an issue, there is a greater likelihood that subsequent people in the group will conform their thinking. This is decision making in light of full prior disclosure. The opposite finding is true too: that conformity decreases when people do not have full insight into what others are thinking.

This principle gives rise to a potential danger in collaborative situations. Let's take document co-authoring as an example. In the first review cycle, what does the author want? I'd argue for high-quality feedback from reviewers, so the document can be improved. In an "attach document to email and distribute it for feedback" approach, because none of the reviewers can see what the others have already said, they have to make an independent decision, and give independent feedback. In a more open approach like we have explored in this chapter, because the feedback of others is accessible in parallel with the original document, we run the risk that subsequent reviewers will reduce the quality of their review.

Potential problems are free riding and decreased feedback:

- *Free riding*. "Jim's already said kind of what I wanted to say. I won't say anything."

- *Decreased feedback*. "Sally, Lily and Dave have already agreed with the ethos of the document. I'm not going to say what I really think."

Thus, in general, we have a risk in early-stage open collaboration: that because subsequent people can see what others have already said, they will be less likely to share a diverging opinion.[5] For a specific group, however, it is going to come down to the trust and interpersonal dynamics of the people involved. If you are confident people will speak their mind, go for open collaboration. If you are unsure, perhaps the first round of reviews should be a less open approach.

In terms of later-stage document co-authoring, where you want convergence on a final edition, the "attachment and email it around" approach will be less optimal in comparison to using a shared file or wiki in IBM Connections.

Modeling the Benefit of Document Co-Authoring

When I'm running a Collaboration Roadmap workshop, I will often pull out a spreadsheet to model the difference in time involved in co-authoring a document using email versus the new ways we have explored in this chapter. The scenario usually unfolds like this:

- Sally is the lead author, and it takes her 240 minutes to write the first draft of the document. When she sends it around by email to her five co-authors, they each are seeing only Sally's first draft, and it takes each of them 60 minutes to add their input. Sally spends 120 minutes to create the second master edition, based on the five round one versions. In the second review round, her co-authors are seeing input from the other co-authors for the first time; it takes each of them 60 minutes to further review and comment. On subsequent reviews, the amount of new information is reduced for the co-authors, but it still takes Sally 120 minutes to create each new master version.

- In an open collaboration situation, each co-author gets to see the totality of input from the initial author and all subsequent co-authors, so their input is given in that wider context. The time invested in the first round is equivalent, but in the second and subsequent rounds the time is much less. And because there's a single evolving master document, rather than a master document held by Sally that has to be updated based on a whole lot of other copies from the reviewers, Sally's task takes less time too. Finally, the number of review cycles may be less because co-authors have already seen what the other co-authors are saying.

Figure 3-21. Co-Authoring Documents a New Way (Time in Minutes)

Approach: Write Document, Attach to Email, Distribute for Input to Co-Authors

Actor	Version1	Version2	Version3	Version4	Total Time
Sally (lead author)	240	120	120	120	600
Bill (co-author 1)	60	60	30	0	150
Jim (co-author 2)	60	60	30	0	150
Owen (co-author 3)	60	60	30	0	150
Lucy (co-author 4)	60	60	30	0	150
Sandy (co-author 5)	60	60	30	0	150
Total	**540**	**420**	**270**	**120**	

Total time taken **1350** **22.5** hours

Approach: Write Document, Manage Co-Authoring through IBM Connections

Actor	Version1	Version2	Version3	Version4	Total Time
Sally (lead author)	240	60	60	0	360
Bill (co-author 1)	60	30	0	0	90
Jim (co-author 2)	60	30	0	0	90
Owen (co-author 3)	60	30	0	0	90
Lucy (co-author 4)	60	30	0	0	90
Sandy (co-author 5)	60	30	0	0	90
Total	**540**	**210**	**60**	**0**	

Total time taken **810** **13.5** hours
40% faster delivery

Document co-authoring using IBM Connections provides open access to the document and comments from all prior co-authors. This leads to a significant reduction in time required.

Real-Time Simultaneous Co-Authoring Using IBM Docs

In some document-intensive industries co-authoring a document by round-robin—I edit, you edit, he edits, and then I edit again—is too slow. The ability to have a single document version that everyone inputs into in turn does not address the need for speed, clarity, and overall flow. For example:

- *Lawyers Writing a Contract*. Under time pressure to get a contract finalized, multiple lawyers will work on the contract at the same time. Historically each would write their own respective sections of the document in different Word documents, and then give them to the lead author to assemble. Differences in paragraph and font definitions makes the process of merging the different documents messy.

- *Business Advisors Writing an Audit Report*. Audit reports for a client can run to 200 pages, and will require input from multiple people. Advisors have traditionally divided the document into separate sections, and then given them to a lead author to bring them together. It is difficult to get consistency in voice and flow when such documents are divided up though.

In such situations, a different way of working on documents together is needed, and this falls into the realm of real-time simultaneous co-authoring tools. IBM Docs is a newly released co-authoring tool to support the needs of people when simultaneously co-authoring capabilities are required.[6]

IBM Docs is a newly released co-authoring tool to support the needs of people when simultaneously co-authoring capabilities are required.

Here's how it works:

- One person creates a new document in IBM Docs, or uploads a current document. IBM Docs supports documents, spreadsheets, and presentations.

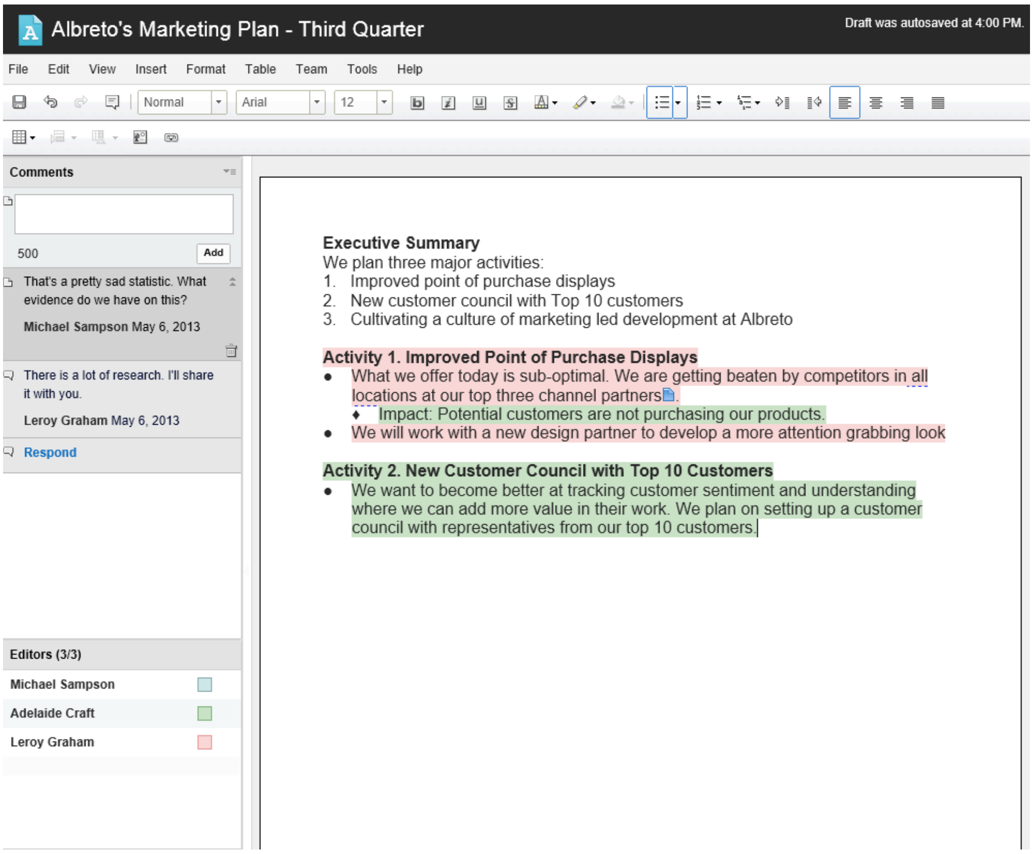
- The creator of the document (or spreadsheet or presentation) invites other people to work on the document with them.

- Opening the document in IBM Docs opens it in a web browser. Anyone with editor rights to the document can type into their version of the document, and their updates are automatically spread across all of the other open editions of the document in real-time. What one person types in this instant is seen immediately by the other authors in their version of the document. Input from other people is highlighted by a background color, to differentiate between what you have written and what other people have contributed.

- IBM Docs has a commenting function, which allows an author to write a comment into the document. These comments show down the left-hand side of the document, and are also denoted in the document with a colored icon. Other authors can respond to the comment, thereby creating a threaded discussion directly in the document.

- When the document is finalized, it can be published for wider use.

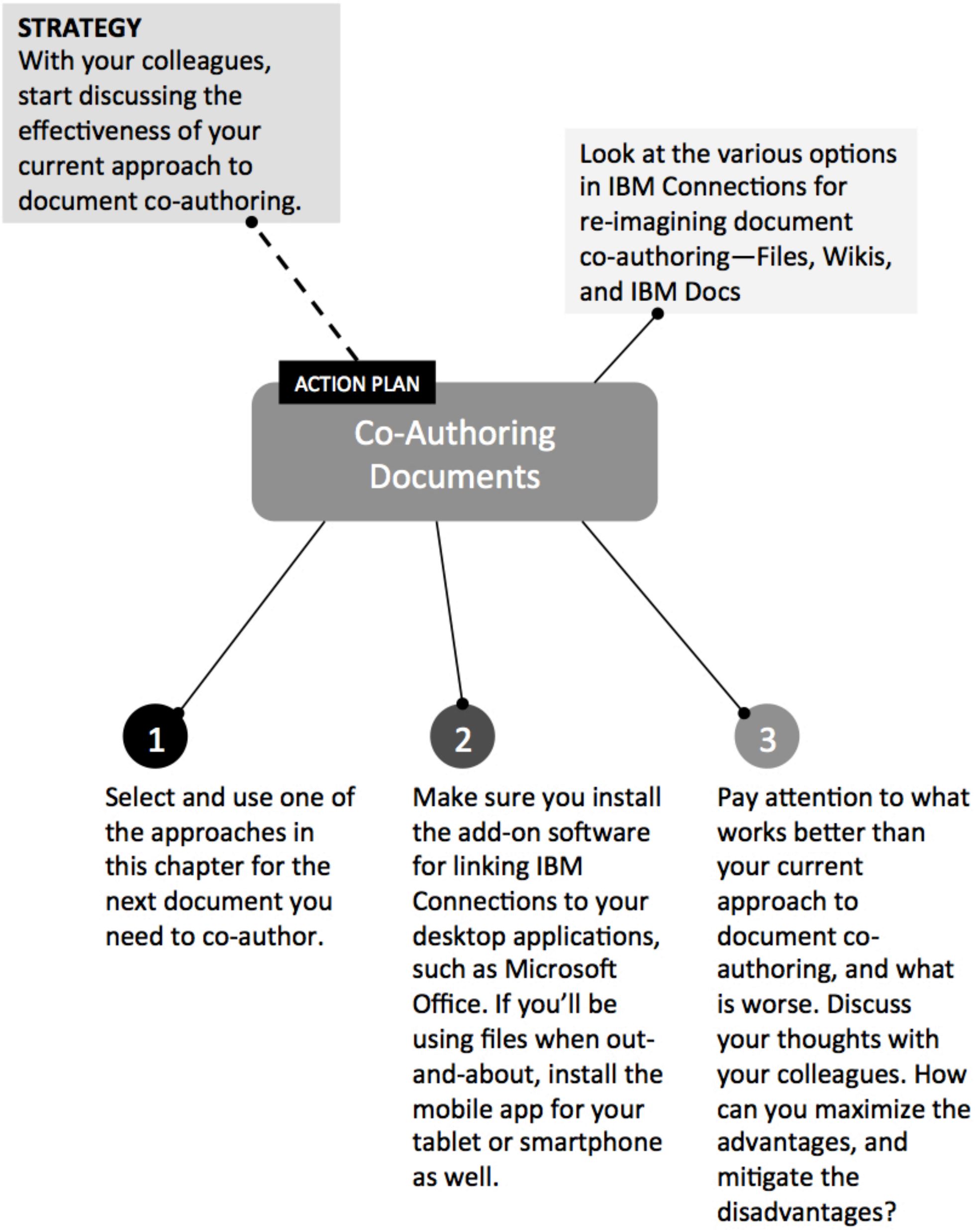
Figure 3-22. Real-Time Co-Authoring with IBM Docs



IBM Docs is a real-time simultaneously co-authoring tool for documents, spreadsheets, and presentations. Multiple people can author a document at the same time, and updates are immediately displayed for everyone who currently has the document open in their browser. It is a very new offering from IBM, and may not yet be available in your environment.

Real-time simultaneous co-authoring has a particular affinity for document intensive industries. It will be interesting to see if it becomes the de facto way of working on documents in the future.

Action Plan


STRATEGY
With your colleagues, start discussing the effectiveness of your current approach to document co-authoring.
Look at the various options in IBM Connections for re-imagining document co-authoring—Files, Wikis, and IBM Docs
ACTION PLAN
Co-Authoring Documents
1
Select and use one of the approaches in this chapter for the next document you need to co-author.
2
Make sure you install the add-on software for linking IBM Connections to your desktop applications, such as Microsoft Office. If you'll be using files when out-and-about, install the mobile app for your tablet or smartphone as well.
3
Pay attention to what works better than your current approach to document co-authoring, and what is worse. Discuss your thoughts with your colleagues. How can you maximize the advantages, and mitigate the disadvantages?

Summary

In this chapter we have looked at how IBM Connections offers new ways of enabling people to co-author documents.[7] This is the first of ten collaboration scenarios we will explore in this book. IBM Connections offers three new ways of improving document co-authoring, and we put most of our attention on doing so with the Files application. We looked at how a couple of organizations are using new ways of co-authoring documents to achieve significant benefits, and concluded the chapter by looking at three advanced concepts around document co-authoring.

IBM Connections offers three new ways of improving document co-authoring: Files, Wikis, and IBM Docs for real-time co-authoring.

In the next chapter we turn our attention to the second collaboration scenario: managing meetings.

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[1] Butler Group, *Document Collaboration Inefficiencies Waste Up to 25% of Staff Time: Butler Group*, January 2007. See www.domain-b.com/infotech/itnews/2007/20070116_collaboration.html.

[2] For more on the Document Co-Authoring collaborative scenario, see my blog posts at currents.michaelsampson.net/document-co-authoring/. The topic is also analyzed in more depth in Chapter 2 of *Collaboration Roadmap*.

[3] Note that your organization may provide the standard apps via an internal app store or similar process, or may actually provide customized versions via internal channels. To check, talk to your IT department. It is vital to keep in mind three things about these mobile apps:

1. *Not Fully Functional*. None of the apps are as full functional as using a Web browser on a computer. The apps make many features available, but not all, and are limited by the design constraints of the device in question.

2. *Constantly Getting Better*. The apps are constantly getting better, as IBM releases new versions of IBM Connections, as well as new versions of the respective apps.

3. *Non-Equivalence*. The apps for different mobile platforms are different from each other, often in subtle ways.

[4] For more on Ricoh's use of IBM Connections, see *Ricoh generates new ideas with lateral communication on a global scale* (August 2012), at https://www-01.ibm.com/software/success/cssdb.nsf/CS/RNAE-8WQLDU, and *IBM Customer Testimonial: Ricoh Improves Business Processes with SmartCloud Engage* (July 2012), at www.youtube.com/watch?v=SmxdYVMq8iQ.

[5] This is exactly the same dynamic—leveraged in the opposite direction—that a new entrant calendaring vendor discovered in their meeting scheduling research: that in a multi-person group, the latter people were very unlikely to reject a particular meeting time if everyone else said they could make it. See my June 2007 blog post at currents.michaelsampson.net/2007/06/messaging-news.html for more.

[6] As a newly released tool from IBM, IBM Docs will undergo rapid and significant updates over the next couple of years. For a snapshot of what's coming as at January 2013, see my notes on the IBM Docs session at IBM Connect 2013, at currents.michaelsampson.net/2013/01/id502.html.

[7] In this chapter we did not look at using Libraries in the co-authoring scenario. Libraries is a new tool that was first introduced with IBM Connections 4.5 in March 2013, and requires the optional add-on of IBM Connections Content Manager 4.5. There were two main reasons for excluding Libraries from this chapter: first, it is new, and thus very few organizations will have it available. Second, its emphasis is more on controlled documents and re-creating a document management system inside IBM Connections. The emphasis in such a system is quite different from the more collaborative ways of working on documents we have described in this chapter. If your organization has the Libraries tool available and you can see how to make it work for document co-authoring, proceed.

Chapter 4.
Managing Meetings with IBM Connections

> *An effective meeting is 80 percent planning, 20 percent execution. Too often people spend most of their time in the meeting and the least amount of time getting ready for it. Plan better meetings. They don't just happen.* [1]
>
> Tim Lewis

People spend a lot of time in meetings. A recent study by researchers from the London School of Economics and the Harvard Business School found that CEOs spend an average of one third of their working week in meetings.[2] Most had multiple meetings a day. We're not all CEOs, but that's also a common reality for managers, information workers, and others in today's organizations. It's not all bad news, though, because meetings have a clear role to play in bringing people together, enabling intensive discussions, and making decisions. But if the meeting is poorly run, or the wrong people attend, you are going to quickly get grumpy, unproductive individuals.

In this chapter, we will:

- Review the theory of managing meetings, including the human and technological factors to get right.
- Examine how to use IBM Connections for managing meetings, from pre-meeting preparation through to post-meeting accountabilities.
- Meet a couple of organizations that are making use of IBM Connections for managing meetings today.
- Consider a number of advanced concepts, such as when it's possible to dispense with a meeting altogether.

The Theory of Managing Meetings

Meetings provide an opportunity for people to interact in real time, to focus on a topic at hand, to air different perspectives, and to form common agreement about a way forward. Having a “meeting” of minds and intent is a core part of collaboration—the coordination of future work efforts toward a shared and common outcome. Unfortunately, meetings can be a waste of time if they are poorly led, badly structured, or unnecessary.

Meetings can be a waste of time if they are poorly led, badly structured, or unnecessary.

In evaluating the state of meetings in your organization, some of the following common issues may come to the surface:

- People come unprepared to the meeting. They’re already harried and breathless when they come in the door, and claim to have had no time to read the materials in advance of getting together. The first half of the meeting turns into an ad-hoc presentation of the materials, rather than a discussion about implications.

- Some meetings are just for airing status updates, because there is no other way of informing everyone about what’s going on. The team doesn’t have a work tracking dashboard that summarizes current state on multiple projects, so they have to get together for two hours every week to remind their colleagues about what they are working on.

- People don’t know why they’ve come to the meeting, because although they’ve seen the agenda, it is unclear what contribution they are supposed to make. But they’ve come anyway, in case they “miss out on something.” And if they have flown in from another city or country to attend the meeting, that represents a waste of time and money and little to show for it.

- Meetings drag on for too long, and a few people dominate the discussion by re-hashing more loudly what they’ve already said earlier in the meeting. Other people zone out and do email, play with their iPhones, or surf the web.

- It’s unclear what people are supposed to do next when leaving the meeting.

While we could try to resolve these issues by putting in new technology, it would be waste of time and effort. Most of these represent failure in meeting practice. They are human and organizational cultural issues, not technology ones. That said, and based on the expectation that the human and cultural issues are recognized and active work to mitigate them has begun, new technology can lend some weight to managing meetings differently. For example:

- People who come unprepared to meetings because they have not read the materials in advance may do so because the materials are only distributed 10 minutes before the meeting. The human practice has to change, so that materials are made available at least 48 or 72 hours beforehand. Technology could help in three ways: by reminding the person tasked to distribute the materials they have a hard deadline coming up, and if they fail to do so, the meeting is automatically rescheduled. Technology could also help by the provision of a shared repository for meeting materials, to get away from email distribution. Finally, for people who go from meeting to meeting and are never at their desk, an iPad or similar tablet could allow them to catch up on reading while on the move.

- Meetings held simply for status updates can be eliminated by having an appropriate shared work tracking tool. The human practice—an expectation that everyone will use it and keep their work status appropriately updated—is essential to making it work. Besides, maybe the meeting shouldn't be eliminated altogether. There is real value in discussing roadblocks and mitigations, so the two-hour in-person weekly meeting to share work status updates transforms into a 30-minute audio conference focused on improvement.

- People who attend meetings in case they "miss out on something" can be discouraged from doing so through a human practice and a technology change. The human practice is a return to taking real minutes during the meeting—something we seem to have forgotten in recent years. The technology change is that these minutes are posted to the team's shared repository, and there is an open invitation after the meeting to further discuss any matter in the repository. If someone wasn't there, they can still state their perspective. And if someone should have been there, that can be fixed for future meetings.

- Meetings that drag on for too long because some people dominate the discussion while others zone out can also be mitigated by practice and technology. The practices include approaches such as better meeting facilitation (by an external person if required), the calling of shorter meetings, the removal of chairs from the meeting room so everyone has to stand up, the banning of laptops and smartphones except for the person taking minutes, and so on. Technology can also play a role: if the discussion is actively captured using dialogue mapping, people who keep returning to the same topic can be prevented from doing so.[3]

> While technology can play a supporting role in fixing meetings, the human practice considerations are fundamental.

Clearly there are a number of ways of "fixing" meetings in your organization, and while technology can play a supporting role in doing so, the human practice considerations are fundamental. Installing any form of new technology without a correlated revision of the human practices around meetings is misguided.

How to Manage a Meeting in IBM Connections

Edgar finished composing the email message and sent it off to the Marketing team. They'd had great success at using IBM Connections to pull the document together for the Marketing Board, and now they needed to plan when to meet to prepare the presentation for the board meeting. The board meeting was only a week away, and his sense of urgency was rising fast. He'd proposed an "all-hands-on-deck-cancel-everything-else" meeting at Head Office on Friday, which would require Andrea, Sally, and Geoff to fly in for the day. But he felt like he had no choice. The replies started coming back almost immediately.

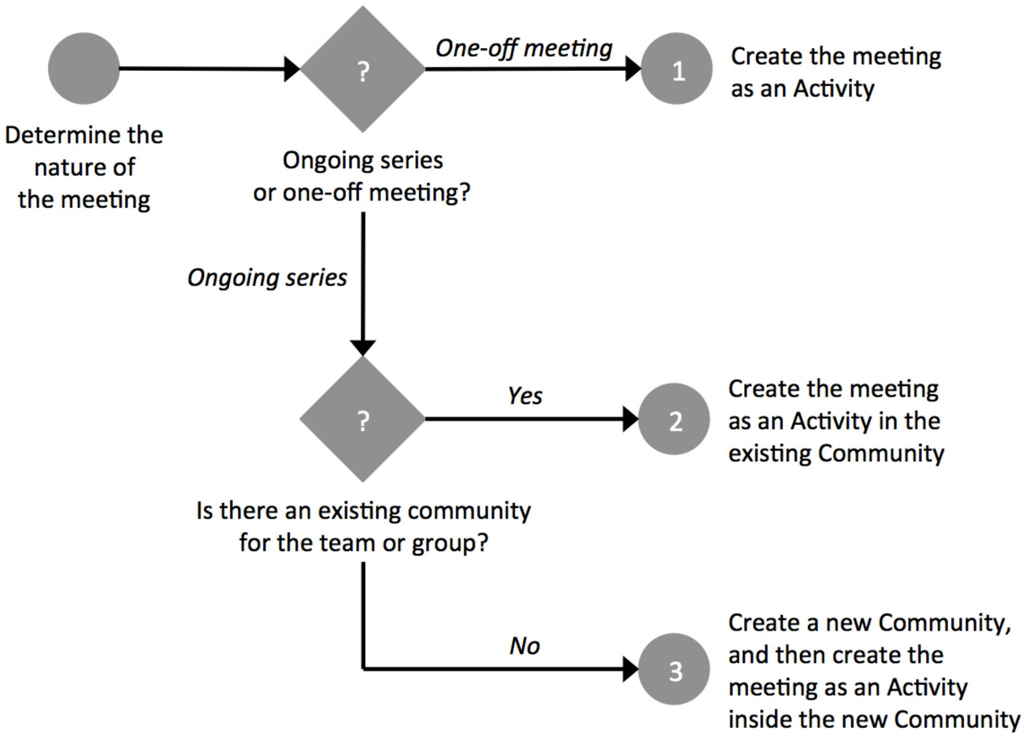
> *"Friday's out for me," wrote Andrea at 10.22am. "Sorry, but I have family commitments I can't cancel this close."*
>
> *"I'm already scheduled to be out-of-the-office on Friday," wrote Geoff at 10.25am. "Did you forget about the market research session in New York, or do you want me to cancel that too? Surely not ... we took a long time to get that session set up?"*
>
> *"It's pretty much out for me too," commented Sally at 10.44am. "There are some things I could move easily, but getting a whole day free for a meeting would be pretty tough at this stage. Is there another way?"*
>
> *Even Walter at Head Office said he couldn't make it on Friday. "While I don't have to fly in, I have back-to-back meetings," he wrote at 11.03am. "I have the same question as Sally ... is there another way?"*
>
> *Edgar felt exasperated. "Now what?" he said to himself. The one strand of hope had been Sally's question—"Is there another way?"—and he decided to call her and ask for her thoughts about whether there was or not.*
>
> *"We used Connections to support writing the document," Sally said. "We could use it to support our meeting too."*
>
> *"How do you see that working?" Edgar questioned, somewhat skeptically.*
>
> *"If we're willing to re-think what a meeting looks like," Sally began, "and in particular, how we will maximize the time available for actually talking in real-time, there's a variety of things we could do. Connections gives us a way to plan the meeting agenda, to make it clear who has to do what by when, and by using Sametime there's even a way of sharing our screens during the meeting, to add a visual element."*
>
> *"This is all new to me," said Edgar. "I've been to some WebEx seminars where I've sat and listened for an hour, but I've never participated in a meeting like this. But given the situation, we have no choice. Can you set it up for us?"*

Step 1. Determine the Nature of the Meeting

Before we dash into IBM Connections and start setting up a meeting, we need to pause for a moment to determine the nature of the upcoming meeting:

- *One-Off Meeting*. If it is a one-off meeting that will never be repeated, just make the meeting an Activity.
- *Ongoing Series*. If the meeting is part of an ongoing series and there is an existing Community for the related team or group, create the Activity in there.
- *Ongoing Series and No Existing Community*. Otherwise, first create a new Community and then create the Activity inside the new community.

Figure 4-1. Determine the Nature of the Meeting



A meeting could be a one-off event, but is more often part of an ongoing series of meetings. For ongoing meetings, create the meeting as an Activity in an existing or new Community.

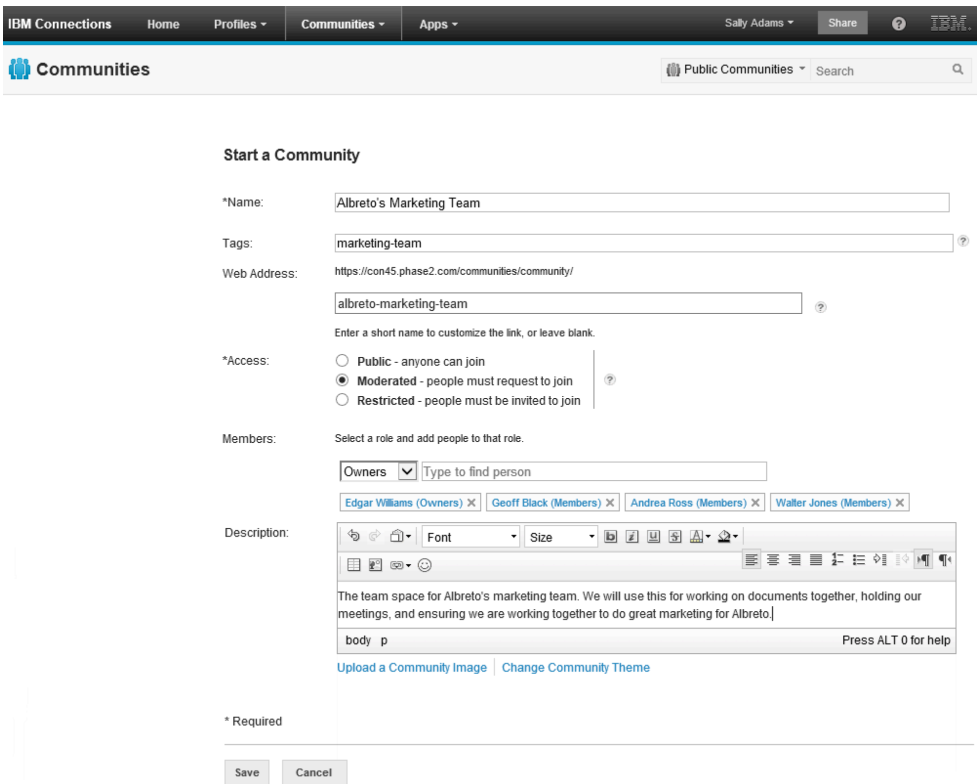
For the meeting in this chapter, it is part of an ongoing series for the Marketing Team. Since the Marketing Team does not currently have its own Community, we will create one in Step 2.

Step 2. Create a Community for the Team

A community in IBM Connections is a separate space that can be used by a team to work together via a number of tools—such as Files, Wikis, and Activities, among others. A community can be public (which means it is open for anyone to join), or moderated or restricted (two options which limit who can join a community). For the community we are creating for the Marketing Team, since the content will be intended for the Marketing Team, create a new community with Moderated access rights. This gives the community a level of access control, but doesn't hide it totally—which is what Restricted access does.

To create a community, hover over the Communities tab along the top menu bar in Connections, and click *I'm an Owner*. This opens a page listing the communities you individually or jointly own. Click the *Start a Community* button, and fill out the resulting form with the details about your new team space.

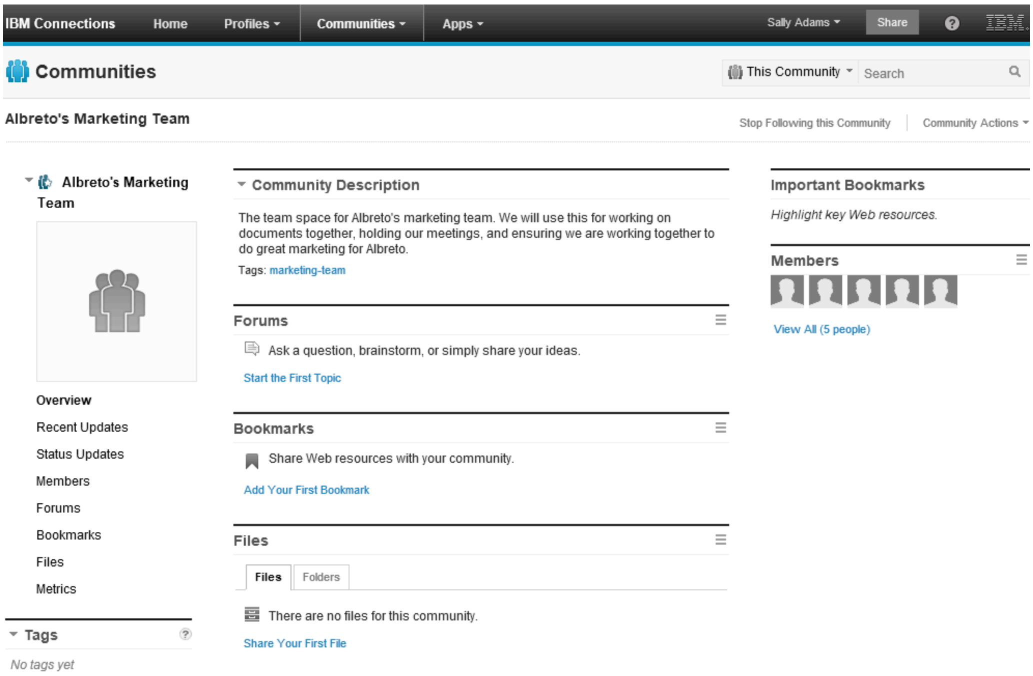
Figure 4-2. Create a Community for the Marketing Team



Fill out the Start a Community form to create a specific place in IBM Connections for the marketing team. It is good practice to type a few tags, and a description.

When you have finished, click *Save* at the bottom of the form.

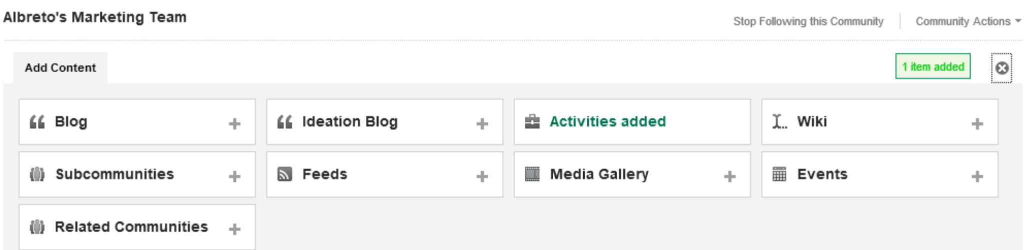
Figure 4-3. Your New Community for the Marketing Team



The default layout of a new community in IBM Connections includes an overview of the community, a discussion forum, a place for bookmarks, and a files area. There is also a members list on the right, and the navigation is on the left.

The Activities tool we need for the meeting is not included by default in the community. To add the tool, click *Community Actions* in the top-right hand corner, then *Customize*. In the list of tools to add, click on the word *Activities*. Once done, click the X in the circle to close the list of tools.

Figure 4-4. Add the Activities Tool to Your Community



Add the Activities tool to the new community for Albreto's Marketing Team. The Activities tool is not added to the community by default.

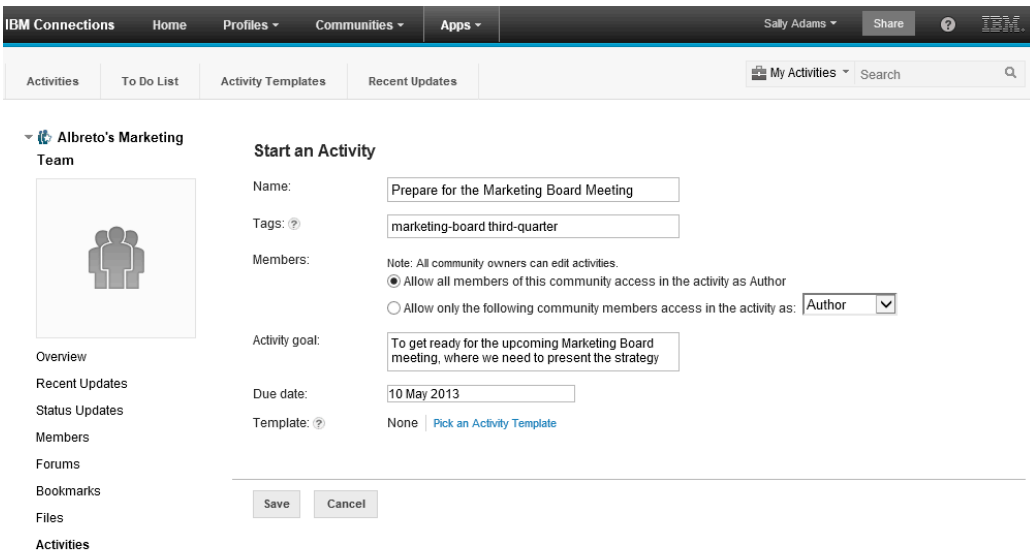
Step 3. Set Up the Meeting as an Activity

An Activity provides a way of quickly drafting a structure for an activity, task or event that has multiple steps—you could think of it as a plan for a small project. Activities include various capabilities that we can use later on in the meeting process—such as task delegation for the post-meeting activities. It is therefore a good tool to use when planning a meeting.

An Activity provides a way of quickly drafting a structure for an activity, task or event that has multiple steps—you could think of it as a plan for a small project.

Create a new Activity for your meeting. Within the community for Albreto's Marketing Team, click on *Activities* in the navigation pane, then *Create Your First Activity*.[4] You will get a form to complete to describe the meeting, the people, and the overall goal. Since the Activity is in a community, you do not have to set up what individual people can do, unless you want to further limit access to the new activity. In most cases, leave the default Members options in place—which allows all members of the community to access the Activity as an Author. Author rights permit each individual to create new items, edit items they have created, and delete their own items. They can not update or delete items created by other people though.

Figure 4-5. Setup the Meeting as a New Activity



Use an Activity to name and describe the nature of the upcoming meeting. As Authors, current members of the community can be involved in planning and executing the meeting.

Click *Save* when you are done to get an empty canvas for setting up the agenda, tasks, and other coordinative information for your meeting.

Step 4. Define Your Purpose and Draft the Agenda

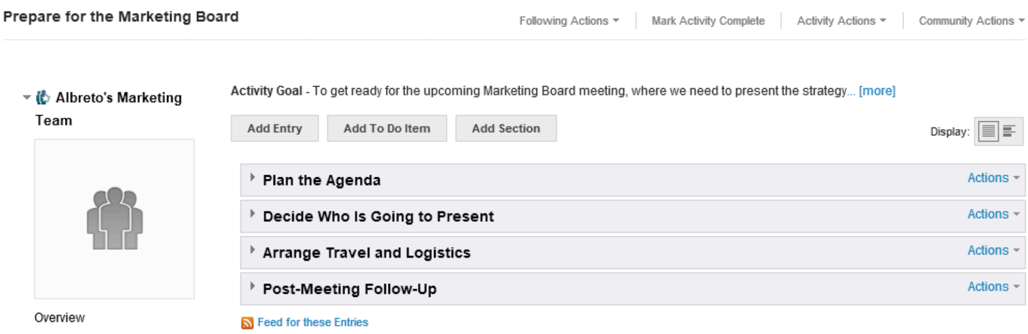
One of the commonly recommended strategies for having a highly effective meeting is to set an agenda that all participants can see in advance. This allows meeting invitees to decide whether or not it makes sense for them to attend the meeting. Each person ultimately has to make the choice whether to attend based on the nature of the proposed meeting, and in light of their other commitments. Let's use the Activity we have just set up to define the purpose of the meeting.

The tools at our disposal in an Activity are Entries, To Do Items, and Sections.

- *Entry*. Something to be completed or working on, but which could have multiple to do items associated with it.
- *To Do Item*. Used for assigning a task, either to anyone to complete—because it is a shared task—or to a specific person.
- *Section*. Used for grouping entries and to do items, so as to provide a structure to the activity.

In order to get going with our meeting, set up four sections as placeholders for the major themes. Use the *Add Section* button to add the following sections—Plan the Agenda, Decide Who Is Going to Present, Arrange Travel and Logistics, and Post-Meeting Follow-Up. After typing each section heading you can click *Save* or just press return.

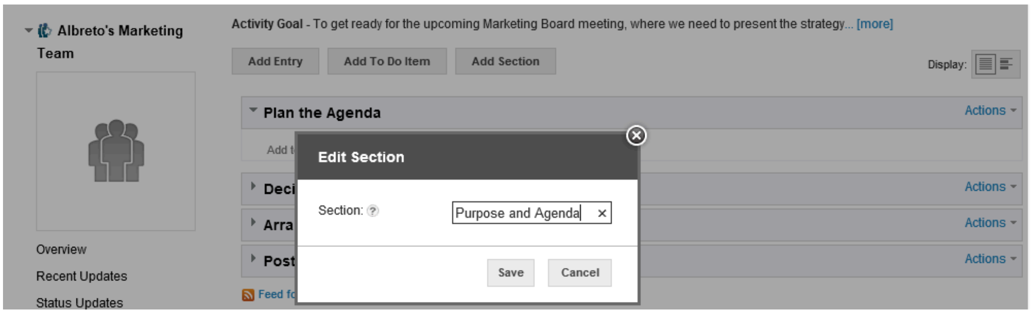
Figure 4-6. Create the High-Level Structure for Your Meeting



Use Sections to create the high-level structure of your meeting. Sections allow people to gain an at-a-glance sense of what the meeting is all about.

With your preliminary structure set in place, you might decide that you do not like one of the section headings you have just created. To revise the name for a section, use the *Actions* drop-down list at the extreme right-hand side of the Plan the Agenda section, for example, and then click *Edit Section*. Change the name to Purpose and Agenda, and click *Save*. This immediately updates the heading for everyone with access to the Activity.

Figure 4-7. Changing the Name of a Section

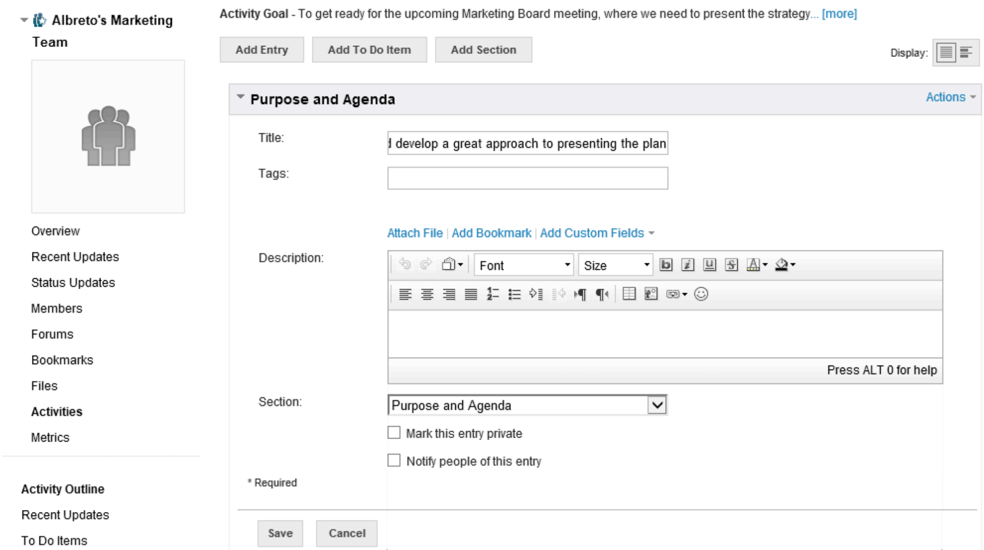


Having used an Activity in IBM Connections to establish the structure of the meeting, it is easy to update the structure and associated items. There is only a single version of the truth, not a whole collection of historical versions and outdated truths floating around in email.

Under the newly minted Purpose and Agenda section, create the following as an Entry. Click on *Purpose and Agenda* to expand the section, then click *Entry*:

- Purpose—to prepare for the upcoming Marketing Board meeting on May 10, and develop a great approach to presenting the plan.

Figure 4-8. Use an Entry to Set the Purpose for the Meeting



Use an Entry for defining the purpose of the meeting, under the Purpose and Agenda section. This will clearly show all members of the Activity what the meeting is about, and set the scene for their contributions before, during, and after the meeting.

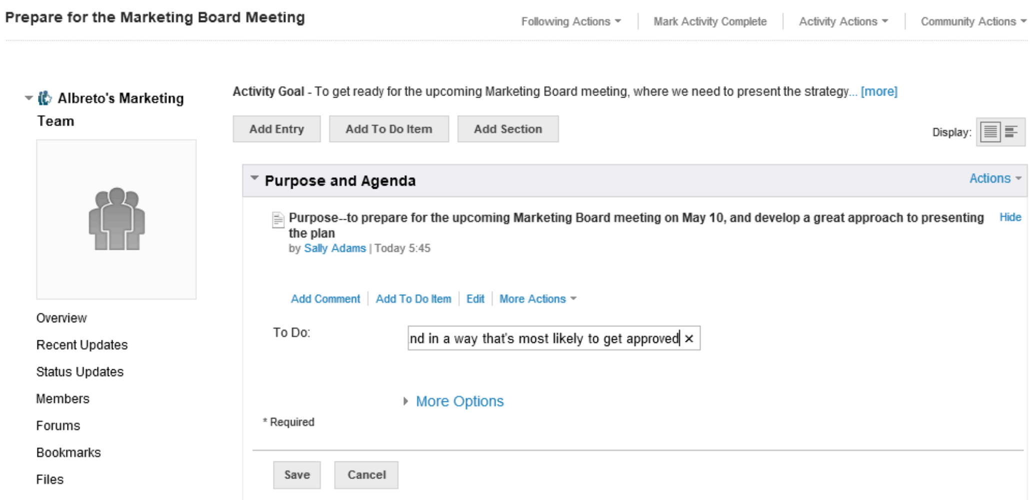
Click *Save* when you have finished.

With the first Entry added, now create separate To Do Items for the three main agenda topics—by clicking *To Do Item* under the Purpose and Agenda section. As To Do Items, these can be ticked as complete, something you can not do with an entry:

- Agenda Item—Brainstorm how to present the marketing plan in a memorable way, and in a way that's most likely to get approved.
- Agenda Item—Decide who is going to present (please advise availability for May 10 in the main section for that)
- Agenda Item—Take care of any travel and logistical details required for attending and presenting at the marketing board on May 10.

Click *Save* after entering each To Do Item.

Figure 4-9. Use To Do Items to Set the Agenda Topics for the Meeting

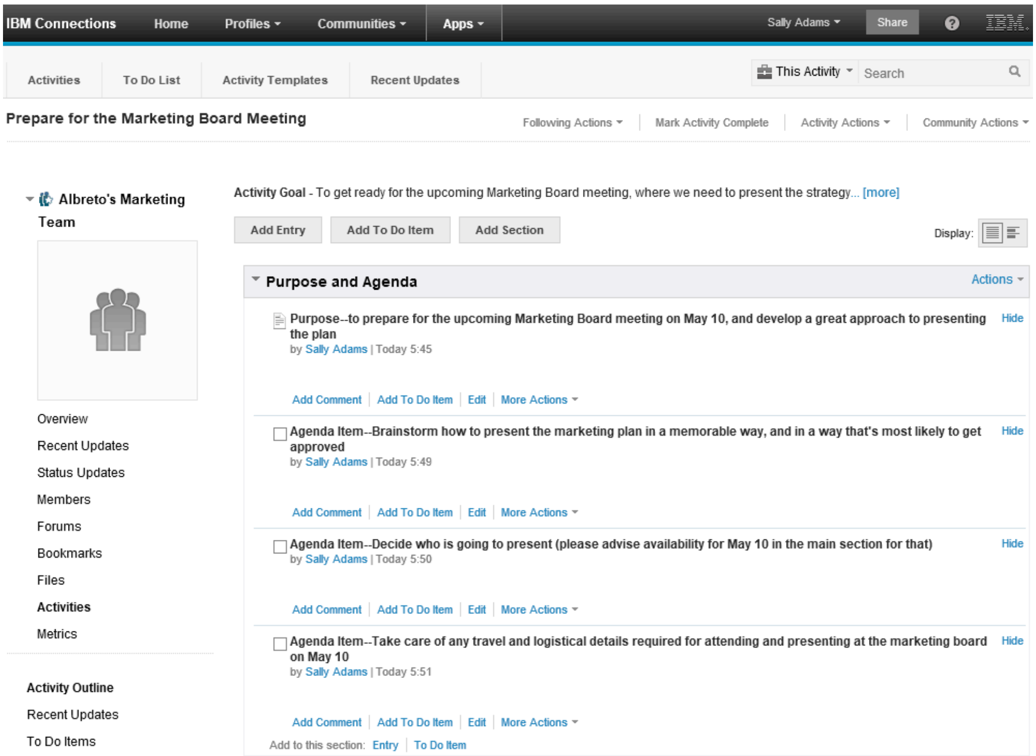


Use To Do Items under the overall Purpose and Agenda section to add the main agenda topics for your meeting. To Do Items can be marked as complete, which is good for tracking progress during the meeting.

With those four items added, we now have a high-level structure, a clear purpose, and a set of achievable agenda items—some of which have already been given sections of their own in the Activity to allow for a greater breakdown of what needs to happen during the actual meeting (see Figure 4-10 on page 90).

What makes this so great is that there can always be a single version of the upcoming meeting agenda, instead of a series of agendas that have to be distributed by email. The days of "Have I got the latest agenda?" are a thing of the past.

Figure 4-10. Defining the Purpose and Agenda Items for the Meeting



Define the purpose of the meeting in the Purpose and Agenda section of the activity, along with a set of achievable targets—or agenda topics in this case.

One of the great things about an Activity is that it can be shared with other people. What you have just created and are viewing on your screen can be viewed and updated by the other people you have invited. There are three levels of access rights that can be given to someone: author, reader, and owner.

- Authors can add entries, to do items, and sections, as well as leave comments. They can delete their own items. They can not modify or delete items created by other members.
- Readers can see what is listed in the Activity, tick off To Do Items assigned specifically to them, but not add or remove anything else.
- Owners have the highest level of access, and are able to do everything an author can do, plus reorder the various aspects of the Activity, delete items created by other people, and even delete the Activity entirely.

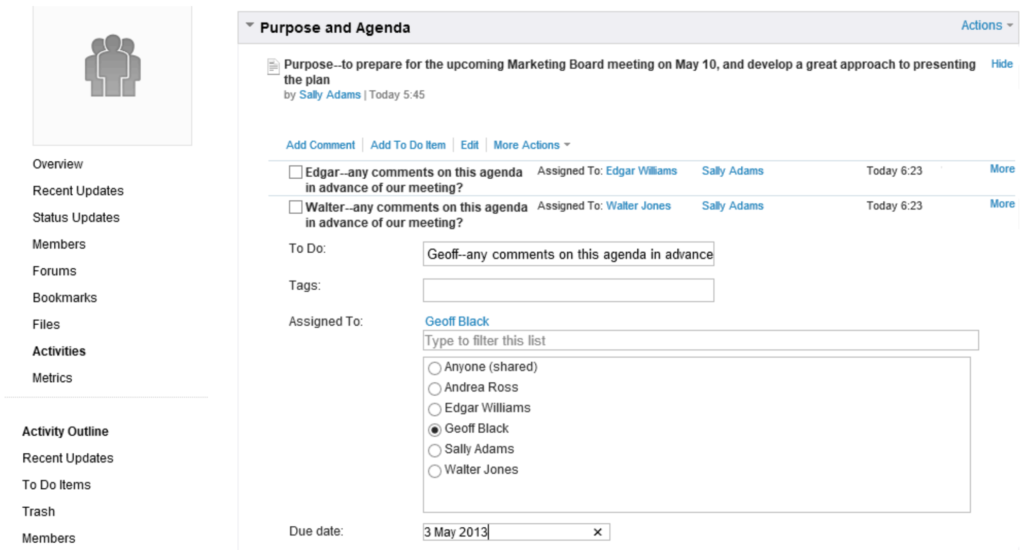
Let's move now to collaborating on the agenda.

Step 5. Collaborate on the Agenda

With the initial structure set for the meeting, it is time to reach out to the other people you hope will attend. Even if they don't come to the meeting itself, it would be great to get their input in advance of the meeting. The ideal situation is that we can invite other people to collaborate on the upcoming meeting from within the activity. The next best alternative would be to head away from the activity and alert them to the collaboration opportunity through another means—an email message, a Sametime instant message, or even a phone call. Let's run with the ideal situation and use the activity, because it offers the greatest simplicity.

The way to achieve this is to create a To Do Item for each person inside the activity, and to note that you are inviting them to collaborate on the agenda in advance of the meeting. Use the To Do field to specify what you want from each person (e.g., *Edgar—any comments on this agenda in advance of our meeting?*), assign the To Do Item to Edgar, and set a due date. It is worth taking this approach if you have up to five people involved, because it clearly lays out the contribution being requested. And it will only take you 1-2 minutes to do for up to five people.

Figure 4-11. Invite Collaboration on the Agenda



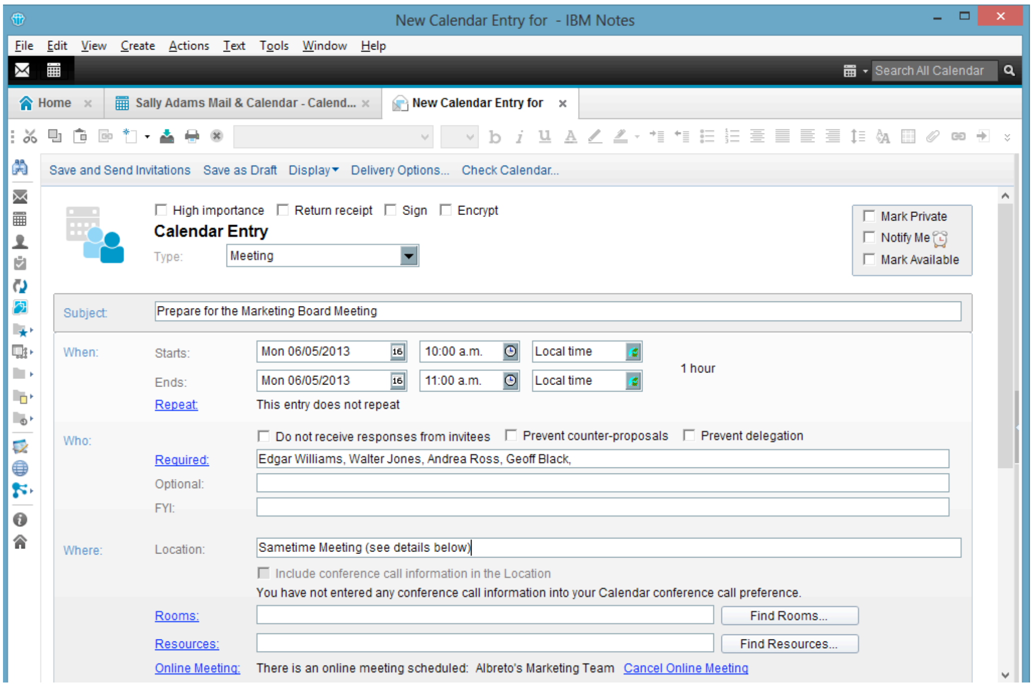
Create a To Do Item for each person you want to look over the agenda and provide input. To Do Items alert each person about what is being asked of them, and can be ticked off as done.

What makes this approach so useful is that the assignee receives an alert via email that they have a To Do Item to accomplish, and the To Do Item also shows in the Action Required section of their home screen in Connections. In addition, once they have provided input, they can mark off the To Do Item to show it has been completed.

Step 6. Schedule the Meeting

As your colleagues start collaborating with you on the agenda in the activity, some of the specific topics to be addressed in the "meeting" will often be handled without having to speak in real time. The activity becomes a meeting place—with people meeting around content of common interest—and what we usually call a meeting is reserved for the more difficult issues or those that require real-time interaction. To set up such a meeting, use the calendaring application in your email client to send out a meeting invitation. In IBM Notes, open your calendar and click *New*.[5] This opens a blank Calendar Entry. Give the calendar entry a subject, set the date and time, enter the names of your colleagues that need to attend the meeting (click *Required* to do free-busy search for the next available meeting time for everyone), and click on *Online Meeting* to set up a Sametime meeting. In the description field include a link to the Activity in IBM Connections, since this is where the meeting description, agenda, and related discussions are taking place.

Figure 4-12. Create a Calendar Entry in IBM Notes to Schedule the Meeting



Schedule the meeting by sending a meeting invite in your calendaring application. In IBM Notes, create a Calendar Entry. In Microsoft Outlook, create a Meeting.

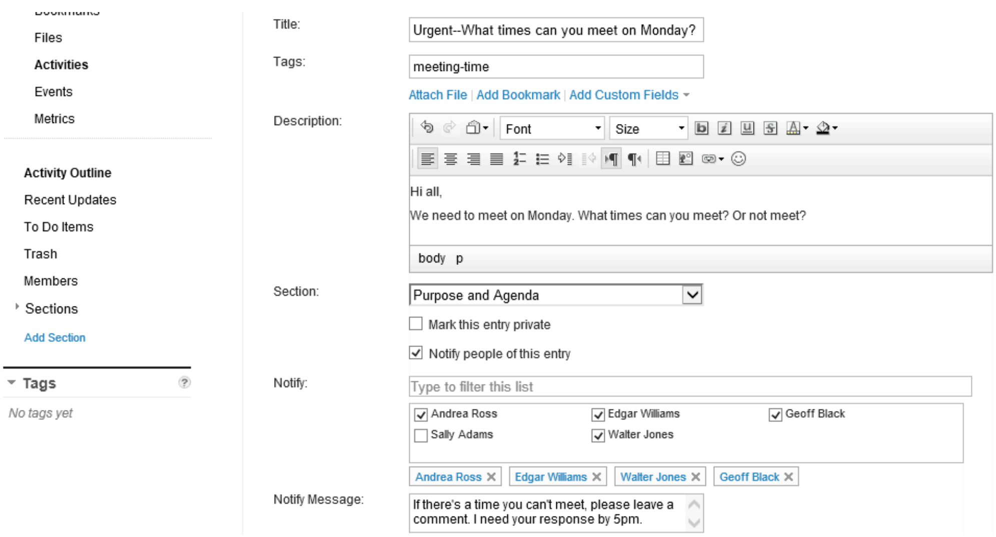
When completed, send the meeting invitation. Your colleagues will be able to accept or reject the meeting, and once accepted, it will be added into their calendar. When it is time for the meeting, each attendee will be prompted to join the meeting, and will have all of the details available immediately to them within the meeting invite.

Using your calendaring application to schedule the meeting is the most seamless way of doing so, but there are two other alternatives in IBM Connections that you could pursue. Both have downsides that limit their effectiveness, but let's look at each in turn.

Alternative 1. Use Comments in an Activity Entry to Signal Availability

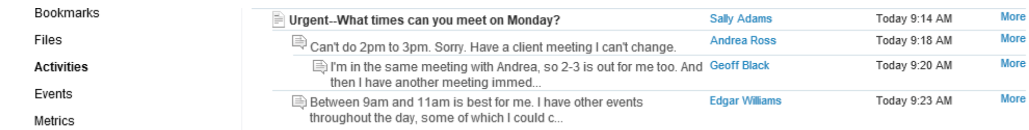
The meeting owner could set up an Entry in the activity to ask the list of desired attendees when they are unable to meet on a particular day—and set the Notify option on the entry. On receiving an alert about the entry, each person would open the entry and leave a comment. This would result in a threaded comment stream showing when people could or could not meet (see Figure 4-14).

Figure 4-13. Create an Entry to Gauge Availability



Create an Entry to gauge the availability of desired attendees, and send a notification to request immediate input via the comments against the Event.

Figure 4-14. Meeting Attendees Signal Availability via Comments



Once all desired attendees have signaled their availability, the meeting owner can choose the time that works best for as many people as possible.

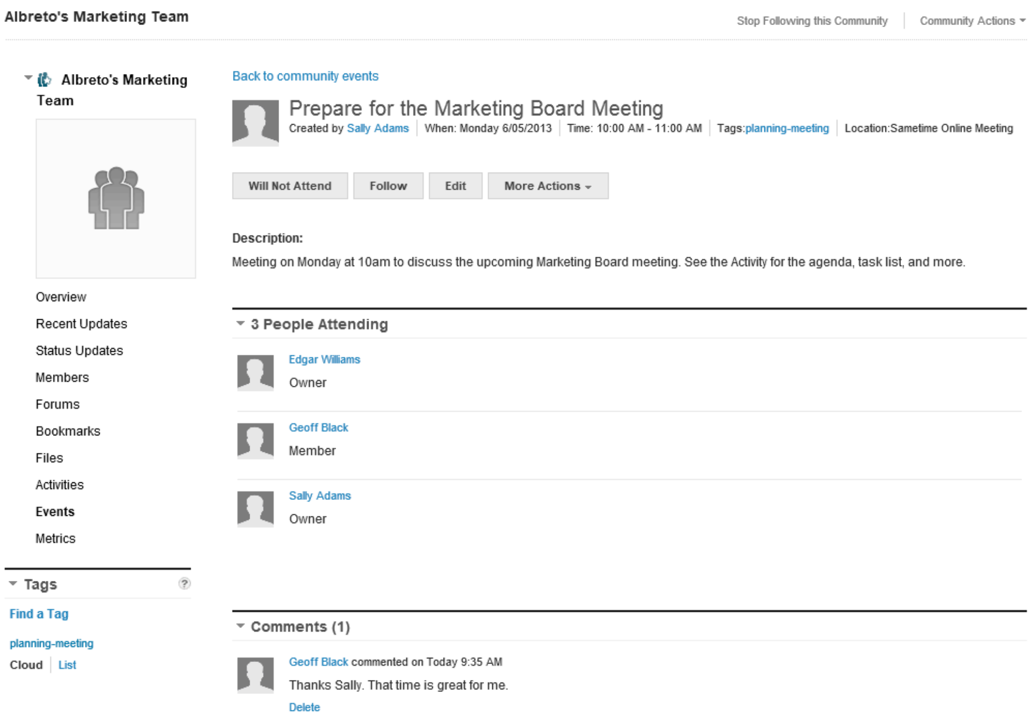
For a small group it could work if everyone was quick to leave a comment regarding their availability. For a larger group, it would be unlikely to result in a common meeting time.

Alternative 2. Use the Events Tool in a Community

The Events tool was added to IBM Connections in Version 4. Since it does not have any free-busy searching capabilities, it is intended more for advising people about meetings they could attend. In theory, however, an event could be created for your upcoming meeting, and your colleagues could respond with their intention to attend or not.

To create an event in your community, first add the Events tool in the same way we added the Activities tool (see Step 2 in this chapter, and the instructions on page 85). Once the tool is added, click *Events* on the left-hand navigator, and then click *Create an Event*. Give the event a title, a tag or two (planning-meeting), set the start and end times, the location, include a link to the activity in the description field, and tick *Notify Community Members*. Click *Save* when finished. These steps create a meeting which people can choose to attend or not. If they will attend, they can click the *Add to Calendar* button to have it appear there.

Figure 4-15. An Opt-In Event in Your Community



An Event can be used to signal an opportunity to attend a meeting. People can say whether they will or will not attend the meeting, but there is no free-busy search.

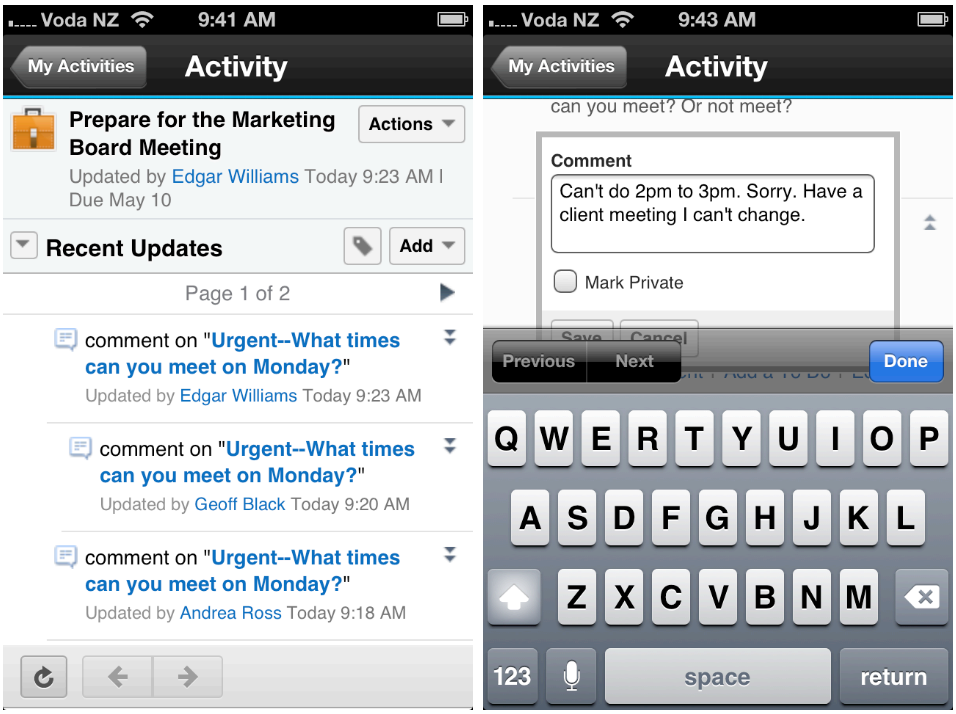
While in theory an Event could be used for scheduling the meeting, in practice there are two issues which limit its effectiveness. First, there is no free-busy search. Second, each accepted event needs to be added to each individual's calendar—manually, and by them.

Sidebar: Accessing an Activity from a Mobile Device

The mobile apps for IBM Connections provide access to Activities. Users can access, view, edit, and add entries, to do items, and comments to an Activity from a mobile device. If they own the activity, they can also edit the activity title, description, and other details.

From an iPhone, for example, you can browse an Activity, contribute comments, and keep track of what is happening. This means that highly mobile workers have full access to their activities while out-and-about. Note, however, that given the size of the iPhone's screen, once the keyboard is extended there is very little space for viewing what you are contributing. You can definitely do it, but it is not the most optimal approach for constant access. In summary, on an iPhone and other smaller screen mobile devices, the mobile app offers a great but limited approach for viewing an activity and sometimes adding or editing entries, to do items, and comments.

Figure 4-16. Access an Activity on an iPhone



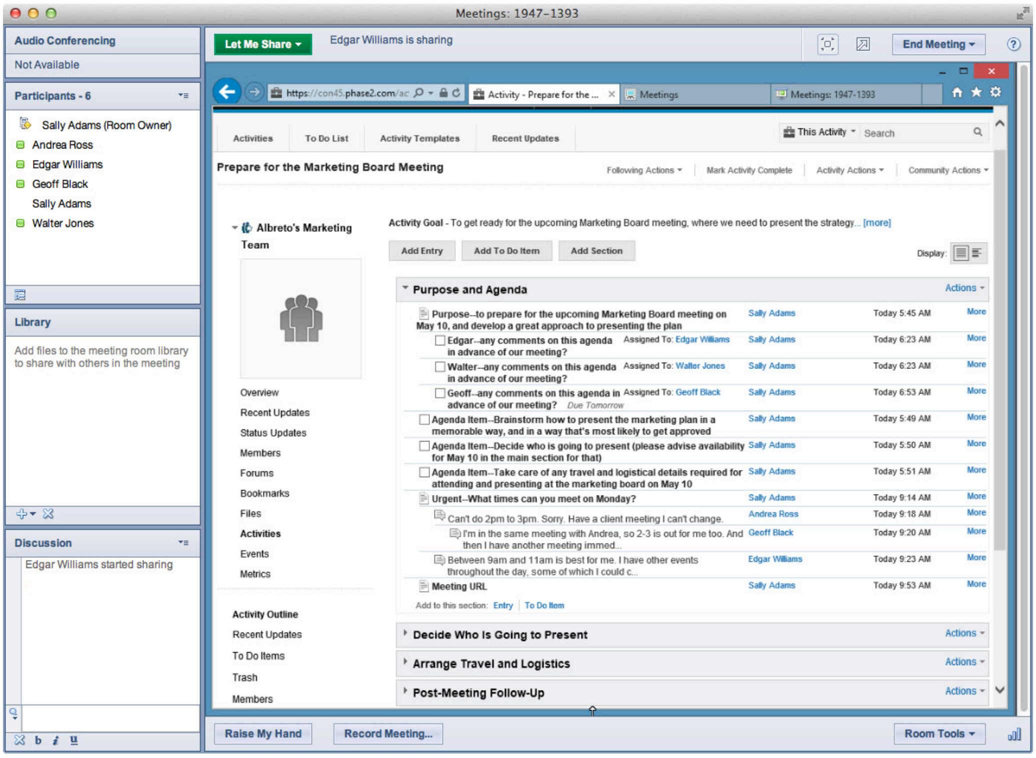
Access Activities on an iPhone to stay current with what is happening. You can add entries and to do items to the activity on an iPhone, but not edit current entries or to do items.

The mobile apps for iPad and Android tablets obviously give more screen space for making changes to an activity.

Step 7. It's Meeting Time—Using IBM Sametime

IBM Sametime is a complementary application to IBM Connections that enables people to hold meetings, and use screen sharing, voice, video, and instant messaging tools to communicate during the meeting. It is a web conferencing application from IBM. The beauty of using IBM Sametime for a meeting is that no one has to travel to attend; they turn to their computer, tablet, or smartphone from wherever they are, connect to the meeting, and they are in.[6]

Figure 4-17. Use IBM Sametime to Hold an Online Meeting



Hold your meeting using IBM Sametime, which allows everyone to meet via computer or tablet without having to travel. Share the activity in the meeting and work on it together.

Once you have started the Sametime meeting, bring up the activity you have been working on during earlier steps in this chapter, and share it with all meeting participants. This allows everyone to view the activity on their screens, and as you make changes to the entries and to do items, all participants will see you doing so. This helps with keeping everyone on the same page during the meeting. Of course other people can separately update the activity with entries, to do items, and comments during the meeting (using a web browser or a mobile app), and these will be displayed for everyone to see as Sametime updates the screen.

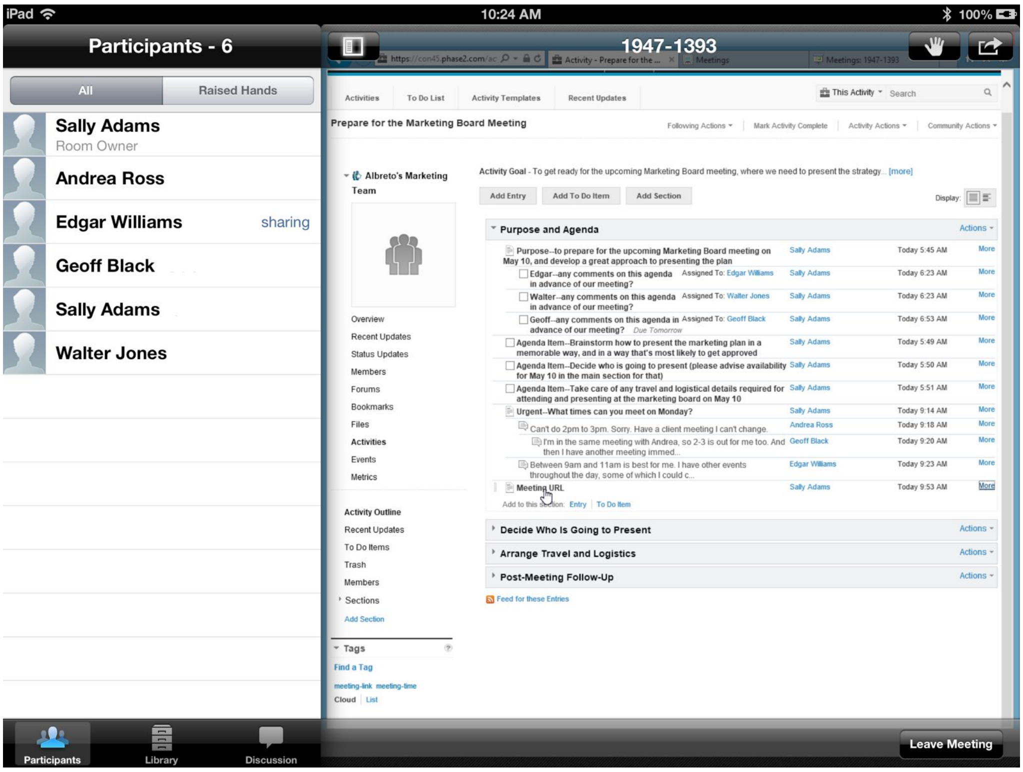
Using IBM Sametime gives you additional options during the meeting, such as:

- *Showing a Presentation*. During the discussion about who will present, the meeting leader could open a draft presentation and review the key ideas.

- *Adding Someone Else to the Meeting*. If you need input from someone else during the meeting, and assuming they are available, you can quickly add them to the meeting. They can provide their input quickly, and then leave.

IBM has released mobile apps for attending Sametime Meetings on iOS and Android devices. On an iPad, connect to the App Store and install the IBM Sametime Meetings app. You can attend the meeting just like you would on a laptop computer.

Figure 4-18. Mobile Apps for Sametime Meetings



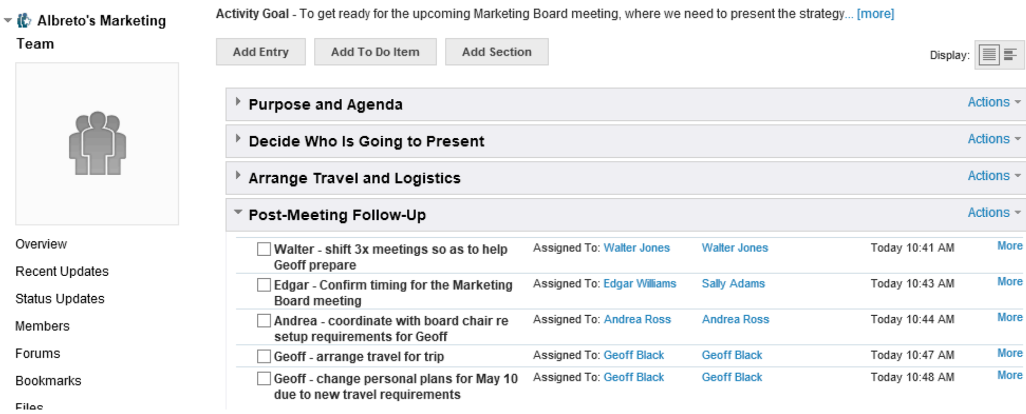
Mobile apps enable meeting participants to join a Sametime Meeting from tablets. There is even a version for the iPhone, but be aware of screen size limitations.

One final comment: it is difficult for one person to take notes on the meeting, keep the activity up-to-date, and fully participate in the flow of the verbal discussion. If you have someone who can do all three tasks, give them the job. If you do not, separate the duties so the people who need to discuss ideas are not also the note taker.

Step 8. Follow-Up After the Meeting

During the meeting appropriate entries, comments, and to do items should be captured within the activity, and as agenda items are completed they should be marked as such. At the conclusion of the meeting, the meeting leader should do a final check with everyone to ensure that all issues and topics have been raised, and that everything people have agreed to do has been documented in the activity as to do items.

Figure 4-19. Defining a Shared List of To Do Items in the Activity



Using the Post-Meeting Follow-Up section in the Activity, the team members jointly note what has to happen after the meeting has concluded. To Do Items are assigned to individual people so everyone has clarity on who is doing what to move the team closer to success.

Once the meeting in IBM Sametime is finished, the participants switch into execution mode and should be making progress on the items they have been assigned. As this happens, here are a couple of suggestions:

1. *Tick Completed To Do Items*. As you complete to do items that have been assigned to you, tick them to show they have been completed. The activity gives a common view on what is happening across the team, demonstrates forward momentum, and encourages others to get their tasks completed.

2. *Ask for Input When Required*. Collaboration software such as IBM Connections helps people to collaborate, but just because you have been assigned a task doesn't mean you have to do it alone. If you need input from other people, post a comment in the activity to request that, or use IBM Sametime to have a quick chat.

Your activity in IBM Connections supports planning for the meeting, completing some meeting tasks before the meeting, documenting things to do during the meeting, and keeping everyone aligned after the meeting. Make effective use of it.

Closing Comments on Managing Meetings with IBM Connections

We started this chapter by reviewing what is wrong with many meetings today, and observed that the most significant issues can not be solved solely by using a new piece of technology. Numerous organizational and human behavioral issues need to be dealt with on an ongoing basis in order to improve meetings—such as having a strong agenda, inviting the right people to the meeting, and using meeting time to maximum effect. In the context of addressing those issues, we have explored how Connections and Sametime) can be used to enhance meetings.

The most significant issues related to meeting ineffectiveness can not be solved solely by using a new piece of technology.

Here are three closing comments:

1. *Using Activities for Ongoing Meetings*.
   If you have a meeting that recurs on a weekly or monthly basis, you could either use one Activity for all instances of the meeting, or have a separate Activity for each meeting. There are pros and cons for both approaches, but the former approach of using one Activity for all meetings seems the best. It means your team members only have one Activity to work with, and that all previous discussions, agenda topics, to do items, and any associated comments are always available in the Activity. New people joining the team can scan through the historical record contained in the Activity, and quickly get up-to-speed with what's going on. If there is one Activity per meeting on-the-other-hand, the task of tracking back through previous meetings is more of a challenge, as is the task of setting up each new meeting as its own Activity.[7]

2. *Accessing Activities through IBM Notes*. Activities can be added to the sidebar in IBM Notes, providing access directly inside the Notes interface. You can add and edit entries and to do items, add members to the activity, and even drag-and-drop email messages or individual attachments from IBM Notes into the activity. Activities are synchronized through the IBM Notes replicator for offline access, meaning that any changes made while offline will be resynchronized with your Connections server when you next connect to the network. There are a few settings that need to be configured in your IBM Notes client in order for this to work; talk to your IT department for the correct settings in your organization.

3. *Supporting Big Meetings*. The scenario in this chapter was a meeting for a small group. If you are planning for a multi-day "big meeting"—for hundreds or thousands of people—use a community instead of an activity. You will need to hold discussions, capture ideas, and share updates among the meeting planners, which are all scenarios we cover in the upcoming chapters.

In summary, let's work to make meetings better through improved meeting practices and better meeting technology.

Case Studies

Enhanced ways of managing meetings using IBM Connections is a reality for many organizations today. Let's look at two of those, both from the Netherlands.

Silverside

A boutique IT consulting firm based in Gouda, Silverside advises organizations on improving business outcomes through better collaboration. With partnerships with Microsoft, IBM, and other vendors, Silverside works to bring together the best offering for the client's requirements and business goals, implemented by Silverside's methodology.

Silverside's consultants work remotely from home or at a client's site for most of the week, but everyone comes to the office on Monday. The first meeting on Monday morning is for Sales and Marketing, during which all current work for clients is reviewed. An activity in IBM Connections is used during the meeting to capture thinking, delegate tasks, and achieve a common statement of planned intent. If the firm has won new customers, or is planning a new marketing event, all of those details are included in the activity.

The whole company meets from 11-12pm on Monday. The topics to discuss during this weekly meeting are held in an activity in IBM Connections, which during the meeting is displayed onto a large screen for everyone to see. The meeting reviews the highlights from the earlier Sales and Marketing meeting, previews the work coming up over the next week, gives people with extra availability an opportunity to take on additional tasks, and provides a forum for raising and discussing essential topics.

Decisions, action points, and topics for future meetings are written into the activity, which everyone can access in Connections at any time. And of course to do items in the activity that are assigned to an individual show up in their individual task list in Connections, which means consultants have the global statement of intent and their own task list.

Roland Driesen, Director of Research & Development, comments on the use of meetings:

> *With everyone handling about five projects in parallel and visiting a lot of different customers during the week our work and communication is hard to structure. We found that email, phone calls and one-on-one meetings were time consuming. Since we implemented a common collaboration language, planned the weekly company meeting to control our priorities, and re-introduced IBM Notes, Sametime and Connections, we became more effective and better informed. By creating live minutes of our meetings in Connections we have introduced a shared overview, more discussion and more control over important tasks. The result is a better informed and more productive team that has less stress and more fun.*

Silverside uses IBM Connections for a range of other scenarios too, including creating documentation, holding discussions, and managing events.

Saxion University of Applied Sciences

With 2,300 employees and 24,000 students, Saxion University of Applied Sciences is one of the largest higher education institutions in the Netherlands.[8] The university is spread across four locations, and offers teaching and research in almost 100 areas. Driven by a vision of the new world of work in the 21st century, Saxion embarked on a journey to make work more effective, efficient, and flexible. Starting in 2011, IBM Connections was part of the technology that enabled this journey.

Driven by a vision of the new world of work in the 21st century, Saxion embarked on a journey to make work more effective, efficient, and flexible.

In its early user adoption work, and a pilot project with 55 employees, there was a significant focus on understanding the way work was getting done currently, and re-imagining how to do it better using IBM Connections. One of the early challenges identified was the lack of effectiveness and efficiency in meeting practices. The group running the pilot project developed a way to improve meeting effectiveness and efficiency using Activities in IBM Connections.

In Saxion's model, while Activities provides a common storage place for all meeting-related information, three behaviors formed the behavioral framework for effective meetings: preparation, holding the actual meeting, and processing of actions.

Marion Vrielink, an ICT Advisor at Saxion University, comments that the new way of holding meetings had a significant impact:

> *The result is a more efficient and effective meeting culture with clear agreements and a central (digital) place for sharing and collaborating on meeting information, accessible from any device, any time and anywhere. People no longer need to search through different folders, mailboxes, and shared drives to find meeting information; they always have all recent meeting information in one digital overview, such as the meeting agenda, actions, decisions, documents, discussions and announcements. By doing their work (collaborating around meetings) using an Activity, employees are contributing information and automatically enriching their own Profile with their expertise. This has positive flow-on effects for Saxion, our employees, and students.*

In keeping with the use of one Activity for managing multiple recurring meetings, Saxion creates a section in a meeting activity called *Proposed Decisions* and another section called *Decisions*. The proposed decisions section contains a brief statement of all proposed decisions, for discussion before, during, or after any one meeting—and could link to a discussion forum for deeper analysis. As decisions are made, these are shifted into the Decisions section so the team has a consolidated list of all decisions spanning all of its meetings.

Advanced Concepts

In this chapter we have talked about how to use IBM Connections for managing meetings. Let's explore three advanced concepts in relation to managing meetings:

1. Re-thinking the need to have a meeting.

2. When it's worth paying the price for face-to-face meetings.

3. The availability of video meetings from wherever you work.

Re-Thinking the Need to Have a Meeting

One of the possibilities we have when empowered with new technology is to re-think the activities that have become common place in light of earlier technological capabilities. The need to meet provides us with one such possibility.

A meeting represents a specific form for getting something done—by bringing people together at the same time and perhaps at the same place, everyone can hear what the other meeting participants are saying, a sense of whether there is common agreement or not can emerge, and decisions can be made in light of those factors. There are instances when a meeting as the form of achieving these objectives remain absolutely essential, but there are other times when a different form could be used for achieving the same outcomes. For example:

- Meetings held to discuss the pros and cons of an idea could be replaced with a discussion forum in IBM Connections (see chapter 5). If the right people are involved, the need to meet around a table could go away entirely—the meeting is an older form of discussion that can be replaced with a newer form.

- Meetings held for the purpose of deciding priorities and allocating resources could be replaced with a structured list of possible initiatives, along with a means for the right people to comment on and rate the initiatives they believe should be supported. This would allow the initiatives that were viewed highly to rise to the top of the priority list, without having to resort to a meeting.

The Clifford Chance Foundation, the charitable arm of the global Clifford Chance legal firm, has experienced such a re-thinking that replaces two forms—meetings and emails—with a wiki for decision-making and resource allocation.[9]

> *The Clifford Chance Foundation is made up of staff of all levels of seniority from across the whole firm, who come together to review applications for funding for charitable causes. As a virtual group tasked with making recommendations to the board, they have an operational challenge—they can only have so many conference calls, each of which must be focused on reaching decisions quickly. If each application were e-*

mailed to every member, the number of interactions and disjointed discussions would be considerable and inefficient.

The introduction of wikis into this environment means that group members can now post each new application to their designated wiki, along with meeting agendas, minutes, decisions and management communications. With everyone's contributions organised by topic, the wiki makes it easy for members to comment on submissions or help draft communications. A daily e-mail alert with links to the most recent additions means that members can see who changed what and when, on each page. Using the wiki is a much more efficient way of collaborating than relying on Microsoft Word and e-mail, as fewer interactions means less chance of missing something. Foundation members claim that their meetings are far more focused because most of the discussion takes place beforehand.

Corporate email messages, intranet news items, posters on the wall in the lunch room are all examples of how new technology has enabled a re-thinking of how to distribute information to people beyond having a meeting for that purpose. IBM Connections allows us to go further than this, and to re-think even more of the meetings we have. Let's face it: we have too many meetings of the wrong type now, and this fact cheapens those meetings that are essential. Let's re-think the poorly-executed meetings and lay the foundation for wonderfully-executed meetings.

Corporate email messages, intranet news items, posters on the wall in the lunch room are all examples of how new technology has enabled a re-thinking of how to distribute information.

Sometimes It's Worth Paying the Price to Meet Face-to-Face

There are times when it's worth paying the price to meet face-to-face, and insisting on a remote meeting in such cases will significantly undermine the efficacy of the interaction. Here's five factors to consider when choosing a remote or in-person meeting:

- *Type of Meeting*. What's the nature of the meeting? Giving a talk to a large group, leading a workshop, interviewing business people about their work … these lend themselves more to face-to-face interaction. If it's a routine catchup between existing team members, forget the travel and look for remote meeting approaches. That's said, it's great to bring team members together at least twice a year, to help with building trust, reestablishing team bonds, and given people an opportunity to celebrate their successes together.

- *Length of the Meeting*. How long is the target meeting for? Between one and three hours is about the maximum for an effective meeting by video or web conference. Once it gets much longer than that, being there in person becomes more important. For example, sitting through an all-day meeting where team members are conferencing in, means participants use so much extra energy just to hear what other participants are saying.

- *Time Zone Differences*. How many time zones are we crossing, and for how long? If your teams are at opposite sides of the globe, and thus transversing 12 or so time zones, meetings and presentations had better be short. For longer events—day long or multi-day meetings—turning up in person may be worth it.

- *Questions That Can Only Be Asked Face-to-Face*. Are there questions that can really only be asked face-to-face, because they involve a subtle interplay between words, facial expressions, and body language? Business development questions are often of this nature.

- *Facial Expressions and Body Language*. How important is it to be able to read facial expressions and body language, and to incorporate those observations into your approach to the meeting? If it's a routine meeting with people you know well, you can probably guess what their facial expression looks like. Actually being there isn't important. For new teams, or when new team members are added to an existing group, being there becomes more important.

It's not always possible to meet for a face-to-face meeting, but sometimes it's essential.

Figure 4-20. Choosing Between a Remote Meeting or a Face-to-Face Meeting

Factor	**Remote Meeting**	**Face-to-Face Meeting**
Type of meeting	Routine catchup between existing team members	Talking to a large group, leading a workshop, interviews
Length of meeting	Between one and three hours	More than three hours; one to three days (or more)
Time zone differences	Only a few time zones	Many time zones
Questions/Topics	Questions and topics that are regularly discussed	Confidential, sensitive, or difficult topics
Facial Expressions and Body Language	Already know their facial expressions and body language	Vital to understanding and guiding the meeting

When choosing between a remote or face-to-face meeting, look for the presence of multiple factors lining up under either type. Once you have got three factors, that's usually the approach to take.

Video Meetings Where You Work

There's an interesting change afoot in how video conferencing is used for meeting with others, and it has a direct bearing on the use of IBM Connections. Two reports in September 2012 made the following observations:

- CFOs place high priority on making more video conferencing equipment available, in order to reduce travel costs and the associated impacts.[10]

- In recent expenditure patterns, organizations are de-emphasizing room-based video conferencing equipment (including full-immersive telepresence equipment) and shifting more towards video-enabled desk phones and desktop video devices.[11]

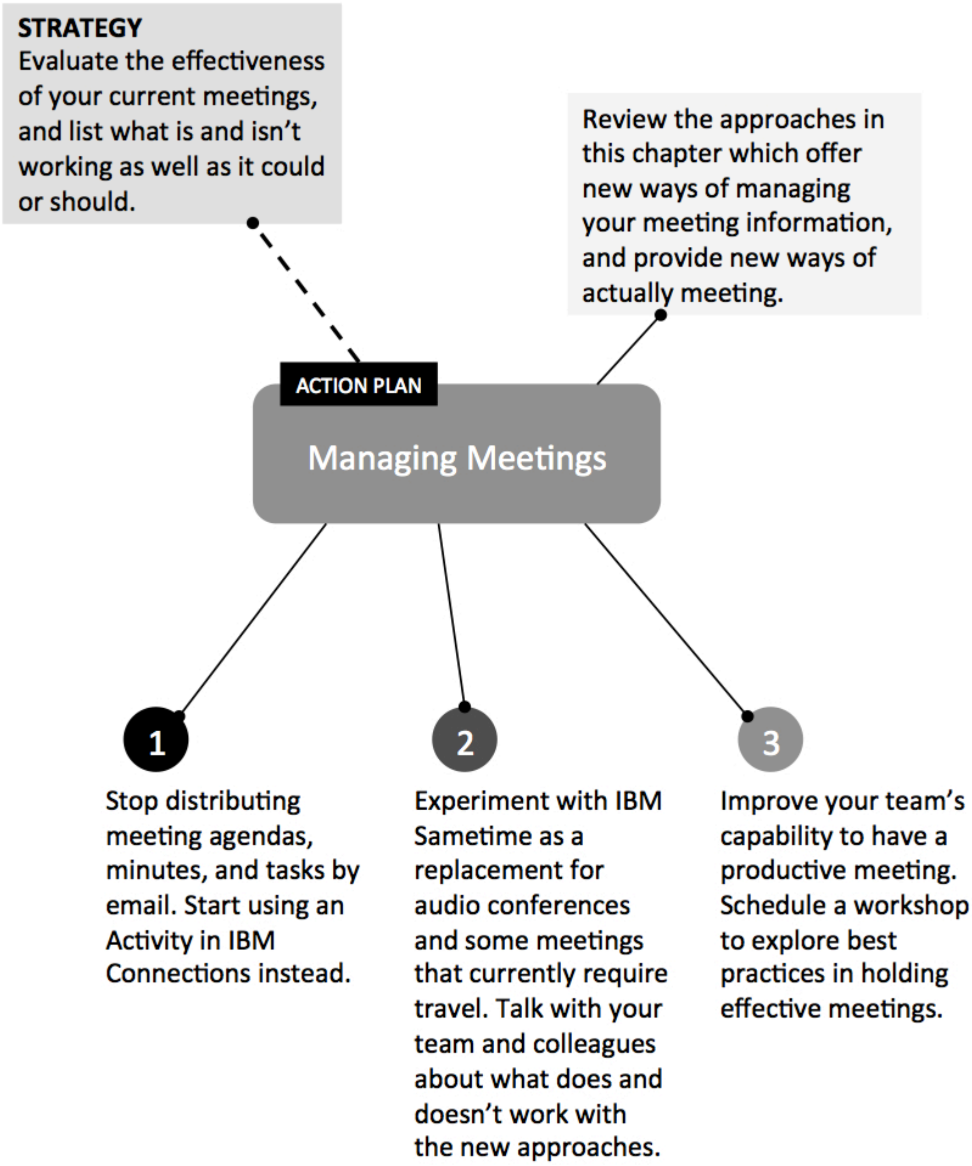
Throw in the tremendous traction gained by Apple over the past two years with the second, third, and fourth generations of the iPad, all of which support video meetings, and you have the makings of a new story: video conferencing where you work, not where you go to have a meeting.

When done right, room-based video conferencing is tremendous. That point isn't up for negotiation. Being done right means big screens, great audio, and a jitter-free experience. If you are lucky enough to work at an organization that makes telepresence suites available for inter-office meetings, the experience is even more incredible. It's supposed to be "as good as being there," but given you don't have to travel for a few hours either side of the meeting, perhaps it's "even better than being there." However, while room-based video conferencing and telepresence does have a place for small and large group meetings, (a) you still have to go somewhere different to where you work to participate, and (b) it's hard booking such a room on a regular basis for a one-to-one meeting. If such meeting rooms are scare, most organizations will prioritize those for group meetings rather than one-to-one discussions, unless of course you happen to be the CEO.

> If you have a tablet or smartphone, wherever you are, regardless of being at your desk or not, you can initiate or join a video meeting.

Which brings us to video conferencing where you work. PBX-based video conferencing systems that put a video-equipped phone on your desktop, took the leading position for video shipments in 2Q 2012 (see the Infonetics study). If it hadn't been for the growth in that segment, according to Infonetics, the whole video conferencing and telepresence market would have reported much worse figures. If the person calling you has a video phone too, you get desktop-to-desktop video in the flow of day-to-day work. If you have a tablet or smartphone with video capabilities—an iPhone or iPad with FaceTime for example—you can achieve the same outcome without requiring special hardware. Wherever you are, regardless of being at your desk or not, you can initiate or join a video meeting.

Action Plan


STRATEGY
Evaluate the effectiveness of your current meetings, and list what is and isn't working as well as it could or should.
Review the approaches in this chapter which offer new ways of managing your meeting information, and provide new ways of actually meeting.
ACTION PLAN
Managing Meetings
1
Stop distributing meeting agendas, minutes, and tasks by email. Start using an Activity in IBM Connections instead.
2
Experiment with IBM Sametime as a replacement for audio conferences and some meetings that currently require travel. Talk with your team and colleagues about what does and doesn't work with the new approaches.
3
Improve your team's capability to have a productive meeting. Schedule a workshop to explore best practices in holding effective meetings.

Summary

People spend a lot of time in meetings, and well designed meetings can be a very effective forum for collaboration. In this chapter we have looked at how you can use IBM Connections to support meetings, from the initial planning phase through to post-meeting follow-up. IBM Sametime offers complementary capabilities for holding the actual meeting when the meeting participants can't be in the same location. After looking at how two organizations are using IBM Connections to support their meetings today, we looked at three advanced concepts, including whether a meeting is necessary or not, and the move to video meetings where you work.

In this chapter we have looked at how you can use IBM Connections to support meetings, from the initial planning phase through to post-meeting follow-up.

Meetings are a common forum for holding discussions, but discussions don't have to be limited to real-time meetings. In the next chapter we investigate how to use IBM Connections for holding discussions when participants can't be in the same location or meet at the same item.

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[1] I haven't met Tim Lewis (yet), but this quote about meetings is something he said in 2002 while the Manager of Knowledge and Culture at Eddie Bauer. I like it—it captures a reality I fully agree with, and try hard to live. For the quote, see www.netspeedleadership.com/article.php?article=14. For Tim, see www.linkedin.com/pub/tim-lewis/3/967/48a.

[2] See Rachel Emma Silverman, *Where's the Boss? Trapped in a Meeting*, WSJ Online, February 2012, at online.wsj.com/article/SB10001424052970204642604577215013504567548.html.

[3] See Jeff Conklin's book, *Dialogue Mapping: Building Shared Understanding of Wicked Problems*, at www.amazon.com/Dialogue-Mapping-Building-Understanding-Problems/dp/0470017686

[4] If you are not going to use a Community to host the Activities tool for your meeting, look for the *Apps* tab at the top of the screen in IBM Connections. Open the *Activities* tool, and click *Start an Activity*. This will create a standalone activity for your meeting.

[5] For organizations using Microsoft Outlook for calendaring, the steps are similar. Talk to a colleague or your IT group for specific guidance based on the version of Microsoft Outlook you have available.

[6] If you are unsure whether your organization is licensed to use IBM Sametime, please check with your IT department. It may be available but you don't know about it. Or it may not be available, but you could champion for it given the potential benefits. For more details about IBM Sametime, see www-01.ibm.com/software/lotus/sametime/.

[7] Sasja Beerendonk and Marion Vrielink facilitated a Birds-of-the-Feather session at IBM Connect 2013 on using activities to manage meetings, and one of the topics in that discussion was about using a single activity for multiple meetings. The discussion went well, and I captured some notes on my blog; see currents.michaelsampson.net/2013/01/bof106.html. Alan Hamilton, a Social Business Consultant with IBM in the UK, has also written about using one activity for multiple meetings. You will observe that Alan's screenshots are from an earlier version of IBM Connections. See alanghamilton.com/2012/02/28/manage-any-meeting-with-activities-in-ibm-connections/.

[8] The case study on Saxion University is based on a presentation at Social Connections IV in December 2012 (see www.slideshare.net/soccnx/managing-meetings-effectively-with-activities), and an update at BLUG in March 2013 (see www.blug.be/blug.nsf/pages/Event20130321_Sessions).

[9] See my blog post, *From Email to Wiki: A Clifford Chance Case Study*, at currents.michaelsampson.net/2010/10/from-email-to-wiki.html. While Clifford Chance is not using IBM Connections—Atlassian Confluence and Microsoft SharePoint are the tools of choice—the concept is what's important.

[10] This is from a Deloitte survey of 250 CFOs around the world. See *CFOs playing bigger role in driving sustainability efforts in their organizations*, from September 18, 2012, at www.prnewswire.com/news-releases/deloitte-survey-cfos-playing-bigger-role-in-driving-sustainability-efforts-in-their-organizations-170163456.html.

[11] Infonetics Research, *Enterprise videoconferencing bogged down in Q2 by Europe, public sector*, September 2012, at www.infonetics.com/pr/2012/2Q12-Enterprise-Telepresence-and-Video-Conferencing-Market-Highlights.asp.

Chapter 5.
Holding Discussions with IBM Connections

> *The true spirit of conversation consists in building on another man's observation, not overturning it.* [1]
>
> Edward G. Bulwer-Lytton

There is nothing quite as satisfying as a great conversation with a group of people who share a common interest, are working towards a common outcome, or who really want to work something out. If you can get the dynamics right and people check their egos at the door, it's almost a magical experience. The ideas are flowing. People are sharing different perspectives. Disagreements arise. Alternative ways of handling the matter are explored. Tempers flare. Passion is stirred. A compromise is mooted. There's more discussion. A new way begins to be understood. And by the end of the conversation, the group has coalesced around a way forward, one that's mutually satisfying, and one that couldn't have happened without everyone's full participation. Such conversations are all too rare in business life, and we need more of them. This chapter shows how to use IBM Connections for holding discussions in a collaborative setting.

In this chapter, we will:

- Look at current ways of holding a discussion using email, and the limitations of such an approach.
- Consider new ways of holding discussions in IBM Connections, especially when team members are unable to travel for a face-to-face meeting.
- Investigate how firms are using IBM Connections for discussions today.
- Explore a number of advanced concepts, such as how to engage quieter people.

The Theory of Holding a Discussion

A discussion provides a means for individuals, a team, or a group to discuss ideas, challenges, problems, and opportunities, with a view to exploring the boundaries of what's known and lay the basis for making a decision. Discussions are frequently held around a meeting table, which allows the participants to both hear the words and read the body language and vocal intonation of other speakers. Due to the difficulties of getting everyone necessary around a meeting table whenever a discussion is required, discussions are also frequently held by email. However, while there are some efficiencies to be gained by holding a discussion by email, the approach is not without significant problems, such as confusion around conversation flow and context. This leads to:[2]

While there are some efficiencies to be gained by holding a discussion by email, the approach is not without significant problems, such as confusion around conversation flow and context.

- *Frustration*. People in the team can get frustrated with each other because their conversation is rendered chaotic by email. The academics tell us that failing to get team members to have the same mind and outlook on a project is one of the most significant roadblocks to project success; continually being frustrated with others does not contribute to healthy inter-team member relations and can hinder people from reaching a common position.

- *Misunderstandings*. It is very easy for people to add or remove others from specific messages in a thread, which means that everyone who received the original message is not guaranteed of seeing every resultant messages. Some people are added; others are removed. Thus not everyone is going to have the full picture of the conversation, and if they have missed out on certain important messages, they're will not have the same view or perspective on the conversation that others have. This can lead to mis-understanding and conflict.

- *Constant Re-evaluation of Topic Fit*. New messages that arrive late in the piece force each recipient to cast their mind back to where the conversation currently stands, and then to re-evaluate just where precisely in that neatly ordered representation the new message should be slotted. Email helps greatly with helping people say what they want to say when they want to say it, but it doesn't help everyone else comprehend the important of what's being said. They've got to figure it out for themselves.

- *Fragmented and Time-Delayed Conversations*. While email is designed as a store-and-forward communication environment, which gives great power to all involved to communicate when they are ready to do so, such time delays in communication endeavors leads to fragmented conversations. You ask for feedback on something that you're working on; it may take three or four days before you've heard back from everyone, by which time the issue is no longer relevant. And even if you do email others to let them know that you're no longer looking for input, it is most likely that others will review the older messages first, thus responding anyway. You are going to get messages that you don't need anymore (and some of the subsequent points raised may make you re-evaluate decisions that can't be changed easily now), while other people are going to waste their time giving input that can no longer be fruitfully used.

- *Scattered Messages*. Merely looking at your email inbox isn't going to give you a total sense of a conversation that you are involved with, because it misses all of your contributions. Where are those? In your Sent folder. The majority of email clients do not show your contributions in line with contributions of others, instead moving them off somewhere else.

Email means that people have to work harder to follow the flow of a conversation than they would if more conversationally correct tools or approaches were used. A discussion forum, for example, enables people to specifically insert their feedback and thoughts into the correct place in a conversation hierarchy.

Email means that people have to work harder to follow the flow of a conversation than they would if more conversationally correct tools or approaches were used.

By changing the technology used for holding discussions, individuals, teams, and groups can improve both discussion efficiency and discussion effectiveness:

- *Discussion Efficiency*. The purely mechanical tasks of holding a discussion are more efficient in a discussion forum compared to a collection of email messages. Where to click to read the latest messages is more clearly stated, and these new messages are shown immediately in the context of prior messages. People don't have to try to remember which discussion a particular thought is part of; it's obvious just by looking at where it is positioned.

- *Discussion Effectiveness*. Holding a discussion in a discussion forum can positively impact the effectiveness of the discussion. Wider participation from people with diverse perspectives can be achieved in the discussion, since it is more accessible for input from other people, instead of being limited by design to those who were included in the original email thread. A second way of increasing discussion effectiveness is through the retention of the discussion for future reference by staff, and the incorporation of the discussion in search results. People can look back to see the thinking behind decisions, and if the thinking is more widely applicable, can leverage earlier approaches in current challenges.

There's a lot to be gained by shifting discussions out of email and into a discussion forum.

How to Hold a Discussion in IBM Connections

The Marketing Board presentation was a resounding success. While it had been up to Geoff to make the pitch on the day for a new approach to marketing at Albreto, the whole team were able to share in the after glow—their work had paid off, they'd been given the green light to proceed, and they saw great things in the future. Equally true was the realization that this was the beginning of the real journey. The essential change in strategy was to cease viewing the marketing function at Albreto as an add-on to the real work of product development, but instead to integrate customer-led thinking into the way products were imagined, drafted, designed, and manufactured. Sure this approach had worked 20 years ago when Albreto was new to the market, but times had changed.

> *"We've got a million things to do now," said Geoff, with obvious exaggeration, but the other team members knew what he was saying. "How do we pull together our best thinking and the different ideas we've discussed in passing into an integrated set of ideas that will help us move forward?"*
>
> *"Let's have a marketing retreat," suggested Walter. "We could get together for two, maybe three days, and plan out what we're going to do."*
>
> *"That is a very common way of working around here," offered Andrea. "The trouble would be finding a time that would suit us all, given our other work and family commitments. But perhaps we could pull it off."*
>
> *"Mmm, I'm less sure," said Sally. "You are right: it is a very common way of working here at Albreto, and we could take three days, but ... I think there's a better way."*
>
> *"You're not going to suggest a three-day video conference, are you?" said Geoff. "We tried one of those once, and it was an unmitigated disaster."*
>
> *"Don't worry, I'm not thinking of that," replied Sally. "What I am thinking of is this: how about we use a Forum in IBM Connections to get the integrated set of ideas that you want, without requiring travel for a two or three day meeting."*
>
> *"What does a Forum offer us?" asked Edgar.*
>
> *"It's a very simple concept," said Sally. "It gives us a way of having a conversation about our topics, and we can do it from wherever we are—the office, the road, even at home. Everything is captured in one place, and we can each see what everyone else has said. There's a few things we need to get right in order to make the human side of it work, but it's a great alternative to taking a chunk of time away from the office."*
>
> *"I'm willing to give it a try," said Geoff. "We've already experienced the power of IBM Connections in getting to this point. What about the rest of you? Are you in?"*

Step 1. Determine the Nature of the Discussion Forum

After Geoff had asked if the other team members were willing to give the Forum a try, Sally had quickly interrupted and said there was a twist they needed to discuss first. That was whether they were willing to have their conversation openly so that anyone else from Albreto could see what they were saying, or whether they wanted it to be a private discussion just for the marketing team. Walter and Andrea had both immediately expressed their dislike of the open conversation idea, and that they should quickly drop the whole Forum thing. Sally asked them to suspend judgment for a couple of minutes, and said that IBM Connections supported both approaches, and that it was up to the team to make the decision whether they'd run with a public forum or a private one. Geoff then asked Sally what she saw as the differences between the two approaches, and after searching for a moment, she pulled up a chart that laid out four differences.

Figure 5-1. Deciding on a Public or Private Forum

Decision Attribute	Public Forum	Private Forum
Confidentiality over discussion items	Anyone with access to IBM Connections at work can see and contribute towards discussion items. It's an open conversation.	Only those people invited to the Forum can see and contribute discussion items. It's hidden and private.
Suitability for discussing sensitive or secret topics	Low suitability. Anyone with access to Connections will be able to see what is being said.	High suitability. You can limit access to specific people, and conversation items are hidden from search results.
Potential for serendipity in contributions	High potential. Other people with an interest in the discussion can have their say.	Almost non-existent potential. You have to be pre-invited to even know about the discussion.
Forum compared to a discussion by email	Improves discussion efficiency, plus increases the prospect of discussion effectiveness through participation from other people.	Improves discussion efficiency, but doesn't do anything for discussion effectiveness because participation is limited.

There are four differences between public and private forums. In IBM Connections, public forums are created outside of a community (although a forum could be created in a community that had open membership). Forums created inside a community can be made private by setting the community's access rights to Restricted.

There are three ways of creating a public forum, and one way of creating a private forum:

- *Public Forum (Three Approaches)*. A public forum can be created in one of three ways in IBM Connections. The first is to create a Forum directly, because the Forum tool is one of the main out-of-the-box tools that can be created in a standalone mode. A Forum created in this way has no access privileges; it is open and public by design. The second and third approaches are to create a community with Public or Moderated access rights, and then use the Forum tool that is included by default in the community. Anyone can contribute to a forum in a public community. Anyone can read the forum in a Moderated community.

- *Private Forum (One Approach)*. The Forum tool does not have the concept of access privileges in IBM Connections. To limit access to a forum, therefore, you must create a community with Restricted access privileges, and then use the forum inside the community. People wanting access to the forum must be a member of the associated community.

In this chapter, we will take the approach of creating a community with Public access rights and using the forum inside the community. This approach gives the flexibility later on for using other tools—such as ideation blogs, wikis, and files—for the community of people that originally came together around the forum. In the previous chapter we created a community for the Marketing Team. Throughout this book they will continue to use that community for their internal team-related activities. If the forum they were going to create was private to the team only, it would make sense to use the Marketing Team community instead. But since in this chapter the intended community of people is different for the forum—potentially everyone at Albreto—we need to create a second community in IBM Connections and use the forum in there.

Step 2. Create a Public Community

As we did in the previous chapter (see instructions on page 84), create a new community with the following details:

- *Name*. Give the community the name *Marketing Albreto to the World*.

- *Tags*. Enter the tag *marketing*.

- *Web Address*. Use the short name of *marketing-albreto*.

- *Access*. Leave the access as *Public - anyone can join*.

- *Description*. Write a one to four line description of the community. Start with something like *We all have a role to play in Marketing Albreto. Let's work together*.

Click *Save* to create the public community.

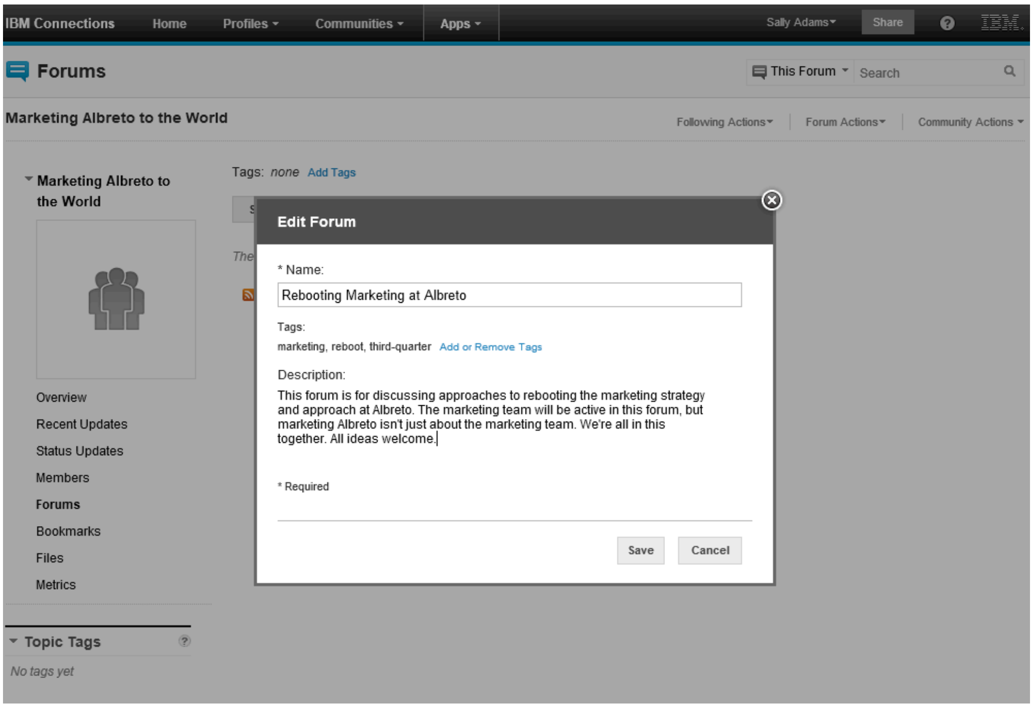
Step 3. Give the Forum a Specific Name

The Forum tool is included in a new community by default, and a forum is created for containing discussion topics, questions, and replies. The name of the forum is the same as the name of the community, and before we get going we need to change the name of the forum to something meaningful.

To change the name of the forum, click *Forums* in the left-hand navigator, and then click the *Forums* tab in the main screen area. Open the *Marketing Albreto to the World* forum, and under *Forum Actions* along the top of the forum click *Edit Forum*. Change the name of the forum to something meaningful for the discussion you hope to stimulate within the forum. For example, *Rebooting Marketing at Albreto* would be a suitable title, and should be complemented with a description of the forum.

Change the name of the forum to something meaningful for the discussion you hope to stimulate within the forum.

Figure 5-2. Give Your Forum a Meaningful Title to Focus the Discussion



Give the forum a specific name, as a means of signaling the type of discussion you want to stimulate in the forum. Bland forum names can lead to bland and meandering discussions.

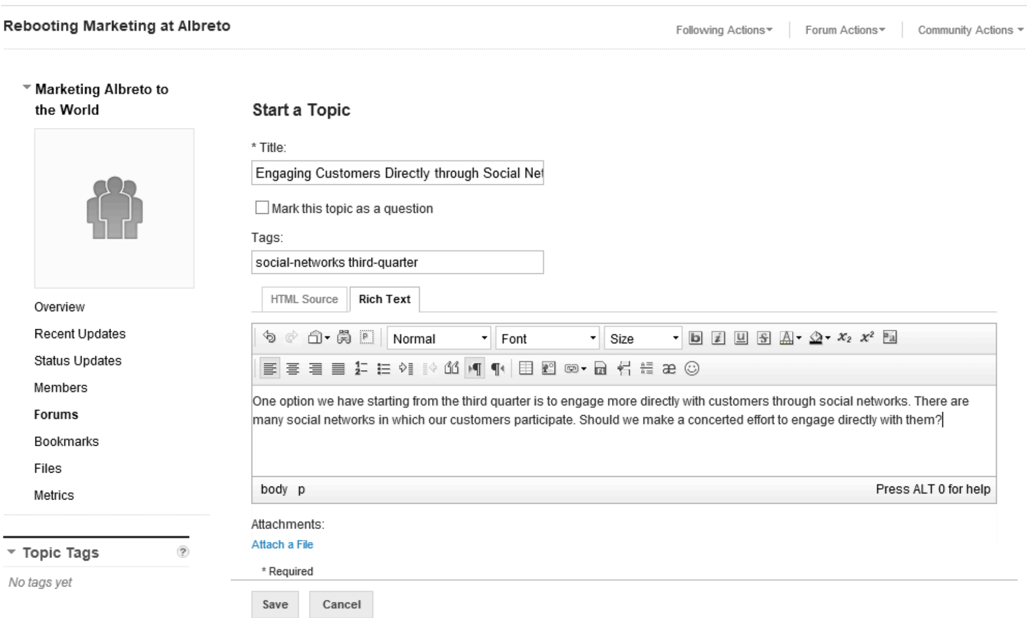
Click *Save* when finished.

Step 4. Create the First Discussion Topic

The Forum you have just created is the container in which discussions can be held. It's like a meeting room in which meetings can be held, although unlike a meeting room it enables multiple simultaneous discussions to take place. You begin the first discussion topic by clicking *Start a Topic*. The discussion form has one required field, and four optional fields:

- A title for the discussion topic, which is required. A clear title, strongly stated and with specific details, will draw people into the topic much more than a bland title will. For example, "Upcoming Marketing Plans" is too weak. "Engaging Customers Directly through Social Networks in the Third Quarter—Discuss" is a lot better.
- A tick box for marking the topic as a question. If it's not a question, don't tick it.
- A field for tagging the topic with specific phrases. This helps with describing the discussion topics in the Forum, and grouping like topics without searching.
- A large rich text field for your contribution to the discussion. Rich text means you can use different fonts, sizes, and colors to help get your message across.
- A place for attaching one or more files to the discussion topic.

Figure 5-3. Creating a Discussion Topic

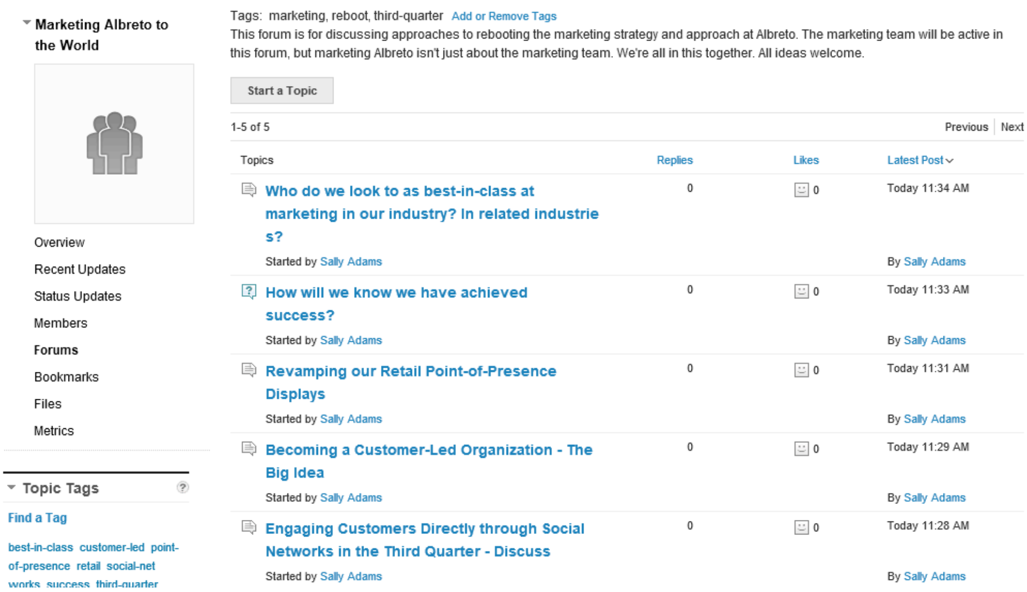


Creating a discussion topic is a simple matter of filling out a form. Give the topic a title and write the initial paragraph or two to stimulate discussion. Adding a tag is a good idea too.

In a situation like the marketing team's discussion, where a Forum is being used for the first time, one person could seed the Forum with a wide range of initial topics and questions. This means that when other team members visit the Forum for the first time, they are seeing a list of discussion topics and questions that are relevant to them. From an adoption perspective, this encourages adoption because the Forum—a mere technical construct—is diminished in importance and the content inside—what's actually relevant to the people—is increased in importance. An alternative approach is to ask each person in the team to contribute a small number of topics—between one and three—to the Forum, so that they get early exposure to the mechanics of creating a new discussion topic and feel greater ownership of the initial list of questions. That, too, can benefit the adoption process albeit in a different way. On balance, I recommend seeding the Forum with an initial list of topics and questions—five topics or questions seems about the right number. I think the first impression that the work happening in a Forum is relevant to the team is more important than the mechanical ability to create a topic. The latter can follow shortly after, but the first impression is essential.

Seed the Forum with a list of topics to diminish the fact that it's a Forum, and put the focus on the content inside.

Figure 5-4. The List of Topics



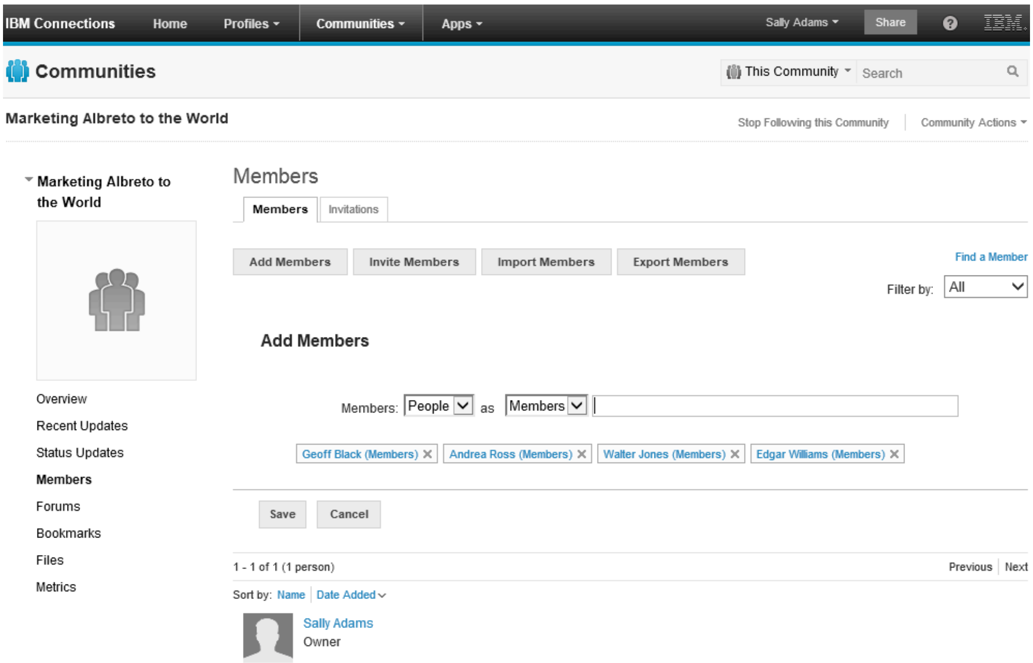
Sally creates an initial list of topics and questions in the new forum, seeding it with content to stimulate discussion. Discussion topics have a speech bubble icon. Questions are denoted with an icon with a question mark inside. If the icon for a question is too subtle, just prefix the topic title with "Question—" to give a clearer statement of what it is supposed to be.

Step 5. Invite Participation

With the forum established and a set of initial topics and questions added to the forum, it's time to invite the other team members to participate. Since the forum is in a community, the community has the concept of a "membership list." Clicking the Members link in the left-hand navigation pane of the community allows you to add or invite members. At the same time, being a public community, people can elect to join the community without having to request permission.

In Sally's case, Walter, Edgar, Andrea, and Geoff already know that the discussion forum is being created, and will be waiting for an alert to let them know it is ready. Sally can add them as members to the community. While looking at the members page, she clicks the *Add Members* button and enters the names of the people on the marketing team.

Figure 5-5. Invite Participation from Team Members



Invite participation in the forum by adding team members to the community. They can be added directly because they already know the forum is coming.

Click *Save* when you have finished adding the names.

If specific people don't start participating within a day or two, follow-up to ask when they will join. Sally should also talk about the forum at the next marketing meeting or teleconference because that helps to make the forum a real part of the team's repertoire.

Step 6. Stimulate Participation, and Be Involved Yourself

Someone has to make the forum work, and to make it real even when it is barely alive.[3] That is the key human dynamics principle of holding discussions in IBM Connections. Being an "Owner" confers benefits and status, but it also carries responsibilities. Making the forum work by stimulating participation, being deeply involved, and proactively resolving any discussion problems is a key element of that responsibility. Here are five specific steps you can take to stimulate participation:

1. *Raise the Important Topics*. Create topics and ask questions in the forum that focus the members on matters of essential interest. In the activity you undertake in the forum, it is essential that the other members see you as a role model—that you are posing the right topics, asking the right questions, and doing what you can to keep the forum focused on its purpose. If as the owner you won't take this role, someone else has to pick it up—or the forum will flounder and die.

2. *Be Involved in Discussions*. Be actively involved in the discussion around your own topics and questions, as well as on the topics and questions that other people have created. When someone else replies to one of your topics or questions, make a subsequent reply yourself—acknowledging what they said, or following-up on something they asked. This validates the core idea that the forum is a real place of conversation, because the person who left the reply as well as everyone else who views the discussion topic in the future will see that you have been involved.

3. *Draw in Contributions from Other People*. Encourage other people to be actively involved in the discussion forum. If you know that Kyle from the Product Development group in the Toronto office has an interest in a specific topic, call and seek his participation. And thank him when he gets involved. Draw on your own understanding of the organization and its people to bring the right people to bear on the current topics in the forum.

4. *Treat the Discussion Forum as a Real Place*. Refer to the discussion forum as a real place during ad-hoc encounters with people, scheduled catchups with staff, and team or group meetings. If someone raises a vital topic in a meeting, tell them they should raise it in the Forum.

5. *Steer and Moderate the Discussion*. Steer the discussion to the essential matters, encouraging more discussion where that's required, and discouraging discussion where less is necessary. When people are discussing the essential matters that are core to the purpose of the forum, be involved in the discussion yourself. Tell other people about the discussion topic and ask them to contribute their point of view too. On the other hand, discussion topics that are not essential to the forum should be stopped. For a light touch, leave a reply commenting that you don't see this topic or question as essential to the forum, and asking the people involved to focus on the other topics. If that doesn't work, and the topic or question is

garnering activity that is still not essential to the forum, call the people involved and talk it through. Perhaps they see something in the topic you don't see. Be open to learning a different point of view, but if as the owner of the forum you still think it is non-essential, suggest they move the discussion to another forum.

Sidebar: But This All Takes Too Much Time ...

Someone you work with is going to complain about the "extra time" it takes to use a discussion forum instead of email. Their complaint will be about all the steps involved in going into the Forum, creating topics with all the different fields, and then trawling through the discussion forum to find topics and questions they need to respond to. "Doesn't it take less time to just use email?" they ask.

Here's a way of answering that question.

1. Using a discussion forum does take time, but so does the current approach of using email. From the perspective of what you have to type to make each approach work, there isn't actually a lot of difference though.

2. If the discussion forum takes more time, it does it at the front of the process—creating the topics or questions, and structuring the forum. By comparison, if it is quicker with email, it is quicker when creating and sending the initial emails.

3. In comparison to email, a Forum offers significant benefits over its lifetime. Previous conversations are not hidden in people's inboxes, forever lost to the purview of other people. Expertise is clearly demonstrated in discussion contributions, and is thus discoverable by other people. Discussions confer long-term benefits beyond the immediate discussion; when someone is facing the same issue in 24 months, the whole discussion doesn't have to be held again. Open the Forum and the line of argument is in plain view.

4. The real difference is one of perception. Your people have used email for holding discussions for years, and thus have deeply ingrained habits. How to use email to hold a discussion has become invisible to them because they have done it so often. Using a Forum for a discussion is new—and by implication your people don't have deeply ingrained habits. These habits have to be learnt.

5. In summary, people are very efficient at using email for holding discussions, and will initially be inefficient at holding discussions in a Forum. But the relative effectiveness of using a forum is much higher than using email. Once people have used a discussion forum for 20 to 30 times, it will start to become an ingrained way of working ... and the argument will go away. But if it doesn't—because the Forum isn't being used for the right purposes or is being approached the wrong way—then go back to email.

Step 7. Remember the Power of the Personal Touch

One of the skills necessary to run an effective discussion forum is knowing when a more immediate personal touch is needed. While an online discussion forum allows for wider participation that is not constrained by time and space, having such a discussion can take much longer than an interactive face-to-face, voice-only, or video-facilitated discussion. There will be times in the life of a discussion forum when complementing the discussion with a more interactive format is beneficial. For example:

While an online discussion forum allows for wider participation that's not constrained by time and space, having such a discussion can take much longer than an interactive discussion.

- *To Resolve a Differing Opinion That Text Can't Achieve*. A couple of people are going back-and-forward on a particular topic, and each is getting more entrenched in their own opinion. They are not listening to what the other is saying. Call for time out on the text-based discussion and schedule a teleconference—or even a face-to-face meeting if that is practical—to give each party an interactive forum for discussing, listening, and trying to reach a joint position. A third person may need to be involved as a facilitator or moderator of the discussion if the two can't come to a natural conclusion. Summarize the main points from the interactive discussion in a post in the online discussion to give everyone a heads-up on what transpired.

- *To Thank Individuals For Their Contribution*. If someone you haven't spent a lot of time with starts making thought-provoking and valuable contributions to the discussion forum, reach out to thank them. A genuine thank you in the forum is appropriate and useful, but if it is possible to go further and thank them in a more personal way, do so. This could take a variety of forms, such as a phone call to convey thanks and express interest in their work, scheduling an informal chat over coffee when you are next at their office location, or sending them a hand-written note through the internal mail system. Taking such actions outside of the online discussion forum helps to blur the difference between the online world and the real world—and help to make both as effective as possible.

- *To Bring In a Schedule-Slammed Expert*. Everyone at your organization will not have the same ability to actively participate in a text-based discussion. If you need input on a particular topic from an expert, but they lack the time to deeply engage on their own, schedule a teleconference or meeting with them. Set the agenda as discussing particular salient topics, and have a notetaker available to capture the key ideas, guidance, and specific recommendations from the expert.

In closing, the power of the personal touch shouldn't be a matter of last resort. Make it a natural mode of operation to raise the effectiveness of the online discussion forum.

Engaging with Discussions in IBM Connections from Mobile Devices

As discussions in IBM Connections become a core part of the day-to-day work in your organization, people will want to be involved in discussions from wherever they are and using whatever devices they have available. Unless enabled by an administrator, IBM Connections does not support the posting of replies to a discussion topic by email, even if you have elected to receive email notifications of new topics.[4] You have two options:

> As discussions in IBM Connections become a core part of the day-to-day work in your organization, people will want to be involved from mobile devices.

- *Mobile Apps*. Use one of the mobile apps that IBM has released for IBM Connections on iOS, Android, and BlackBerry devices. Open the discussion topic, and read it and any replies. Post your comments as replies, or create new discussion topics.

- *Mobile Web Browser*. Forgo the use of a mobile app and just engage with the forum through the web browser on your mobile device. Login via the browser just as you would on a laptop or desktop computer.

Using the mobile app for an Android smartphone, for example, you can quickly get into a current discussion topic and post a reply. Here's the steps involved:

1. From your *I'm Following* screen, notice that a new discussion topic has been posted in a forum you are active in, or that a reply has been posted to one of your discussion topics.

2. Touch and hold the notification to open the *Select Actions* window.

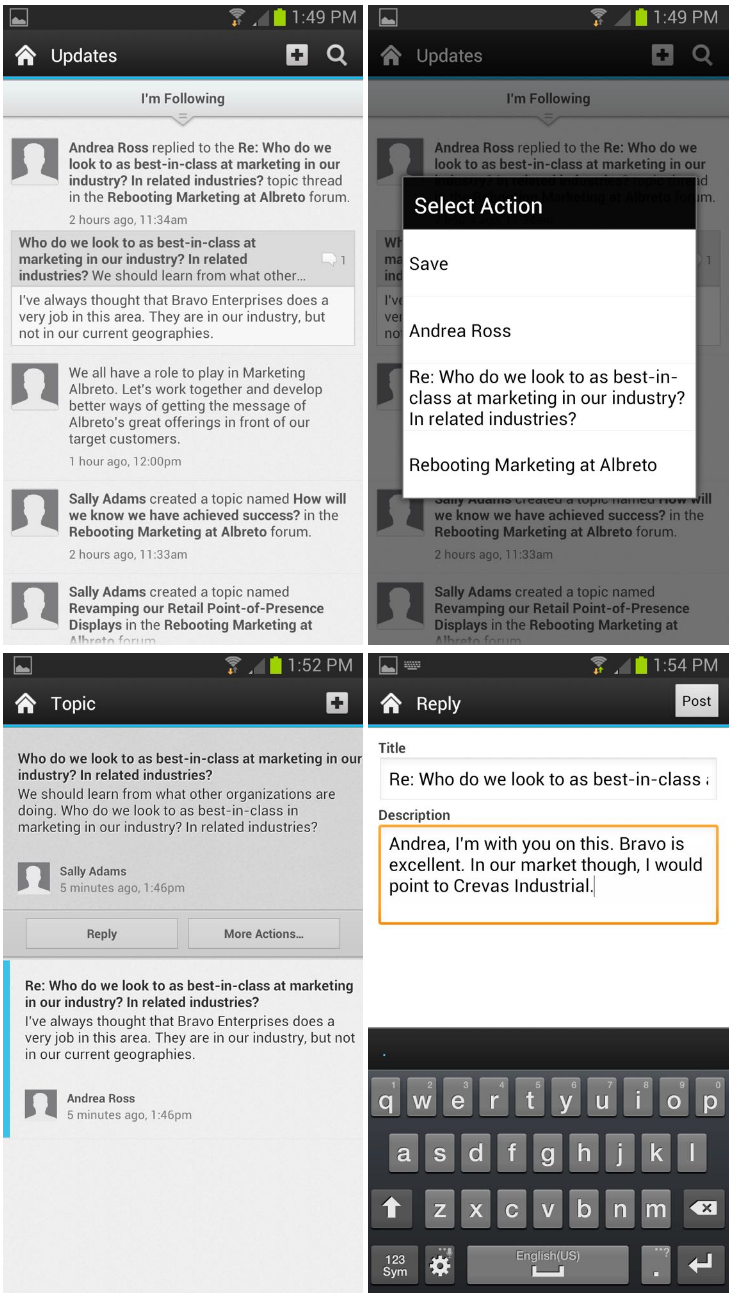
3. Open the topic by touching its name in the *Select Actions* window—in the case shown in Figure 5-6, that's the third option in the list. When it opens on your smartphone, read the discussion thread.

4. Touch the *Reply* button at the top of the topic to post a reply to the topic. If you want to post a reply to one of the existing replies, touch the desired replies and then touch its associated Reply button.

5. Touch *Post* at the top of the screen to lodge your reply in the discussion hierarchy.

To post a new discussion topic in the forum, you need to return to the main Connections screen on your smartphone, and then touch to open the Forums tool. Find the forum in which you want to post your topic, touch its name to open it, and then touch the plus sign at the top of the screen. This opens a new topic window, in which you can type a title, description, and tags. You can also mark the topic as a question.

Figure 5-6. Discussions Using the Mobile App for Android



Engage in discussions in IBM Connections using the mobile app on your smartphone. Open the topic and create a reply in the discussion hierarchy, or add a new discussion topic.

Step 8. Don't Kill Unexpected Participation

By making a discussion forum publicly accessible to people you don't know in your organization sets the stage for collaboration. It signals an intentional willingness to hear from other people—in essence broadcasting an invitation to participate. Your response when such participation actually happens must align with this underlying collaborative ethos, otherwise making the forum public will have been for nothing.

You can quickly and effectively kill unexpected participation by following some devious strategies—but the point is that we want to avoid doing so.

You can quickly and effectively kill unexpected participation by following some devious strategies—but the point is that we want to avoid doing so. Be careful not to embrace one or more of these strategies:

- *Ignoring Their Contribution*. Don't say anything in response to their contribution in the Forum, and quietly warn other current members of the Forum not to do so either. Once the unexpected contributor sees that no action is being taken on what they have said in the forum, they will leave and never come back.

- *Undermining What They Said*. Immediately counter their contribution with a bevy of reasons why what they have said will not work. Focus on all of the negatives, and refuse to be drawn into the possibilities. Don't concede that there is any potential validity in their contribution.

- *Playing the Power Card*. If the unexpected contributor lacks the formal qualifications you have amassed, or has little experience in the subject matter, be quick to point out that you are the established expert and by comparison they know nothing. For good measure tell them it has been tried before and failed.

- *Focusing on Style, Not Substance*. Comment exclusively on their poor choice of words, their lack of grammatical coherence, or the extreme brevity through which they have conveyed their thinking. This will alleviate the need to put any consideration into the substance of what they have said, and will allow you to write them off as a lightweight contributor.

Clearly there's a time and place during the life of a discussion when diverging input is welcomed and has a possibility of being fully examined. If that time has passed, write a note to that effect in the discussion forum so unexpected visitors don't waste their time writing a comment that will be ignored. If you are no longer open to wider participation on a particular topic in the discussion forum, clearly say so. It's much better to pay the lesser cost of a potential misunderstanding than to pay the high cost of a lost collaborator by ignoring their thoughtful contribution.

Step 9. Tidy Up the Discussion Forum

The Forum in IBM Connections provides a much improved way of holding discussions. As long as the forum is active and engaging, there will usually be enough of a shared conceptual model about what's happening to make it work for the people involved.

Forums benefit from being tidied up once in a while. Such tidying up includes:

- *Locking Non-Current Discussion Topics*. A locked topic prevents people from commenting further (see Figure 5-7) and sends a clear signal about which topics are current, which are not, and encourages people to spend their time on the current topics. You need to be a community owner to lock a topic. If you don't want to lock a topic and prevent replies, but still want to signal non-currency, prefix the topic title with the word "Closed" and the date on which it was closed.

- *Marking Questions as Answered*. Discussion topics raised as questions should be marked as answered when the appropriate answer has been given. Either the original topic author needs to do this, or one of the community owners.

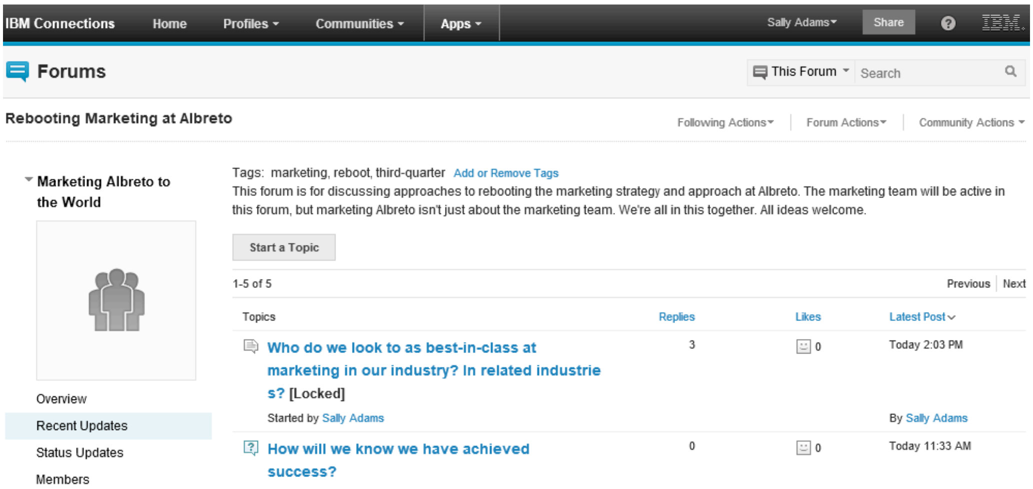
- *Highlighting the Impacts*. Point to the impact a topic had in your organization. If the discussion led to the revision of an organizational policy, it's good to say that. The people who were involved in the discussion at the time will recall what happened, but it's good to state the wider outcome of the discussion—because it shows that the forum is a real, valid, and essential part of organizational life. Otherwise over time people will forget, and new people won't know anything about what happened.

- *Enhancing Findability of Key Topics*. Add relevant tags to the discussion topics to enhance findability. This ensures that the experience conveyed in the discussion thread has a higher likelihood of being found by people requiring access to the original material and to the people who were involved in the discussion.

- *Summarizing Topics and Comments*. A summary post that draws together what was said in a specific topic can point out the main lines of the discussion and the decision that was made (see Figure 5-8). This saves new people who come across the thread from having to read through the entire discussion thread just to get a sense of what was discussed. A summary written by someone who was involved can greatly enhance the future usability of the forum.

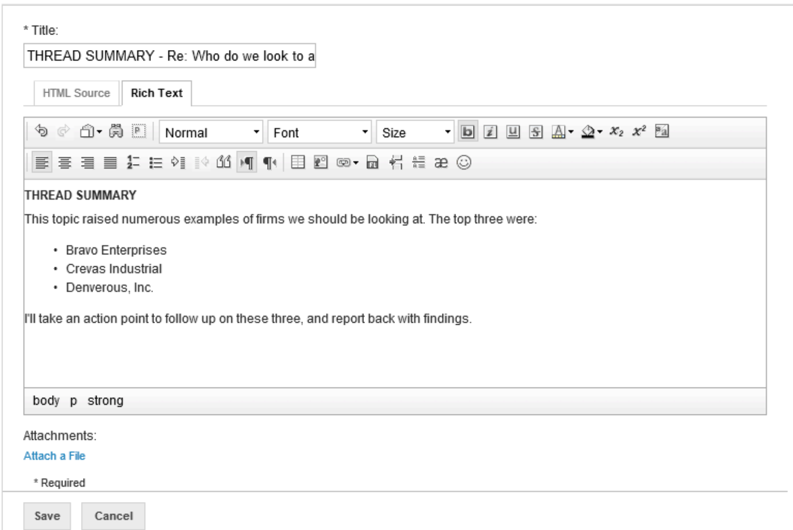
- *Thanking Participants for their Involvement*. Thank the leading discussion participants for their involvement in the discussion, but do it without squelching their original motivation for being involved. For example, calling the discussion an "exercise" in getting people's input can signal that you weren't really serious. Equally, claiming that everyone just reinforced what you already knew diminishes their contribution and will weaken their resolve to contribute further.

Figure 5-7. Locking a Discussion Topic



Locked discussion topics are no longer current. This signals which topics are of current interest, clearly setting an expectation about the currency of discussions.

Figure 5-8. Publishing a Summary Discussion Post



Summarize the main points in the discussion thread to simplify future access to the discussion. It means that people don't have to unnecessarily read through the whole thread just to get a sense of what was said or decided. Change the title of the reply to indicate it is the Summary of the thread.

Closing Comments on Holding Discussions with IBM Connections

As we bring this exploration of holding discussions in IBM Connections to an end, let's draw out some closing comments.

- *Being Open to Serendipity and Diverging Perspectives*. Opening a forum for widespread input from employees will raise ideas, perspectives, and recommendations that will diverge from your team's current way of working. There will be some messiness in the ensuing discussions, especially when your team dislikes the input it is getting. Once you have begun, however, you will need to stay the course. If you are not going to demonstrate real openness to the ideas of others, and are planning on merely going through the motions, give up now. Using great technology to hold discussions is a waste of time if you lack the ears to hear.

If you are not going to demonstrate real openness to the ideas of others, and are planning on merely going through the motions, give up now.

- *Stimulating Focused Discussion by Creating Separate Forums*. One of the capabilities in the Forums tool is the ability to create multiple discussion forums. This means that you can have one Forum in a community (or even standalone) with separate areas for focused discussions. If you give each forum a specific title, you can drive a focus on specific topics within each forum, getting away from bland and meandering discussions. To create a second (or third) forum in the tool, open the Forums tool, click into the Forums tab along the top, and then add another forum. Remember to associate new discussion topics with the appropriate forum.

- *Stimulating Serendipity By Just Using One Forum*. On the other hand, there is something to be said for having only one forum in a community, and thereby forcing people to see what everyone else is writing, thinking, and discussing. Putting tags on discussion topics still provides a way of filtering the list of topics to get to a shortened, more focused, and highly relevant topic list when that's important. But at all other times, there is just one integrated list of topics. If you are contemplating taking this path, the line of thinking goes like this: the community provides enough commonality to attract people with common interests, and therefore it is likely that the topics in the discussion forum should interest most people. Artificially separating them into distinct forums reduces some of the potential magic in stumbling across a discussion thread you weren't looking for—and yet it solves the exact problem you have.

In closing, providing enhanced ways of holding discussions through IBM Connections can result in significant benefits. We have looked at the practical steps involved in doing so throughout this chapter, and highlighted the essential human disciplines too.

Case Studies

Let's look at a couple of organizations that have taken advantage of the new capabilities in IBM Connections to support a new way of holding discussions.

Sika Group

In business for over 100 years, Sika Group is all about sealing, bonding, damping, reinforcing, and protecting load-balancing structures. Headquartered in Switzerland with subsidiaries in 76 countries, its more than 15,000 employees design, create, and market new technologies to support customers in construction and various industry sectors. As the company has expanded its operations and become more geographically distributed, there was a great need to provide up-to-date product knowledge to Sika employees, facilitate joint learning, and enable staff to quickly identify and interact with experts. The collaboration team of Sika's Group IT saw the possibilities in using IBM Connections to support better collaboration and innovation, and one business unit started a pilot of Connections in 2011. The pilot quickly moved from an initial group of 250 employees to wider participation from 2,000 employees. The use of communities that cross traditional business unit boundaries and bring people together has been a major focus at Sika.

Sika had a great need to provide up-to-date product knowledge to its employees, facilitate joint learning, and enable staff to quickly identify experts.

Paul Haag, a chemist and now an internal IT consultant in the Sika Automotive business unit, and a leading champion for the use of IBM Connections at Sika, commented on one of the new communities:

> *When one of our experts shifted from Switzerland to China, he wanted a way of sharing his product knowledge within Sika. We created a community called After-Market Glass Replacement, and he has been able to share what he knows about products available from Sika and its competitors. Sika staff participating in the community are able to ask questions and get answers in the discussion forum, rather than relying on email messages.*

Sika's approach to the use of IBM Connections has resulted in other benefits for the firm as well. Recently a sales executive from Germany received an order from one of their customers in Spanish, and given he could not speak Spanish was unable to decipher it. As he was visiting another Sika office at the time he didn't have his normal support network available, but a quick search of Profiles in Connections turned up a local staff member who could speak Spanish. Since that man was Italian, it was a surprise even to other local staff that he had Spanish-speaking skills. Without Connections, no one would have known of the resources available in the same office. The order would still have been translated some other way, but Connections enabled a more rapid resolution.

Orica Limited

Founded in 1874, Orica is a global company with operations in over 50 countries. It offers products and services for the mining and construction industries—primarily explosives. With 15,000 employees worldwide, there is a lot of scope for sharing ideas, building connections, and bringing new solutions to market.

The Technical Services and R&D teams in Orica are composed of around 300 technicians, engineers, and scientists. As employees of the world's largest explosives manufacturer, they are at the forefront of their field, with members often facing unusual or difficult blasting problems they have not seen before. The group is widely dispersed around the world, with some individuals operating as the only representative in their country.

Martin Adam, the manager of the Technical Services team in Asia, has been with Orica for 13 years, and having worked across three of Orica's five global regions, he knows a lot of people. This makes him a key connection point within the firm. Martin found that his team members were making extensive use of email to request help for pressing issues, to hold discussions, and to find out if anyone knew something about a topic—for example, asking Martin if he'd seen a particular problem before or knew someone who had.

Martin found this type of contact to be really inefficient. Firstly, it relied on him knowing where to direct the query—which sometimes he didn't. Secondly, once Martin directed the query to the right person, the resolution of the problem was hidden between the two people. Nobody else ever got to find out about the exchange. If another engineer came across the same problem again, the whole cycle had to be repeated.

In seeing how ineffective this approach was, Martin created a forum in IBM Connections to enable all of this discussion to move out of email. Sharing information more openly was a key emphasis. Here's where the forum is at:

- Almost everyone in the Technical Services and R&D groups is a member.
- There is activity in the group most days, but Martin estimates 95% of the activity comes from a small core of about 20 people.
- Some members find it difficult to participate because they don't have adequate English skills to read or contribute to the forums.
- Working in very remote countries makes it difficult for some group members to actively participate in the forum. Internet access and bandwidth are often poor.

Martin recognizes that expanding the initial success he has achieved within his group to more of the company is going to require new strategies, more executive support, and better education on the possibilities of IBM Connections.

Advanced Concepts

Holding discussions in IBM Connections benefits from an awareness of a few advanced concepts. We are going to consider four concepts in this section.

Pre-Structuring the Conversation

Conversations in a forum can be pre-structured or emergent (or a mix of the two). The difference between the two main types are:

- *Pre-Structured Conversation*. The conversation task is divided into a series of sub-elements, and particular people are tasked with talking through the issues surrounding their conversation task. Specifically this means that the forum owner will create the top-level discussion threads in the forum, and request that certain people put most of their emphasis on one or two threads.

- *Emergent Conversation*. The conversation tasks emerge from interaction between people. As new aspects of the conversation are raised, a new discussion thread is started in the forum, and those people with an interest in the thread will contribute their thinking. This means the forum owner doesn't create the discussion threads, but rather the forum as a place for the discussion to emerge.

While there is scope for both forms of conversation in a forum, and one could make a strong argument that emergent conversation is the best form, there are times when pre-structuring the conversation is worthwhile. Specific instances include:

1. *To Cope With Time Limits*. If there is only a short amount of time available for the conversation, pre-structure the conversation to ensure the key aspects of the topic are covered, rather than leaving it up to chance.

2. *To Force Different Thinking*. You know that one or more discussion participants will take a particular line of argument, but you want them to consider the pros and cons of another approach. Pre-structure the conversation and task them with a different sub-element than the one they would naturally deviate towards.

3. *To Encourage Adoption*. It's early days in the life of the forum, and you want people to first learn the mechanics of being involved, and only then to grow into the role of proposing discussion threads. Pre-structure the conversation to give them that opportunity.

In summary, pre-structuring the conversation in a forum can be a beneficial approach under certain circumstances. In a mature forum, however, you should expect to see mostly emergent conversation, because the participants in the forum have a vested interest in making the discussion work, even though they are not an "owner" of the forum in the formal sense of the word.

Overcoming Learned Blindness

As people develop expertise in their chosen field, it's common for them to identify the strategies, tactics, and approaches that work best. Success becomes self-reinforcing, and ideas that don't align with the best patterns are quickly rejected. As long as the underlying conditions remain unchanged, success keeps rolling in. There's a danger, though, to this highly tuned engine of productivity. As conditions change, success starts to slip away, and those in power are unable to rectify the situation. They want to keep doing what worked previously, and are unwilling to entertain new ideas.

People face this dynamic when setting up a discussion in IBM Connections. If you have a topic to explore, or a decision to make, it's highly efficient to limit participation to those who will reinforce the current paradigm. The discussion will unfold along familiar lines, because the invited parties already have a common approach, the same information base, and have been trained to see a particular pattern unfolding. It's likely that conflict will be minimized, too, because all the sharp edges between people will already have been resolved. It's a safe and efficient discussion, with an almost pre-determined conclusion.

> If you have a topic to explore, or a decision to make, it's highly efficient to limit participation to those who will reinforce the current paradigm. But it's not always effective.

On the other hand, if it's effectiveness you want, try inviting people outside of the normal circle to take part. Or take the really radical step of opening the discussion to anyone who has an interest in what's being discussed. Connections offers the opportunity to extend the right to take part in discussions to a wider group of people, without having to know in advance who to ask. As a greater number of people gain access to Connections, someone is going to stumble across your open discussion forum, start poking around in the current topics, and will then make some tentative comments from a totally different point-of-view. How you respond will dictate whether they become more engaged, or leave enraged.

If you truly want engagement, swallow your pre-conceived ideas of what the right decision looks like in this case and ask them to explain their point of view in more depth. If there's a new angle that's worthy of real investigation, create the conditions in which that can be best done. Perhaps it's an extended phone call. Perhaps it's an invitation to the new person to come by head office for a week for a series of meetings. Perhaps it's giving them a budget to go off and do the detailed work to make their case more robust for wider presentation.

Of course, such an approach is costly in time and money. It will be easy to dismiss them as an annoyance. They leave enraged at your incompetence. But all is well—until the changing conditions prove them right. Efficient or effective—sometimes it is your choice.

Quieter People—More or Less Involvement?

The great rule of thumb about people is that everyone is different. Without attempting to define a grand unified theory about everyone under the sun, it's worth contemplating whether quieter people will tend towards more or less involvement in an online discussion forum. Here's some points for thinking about this issue:

- Quieter people may be quiet due to shyness, introversion, or a dislike of combative verbal argument. If they are shy, shifting the discussion out of a meeting room that demands quick verbal skills into a discussion forum that allows for more pre-response contemplation may give them greater freedom of participation. A similar dynamic may occur for introverts. They may see an online discussion forum as engagement with ideas and concepts—something that usually gets them going. For those that dislike combative verbal argument, that will naturally be reduced in an online discussion forum, but it is essential to keep the tone of the online conversation respectful.

- Since online discussion forums use the written word as the medium of conversation and give people more time to think about their response, it's likely that quieter people will have more involvement in the discussion. Writing their thoughts is more comfortable for many quieter people, and being able to consider their response before committing it to everyone else allows for a more thoughtful dynamic to emerge.

- If your team or group has many noisy people who are quick to speak their mind—both in a face-to-face meeting and in an online discussion forum—quieter people may keep their peace and remain quiet. It's not that they lack the mechanical skills of how to participate in an online discussion, but they may interpret the readily available chatter from everyone else as a signal that they don't need to say anything. Their point of view is bound to be espoused by someone else, so they don't need to do it themselves.

- When someone has been quick to propose a way forward, and the team or group has rallied around that approach, a quieter person with a different perspective may be unwilling to speak up because no one will listen. The quieter person may hold a brilliant insight to re-frame the whole discussion, but without a sense that others would be willing to listen while they explain their point of view they may just keep quiet. If you think this might be happening, offer the necessary support.

The key to the involvement of anyone and everyone in a team or group is to stay aware of who is and who isn't speaking up, and by implication what is and isn't being said. In a face-to-face meeting that's being dominated by a few big talkers, a skilled facilitator will notice the quieter people and during a food or drinks break will ask if they have a point of view to contribute. Follow the same principle of intentional observation and quiet intervention in your online discussion forums.

Online Discussion Versus Face-to-Face Discussion

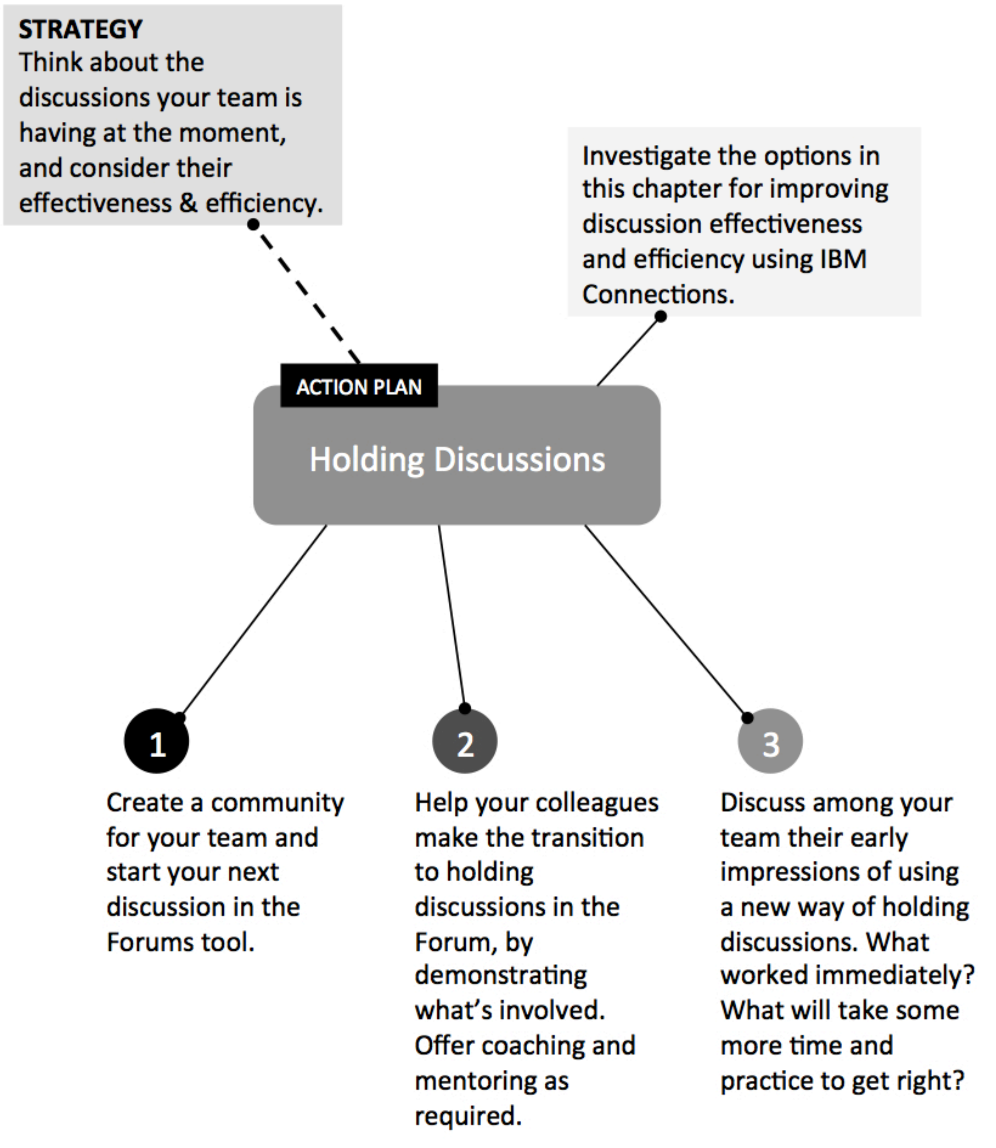
The dynamics of an online discussion in IBM Connections are different to those in a face-to-face discussion (whether held in person or by video-conference). That doesn't make one right and the other wrong; just different. It is essential to consider the dynamics of each discussion modality, and choose the right one for any given discussion.

Figure 5-9. Analyzing the Dynamics of Discussion Modalities

Online Discussion	Face-to-Face Discussion
Wider involvement from people across the firm is possible. You don't have to be at a specific place to participate.	Only those people who can attend the discussion can take part.
People can contribute their ideas from anywhere, and at any time. The discussion is open for contribution beyond the confines of the face-to-face meeting.	The discussion is time-bound, which helps with focus. But once the time is up, the discussion is over, unless a second meeting is convened.
People have time to think about their answer before replying, and will often give a more balanced perspective. Equally, they may hold back from sharing radical and truly insightful ideas. This can lead to more responses around an average sentiment, and remove vital insights.	People are expected to jump into the fast flow of discussion. There is little time to compose an answer before stating it, and people's passions can be stirred thereby stimulating creativity and innovative thinking.
The discussion is stored for future reference in its native, raw form. People a year from now can review the contours of the discussion. What's said contributes directly to the knowledge base of the firm.	The discussion is ephemeral; once the discussion is over, the contours of the discussion are lost. Minutes may be written up, but these are often a sanitized version of what was decided, not how.
The discussion is in written text, which is easy to scan, and if required, to get translated into another language. But you can't read body language or hear vocal intonation to help understand what's being said.	Participants have a wide band of communication available, including the words spoken, body language, and vocal intonation. This makes for high quality communication.

IBM Connections enables wider involvement in a discussion from people within the firm, and captures the contours of the discussion for future reference. But in comparison to a face-to-face discussion, it can take longer to reach a conclusion, and people may not contribute such creative ideas due to having more time to think about their answers.

Action Plan


STRATEGY
Think about the discussions your team is having at the moment, and consider their effectiveness & efficiency.
Investigate the options in this chapter for improving discussion effectiveness and efficiency using IBM Connections.
ACTION PLAN
Holding Discussions
1
Create a community for your team and start your next discussion in the Forums tool.
2
Help your colleagues make the transition to holding discussions in the Forum, by demonstrating what's involved. Offer coaching and mentoring as required.
3
Discuss among your team their early impressions of using a new way of holding discussions. What worked immediately? What will take some more time and practice to get right?

Summary

Discussions are a common form of collaboration between people, and there's an opportunity to increase both discussion efficiency and discussion effectiveness by transitioning discussions from email messages to a Forum in IBM Connections. In this chapter we have considered the cost of holding discussions through email messages, along with how to hold an effective discussion in IBM Connections. We concluded with a number of advanced concepts around holding discussions, such as how to create a private forum for a discussion, overcoming learned blindness by being open to different perspectives, and the different dynamics in online versus face-to-face discussions.

> There is an opportunity to increase both discussion efficiency and discussion effectiveness by transitioning discussions from email messages to a Forum in IBM Connections.

In the next chapter we take a short break from talking about collaboration scenarios, and deal with a topic that has now become essential in your use of IBM Connections—setting up your profile. After doing so, the next scenario of sharing team and organizational updates is examined in Chapter 7.

[1] Edward Bulwer-Lytton lived from 1803-1873, and as well as being a politician, wrote poetry, plays, and novels. See en.wikipedia.org/wiki/Edward_Bulwer-Lytton,_1st_Baron_Lytton

[2] This analysis is based on some work from a few years ago. See my blog post from January 2007 entitled *Unresolved Issues with Email: Confusion in Conversation Flow* at currents.michaelsampson.net/2007/01/unresolved-issu.html. See also *Unresolved Issues with Email: Confusion in Conversation Context* at currents.michaelsampson.net/2007/01/unresolved-is-1.html.

[3] In the Four Stage Model of User Adoption presented in my book *User Adoption Strategies (2nd Edition)*, the fourth stage is called Making It Real. The emphasis of the fourth stage and the various strategies within it are about making a new collaboration tool "the place where work gets done." While Step 5 in this chapter—Stimulate Participation, and Be Involved Yourself—doesn't correspond directly to any one of the strategies in the Making It Real stage of user adoption, it is conceptually and philosophically-aligned with this whole fourth stage. See www.michaelsampson.net/useradoption.html for more details on the book.

[4] Replying by email to a topic in a discussion forum was added in Connections 4.0. Support for this capability is turned off by default, and must be enabled by your Connections administrator.

Chapter 6.
Setting Up Your Profile in IBM Connections

What are you passionate about?[1]

Joshua Fields Millburn and Ryan Nicodemus

We have arrived at a point in this book—and more importantly a point in your journey in doing business with IBM Connections—where we need to step aside momentarily from the collaboration scenarios we are discussing. There is a supporting idea we need to discuss and that you need to do something about, and if we don't deal with it now, its absence will cause various negative outcomes as you start working through the remaining seven collaboration scenarios. That topic is setting up your profile in IBM Connections.

In the three collaboration scenarios we have already examined, for the most part you have been interacting with people who already know you. In the scenarios that follow, you will be increasingly interacting with people who don't know you and have never met you. Therefore having an up-to-date profile in Connections is essential in order to reap some of the collaborative and human benefits of doing business with IBM Connections.

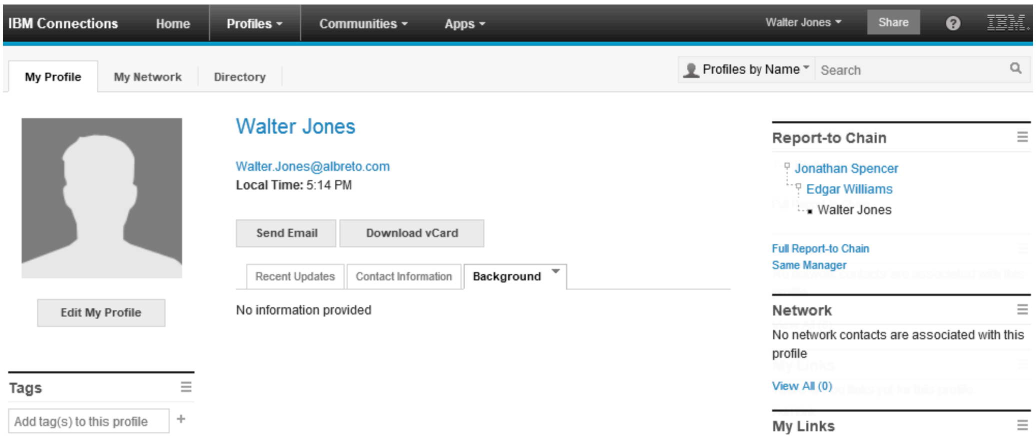
In this chapter, we will:

- Define the problem of not having your profile set up in IBM Connections.
- Look at what is possible in setting up your profile.
- Lay out what should be the minimum standard for a profile for everyone using IBM Connections.
- See the difference experienced by your colleagues as a result of you having set up your profile. And how that will ultimately help you.

The Problem of a Person Without a Profile

Everyone using IBM Connections has a profile—a glorified directory listing that says who the person is, shows what they look like, and lists contact information. In Connections, the ability for each individual to fill out their profile with detailed information about who they are leads such a profile to be called a "rich profile." It's information rich, and has lots of flow on benefits. However, unless your IT department has automatically populated your directory entry with information from current IT and HR systems, it is likely that your profile is empty. It will look something like the profile shown below.

Figure 6-1. The Bland Default Profile



Your default profile will have very little information in it unless you add it, or unless some of the information has been populated automatically from other IT and HR systems.

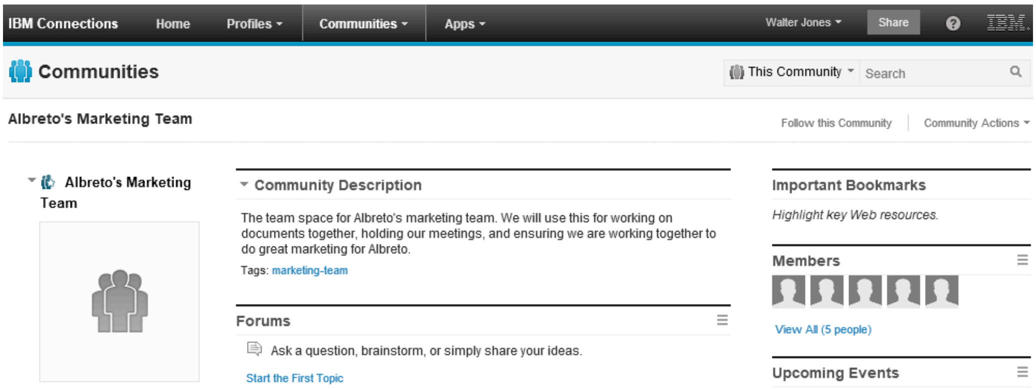
Have a look at that photo of you, which shows throughout Connections. The default photo for everyone—you included—is a light grey outline of a human head and shoulders set against a dark grey background—reminiscent of the type of poster used in gun arcades for practicing shooting accuracy. That is not the type of image you want to portray.

Information from your profile is displayed in a variety of places throughout Connections, including the following three areas:

- *Community Membership*. This is the members list in the communities to which you belong (see Figure 6-2). The grey and colorless "photo" is shown for each member who has not filled out their profile. It's not a good look.
- *Business Card*. When hovering over a name, you can click to view their business card in IBM Connections. The grey and colorless photo is displayed there.

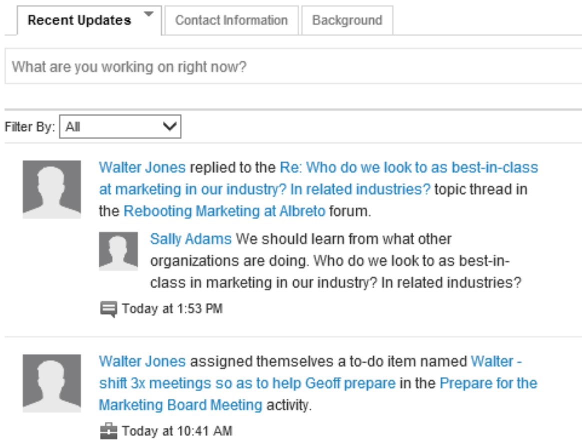
- *Status Updates*. When posting a status update, or when an activity you have done automatically generates an activity alert, your profile photo is included (see Figure 6-3). If you haven't set up your profile, a grey and colorless "photo" of you will be circulating.

Figure 6-2. Group Members Are Grey and Colorless



Your profile photo shows in the Members area in the communities to which you belong. If you have a grey and colorless photo, that will show to the other members of the community.

Figure 6-3. Your Profile Photo is Displayed in Status Updates



Your profile photo shows in Status Updates throughout IBM Connections. If everyone is grey and colorless, it means that people can't see the real person behind the update.

In practical terms what this leads to is the creation of an impersonal, non-human, and unsocial system. People are portrayed as grey and colorless, without life, vitality, and no personal style. Thankfully with 10-15 minutes of effort on your part you can banish grey and colorless forever.

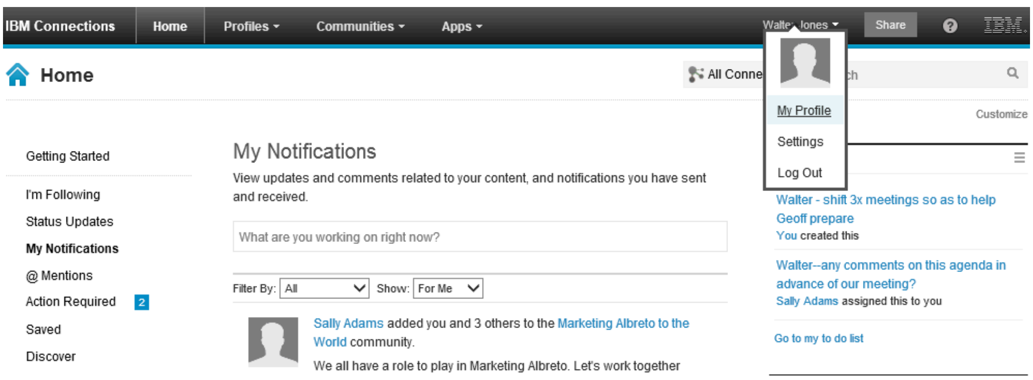
Becoming a Person with a Profile

It is very easy to set up your profile, and will require only 15 minutes of investment at this point. As things change that have relevance for people trying to learn about you or make contact with you, come back and update your profile. It is probably going to take you longer to read this chapter than to update your profile—it's an easy but essential task.

Step 1. Open Your Profile in Edit Mode

To set up your profile, click on your name near the top right hand side of the screen in Connections, and then click *My Profile* in the drop-down list. Once your profile opens, click *Edit My Profile* under the grey and colorless photo to open your profile in edit mode.

Figure 6-4. Open Your Profile from Your Name at the Top of the Screen



Your default profile in IBM Connections is bland and uninteresting. Adding details about who you are and what you do brings color, vibrancy, life, and possibility in the use of Connections.

Once in edit mode, there are at least four tabs shown in your profile:[2]

- *Contact Information*. Specific details on how to make contact with you, such as your address, phone number, an alternative email address, and your time zone.

- *About Me*. A place for more detailed information about you. You can write a paragraph or two (or ten) to describe who you are and what you do.

- *Photo*. A business appropriate photo of you, to do away with the grey and colorless rendition shown by default.

- *Pronunciation*. A way of sharing an audio file of how to pronounce your name. This is excellent for other people if you have a name that is difficult to pronounce, or work in a global organization with people who speak different languages.

Step 2. Enter Your Contact Information (2 Minutes)

Click on the *Contact Information* tab in your profile to enter up-to-date contact information. The information you can enter is fairly generic contact information, and will only be displayed to people inside your organization—or to specific external people who are given secure access to your organization's installation of Connections. It is a two minute job to enter all of the possible information on this tab—and some of the fields may already have been automatically filled in from other internal directory and HR systems. Click *Save* when you have finished.

Figure 6-5. Enter Your Contact Information

Enter as much Contact Information that you want to share with other people inside your organization. Leave blank any contact details you don't have, or don't want to share.

Step 3. Write One or Two Paragraphs About Yourself (2 Minutes)

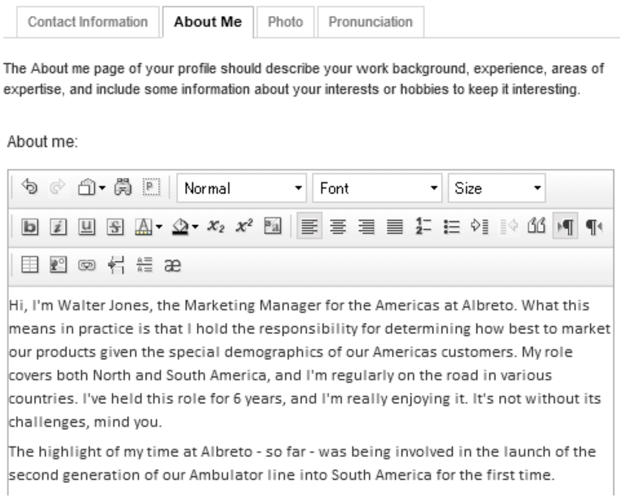
Now you have entered your contact information, click on the *About Me* tab. The first area under this tab—the large field called About me—provides a place for you to write one or two (or more) paragraphs about your work and professional life. Go ahead and write one or two paragraphs as the starting point for your About me section. If you have already written such information on your LinkedIn profile you can copy-and-paste that into here.

Information that is good to include in the About Me section is:

- What your job title actually means. Generic job titles like "Business Analyst," "Programmer Manager," and "Market Manager" convey minimal insight into what you actually do. Write a paragraph about what being a business analyst—or whatever you are—means day-to-day. You are the best person to explain what you actually do, and it will help your colleagues immensely.

- An initiative or project you were involved with that represents your great work. If your organization has recently expanded into China, for example, and you were on the project team that developed the strategy for doing so, put it in your profile.

Figure 6-6. Write a Brief Overview of You and Your Work



Write one or two paragraphs about your work, noting what you do, which parts of your work are particularly inspiring, and perhaps a project you are especially proud of.

Click *Save* when you have finished.

If you are struggling to know what to write about your work in this section, think about it this way. If you were sitting down over coffee with a new colleague and were talking about your work, what would you say to him or her? That is what you want to write in this area.

Step 4. Share Some Background Information (2 Minutes)

There is a second field on the About Me tab called *Background*. This field provides an optional place for giving some contextual information about you, how you prepared for the work you are doing now, and perhaps a note about your hobbies or interests. The overriding principle is any information you share here needs to be business-appropriate.

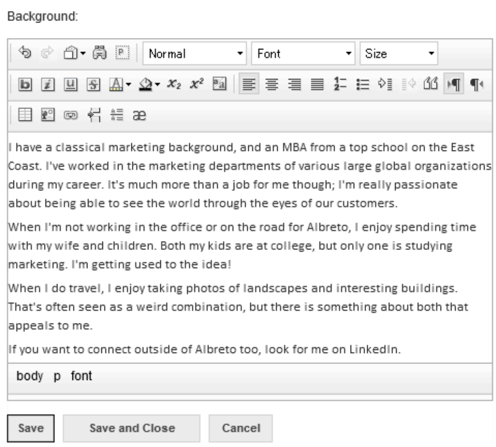
If you are comfortable sharing background information with your colleagues, here are some good areas to write about briefly:

- Your educational background, if that is relevant to your work. Some job roles require specialized training spanning many years, and if you have such a role, it is good to note your educational background. That will give assurance to your colleagues and potential contacts that you have the required certifications.

- What you enjoy doing outside of work hours. If you are into running, rock-climbing, or reading poetry, you can note that here to give people a wider sense of who you are and what you are interested in. People who have similar interests will view you as being more trustworthy as a result.

- Your contact details on external social networking services, such as Facebook, Twitter, and LinkedIn. This provides an opportunity for people to connect with you outside of work—so only share these details if you want that to happen.

Figure 6-7. Share Some Background Information



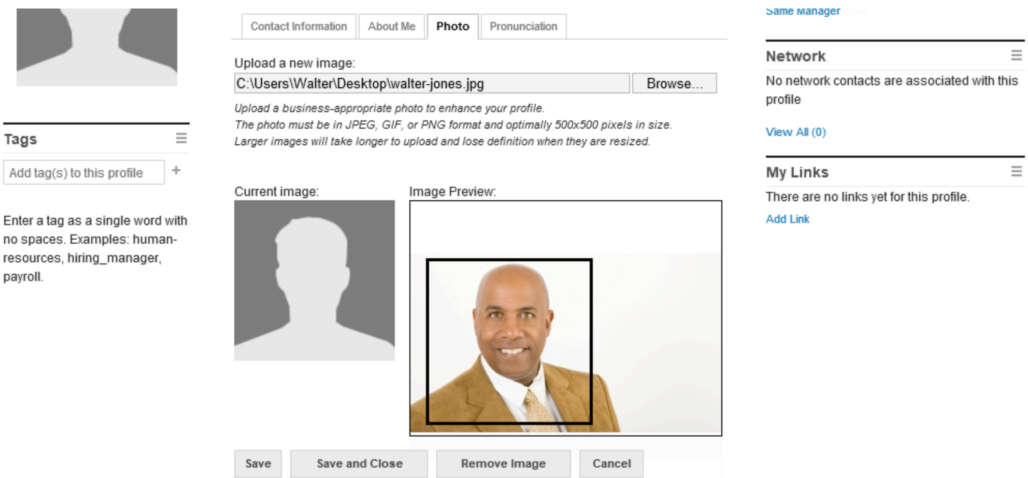
Share any business-appropriate contextual information about yourself that you feel comfortable sharing with your work colleagues. Your educational background, along with a brief note about your hobbies and interests are ideal topics for the Background field.

Click *Save* when you have finished.

Step 5. Take and Upload a Photo of Yourself (2 Minutes)

Use the digital camera on your iPhone, smartphone, or actual digital camera to take a business-appropriate photo for your profile. Once you have the photo, click the *Photo* tab in your profile, and then click the *Choose File* button. Find the photo on your computer, and once the image preview is shown in IBM Connections, select the best part of the photo to use. Do note the restrictions about file types, and pixel size, as these will constrain what you can and can't do. When you have finished, click *Save*.

Figure 6-8. Upload a Business Appropriate Photo of Yourself into Your Profile



Upload a business-appropriate photo of yourself to your profile. This gives people a real sense of the person behind the words, and adds life and color throughout IBM Connections.

While your iPhone or digital camera will take a perfectly adequate picture for your profile, there are a couple of higher quality approaches you could take:

- Some firms arrange for a professional photographer to be onsite for a couple of days during morning, lunch, and afternoon breaks in the café. There is an open invitation to come and get a great profile picture taken. The physical reality of a photographer being in the café creates interest in the use of IBM Connections in general, and of profiles in particular.

- Pay a professional photographer to take a "public relations" photo of you. Anyone who manages other people should have a good professional photo readily available, and a professional photographer has the right equipment and experience to take a stunning photo of you.

Clearly if you take one of these approaches it is going to take you more than two minutes to get the photo, but once you have it, take your two minutes to upload it to your profile.

Sidebar: Add Pronunciation Information for Your Name (Optional)

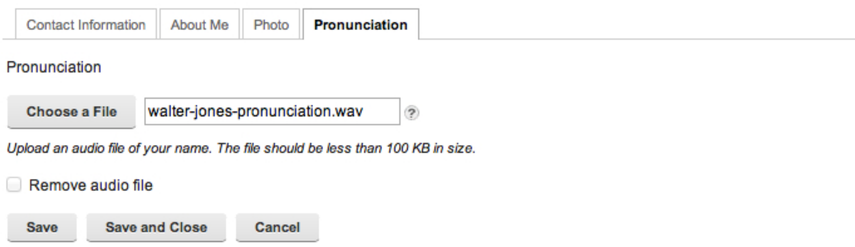
In *How to Win Friends and Influence People*, Dale Carnegie recounts the story of Sid Levy getting ready to visit a customer called Nicodemus Papadoulos.[2] Most people called him "Nick" due to his difficult to pronounce name. Sid spent time in advance of the meeting learning how to pronounce Nick's full name perfectly, and made a flourish of greeting him as "Mr. Nicodemus Papadoulos" when they did meet. Nicodemus was shocked, and commented that this was the first time anyone had ever pronounced his name correctly in 15 years of doing business in the United States.

You may have been blessed with a common name that is easy to pronounce—or so it seems to you—but as our organizations expand and become more culturally diverse, one of your current or potential colleagues is going to struggle to say your name properly. The pronunciation details in your profile can save your colleagues from this stress, and give you a quick-and-simple way of helping everyone say your name correctly. Here's how to use it:

- Record yourself saying your name. The file that you upload can be a maximum of 100KB, and must be saved as a WAV file. On a Windows computer, use the Sound Recorder application. On a Mac, use SimplyRec from the App Store.

- Click the *Pronunciation* tab when your profile is in edit mode, and then click the *Choose File* button. Find the audio file you just created using the pop-up file finder window, and click to select it.

Figure 6-9. Record and Upload a Pronunciation File into Your Profile



Recording a pronunciation file and saving it to your profile gives current and prospective colleagues the authoritative way of saying your name.

- Click the *Save* button when you have finished.

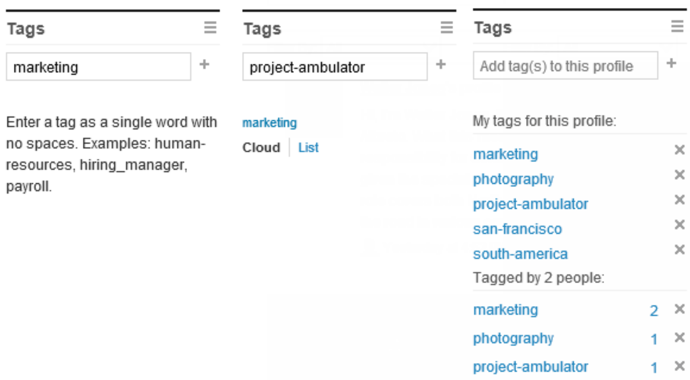
The 100KB file size limit may prove to be insufficient for your requirements—it allows you to say your name and nothing else. If you can not record enough of what you want to say and stay within the 100KB limit, another option is to record a longer file and publish it to your blog in IBM Connections. Then create a link to your blog post in the About Me part of your profile.

Step 6. Add Three to Seven Tags About Yourself (2 Minutes)

Tags are single word or short phrase descriptors that provide a brief snapshot about you. They are like the highlights that quickly describe who you are and what you do. Adding three to seven tags to your profile allows you to present your version of yourself to your colleagues, just as they also will be able to share their perspective of you by tagging your profile with the single word and short phrase descriptors that make most sense.

To add an initial set of tags to your profile, make sure you have your profile open. Find the tag box under your photo and start typing. To enter a short phrase, join the words together with an underline (_) or hyphen (-). If the tag you are typing has been entered previously, it will display in a type-ahead drop-down box to help with consistent spelling.

Figure 6-10. Add Three to Seven Tags About Yourself



Adding tags to your profile provides you with a way of describing yourself in a series of single word or short phrase descriptors. This can help other people discover your work.

Some suggestions for tags:

- Your job title, and the business unit you work in.
- Your particular professional and business interests.
- A market or geographical area you are watching closely.
- A sport you play, or a hobby you are involved with.

Saving the tags against your profile is a simple matter of pressing Enter or Return on your keyboard, or clicking the plus (+) sign on the right-hand side of the tag field. Tags you entered on your profile display under the section "*My tags for this profile.*" A list of all tags and the number of people who have contributed that tags display under the section called "*Tagged by (number) people.*" This shows the breadth of tagging applied to your profile.

Step 7. Review Your Reporting Structure (2 Minutes)

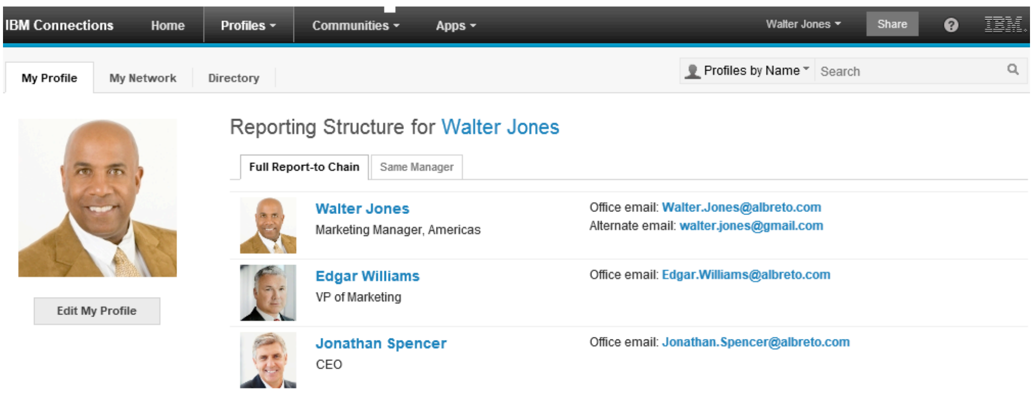
Getting a sense of where someone "fits" into an organization can be difficult. Knowing who they report to, who reports to them, and where their unit sits in the grand scheme of things is frequently opaque. IBM Connections provides a quick-and-easy way of seeing who you—and other people—report to, and then delving deeper into the current organizational design.

To review your reporting structure, there is a quick view displayed on your profile, called *Report-to Chain*. The chain gives a snapshot of your upwards reporting line. For a detailed view—which adds titles and contact details—click *Full Report-to Chain* (see Figure 6-12).

Figure 6-11. The Quick View of Your Report-to Chain

The Report-to Chain on your profile gives a quick snapshot of your upwards reporting line.

Figure 6-12. The Full Report-to Chain



The Full Report-to Chain adds details about each person in the reporting line. You can click on any of the names displayed to open the person's profile.

The reporting structure information is set automatically based on IBM Connections receiving reporting information from a corporate directory or a human resources management system. If your reporting structure is incorrect, you will need to make contact with the IBM Connections people in your IT department to get it fixed. It is not something you can manage yourself.

Step 8. Keep Your Profile Up-To-Date (1 Minute)

The final step in setting up your profile is to make a commitment to yourself to keep it up-to-date. Practically speaking, this means looking at and reading your profile once a month, and updating, correcting, fixing, or adding anything that makes sense based on what has transpired in the past month. Your profile should be a living representation of you, and as you live and move and change and learn, so should your profile.

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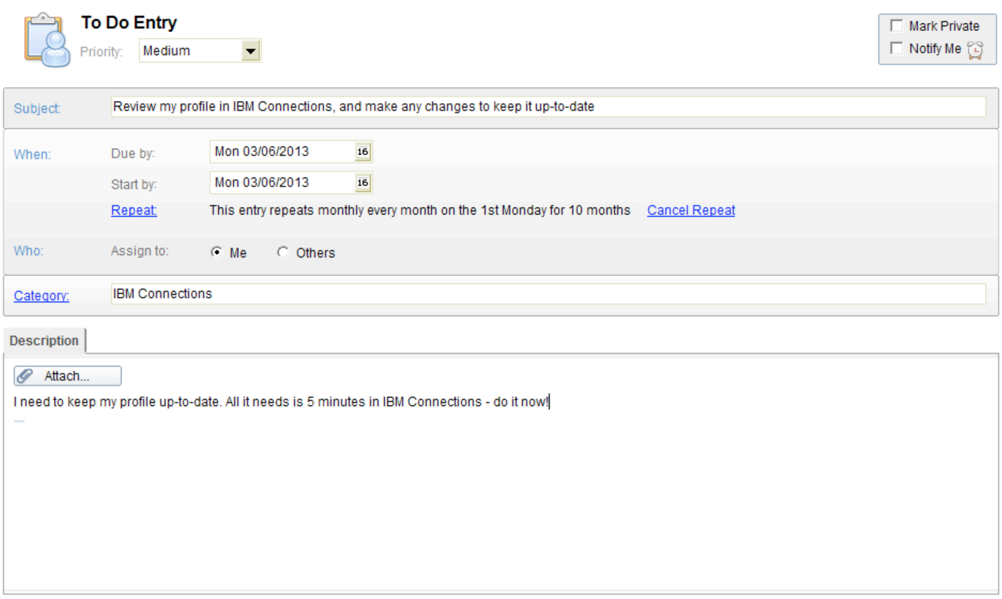
With the commitment made to keep your profile up-to-date, the tangible step is to create a reminder in your personal task management application to look at and read your profile in one month. In IBM Notes, open your mail file, and click the *New* button and then click *To Do* in the drop-down list. Give your new To Do a subject, set the due date, and create a repeating reminder for every month after that. If you set the repeat for *Monthly by Day*, and choose *2nd Monday* or *3rd Thursday* or one of the other options that falls on a work day, Notes will ensure that the date doesn't fall on a weekend.

Figure 6-13. Create a Repeating To Do For Keeping Your Profile Up-to-Date



It is important to keep your profile up-to-date. Create a repeating To Do for keeping your profile up-to-date, using your personal task management application.

Of course you could alternatively create a personal Activity in IBM Connections, and create a To Do item in your activity for keeping your profile up-to-date.

Minimum Standard for Profile Information

If your organization is embracing IBM Connections for the right reasons—and those are dependent on what your organization is trying to achieve strategically—it is highly likely that an up-to-date collection of profiles will help rather than hinder the achievement of that strategy. In line with this, it is useful to have a minimum standard for profile information, modeled by senior executives, and for it to become an accepted way of working at your organization.

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Clearly there is a lot of information that could be included in a profile, and while we don't want to discourage people from going full out and including everything, the bar for the minimum standard should be set at a lower level. At least the four items below should be included in your minimum standard for profiles:

1. *Photo*. A photo of each person, showing what they look like to aid recognizability when meeting them, as well as adding a sense of life and vibrancy to IBM Connections. Putting a face to a name is very human.

2. *Phone Number*. An office or mobile phone number for each person. IBM Connections is a great tool for creating and sustaining business relationships, but the act of picking up the phone and calling someone is powerful in a different way. One doesn't negate the other.

3. *Location*. The geographical location in which each person works. Physical location around the world quickly signals important information such as the usual work day, the current work time, the ease of communicating with someone, and opportunities for meeting with colleagues during an upcoming business trip.

4. *Job Title*. Knowing what someone does helps with classifying people in terms of their contribution within the organization. If you need to speak with someone about a corporate legal matter, reaching out to a marketing manager is unlikely to help. Job titles make clear the pathway of connection.

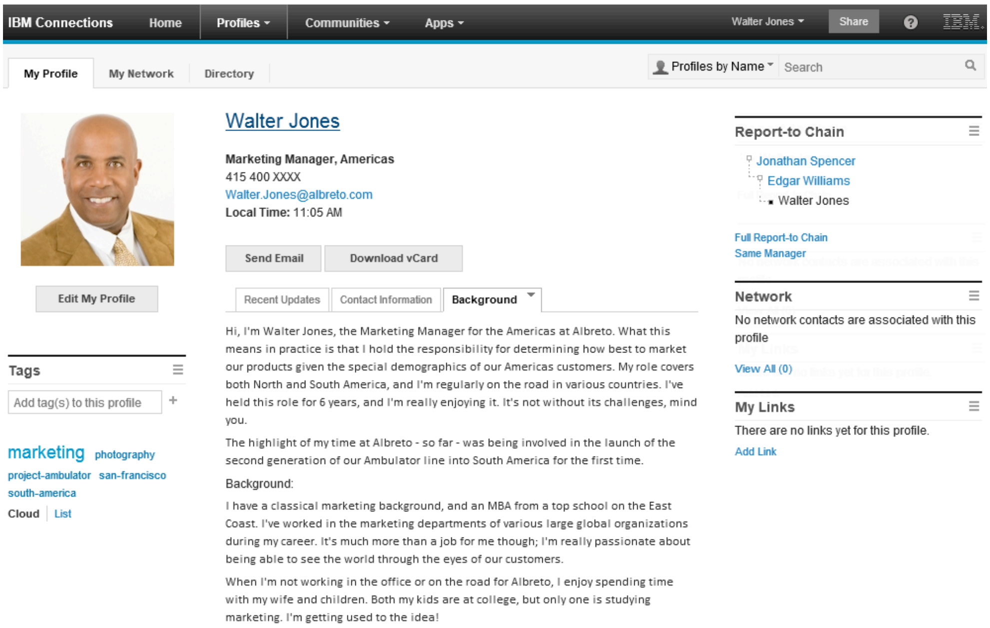
It is going to take a while to get everyone to this place, but the point above about senior executive modeling bears repeating. If your senior executives want IBM Connections to succeed, they should model the behaviors they seek from others. Their own profiles should be up-to-date with more than the minimum amount of information. Executives should be active in forums, communities, and blogs. They should emphasize to their direct reports the importance of creating a viable place for collaboration in IBM Connections. While executive involvement isn't a silver bullet for success with IBM Connections, few organizations will succeed in the face of active executive resistance.

Introducing the New You

Your 15-minute workout on your profile has produced wonders across IBM Connections. Let's quickly look at the impact.

- Your profile now reflects you as a person, and gives a sense of who you are, where you fit into the organization, and how to connect with you. Your bland profile of 15 minutes ago has been banished forever.

Figure 6-14. Your Profile Reflects the Person Behind the Name



Your updated profile displays your photo, contact information, background information, and the tags you applied to your own profile. The person behind the name now shines through.

- When hovering over a person's name in IBM Connections, people have the option to view the person's business card in Connections. With the updates you have made to your profile, the human and personal information about you is now displayed (see Figure 6-15).

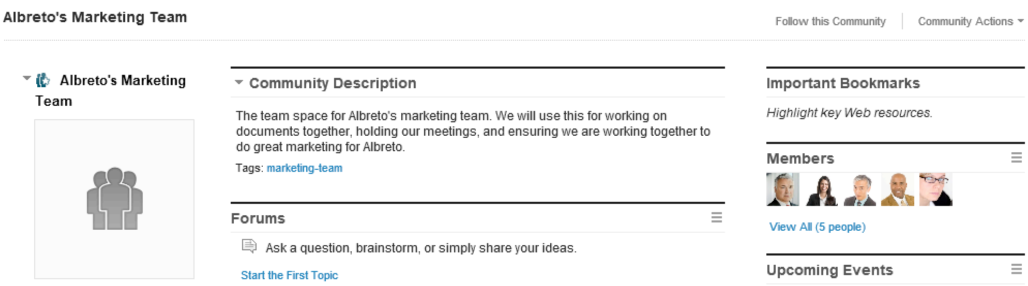
- Membership details in the various communities in IBM Connections include your photo as the immediate representation of you (see Figure 6-16). People working in the community can quickly see who else is engaged, without having to hover over each name. The photo makes it very clear, very quickly.

- Your photo is retrospectively updated across Connections, which means that any place your earlier photo was displayed has now been updated (see Figure 6-17).

Figure 6-15. Your Updated Business Card in IBM Connections

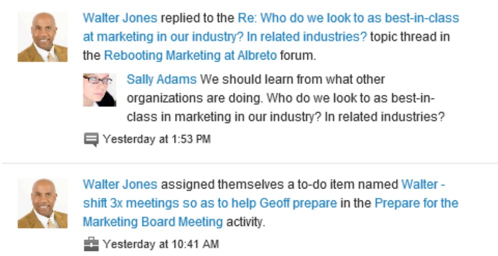
Your business card—a quick snapshot that's available anywhere your name is displayed in clickable form through Connections—offers the rich information from your updated profile.

Figure 6-16. Membership Details in Communities in IBM Connections



The picture from your profile shows throughout the communities you are involved with. Other people can see at a glance who is a member of the community.

Figure 6-17. Profile Information Displays in Updates and Notifications



Your picture is displayed in various updates and notifications throughout IBM Connections, giving other people a quick way of assessing who is doing what throughout Connections.

Case Studies

Profiles are often one of the compelling reasons for organizations to embrace IBM Connections. Let's look at how two organizations have approached the challenge of getting people to fill out their profile: IBM Rational, and SSP International.

IBM Rational

IBM Rational creates software tools to support the work of software development and delivery teams.[3] Its 3500 employees are spread around the world, and it needed a better way of bringing together the collective knowledge, experience, and understanding of its employees. Starting in 2009, IBM Rational embraced IBM Connections, and put its initial efforts into linking the discussion forums, profiles, and blogs in IBM Connections with its current wiki environment. By early 2012, IBM Rational had 15 communities for major initiatives, and more than 400 communities for organizational groups and small projects.

Darrel Rader, the Manager of Capability and Community Development at IBM Rational, has been a driving force behind the effective use of IBM Connections. Among other activities, Darrel has emphasized the importance of people having an up-to-date profile. He hasn't just left it as a nice-to-do task, however, but created numerous approaches to helping employees get their profiles set up and working effectively:

> *To help support user adoption, Rader encouraged employees to use online profiles to make their knowledge and skills known to a wider audience. He provided profile templates to guide them in creating the most effective profiles with identifying tags. This made it much easier for people to find the exact person they needed—for example, locating an Agile expert in Italy who specializes in the healthcare industry.*
>
> *Rader successfully encouraged user adoption of profiles by leading frequent, short (10–15 minutes) tagging exercises. The exercises led employees through how to tag their online profile, so they could be found quickly. In a matter of minutes, employees participating in the tagging exercises were able to add relevant tags to their profiles; for example, adding a predefined tag indicating a specific industry expertise, such as healthcare.*

Rader successfully encouraged user adoption of profiles by leading frequent, short tagging exercises. The exercises led employees through how to tag their online profile.

IBM Rational has achieved numerous benefits through its work with IBM Connections, including decreased time to resolve problems, increased transparency, and reduced duplication of investment in similar projects.

SSP International

SSP International operates food and beverage outlets in 400-plus travel locations in over 30 countries around the world, with an emphasis on train stations and airports. SSP has built a portfolio of brands, including bespoke in-house brands such Caffe Ritazza and Camden Food Co., and operates many global brands through franchise agreements, such as Starbucks, Marks and Spencer Simply Food, and Burger King. SSP's core competencies lie in its understanding of the wants and needs of traveling consumers, the delivery of a brand mix tailored for each location, and the successful operational delivery of brands in logistically-challenging travel environments.

SSP has a history of growth through the acquisition of similar operational businesses, and more recently organic development into new regions and locations. With the nature of this growth and a wide geographical reach comes the challenge of enabling people with similar work responsibilities, experiences, and interests to work together, a challenge that could not be met with current systems. In response SSP's executive team began looking for a new way to enable collaboration to drive innovation and bring people together across SSP's global business, and chose IBM Connections.

In planning its adoption strategy for Connections, SSP focused its initial emphasis on delivering a unified directory with rich profiles. Helen Crimble, Internal Communications Manager for SSP Group, describes the approach:

> *It was important for SSP to be able to bring people together from across the world, so we put a lot of work into delivering an almost-complete people directory. I designed an online survey to ask people about themselves and their work. The survey was translated into 12 languages and sent to the users identified by each country as requiring a profile in Connections. We used an alias so the survey e-mail came from the relevant country Managing Director, and appointed in-country champions to encourage survey responses. We kept in contact with our country contacts, informing them about the progress of their people in completing the survey, and the importance of getting as high a response rate as possible. We also created a league table of completion rates for the countries to encourage competitive spirit. All of the survey information about people was imported into IBM Connections, and on day one we launched with about 80% completed profiles. It was a wonderful start to our journey with IBM Connections, because our people had a new way of quickly finding other people with similar or related interests across SSP.*

Employees have embraced the new way of working at SSP, and among other tools, are using Activities for managing meetings, Files for sharing documents, and Communities for creating both project teams and learning groups. Serving the travel market means that mobility is a big demand for SSP employees, and early adopters have been quick to embrace mobile access to Connections. In summary, Connections has provided a new way of working that brings together people from across SSP's global business, and has created an environment to support SSP's current and future business activities around the world.

Advanced Concepts

We look at three advanced concepts in this section:

1. Alternative ways of getting profiles set up initially.
2. Remembering the adoption challenge with Knowledge Yellow Pages.
3. Privacy considerations for personal profiles, especially in Europe.

Let's take each concept in turn.

Other Ways of Getting Your Profile Set Up

Asking people to fill out their profiles is one approach for getting profiles set up initially. There are other approaches, too, some of which are complementary and some of which remove the need for people to do it themselves. In brief:

- *Ingest Profile Data from Other Systems*. Much of the information that should be in a profile already exists in other internal systems, including IT-owned directories and HR-owned people management systems. Don't ask people to enter it again. Set up automated procedures to ingest relevant data into people's profiles.

- *Hire a Temporary Worker to Set Up Profile Data*. Assuming you already have much of the profile data in other systems but lack the ability to ingest it automatically, give the job to a temp or student for a couple of months. He or she can trawl through the various internal systems, build a database of profile information, and when done, it can be imported into Connections.

- *Ask the Departmental Administrative Assistant to Set Up Profile Data*. Instead of a temp or student who doesn't know the people in the organization, ask the departmental administrative assistants to set up the profile data for everyone in the department. Larger departments could have multiple administrative assistants work on the task part time over the course of a week or two.

- *Add Setting Up Your Profile to the List of Induction Tasks*. When new people join an organization they are usually given a list of induction tasks to complete. Add setting up the initial edition of their profile as one of those tasks. It therefore becomes something you do on the first or second day of joining the organization.

There is a risk in using the first three approaches: your people see their own profile as irrelevant, because they have had no involvement in setting it up. If you do embrace one of these approaches, do it within a wider program of doing business with IBM Connections, emphasizing the importance of profiles, senior executive modeling, and encouraging people to keep their profiles up-to-date.

Remembering Knowledge Yellow Pages—The Adoption Challenge

A long time ago—about 15 years—Knowledge Yellow Pages databases were frequently developed at firms with tens or hundreds of office/business locations around the world, as well as thousands or tens of thousands of employees. The purpose of a Knowledge Yellow Pages system was to highlight expertise, and make it possible to find the right person to speak to about a particular matter. It was the older approach to expertise profiles championed by IBM Connections and similar systems.

The major problem with such databases was getting people to fill out their profiles.

- BP, a petroleum giant with thousands of locations around the world. Developed a KYPs in the late 1990 to help employees locate expertise. In year 1, only 12% of staff had volunteered their information.

- Pratt-Whitney Rocketdyne, a manufacturer of high-performance rocket engines. Implemented a knowledge yellow pages system in the late 1990s, but by 2006 only 25% of scientists had filled out their profile.

Making participation mandatory usually backfired. People ignored the mandate, especially when there were no consequences. Or they only participated at the minimum level—by putting in as little information as possible, or by obfuscating their expertise and ignoring demands for keeping the system up-to-date.

Participation works when people see personal value and benefit—such as when they have been able to discover knowledge and expertise from other people. Gaining personal value increases the likelihood of participation, but doesn't guarantee it. Unfortunately this dynamic creates a perverse set of incentives—those people who participate early get less value than those who leave their participation until later.

Participation works when people see personal value and benefit—such as when they have been able to discover knowledge and expertise from other people.

Newer technology approaches to KYPs do not rely on explicitly declared knowledge descriptors. The Profile part of IBM Connections (and similar tools) aggregate the tags that people apply to content they create—as wiki pages, blog posts, and documents—into tag clouds shown on the individual's profile. The intent of such aggregation is to demonstrate what different people write about, and to provide linkage from the use of such descriptors to particular instances that may demonstrate expertise. The underlying assumption is that people are more likely to write about areas they know something about, and less likely to write about areas they don't know anything about.

Privacy Considerations for Personal Profiles

The potential benefits of having access to a comprehensive set of profiles about employees include quick access to experts, identification of employees for new projects and roles, and being able to assess the contributions people are making within the organization. These rosy ideals have downsides, though, and what sounds appealing to some people can smack of personal privacy issues to others, especially for European and Asian employees.

- *Europe*. Personally-identifiable information is protected under data protection directives (they are not laws as such, so individual member states have some latitude in implementation). The European Commission has been working in recent years to align data protection rules across European Union member states. Some countries—such as France and Germany—add additional privacy requirements.

- *Asia*. Hong Kong, India, and Taiwan, among other Asian countries, have revised privacy laws in recent years. While consumer privacy is a big focus in these, they set an increasing standard for privacy of employee information.

What is involved in appropriately and adequately addressing privacy issues? Let us look at this from two angles—the business essentials, and the technology essentials. Please note that these two pages are not intended to be a comprehensive treatment of privacy considerations in collaboration systems.[4]

The Business Essentials

The first essential prescription is to get your legal department involved early in the process. Outside of whatever happens with IBM Connections, part of their remit should be to keep abreast of privacy regulations in the different countries in which your organization operates, and the translation of those regulations into appropriate policies and procedures for your organization. Note, however, that given the complexities of these issues, your in-house legal department may find it best to engage an external legal firm with a cross-border specialization in data privacy. Clearly your legal department will work with other parts of the organization to implement these policies and procedures, but they have a driving role to play. It makes an impressive statement about an organization when legal and privacy issues of new collaboration approaches and tools have been integrated from the beginning, not treated as a nearly-forgotten afterthought.

> Get your legal department involved early in the process.

The second prescription is to involve a representative group of employees in the planning activities and discussions leading up to the introduction of IBM Connections. In European countries, employees have a legal right to their private information, and take such rights very seriously. Various other countries have similar legal frameworks in place, but irrespective of what is stated at law, to encourage the principle of collaboration inside an organization you need to live the ideals of collaboration. Transparency, openness, and shared decision rights do not merely come into being because an organization implements new technology. Those ideals should be evidenced in an organization's culture long before they get a new expression in IBM Connections.

Thirdly, and your legal department will be able to give specific guidance in this area, you may need to involve external bodies in exploring the impact of new collaboration approaches and tools. There are subtle but complex differences between European countries, so it is vital to get appropriate advice for each country. Don't leave this unaddressed or neglect to deal with it. Find out what is required, and get it done.

Finally, data privacy in the United States is very different from Europe. If you will be sharing profile data of European employees with offices in the United States, you must ensure that the legal implications of doing so have been thoroughly addressed.

The Technology Essentials

In terms of specific implications at a technology level with IBM Connections, the following strategies are likely to be required:

- *Encrypting Data on Mobile Devices*. Employees accessing IBM Connections from a mobile device should be storing all data in encrypted form. This protects employees' privacy, not to mention organizational intellectual property, in the situation where a device is lost or stolen. If data from IBM Connections is being stored on thumb-drives, these too should be encrypted.

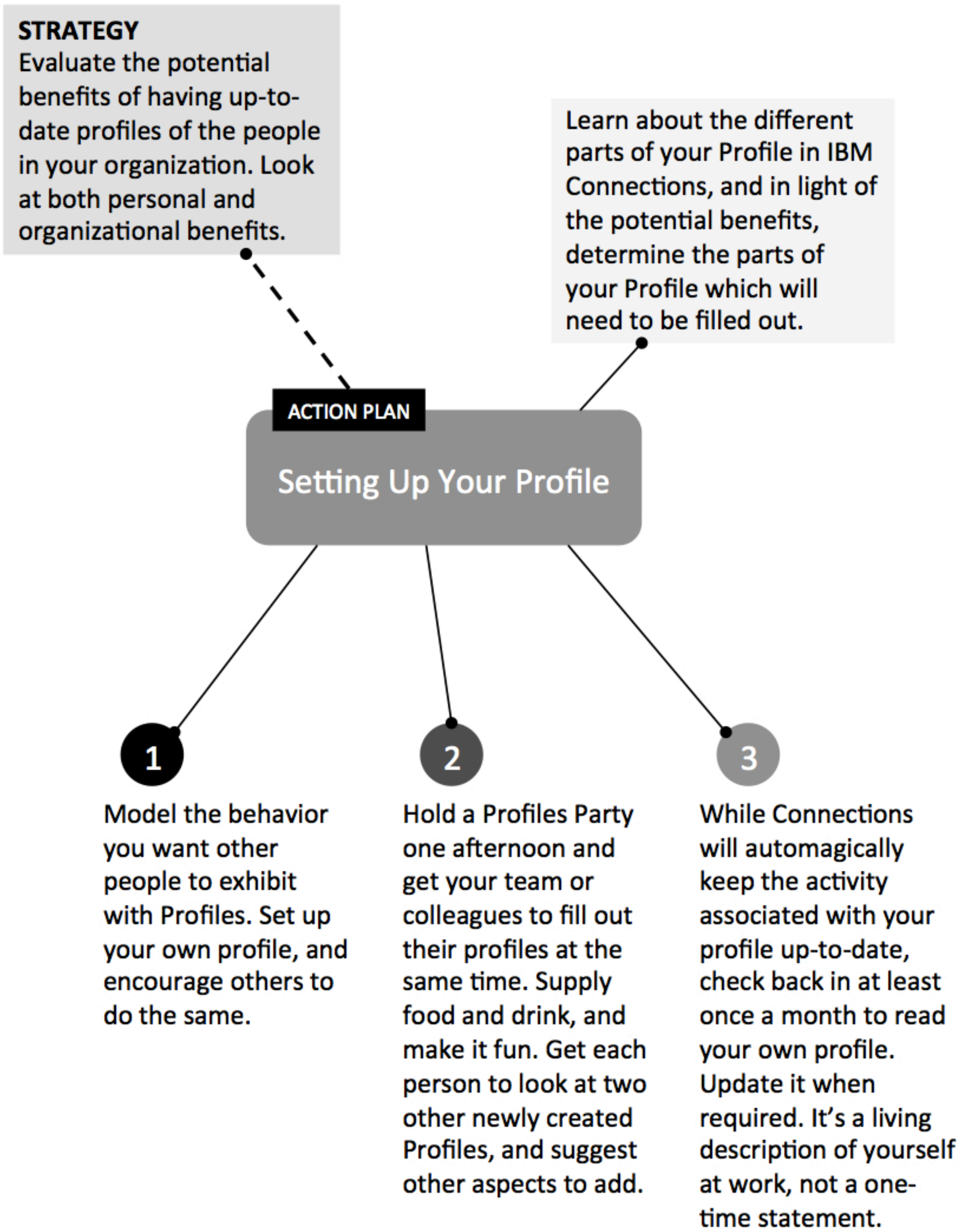
- *Wiping Data Remotely on Lost or Stolen Mobile Devices*. Mobile devices, including smartphones, tablets, and laptops are frequently misplaced, lost, or stolen. In addition to the data being stored in an encrypted format, your IT department should have the ability to remotely wipe private and organizational data.

- *Storing Data on Cloud Services with Due Consideration*. Various service providers, including IBM, offer the ability to get access to IBM Connections via a cloud service. There are various considerations to be worked through if your organization is contemplating taking this approach, such as where the data is actually stored—because this can entail a form of exporting data overseas.[5]

In Conclusion

Privacy considerations will not derail your project or make it impossible to proceed, unless you go about it the wrong way. Your employees have a moral and legal right to their privacy, so running roughshod over privacy is a recipe for disaster. Get legal guidance about what is required. Model transparency, openness, and other collaborative behaviors throughout the planning process, and put in place the necessary frameworks.

Action Plan


STRATEGY
Evaluate the potential benefits of having up-to-date profiles of the people in your organization. Look at both personal and organizational benefits.
Learn about the different parts of your Profile in IBM Connections, and in light of the potential benefits, determine the parts of your Profile which will need to be filled out.
ACTION PLAN
Setting Up Your Profile
1
Model the behavior you want other people to exhibit with Profiles. Set up your own profile, and encourage others to do the same.
2
Hold a Profiles Party one afternoon and get your team or colleagues to fill out their profiles at the same time. Supply food and drink, and make it fun. Get each person to look at two other newly created Profiles, and suggest other aspects to add.
3
While Connections will automagically keep the activity associated with your profile up-to-date, check back in at least once a month to read your own profile. Update it when required. It's a living description of yourself at work, not a one-time statement.

Summary

Setting up your profile will only take 10-15 minutes, depending on how much of it you fill out. It makes a tremendous difference to your experience of IBM Connections if other people have filled out their profile, and the same is true for them too. Don't wait around for other people to take the lead on this one—set a great example, get it done, and encourage your team and colleagues to do the same too.

> Don't wait around for other people to take the lead on this one—set a great example, get it done, and encourage your team and colleagues to do the same.

In the next chapter we return to the main intent of this book: to explore ten collaboration scenarios that can be improved and enhanced through IBM Connections. Chapter 7 addresses the scenario of sharing team and organizational updates.

[1] The quote I initially had for this chapter was the innocent-sounding "*What do you do?*," but in the finalization stages of the manuscript googled the phrase and found Joshua and Ryan's blog post on the same. What they wrote about that question, and how to rephrase it resonated with me, so I joyfully took away the initial quote (that I was never 100% pleased with) and have used their rephrasing instead. See *Life's Most Dangerous Question: What Do You Do?* at www.theminimalists.com/do/.

[2] Various third-party add-in tools for IBM Connections extend an individual's profile with further tabs. For example, Kudos Badges from ISW, a tool for accelerating user adoption of IBM Connections, adds another tab (see www.kudosbadges.com). If your organization has one or more of these additional tools installed, your profile page will look different to the one displayed throughout this chapter.

[3] This case study on IBM Rational is based on an article and video from IBM about IBM Rational's use of IBM Connections. Please see *Becoming a Social Business: The IBM Rational Story* (March 2012) at www-01.ibm.com/software/success/cssdb.nsf/CS/RNAE-8SC3FL, and *IBM Customer Testimonial: IBM Rational Labs* (January 2012), at www.youtube.com/watch?v=qz_7uukeJ8k.

[4] For another brief but complementary view of data privacy legislation in the European Union, see Martin White's research note from May 2012—*Legal Issues for Intranet Managers*. www.intranetfocus.com/wp-content/uploads/Legal-issues-for-Intranet-Managers1.pdf

[5] It was gratifying to see IBM's announcement of the opening of a European Data Center in early April 2013. Organizations in Europe wanting a hosted version of IBM Connections can now do so through a Germany-based data center. See *IBM Expands SmartCloud for Social Business with European Data Center: European Data Center Will Give Businesses Opportunity to Follow Customers such as Shanks that are Benefiting from Cloud Based Social Business Solutions Today*, at www-03.ibm.com/press/us/en/pressrelease/40780.wss. Please remember, however, that the mere existence of this data center does not in any way negate the requirement to work with your legal department and employees.

Chapter 7.
Distributing Team and Organizational Updates with IBM Connections

> *Bees work by spreading the pollen from flower to flower and letting great things happen: cross-fertilization. (That's why the "colony collapse disorder" is so troubling.) You don't have to dress up in one of those bee costumes or do the funky dance. But feel free to spread and exchange stories of success, of great work, of cool stuff happening.*[1]
>
> Michael Bungay Stanier, Box of Crayons

How do you know when someone is working on a really exciting project, on which you might have something to contribute? Usually it's when they tell you directly what they are doing, or when you hear it from someone else. Knowing what other people are doing creates opportunities for collaboration, and there are common approaches to distributing such updates today. New technologies, such as IBM Connections, introduce new ways of distributing team and organizational updates, and thereby laying a foundation for improved collaboration.

In this chapter, we will:

- Look at the theory of distributing team and organizational updates, and why it is so important.
- Examine two ways that IBM Connections supports spreading updates.
- Consider the experience a firm that is using IBM Connections to distribute team and organizational updates.
- Explore a range of advanced concepts, including how IBM Connections supports regulatory compliance mandates.

The Theory of Distributing Team and Organizational Updates

Keeping everyone on the same page, whether it be in a team, a department or across the entire organization, is a major communications task. The act of getting the message out is just one small part of the overall process; ensuring that people understand the message and can change to work in a different way are much larger.

The most common approach to sharing updates across a group of people is email blasts.

- A project leader sends out a weekly email giving a status update on the current project to all team members. The main messages are in the body of the email along with an attachment for them to read—probably a new version of the dreaded project plan. The project leader knows that she'll have to deal with at least one person in the coming days who is working off the wrong project plan.

- A departmental manager writes a fortnightly email to everyone in his department, explaining senior management's current top priorities, and outlining where he'll be in the coming weeks. In inviting comments and feedback from his staff, he knows that a few people will ask the same questions, but he's become used to copying-and-pasting from previous emails so as to save time.

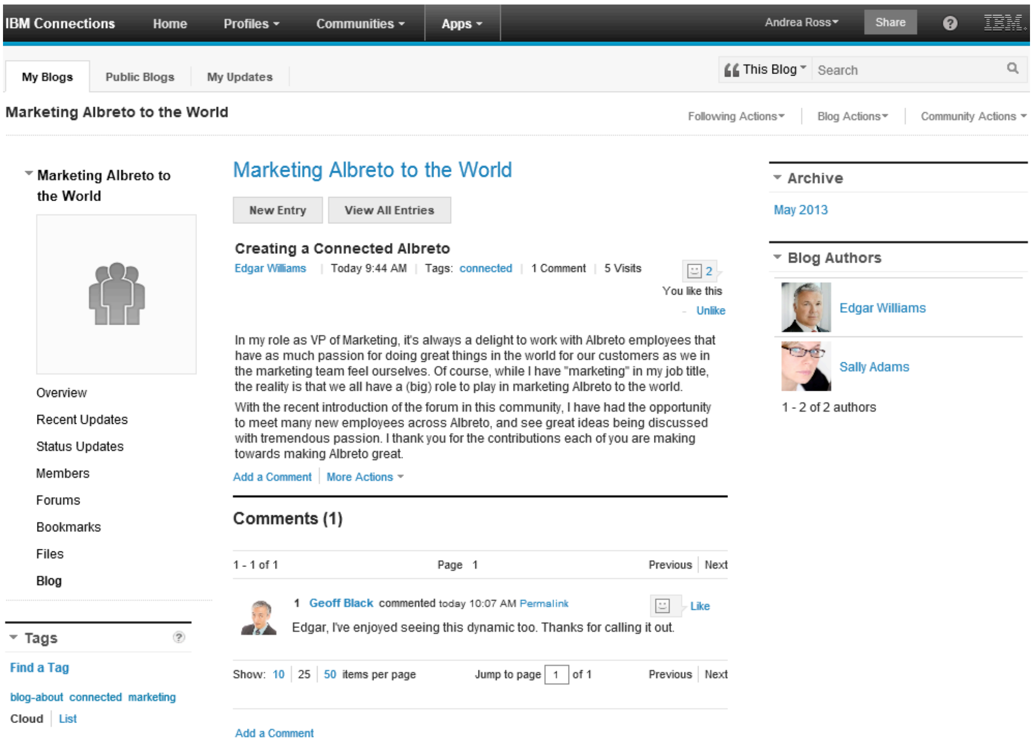
In keeping with our focus on changing work practice, each of these areas can be revamped given new collaboration technologies. For example, a blog could be used in both instances to facilitate the same process of communicating, but in a different way:

- The project leader would post her weekly update on the team's blog, and everyone on the team would know where to find the current edition of the project plan. Now the project plan has changed from being a "file" that has to be downloaded and reviewed. Instead, it has become a web page in the team's collaboration site that is always up-to-date with the latest information. There is no more searching or calling around to find the current version.

The project leader would post her weekly update on the team's blog, and everyone on the team would know where to find the current edition of the project plan.

- The departmental manager changes his work practice and now writes a regular blog on his departmental intranet site. Rather than merely restating what management have been talking about, he is able to link to the blog posts from his seniors, in order to give his people access to the source message. He is then able to add his interpretation of the message for his people. Through the comment function on the blog, people within the department are able to ask questions and provide their feedback directly, without having to send private emails. Everyone in the department is able to see the questions that have already been asked, as well as the responses that have been given. They can seek further clarification on particular topics if something remains unclear, or put their energy into asking a different question.

Figure 7-1. Sharing Team and Organizational Updates via a Blog



Blogs provide a way of sharing updates within a team or group. People can request that updates are pushed to them (via a subscription), and are able to leave comments for the original author and other blog readers to see.

A law firm used a blog to replace its monthly inside newsletter. One benefit they quickly discovered was the faster “time-to-market” for newsletter articles, which no longer sat around for weeks on end before being released. A second benefit was that management developed a more natural and informal “voice” for staff communications.

How to Distribute Team and Organizational Updates in IBM Connections

Geoff was feeling very pleased with himself. The new discussion forum had proven a great addition to the marketing team. They had captured and examined many more ideas than they could have done with the face-to-face meeting he had originally proposed. It had also given other people outside of the marketing team a way of seeing what was going on, and a method of contributing to discussions both when they were specifically asked and more generally as part of their work. Geoff felt it had opened new lines of communication that had not existed before, and this was having flow-on effects even at the café when he went to get his lunch. People he'd seen for years but never spoken to now knew his name, and would come over to continue conversations that had started in the forum. There was something that was still nagging at him though—an unresolved issue—so he called Sally to discuss.

> *"I truly get the value of the forum," Geoff said to Sally, "but how do people who are not involved moment-by-moment know what's going on? And equally, is that still important, or do we just assume that people who want to know will check in often?"*
>
> *"Well, even though I'm on the marketing team," Sally said, "I get overwhelmed most days by the velocity of the discussions. There's so much going on. It's hard to know where to start. So I think it's safe to assume that for people outside the team, we need to provide another way of keeping up-to-date."*
>
> *"What are the options?" Geoff asked.*
>
> *"Before answering that," said Sally, "there's another aspect we need to think about."*
>
> *"What's that?" Geoff said.*
>
> *"The forum is a big part of our public face inside Albreto, but it's not everything we're doing," said Sally. "I think we need a way of sharing updates about what's going on across the whole portfolio of marketing activities."*
>
> *"Agreed; good point. So coming back to the options," said Geoff, "what do you see?"*
>
> *"Out of the tools we have available in Connections," Sally started, "it comes down to either a blog or status updates. The blog gives us a more reflective way of providing updates. Status updates are shorter, but can give the experience of drinking from a fire hose."*
>
> *"My kids have a blog," said Geoff. "Are you sure that it's right for our team?"*
>
> *"Same technology, yes," said Sally, "but we'll use it differently to how your kids do."*

Using a Blog to Distribute Updates

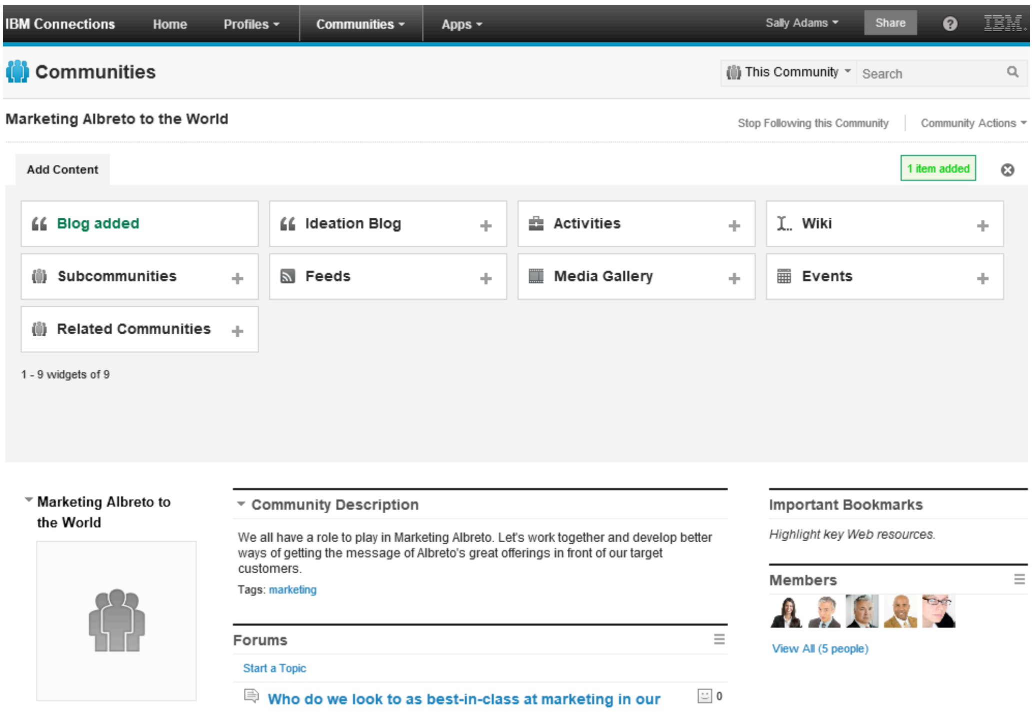
A blog provides a way of distributing updates to anyone who wants to pay attention, as well as a means of enabling dialogue about the updates. A blog can be standalone in IBM Connections, or part of a new or existing community. In this chapter, given the scenario just discussed, we will add the blog to the Marketing Team's public-facing community.

A blog can be standalone in IBM Connections, or part of a new or existing community.

Step 1. Add the Blog to Your Community

A blog is one of the standard tools in IBM Connections. Before you can start writing blog posts to provide updates, you first need to create the blog to contain the posts. Open the community in which you will be adding the blog tool (*Marketing Albreto to the World*), and click *Community Actions* at the top of the screen. In the drop-down list choose *Customize*, and then click *Blog* in the Add Content box. You need to be an owner of the community to make this change. Once you have added the blog, click the X in the circle to close the Add Content box.

Figure 7-2. Add a Blog to the Community

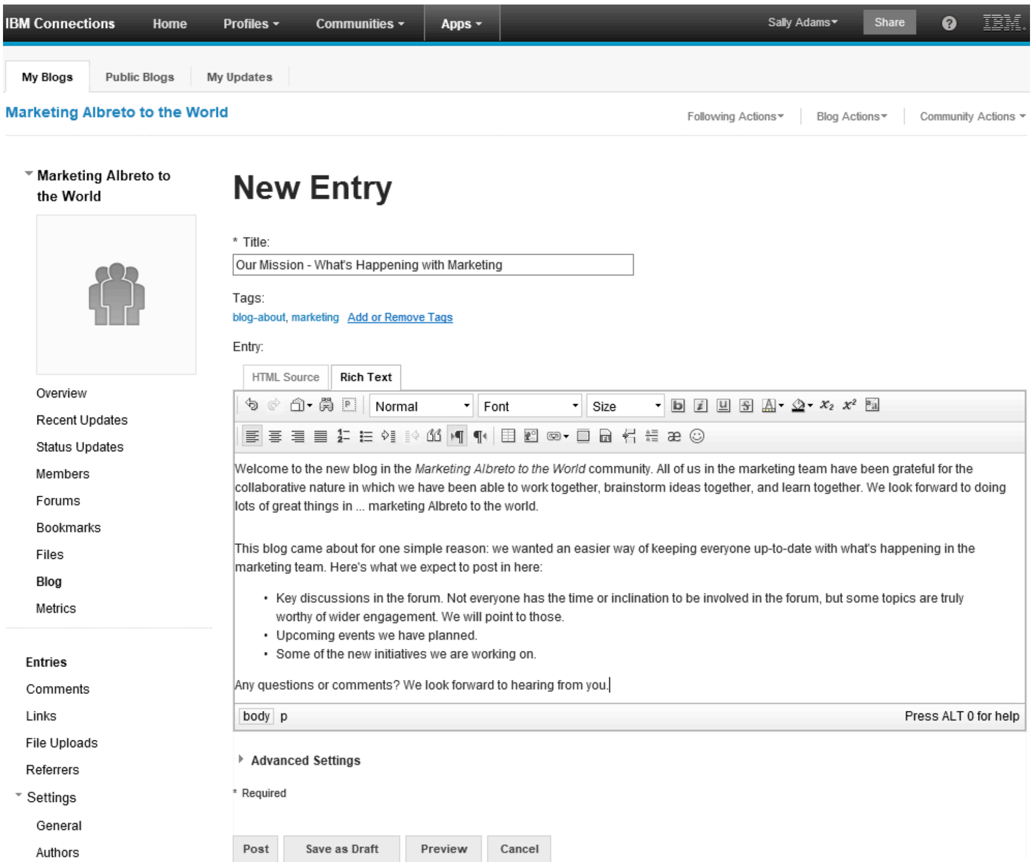


Add a blog to the Marketing Albreto to the World community for providing more reflective updates on what is happening inside the community.

Step 2. Write the First Blog Entry to Set the Scope of The Blog

With the new blog added to the community, the second step is to create a first blog entry. It is a good idea to use the very first blog entry to set the scope of the new blog. You won't have any readers just yet, but this very first blog post tells future readers what the blog is going to be used for. To do this, open your blog inside the Marketing Albreto to the World community by clicking *Blog* in the left-hand navigation pane. Then click the *New Entry* button to open a form that provides structured space for writing a blog title, entering one or more tags, and writing the body of your blog post.

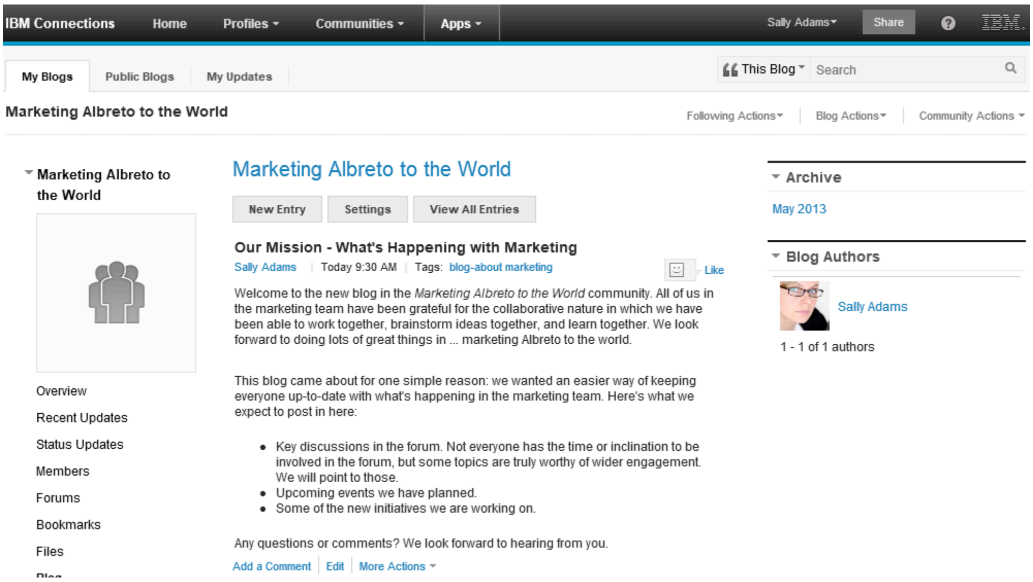
Figure 7-3. Write the First Entry in Your Blog



Use the first blog entry in your new blog to set the intended scope for what your blog is going to be about. You may vary the scope in the future, but having a clear starting point is useful to the people who will come across your blog.

When you have finished writing the first blog entry, click the *Post* button to save and publish what you have written. It will now be available for other people to read.

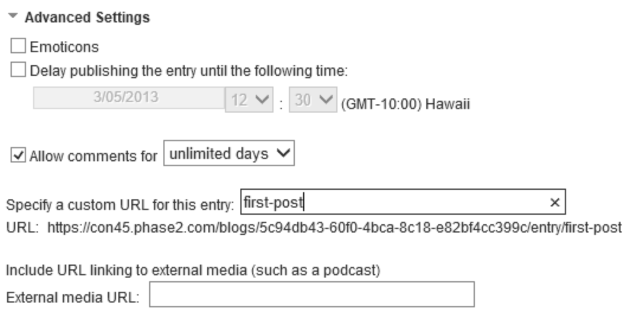
Figure 7-4. The Published Face of Your First Blog Entry



Published blog entries are available to be read in your blog. Readers can leave comments to share their perspective on a blog entry, or can click the Like button to express support.

It is worth mentioning at this point the optional Advanced Settings that are available when you create a blog entry. These allow you to delay publishing an entry until a specified date and time. You can also limit the duration of receiving comments (with a range of days between 1 and 90, or unlimited), and give the blog entry a particular web name. For example, you could give the entry a shorter name, such as “first-post.” This would replace the longer default name, which is automatically calculated as the title of your blog entry, with all spaces replaced with the underline character (“_”).

Figure 7-5. Advanced Settings on a Blog Entry



Advanced settings on a blog entry give precise control over the timing of publication, commenting duration, and the web name given to the blog post, among other settings.

Step 3. Share Updates through New Blog Entries

With your new blog created and the first entry written, start writing new blog entries to provide updates to the interested others in your organization. Keeping other people informed about what's going on in the following areas might create opportunities for collaboration:

With your new blog created and the first entry written, start writing new blog entries to provide updates to the interested others in your organization.

- *Discussions in your Forum*. If you have particularly interesting discussions taking place in a Forum, make reference to them on your blog. You could summarize the key points from a current discussion topic, and invite participation from the people who read your blog. This could bring new people to the discussion forum, and also allow a more reflective stance about what's happening outside of the rush of the forum.

- *Weekly Activities*. Write about the current projects and other activities you are doing in your group or department. If there is a new marketing campaign under development, talk about it on your blog and point people to the community space in IBM Connections you are using to run the project (see Chapter 7 for more on this). If you have released a new video advertisement, post it in the blog for internal people to see.

- *Upcoming Meetings and Events*. When you are planning towards a major meeting or event, let others in the organization know what is coming up. If you are planning your annual marketing retreat, for example, say when it is happening and outline the agenda. Or if you are planning on having a booth display at an upcoming industry conference or trade show, give the dates and details of when and where. Your colleagues may know customers who should attend the event.

- *Exploratory Use of New Tools*. If your group or department is exploring the use of new tools for getting work done—such as IBM Connections, tablets, or mobile apps—talk about your experiences on your blog. You will be able to highlight your learnings, and may discover other groups that are looking at the same ideas.

As your audience grows you will develop a rhythm to the nature and regularity of your new blog entries. In the early days aim for at least one new blog entry a week—that's probably the minimum level required to show that a blog is a living entity. You might increase the regularity of these updates as more people come to rely on your blog as a source of current happenings; this could take you to a blog entry every two or three days, or even daily. Over time you will have to develop a sense of the best approach based on the feedback from your audience.

Sidebar: The Importance of Voice

The “voice” of a blog is one secret to success. Get it right through authenticity, relevancy, and respect for your readers, and you will do well. Get it wrong through corporate-speak, irrelevant material, or a disrespectful approach to your readers and you won’t.

There are five aspects of the voice of your blog to get right:

1. *Authenticity*. Write your blog posts as though you have having a personal conversation with your readers, rather than hollering at them through a megaphone. The intent of a blog is to put people and personality back into corporate life, and to get away from carefully managed “corporate-speak” missives. Be yourself. Be professional. Write clearly to communicate, to share updates, but not to obfuscate.

2. *Relevancy*. Updates shared through your blog should be relevant to the audience of readers you have in mind. It is alright to go off-topic once in a while, but the vast majority of the content on your blog should be aligned with the stated purpose of the blog.

3. *Respect*. Show respect to your readers in the way you write, the words you use, the words you leave out, and the attitude that’s conveyed through the blog. Think of it as a personal conversation with your audience, one reader at a time. Some you will know directly, but many you won’t know—so be cautious about how you use humor and less-than-professional ways of speaking.

4. *Invite Comments and Discussion*. A “blog” without the ability for readers to write a comment and engage in conversation is not a blog. The two go together—the freedom to write for distributing updates, and the necessity to engage with your readers about those updates. If you don’t want the two-way flow of interaction that a blog makes possible, don’t create a blog. Use another means that controls the flow of conversation and makes it a one-way communication channel. A blog is for “talking with” people, not “talking at” them.

5. *Respect Confidentiality*. As part of your job, you will are likely to know confidential information that hasn’t been disclosed to the rest of the organization. Your blog updates are not the place to broadcast this information. If in doubt of your clearance to convey the information more widely, ask for clarification.

Follow the above guidelines and you will create a vital source of updates for the people inside your organization, regardless of whether that’s a big group or a select few.

Step 4. Tell People About Your Blog

Tell other people about your blog, and that they can find the most recent updates from your group or department there. While this step is as simple as it sounds, there are more ways available to telling people about your blog than just opening your mouth. Consider using one or more of the following approaches to get the word out:

While this step is as simple as it sounds, there are more ways available to telling people about your blog than just opening your mouth.

- *Include the Blog Address on Your Materials*. If you release printed collateral inside your organization, include the link to your blog. If you have a separate web page on the intranet describing what your group or department does inside the organization, include the link there too. It will set the expectation that the blog is a current place to find updates about your group.

- *List the Blog in Your Email Signature and Profile*. List the address of your blog in your email signature in Notes or Outlook, and include it as a resource in your Profile in IBM Connections (refer back to Chapter 6 for more on using the Profiles part of IBM Connections). This gives other people a quick way of finding where you write in IBM Connections, and clicking through to learn more.

- *Comment on Other Blog Entries*. As other people in your organization start their own blogs, engage with them on their blog. Read what they are saying, and as appropriate, write a comment on one of their blog entries. Include a link back to your own blog, so as to give the other blog owner and any other readers of that blog a way of finding you and your blog.

- *Comment About Other Blog Entries*. As other people start blogging interesting updates on their blogs, write a blog entry on your blog about what someone else has written, linking to their blog entry. This will demonstrate that you are acting in a collaborative way, by listening to what other people are doing and thinking about it through your own expertise and experience. Ultimately you want to model the behavior you want other people to adopt, and this approach is one way of achieving that.

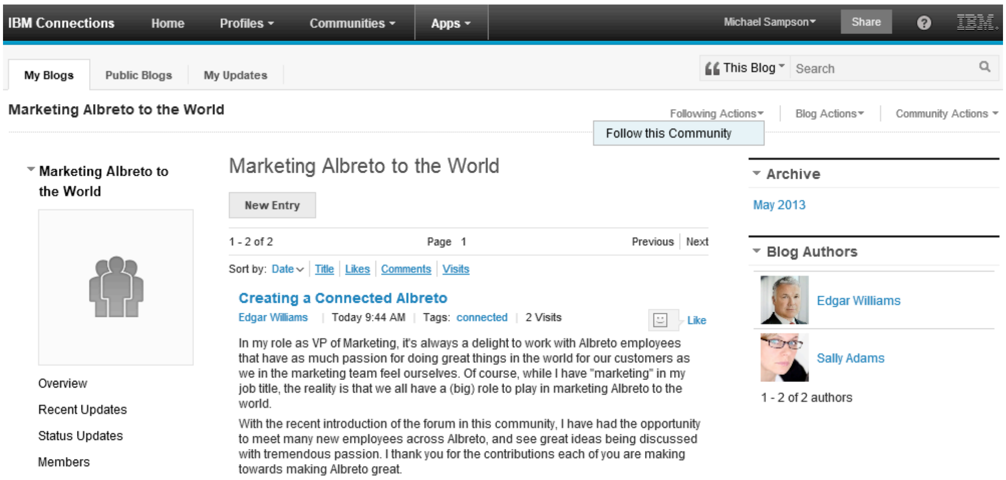
- *Use Tags on Blog Entries to Encourage Serendipity*. Use tags on your blog entries—both single words and short phrases—to highlight the nature and ethos of your specific blog entry. This helps in at least two ways. First, it populates the tag list and cloud on your blog, which signals to readers what your blog is about. Second, it helps other people find your blog entries when they search for particular tags.

These approaches give several ways of spreading the word about your blog, and making it a valuable place for receiving updates about what's going on in your group.

Sidebar: Following a Blog

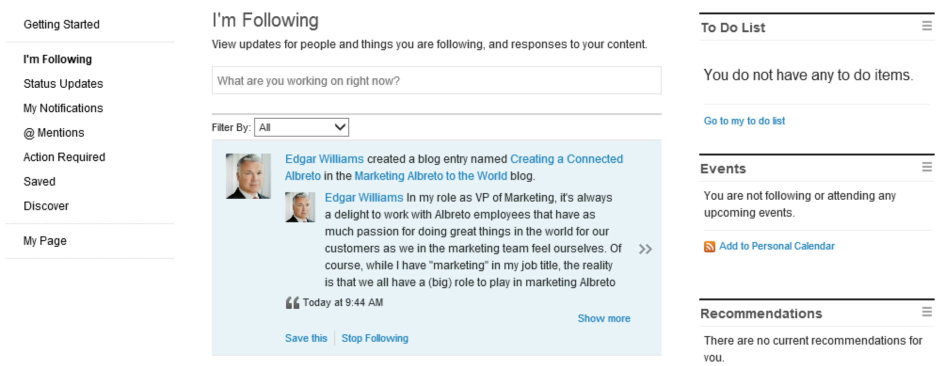
Being able to automatically receive an alert when new blog entries are posted is helpful for people. Most people are too busy to remember to check back for the latest entries every day or once a week. An alerting capability is built into blogs in IBM Connections. For blogs in a community, click *Follow this Community* (see Figure 7-6). For blogs not in a community, click *Follow this Blog*. In either situation, updates will display in the I'm Following section of your home page in IBM Connections (see Figure 7-7).

Figure 7-6. Follow a Blog to Receive Alerts for New Entries



By clicking "Follow this Blog" (in the top right-hand corner), a reader will automatically receive updates on new content. They won't have to manually check back every day or two.

Figure 7-7. New Blog Alerts Flow to Your I'm Following List



Updates to any blog you are following will automatically flow to your home page in IBM Connections. This will keep you automatically informed about new content.

Sidebar: Subscribing to the Feed for a Blog

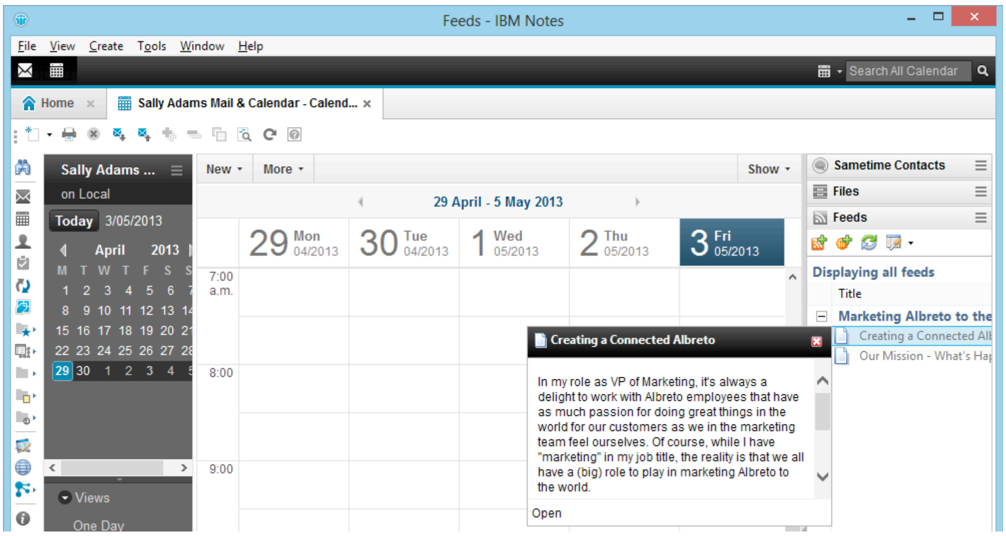
Another option for receiving updates from blogs in IBM Connections is to subscribe to the "Feed," which is similar in intent to following a blog but different in terms of where the updates from the blog end up. A "feed" is a geeky term for a particular way of receiving updates from a blog, and in this case they are displayed in a "feed reader" (something that can read a feed). To subscribe to a blog feed, click the *Feed for Blog Entries* or *Feed for Blog Comments* at the bottom of the blog page.

Figure 7-8. Subscribing to the Blog Feed (For Entries and/or Comments)

People can subscribe to your blog for updates using RSS/ATOM feeds, and can choose whether to get an alert on new blog entries only, or also for new blog comments.

If you have a feed reader on your computer, the updates from the blog will be displayed for reading there. Feed readers periodically update all of the feeds that have been added to them, thereby keeping you up-to-date with what is happening without you having to remember to go searching for updates. Both IBM Notes and Microsoft Outlook can read and display feeds from IBM Connections, and there are various options of dedicated feed readers on Windows and Mac (such as Reeder for Mac OS X).

Figure 7-9. Add the Blog Feed to IBM Notes



Use IBM Notes or another product capable of reading feeds to periodically poll blogs in IBM Connections for updates. Any new posts will be displayed in the updated feed list.

Step 5. Encourage Dialogue, Feedback, and Participation

The final step in distributing team and organizational updates through a blog is to encourage dialogue, feedback, and participation from other people. You may not always get it, but explicitly asking for input from other people sets the expectation that you welcome such interaction. Here's how to approach this step for your blog:

> Encourage dialogue, feedback, and participation from other people. Explicitly asking for input from others sets the expectation that you welcome such interaction.

- *State the Update, and Ask for Input*. After stating the update in your blog entry, make a habit of using the final line to ask for input. Write something like *How would you approach the above challenge?*, or *What do you think we should discuss at our next annual meeting?*, or *Where do you think we should be putting more emphasis over the next three months?* Phrases such as these, when they are sincerely stated and followed through, will encourage participation from others.

- *Don't Ask Just for the Sake of It*. There are times in organizational life when there is no time for input from other people, but an update on a decision that has been made under urgency has to be given. It doesn't make sense to ask for input on the decision under such circumstances, so leave it out when the timeframe doesn't support collaborative interaction. You do need to be careful with this though; if you state that your blog is a place of stimulating collaboration but then never ask for input from others, your words and actions will not align and the blog will lose its power of engagement.

- *Take Participation Off-Blog*. Your blog is a means to end. It is a means of sharing updates, as well as a means of finding out about other people that have interesting ideas for your work. This means that you don't need to limit the dialogue, feedback, and participation to comments on your blog. It's fine—great even—to use your blog as a springboard to in-person interaction. When you have shared an update and found some other people that have something worthwhile to say, call and speak to them one-to-one. Or hold a virtual or face-to-face meeting with them as a group, for brainstorming and exploring new ideas. It is good to close-the-loop by saying what happened in a comment on your blog, or as a new blog entry.

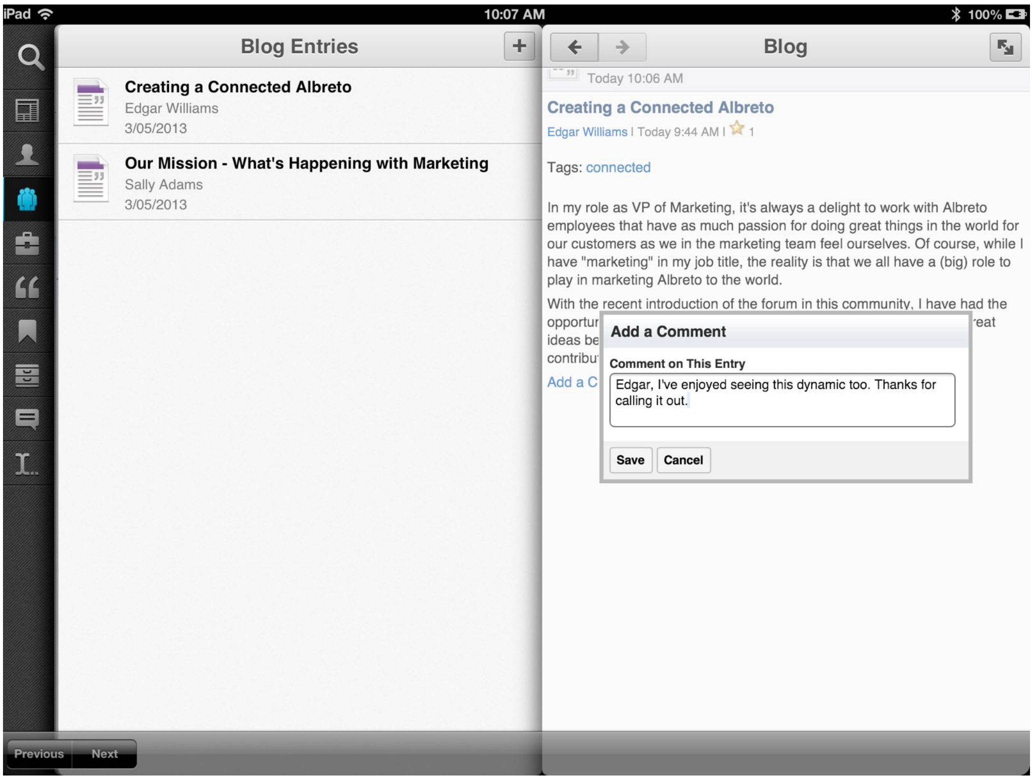
In closing, you will have noticed that steps 3-5 work in a circle. As you write blog entries to distribute updates about your work (step 3), other people will have a way of quickly learning about what's happening (step 4), and some will have a perspective to share that will contribute to your work (step 5). This in turn will lead to new updates (step 3), and so the cycle continues.

Accessing Blogs on a Mobile Device

The mobile apps for tablets and smartphones provide access to blogs in IBM Connections. You can view the latest changes across all of the blogs you have access to, read the posts you want to read, and even add a comment from the mobile app.

In the mobile app for the iPad, for example, you can touch *Blogs* in the navigation pane to view the list of latest blog entries. Touch the title of any blog post you want to read in full. Once you are viewing a blog post, you can add a comment, recommend the entry, and if you have appropriate rights, edit or delete the blog post.

Figure 7-10. Read and Comment on Blog Posts on a Mobile Device



Use a mobile app for IBM Connections to access blog posts across IBM Connections. When viewing a blog post, can you participate by commenting or recommending the post.

There are other ways of seeing and interacting with new blog posts too. You can touch into the *Updates* tab to view all updates from across IBM Connections that are relevant to you. Or if there is a community blog that you want to check on, open the community and view blog posts inside the community. If you have the appropriate rights, you can also comment on or recommend a blog post (recommending is the same as clicking Like).

An Alternative Approach—Using Status Updates to Distribute Updates

IBM Connections offers a second way of distributing team and organizational updates. In the next few pages we will look at how to use the Status Updates feature of IBM Connections instead of a blog. Status updates are intended to be a short form method of sharing an update, a thought, a reflection, a link to a blog entry, or anything else. Technically you can type up to 1,000 characters, including spaces, and it is possible to attach a file to a status update. Status Updates can be used for many purposes, but here is how to use them to distribute updates.

Status updates are intended to be a short form method of sharing an update, a thought, a reflection, a link to a blog entry, or anything else.

Step 1. Decide What Makes Your Status Updates Coherent

By design, Status Updates come from a person, not an organizational group or department. While it would be possible to set up a specific user account for an organizational group or department, such an approach undermines the very intent of IBM Connections: to bring *people* together as *people*. A second reason for staying away from a group account is that if multiple people in your group or department will be sharing updates, they will have to switch in and out of their individual account to post an update using the group's account. That is a perfect idea in theory, but it quickly fails in practice as being too fiddly. Thankfully there is a better idea, one that simultaneously allows people to be themselves, for multiple people to post updates from an organizational group or department, and one that doesn't require fiddling around with user accounts.

The answer is to create status updates within a community. Such updates still respect the design intent of originating from an individual, but their creation within a community enables a coherency in a stream of updates. Status Updates posted in a community display in various places in IBM Connections:

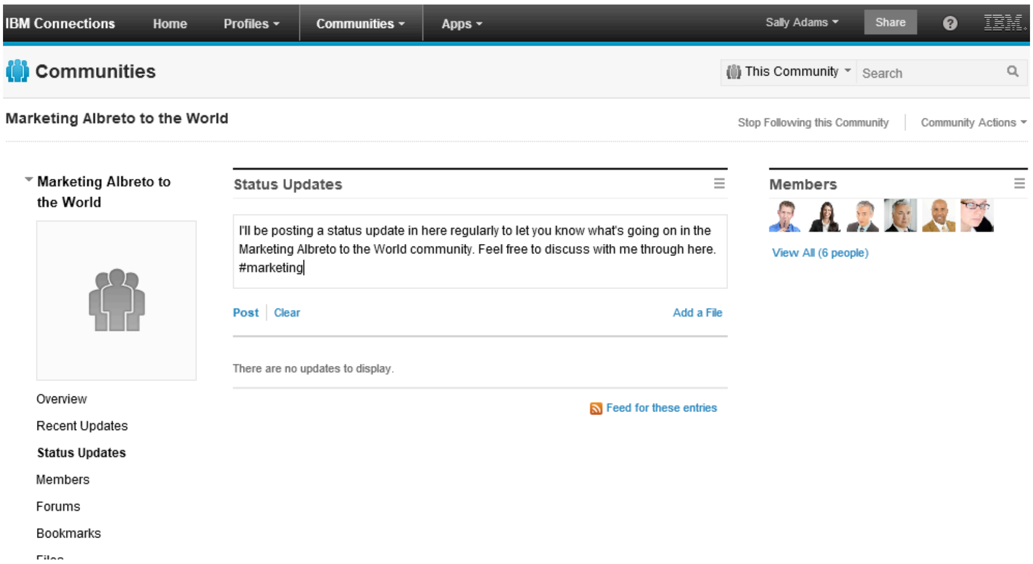
- In the *Status Updates* list inside the community, which becomes the single place to check on current updates within the community.
- On the profile of the individual who posted the status update in the community. The notification highlights that the update was posted in a community, rather than being an update directly from the individual.
- On the *I'm Following* list for any individual who is following the person who posted the status update inside the community. It will also show here for an individual who is a member of the community, or is following the community.

Status updates posted in a community are a great way of enabling coherency across a stream of updates.

Step 2. Write The First Status Update

To write the first status update, open the Marketing Albreto to the World community, and click on *Status Updates* in the left-hand navigation pane. This opens a simple screen with a one-line box that reads *Share a message with the community*. Write your status update in the box provided, include any relevant hashtags, and click *Post* to make the update visible inside the community.

Figure 7-11. Write a Status Update with Your Hashtag



Write a status update in the community to tell others about current projects, events, and activities in your organizational group or division.

Sidebar: What is a Hashtag?

By convention, a hashtag in a status update is the hash symbol followed immediately by a word or short phrase with all spaces removed. For example, #marketing, is the hashtag for marketing. Someone can search in IBM Connections for all instances of a particular hashtag, and this will display all status updates with that hashtag. A status update can have none, one, or more than one hashtag. It is another way of grouping similar updates together.

Hashtags do not have to be formally registered in IBM Connections in order to work. Just type the hashtag in your Status Update and you are done. If there are other status updates with the same hashtag, someone can click to see them all in a list. It is a great way of finding other people who happen to be using the same hashtags in their updates.

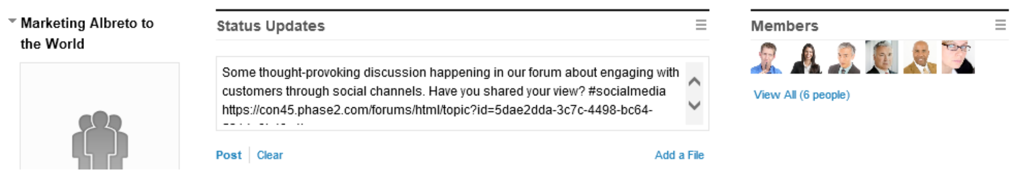
Step 3. Share Updates through New Status Updates

Distribute updates by writing and posting new status updates in the community. Your purpose in making updates is to keep other people informed about what is going on in your group, and to pave the way for collaboration. Status updates are intended to be quick, short, and to the point. They can also include links to other places if you want to provide people with more information.

Here are some things you can do with status updates:

- *Discussions in your Forum*. If there are interesting discussions happening in your forum, write a quick status update, and include a link to the discussion topic. On reading the update, people will have a quick way of clicking into the discussion topic, and contributing their perspective.

Figure 7-12. Include Links to Other Parts of Your Work in IBM Connections



Include links to other parts of your world in IBM Connections, thereby pointing people at what's interesting, and providing opportunities for collaboration.

- *Weekly Happenings*. If you are using status updates instead of a blog to provide an update on weekly happenings, write one status update for each happening, instead of one update for all. This will allow people to see a stream of short updates instead of having one longer update to read through.

- *Upcoming Meetings and Events*. To raise awareness of an upcoming conference or event, write a status update and include a link to the appropriate community space in IBM Connections. The status update advises what's happening, and the community space allows for collaboration. Your status update could read something like *Only 4 weeks until our annual marketing retreat. What else should be on the agenda? #marketing {link}*.

- *Exploratory Use of New Tools*. Include links to discussions of how you are using new tools to do business and get work done. Include hashtags naming specific products—such as *#ipad* or *#surface*—which will link to work other people are doing in the same area throughout IBM Connections. You will discover other people exploring similar topics, and will have an opportunity to share learnings.

A regular stream of updates will keep people informed about your work, and give them a launching pad for learning more and contributing their expertise and experiences.

Step 4. Tell People About Your Status Updates

As status updates become the way you keep the rest of the organization informed about what is happening in your group, you need to get the word out about where to find them. The public community is what you should be pointing people towards.

- *Include the Community Name On Your Materials*. Note your community's name on any materials you print and make available inside your organization. Display it prominently on the intranet web page for your group, and put it on screen at any events you host inside the firm..

> You need to get the word out about where to updates from your group. Point people at your public community.

- *List the Community in Your Email Signature*. Include a clickable link to your community in your email signature. Tell people why they should go there. You will need to get the link from Connections.

Figure 7-13. Include Your Group's Public Community In Your Email Signature

Have a wonderful day,
Sally.

Sally Adams
Marketing Manager, Online Channels
Albreto Ohio Office

For updates on marketing, follow the Marketing Albreto to the World community in IBM Connections

Point people to the community your group is using for distributing updates. Include it by default in your email signature to remind people.

- *Include Other Hashtags in Your Status Updates*. When you find other relevant discussions or updates being shared in your organization, use one or more of the same hashtags from those updates in the updates you post in your community. This will link your community status updates into wider discussions, and create connections back to your community. The links to other hashtags do need to make sense; you will undermine the validity of your updates if you include irrelevant material.

The approaches above, along with the ongoing essential task of writing valuable status updates, will get the word out about how to see what's happening in your group.

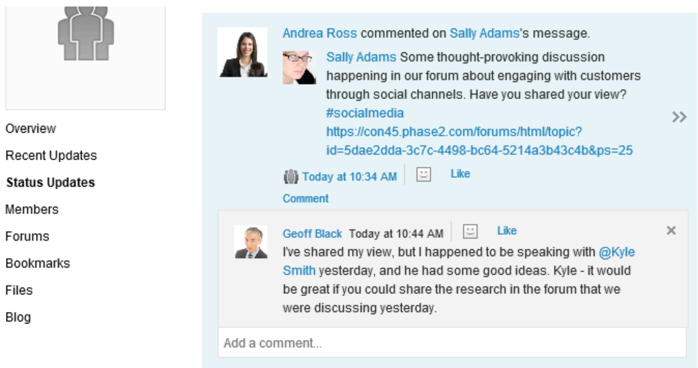
Step 5. Encourage Dialogue, Feedback, and Participation

Status updates are not a one-way medium. They allow dialogue, feedback, and participation directly in a status update. People can comment on a status update, and their comments are shown in line with the original status update. This creates a mini-discussion on a particular status update. If you are looking for interaction with other people, ask for it and then follow-up when people start interacting. Here's three approaches:

- *Request Participation*. Finish your status update with a question to stimulate focused participation. For example, *Any thoughts to share?* in the status update below signals that you are looking for interaction with other people.
- *Be Involved*. Once someone has written a comment, jump into the status update and comment back to them—if that's appropriate. Sometimes a simple "Thanks for the idea" is sufficient; other times a longer reply and a link to an additional resource will be valuable.
- *Talk it Through*. Give them a call to talk through an issue. There are many times when the back-and-forth of status updates engenders misunderstandings rather than breakthrough thinking. If you find yourself going round in circles with a colleague, schedule a phone call, face-to-face meeting, or video conference to work through the issue.

To leave a comment on a status update, click *Comment* under the date and time of the original status update. This opens an entry field to allow you to write a comment. Comments are listed in the order in which they are received.

Figure 7-14. Commenting on a Status Update



Comment on a status update to show support, request clarification, or offer an additional point-of-view. Comments are listed below the original status update. Click the double arrows at the side to pop-out the information pane to view the full conversation.

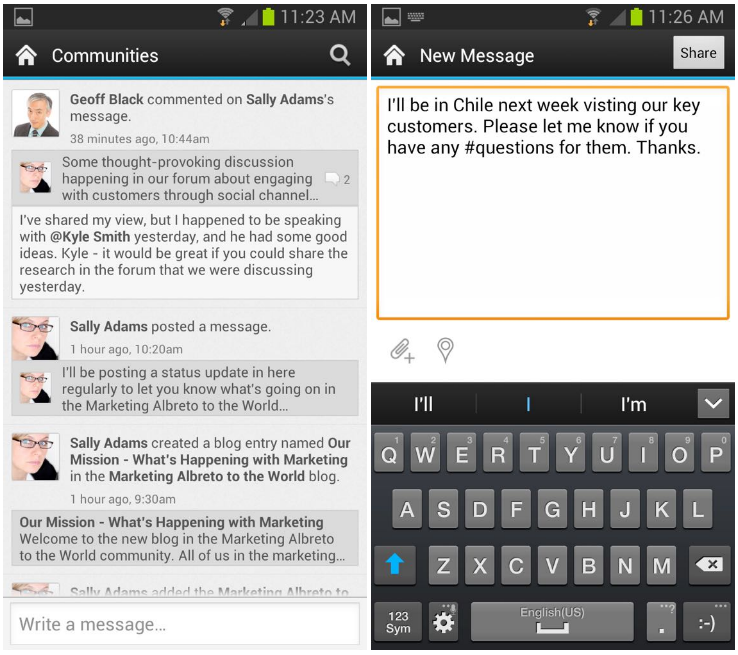
Working with Status Updates on a Mobile Device

Mobile devices offer a perfect form factor for posting status updates inside a community. Given the portability of smartphones, and their always-on nature, you can get updates out to your community as activities, events, meetings, and other happenings take place. The immediacy of distributing updates can be used to gather feedback and reactions in real-time, and this can be used to enrich the actual event.

The immediacy of distributing updates can be used to gather feedback and reactions in real-time.

To post a status update to a community from a smartphone, go to the home screen in the IBM Connections app. Touch the *Communities* option in the list, and then find the community in which you want to post the status update. Touch it to open the community, and then touch the *Updates* tab to open the updates stream. On an Android phone, touch the phrase *Write a message* at the bottom of the screen, and type your status update.

Figure 7-15. Posting Status Updates to a Community



Post a status update to your public community from your smartphone or other mobile device. The update will display in the community's Updates list, and propagate throughout the rest of IBM Connections just as if the update were posted from a laptop or desktop computer.

When you have finished typing your status update, touch *Share* (called *Post* on an iPhone). Refresh the updates list to see your new update in the community.

Closing Comments on Distributing Updates with IBM Connections

In this chapter we have explored the collaboration scenario of distributing team and organizational updates. IBM Connections offers two approaches for supporting the scenario in a new way. However, fundamental to the success of re-imagining the scenario is the recognition that what drives success is the human disciplines, not the mechanics of using IBM Connections.

The human disciplines of distributing updates drive success, not the mechanics of using IBM Connections.

Figure 7-16. The Mechanics and Human Disciplines of Distributing Updates

Factor	Mechanics	Human Disciplines
Creating a new update	Write a new blog post, or post a new status update	Write updates that inform people of things they need to know about. Create updates that add value to their work, or signal new opportunities.
Requesting feedback on an update	Add a line to the end of a blog post or status update to request feedback	Be willing to hear feedback from people outside of your group who hold different opinions
Participating in dialogue in response to an update	Add a comment to your blog post, or reply to a status update	Demonstrate openness to the ideas of others, transparency of intent, and a willingness to work through difficult issues
Keeping people updated about relevant happenings when you are out-and-about	Use the mobile apps on your smartphone or tablet	Have one ear tuned to the current happenings, and one tuned to the feedback you receive from colleagues and co-workers who are not present. Be in two places at once, providing a bridge between the two.

The mechanics of using IBM Connections to distribute updates are easy to master. But without the application of the essential underlying human disciplines of distributing updates, you will not achieve success.

The mechanics take only moments to get right. The disciplines a lifetime.

Case Study—Forbo Eurocol

Forbo Eurocol manufactures and supplies technical products for renovation and new construction projects, with specializations in tile adhesives, grout materials, and leveling compounds.[2] Based in the Netherlands, Eurocol is part of the wider Forbo Group that is active in 35 countries around the world. Although it is only a small company with 150 employees, Eurocol's staff didn't know what each other was working on. IBM Connections provided an opportunity for staff to communicate better, and this has been one of the hallmarks of Eurocol's use of Connections. For example:

- *Departmental Activity*. Several departments keep track of all their work in a departmental activity. Never before was it possible to see what keeps the department members busy in one overview. Meetings have to be held less often because updates and the status of To Do Items are stored in the activity. Email has become less important and every discussion regarding items can now be found in a structured and open environment. Everyone can keep track of the tasks that are assigned to any member so people don't lose sight of other projects. People who are involved in more than one project can find a consolidated list of tasks through the to do list page. It has never been easier to show other people what you are working on.

- *Internal Control System (ICS)*. The ICS keeps track of all the risks in the company, and centralizes all associated communications in one place. Anyone identifying risks or working on mitigating those risks uses a community in IBM Connections. No-one has to ask for updates; all information is live within the ICS.

- *Windows 7 Migration Project*. The IT department is in the process of migrating current computers to Windows 7. A project community gives a way of seeing the project's status, knowing which IT technicians are working on which systems, and sharing the schedule for upgrading particular computers. Resources needed to undertake migration activities can be shared through the community, and any issues can be raised for resolution without needing to fall back into email.

Robert Sigmond, the IT Manager at Eurocol, works actively to link new IT capabilities with Eurocol's end users. Robert has been the driving force behind the adoption of IBM Connections at Eurocol, and comments about its use at the firm:

> *Before we had IBM Connections, it was impossible to know that someone two offices down the hallway was currently working on the same project that you contributed to a year ago. Duplication of projects becomes very expensive, and our inability to link up people who had expertise in specific areas was not good. With IBM Connections we are now able to search for previous contributions, and establish connections to people who have previously worked on similar projects and issues.*

Forbo Eurocol uses IBM Connections for other scenarios too, such as managing meetings.

Advanced Concepts

There are a variety of advanced concepts that will inform your efforts when distributing team and organizational updates with IBM Connections. Five concepts are:

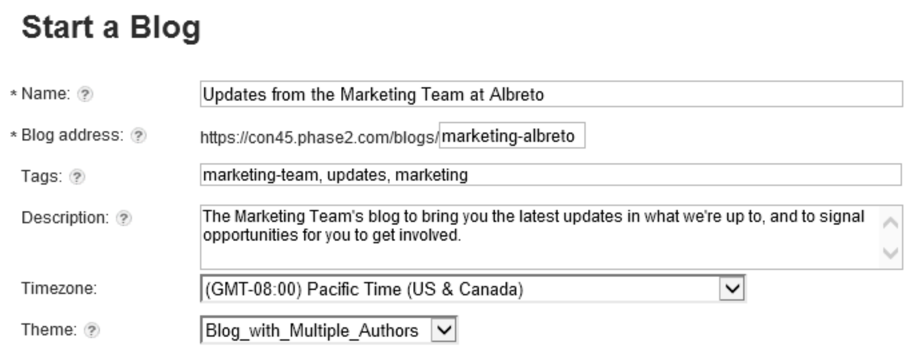
1. Creating a standalone blog in IBM Connections.
2. Using Status Updates to provide my own updates.
3. Addressing the suggestion that collaboration means incompetence.
4. How an increase in time lapse decreases the scope for collaboration.
5. How IBM Connections supports regulatory compliance mandates.

Let's take each in turn.

Creating a Standalone Blog in IBM Connections

To create a standalone blog that is not contained within a community, open the Blogs tool from the Apps tab at the top of the screen in Connections, and click *Start a Blog*. You will get a form to complete to name, tag, and describe your blog. You will also have the option of choosing your timezone[3] and a layout theme for your new blog.

Figure 7-17. Create a Standalone Blog in IBM Connections



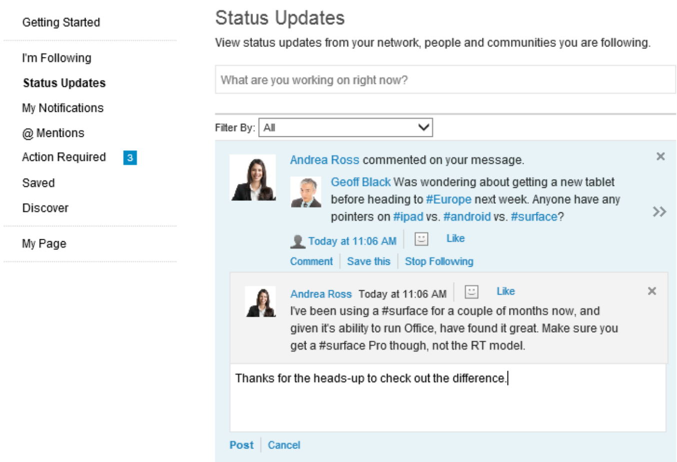
Create a new blog for sharing updates about what's happening in your team or group. A standalone blog is not part of a community.

Click *Save* when you have filled out the form. Your new blog will be created in Connections, and once that is completed you will be shown the list of your blogs. Since the blog has just been created and does not yet have any content in it, a visitor to your blog will be told that it's a new blog without any entries, and that they should visit again or subscribe to be alerted when new entries are posted.

Using Status Updates Outside of a Community

Status updates are not solely a concept for use inside a community. They have equal validity for individuals who want to distribute updates about their work, ask questions from other people, or point people to a new resource they have just found. To create a status update as an individual—outside of a community—open your *I'm Following* or *Status Updates* list from your home page, or open your profile. Enter your update in the field called *What are you working on right now?* When you have entered your status update, click *Post*. This will publish your status update, and in addition to it displaying in your list of status updates, it will show in the I'm Following list for anyone who is following you.

Figure 7-18. Creating a Status Update as an Individual



Create status updates as an individual to share updates on what you are working on, thinking about, or trying to understand. You may find help from unexpected places.

A couple of pointers about using status updates as an individual:

- *Post At Least One Status Update a Day*. Take one minute at the start of your day to post an update about the projects you will work on that day. You will start to feel more connected to co-workers as they comment on your work, or offer help.

- *Use Status Updates for a Quick Conversation*. Other people can reply to status updates, thus providing a way for having a quick conversation. It's fast and fluid, and doesn't require the use of a discussion forum.

- *Make Use of Hashtags*. A hashtag you use in a status update will become clickable. Follow the hashtag trail to see what people are talking about on that issue.

In summary, status updates provide a valid way of distributing your own updates.

Are You Saying I'm Incompetent?

There has been a lot of emphasis in this chapter on using updates as a means of stimulating opportunities for collaboration. The logic is that by saying what you are working on, other people who may have a perspective to share can do so, because if they don't know what you are working on, they won't have the opportunity. This logic can result in one of two broad responses from your people:

1. It is wonderful that we can become a collaborative organization, harnessing the best of what we know collectively to do great work for our customers. I am a competent contributor to the success of my organization.

2. It is terrible that I'm not trusted to do my work, because everyone else who doesn't bear the responsibility for my accountabilities feel they can say anything they want. I am treated as an incompetent employee who must always ask what other people think.

I'm not trusted to do my work, because everyone else who doesn't bear the responsibility for my accountabilities feel they can say anything they want.

Clearly there is a stark difference between these two responses. If you have people who lean more toward the second response, here's how to help them work through the competence question:

- *Start Small*. Choose a particular issue they would normally have completed alone but that holds potential for collaborative input from other people. Identify a few people to contribute their ideas to the issue, and work through how to deliver the required outcome using input from the small group.

- *Build Trust*. Collaboration flourishes in a trust-filled environment. If other people do have something valuable to say, convene a virtual or face-to-face meeting to explore the issues together. If you can meet in-person, extend your time together to lunch and coffee to allow a more free-flow of interaction and sharing.

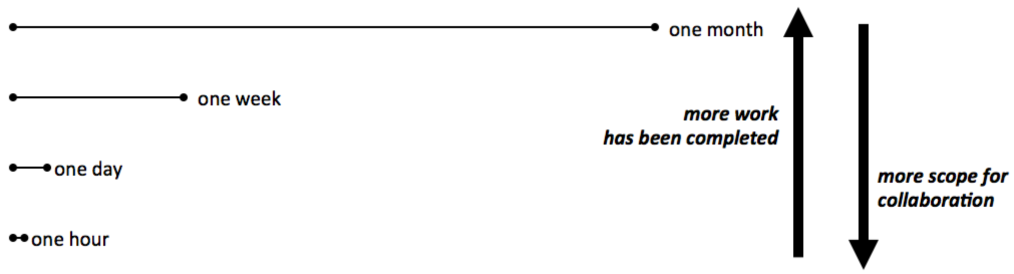
- *Know the Decision Rights*. The act of asking for input does not negate the right to make a decision that is at odds with what others have said. Sometimes the problem is with how collaboration is positioned inside organizations—that it resembles a demand for pure consensus. That's not necessarily true.

The emphasis on collaboration is not to reinforce individual incompetence, but instead to facilitate the greater competence that is possible through working together. But while we can hear that with our minds, it is not until we have personally experienced the power of collaboration that we get it in our hearts. For people that are pushing back, focus on winning the heart.

Time Lapse in Updates: Impact on Collaborative Willingness

There is often an inverse relationship between the time lapse in providing an update and the willingness of other people to collaborate.

Figure 7-19. Time Lapse in Updates



As the time increases between an event happening and the update being given, more work can be completed. But a more finished product also decreases the scope for collaboration.

Think about the difference in four time scales for providing an update about an event:

- *Monthly*. An event happens on day one of the month, and other people receive an update 30 days later. That means that four weeks of effort has been expended between the event happening and the update occurring. The scope for introducing substantive changes to a month old work effort is approaching zero.

- *Weekly*. The same event happens on day one, but now other people are notified a week later. While a week of effort has been invested between the event and the update, with some wrangling it usually going to be possible to introduce changes. But the people who have invested the week of effort will feel put out, regardless.

- *Daily*. The same event happens on day one, and people are told 24 hours later. Some effort will have been expended to address the event, but it is only a day. It's not too late to propose substantive or significant changes.

- *Hourly*. The same event happens on day one, and other people are updated within the hour. The scope for collaboration is very high, as those with a vested interest in the outcome or expertise to share can get involved early in the process.

Not all organizations or industries require that updates are uniformly given within an hour. At one extreme, some organizations need updates within minutes (financial services) or seconds (military, some financial services), while others can quite happily operate with daily or weekly updates. The key is to find the time lapse that works best for your organization, and to implement the technology and human practices that will allow such updates to be effectively shared within the desired timeframe.

Regulatory Compliance in IBM Connections

There is another side to openness, sharing, and transparency that we need to discuss. In particular industries and certain organizational functions, there are external regulations that constrain the degree of openness, sharing, and transparency. Violation of these regulations can lead to significant financial penalties, jail terms for CEOs and senior executives, and other bad outcomes that are best avoided. Specific US regulations include:

- Federal Rules of Civil Procedure (FRCP), which governs the release of evidence in federal court cases for civil litigation.
- Sarbanes-Oxley (SOX), which sets various requirements for controls over accounting procedures.

In particular industries and certain organizational functions, there are external regulations that constrain the degree of openness, sharing, and transparency.

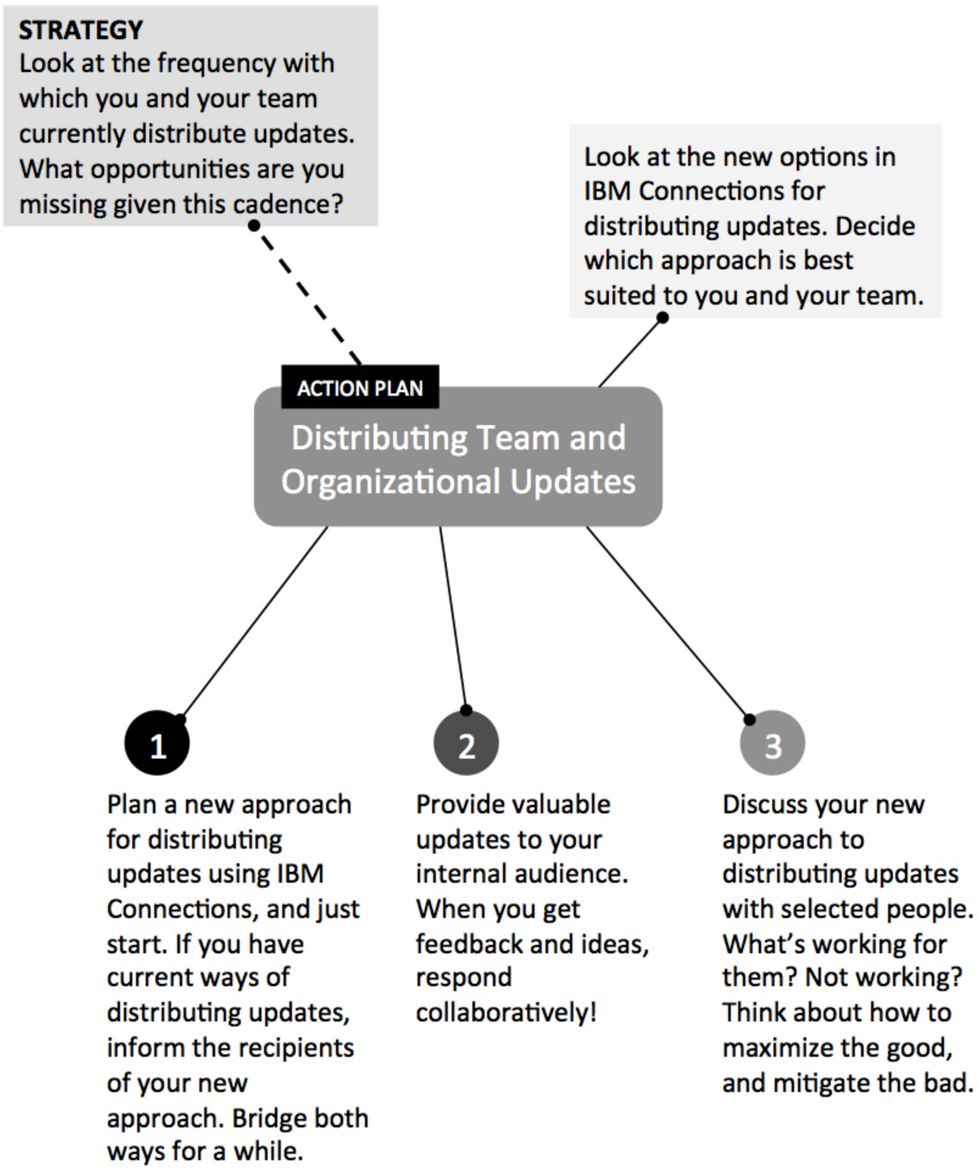
- Health Insurance Portability and Accountability Act (HIPAA), which has particular requirements around the privacy and security of patient health care information.
- In the securities industry, both the Securities and Exchange Commission (SEC) and the Financial Industry Regulatory Authority (FINRA) set regulations. Some securities information has to be retained for defined time periods.

While the specific details are different across these regulations, a common theme in most is to have a policy in place about what can and can't be said or done, a means of knowing what's going on, and the ability to create and secure an authentic historical record of communication to demonstrate proof about what did and did not happen. For firms using IBM Connections, Actiance Vantage offers many of the required policy and compliance capabilities.[4] These include:

- Real-time monitoring of content being created in IBM Connections.
- Logging and archiving of all content, either to an Actiance archive or another existing archival system.
- Contextual review of what was said, highlighting potential violations against specific regulations.

Note that the above regulations don't just apply to updates through blogs and status updates, but more widely across the whole range of capabilities in IBM Connections. In line with this, Actiance Vantage offers coverage across the whole set of capabilities in IBM Connections, although you will need to confirm which regulations specifically relate to your organization, and how these requirements differ in the various geographies in which your organization does business.

Action Plan


STRATEGY
Look at the frequency with which you and your team currently distribute updates. What opportunities are you missing given this cadence?
Look at the new options in IBM Connections for distributing updates. Decide which approach is best suited to you and your team.
ACTION PLAN
Distributing Team and Organizational Updates
1
Plan a new approach for distributing updates using IBM Connections, and just start. If you have current ways of distributing updates, inform the recipients of your new approach. Bridge both ways for a while.
2
Provide valuable updates to your internal audience. When you get feedback and ideas, respond collaboratively!
3
Discuss your new approach to distributing updates with selected people. What's working for them? Not working? Think about how to maximize the good, and mitigate the bad.

Summary

Distributing team and organizational updates is a common activity in organizational life, and often sets the context for wider organizational collaboration. In this chapter we have looked at two ways in which IBM Connections offers new and enhanced approaches for sharing team and organizational updates. We also considered a range of advanced concepts, including the need for regulatory compliance in particular industries and certain organizational functions.

Distributing team and organizational updates is a common activity in organizational life, and often sets the context for wider organizational collaboration.

In the next chapter we dive into the topic of more deliberately creating, ranking, and selecting new ideas for innovation. Capturing ideas and transforming them into innovations is one way of seeding the organization's future, and IBM Connections offers a new way of supporting this common collaboration scenario.

[1] Michael's focus is on helping individuals and organizations reduce the amount of good work done, thereby creating space for doing their "great work." He is the author of *Do More Great Work*, has a wonderful daily newsletter, and runs a range of training programs around the world. Learn more at the Box of Crayons website, at www.boxofcrayons.biz.

[2] The Forbo Eurocol case study is based on a phone interview with Robert Sigmond in mid-April 2013. Used with permission by Forbo Eurocol.

[3] When setting up a standalone blog (see the first advanced concept, on page 184), one of the options is the timezone for your blog. Since there are a number of valid options, which timezone should you choose? Here's two suggestions:

- *Single Author Blog*. If you will be the sole author of the blog, and have a fairly fixed office location, choose the timezone that most closely aligns with your regular business day. Readers will get to sense the ebb-and-flow of your updates. You will still be writing on the behalf of your group or department, but the updates will be timed to align with your own business day.

- *Multi-Author Blog*. When there are two or more people from your group or department providing updates through the blog, choose the timezone that most closely aligns with your group's main location. In other words, if there's a physical location in a particular building that is usually associated with your group, go with that timezone.

After setting the timezone for your blog, note that it is possible through the Advanced Settings on a blog entry to set a future date and time for publishing your entry. This is always stated in terms of the timezone for the blog, so if you are going to write a blog entry to publish in the future to align with a specified event, make sure you get the timezone of the event right. Otherwise you may post some hours too early or too late.

[4] For more on Actiance Vantage, visit www.actiance.com/products/vantage.aspx. Note that Vantage supports more than just IBM Connections for regulatory compliance. A couple of other resources include my notes on Actiance's talk at IBM Connect 2013 (see *Notes on SPOT107 Governance, Compliance, and eDiscovery for IBM Connections*, January 2013, at currents.michaelsampson.net/2013/01/spot107.html), and the datasheet for *Vantage for IBM Connections*, at info.actiance.com/vantage-connections-datasheet (registration required).

Chapter 8.
Capturing Ideas for Innovation with IBM Connections

> *After years of telling corporate citizens to 'trust the system,' many companies must relearn instead to trust their people and encourage them to use neglected creative capacities in order to tap the most potent economic stimulus of all: idea power.* [1]
>
> Rosabeth Moss Kanter

Ideas have tremendous power, and the right idea, at the right time, with a group of enthusiastic and committed people behind it can change the fortunes of a company—and sometimes reshape markets, reinvigorate countries, and even reform the world. In the industrial age there was a major emphasis on splitting the "idea people" from the "cog people;" managers were supposed to have the ideas and the workers did what they were told and weren't supposed to think. But no more—or at least, ideally no more. There are many opportunities for innovating processes, practices, services, marketing strategies, and organizational policies, among others, and anyone in the organization that's paying attention can have a great idea. The challenge is to capture the ideas, get input from others to ascertain support, and move those ideas through to implementation. IBM Connections can provide the technology to help with this.

In this chapter, we will:

- Look at the theory of capturing ideas for innovation.
- Explore how to use IBM Connections to capture, assess, and execute on ideas.
- Learn about two organizations using IBM Connections to support ideation.
- Consider a range of advanced concepts, such as avoiding a repeat of the suggestion box.

The Theory of Capturing Ideas for Innovation

Creating, collecting and ranking ideas for process improvements, new products and services, and many other areas of business and organizational life are great ways to make continual innovation a part of the fabric of how work gets done. To do so, you need some way of collecting the ideas in the first place. This is often done by email, where people send their ideas to a particular address (newideas@mycompany.com for example), but then the ideas are hidden, not available for everyone to see, and generally get forgotten. This leads to cynicism among employees because they never hear back about their ideas, and the organization misses out on a potential treasure trove of insights, enthusiasm, and motivation for improving operations, technology, and customer service.

IBM Connections provides a much better approach to capturing ideas for innovation. Ideas are submitted in an open forum, allowing everyone inside the organization to see what is being proposed. Any employee can contribute their perspective on an idea, providing a way for managers to gauge the motivation and feeling behind specific ideas. This helps identify ideas with a groundswell of support, and equally offers a way of mitigating the risk of people who can talk a big game but never get anything done.

Ideas are submitted in an open forum, allowing everyone inside the organization to see what is being proposed.

Consider the idea of providing access to business processes for customers using mobile devices such as smartphones—which is a very common idea across a broad spectrum of organizations today. At one organization in North America, this idea had been raised multiple times but had never made it through the internal approval process. Many employees supported the idea, and customers clearly wanted the ability, but executives were unable to connect the dots. When raised recently in IBM Connections, employees rallied around the idea, highlighted the potential upside, and gained the attention of executives. The initiative was improved, and customers now have mobile access. Changing the way the idea was captured, expressed, and supported led to a totally different outcome.

Here's how this different approach works:

- *A Place for Ideas*. A place for new ideas is created in IBM Connections, along with a way of differentiating between groups of ideas. People can see related ideas together, without having to wade through ideas that are irrelevant to them.

- *Adding and Viewing Ideas*. People are invited to visit the idea space, and enter their ideas. The idea space displays an up-to-date list of all the ideas which have been previously contributed. While in the idea space, people can comment on ideas submitted by other people.

- *Options for Contributing*. Other people are able to browse through the ideas in the idea space, and read what others have written. They have some options for contributing: they can add a new idea themselves, they can comment on someone else's idea (for example, *I think this is great, and would really help Sales move more of these*), and they can vote. Ideas with greater numbers of votes move to the top of the list, while those ideas with fewer votes move to the bottom of the list.

- *Various Search Options*. People can search for ideas on particular topics, related to particular products and services, or with particular keywords in the title or description. In a very active collaborative idea space, this helps people quickly find ideas that are relevant to their work.

- *Review Ideas and Support*. When it's time to make decisions about where to invest in new products, how to serve clients better, and how to improve processes, the underlying contributions have been made, and the person responsible has a goldmine of thinking to help guide their decisions.

- *Move to Action*. Ideas that have clear support and that will add value to the organization can be moved to action. There is a way of seeing the background to the idea in the idea space, and a clear visual signal in the idea space that the idea is being executed on. This demonstrates the reality of the idea space, overcoming the perception that it is just a bunch of words that no-one listens to.

Figure 8-1. Different Ways of Capturing Ideas for Innovation

Attribute	**Email Address**	**Idea Space**
Submitting ideas	Ideas are sent to an email address that only a few people can access	Ideas are submitted in a space that anyone can view
Gathering feedback on ideas	The owner of the email address may ask for feedback from selected people	Feedback is submitted openly as comments or votes
Moving ideas to action	Approved ideas can be executed, and the original submitter may be told	Approved ideas are openly executed, and everyone can see the transition from idea to action
Potential for serendipity	Low, since the ideas are hidden	High, since the ideas are publicly shared in the firm

There are significant differences in outcomes when ideas are captured via an email address compared to using an idea space.

How to Capture Ideas for Innovation in IBM Connections

Sally was visiting Albreto's head office for a week, and she, Edgar, and Walter were waiting for the elevator to take them back to their desks after a long lunch. They had all become so engrossed in their conversation that their time in the Albreto Café had swiftly slipped by, and what was supposed to be a 30-minute eat-and-run lunch had turned into a two-hour marathon. It was only when Edgar's phone had rung that they all realized what the time was. "We'd better get back," said Edgar, trying to hide a smile as he attempted to look horrified given the time. "Let's finish our conversation on the way back up to Level 16."

"So what you're saying is that we need a new way of capturing all the ideas that are coming up in the Forum—right?" said Walter.

"In a way, yes," answered Sally, "although it's not so black-and-white. I think the Forum has a vital ongoing role for deep discussion, but there is something it is not great at, and that is getting a sense—in a structured way—of which ideas and proposals people would get behind if we moved ahead with them."

"You mean like a way of voting for ideas?" asked Walter.

"Yes, that is what I'm talking about," answered Sally.

"I can kind-of imagine what you are driving at," said Edgar, "but I'm much better when I see it for real. How long will this take to set up?"

"I could do it on my iPad while we head up the elevator," suggested Sally, "and then show you what it looks like."

Edgar nodded his approval, and Sally created the ideation blog. She quickly added a couple of ideas to the blog, and handed over her iPad. Edgar angled the screen so Walter could see it too.

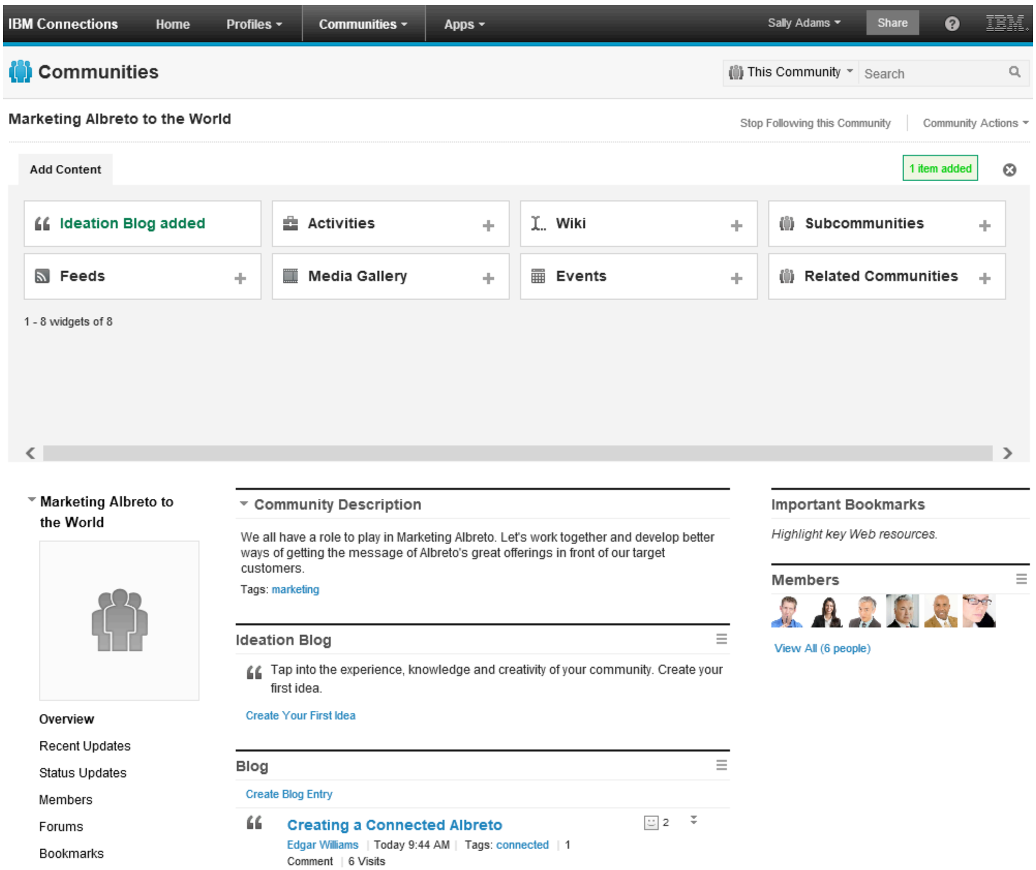
"You can keep the ideation blog, but not the iPad," she said, ribbing him for the fact that he still hadn't purchased a tablet of any make or model. "You know, waiting for 'the next new iPad' is a never-ending game. Just order it online and you can have one tomorrow."

Edgar laughed at himself, and waved off the suggestion. "The very next new iPad, I promise. I'll be first in line." He looked at the new ideation blog on the iPad, and it was as though a lightbulb appeared above his head. "I get it now," he said. "This gives a way of visually ranking ideas, opening the door for anyone at Albreto to have a voice and state their position. And if we decide to push ahead with an idea, we've already got a list of the people who would be keen to support it." He paused for a moment, lost in thought. "How soon can we do this?" he asked as the elevator doors opened.

Step 1. Create the Ideation Blog in a Community

An ideation blog can only be created inside a community; it cannot exist by itself outside of a community space in IBM Connections. So the preliminary step is to either open the community in which you will create the ideation blog, or to first create a new community to host the blog. In this chapter, we will create the ideation blog in the public *Marketing Albreto to the World* community, given the stated intent of providing a more structured way of evaluating ideas raised in the forum. Once you have the community open, click *Community Actions*, then *Customize* to display a list of possible tools to add into the community. Click on *Ideation Blog* to add it to your community. Once you have clicked Ideation Blog, the list of available tools in the community will be updated.

Figure 8-2. Adding an Ideation Blog to a Community



Add the Ideation Blog to your community. By default it will appear at the bottom of the middle pane of the Overview page for your community. You can move the Ideation Blog higher up the middle pane if required.

Step 2. Give Your Ideation Blog a Specific Name to Set the Scope

Your new ideation blog exists to serve a particular need, and giving the blog a specific name helps with setting the scope of the ideation blog and expectations for the members of your community. While the ideation blog will always be called an Ideation Blog on the Overview page and on the left-hand navigation pane, when a member opens the ideation blog they should be presented with a critical question, an idea prompt, or a statement to react to. A critical question is the most focused, but the other two options are also valid:

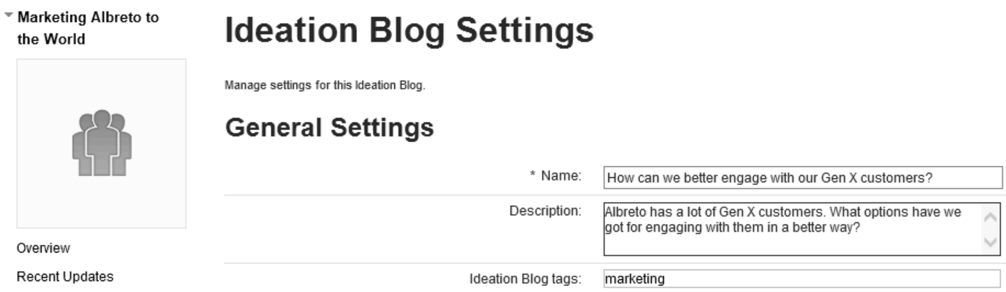
- *Critical Question or Challenge*. When your ideation blog is seeking answers to a question, change the name of the blog to the critical question. Ideas can then be posed as possible answers to the critical question. For example, the critical question could be *How can we better engage with our Gen X customers?*

- *Idea Prompt or Theme*. If your ideation blog is seeking ideas on a more general basis, pose an idea prompt instead of a critical question. For example, the idea prompt could be *Marketing strategies for our target customers: Ideas?*

- *Statement*. If you want to be less directive and set a broader scope for the ideation blog, make a general statement, such as *There are many opportunities for improving Marketing at Albreto. Discuss.*

To change the name of your ideation blog, open the blog and click the *Settings* button. Change the name to your critical question, idea prompt, or statement, and write a brief supporting description too. When done, click *Update Ideation Blog Settings*.

Figure 8-3. Change the Name of Your Ideation Blog to Set the Scope



Change the name of your ideation blog to a critical question, idea prompt, or statement. This sets the scope for the blog and gives people something specific to think about and respond to.

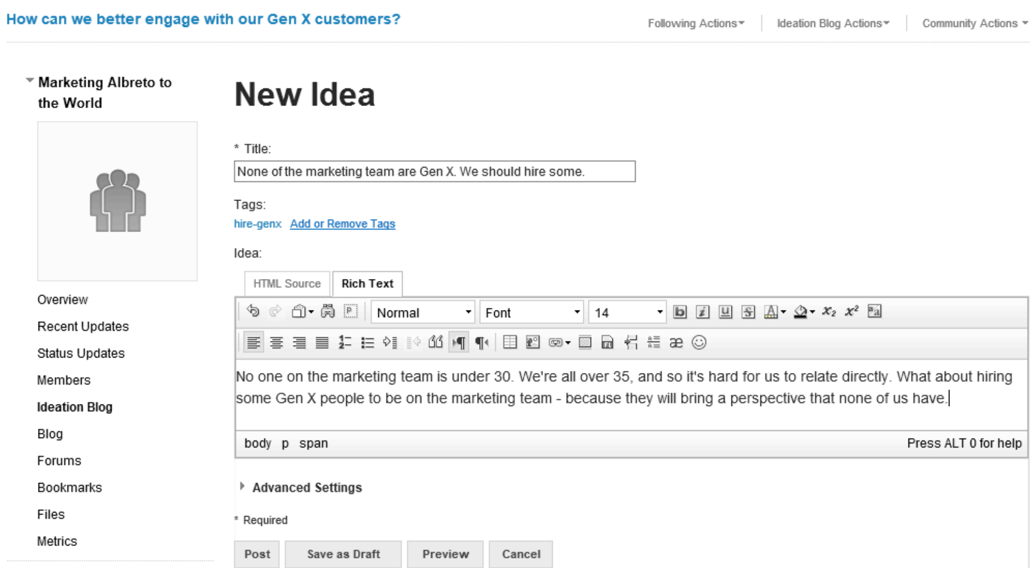
If you choose to use the default name of your new ideation blog (which is the same name as your community—for example *Marketing Albreto to the World*), you will need another way of communicating the scope and expected focus of the ideation blog. One option inside the community is to update the Community Description area on the Overview page, posing the critical question, idea prompt, or statement you want people to think about.

Step 3. Create the First Idea or Ideas

Create the first idea or couple of ideas in the ideation blog, so the other members of your team or group are not presented with a blank canvas. While for some people a blank canvas feels wonderful and fuels their creativity, this is a short-lived experience and quickly over once the first person has created an idea in the ideation blog. Most of your team or group members will visit the blog once it has one or more ideas already created, and this signals to everyone that the ideation blog is a real place for discussing ideas. A blank canvas can also feel like an empty hall with no one listening—a real turn-off for participation and involvement.

To create the first idea in the ideation blog, open the blog and click the *New Idea* button. This opens a form with an area for entering the title for your idea, assigning one or more tags, describing your idea in more detail, and an area for Advanced Settings. At a minimum you need to enter a title and some detail about your idea.

Figure 8-4. Create the First Idea in Your Ideation Blog

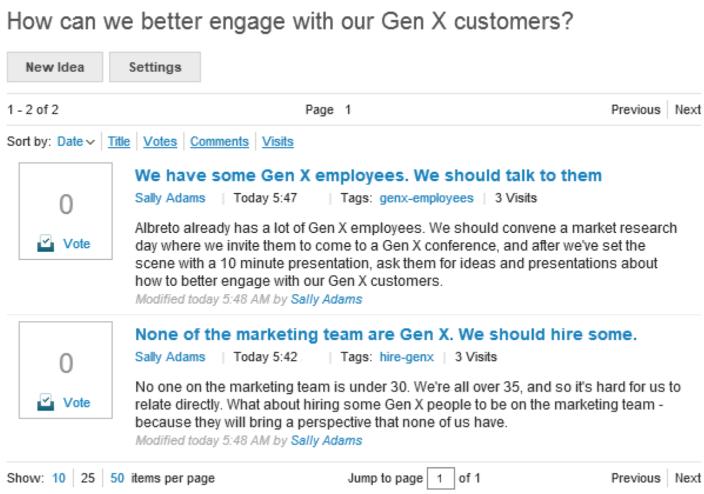


Create the first idea in the ideation blog, giving your idea a title and as much description as is required to get your point across. Post the idea when you have finished.

When you have finishing describing your idea, click the *Post* button. This will save and publish your idea to the ideation blog. Alternatively, if you want to come back to your post and make more edits before sharing it, click *Save as Draft* instead. You will be able to see your draft idea and make changes, but none of your other team or group members will be able to see it until you decide to post it.

When you have finished creating the first one or two ideas, click *Ideation Blog* in the left-hand navigation pane to open the summary page of your ideation blog. The summary page shows all of the ideas that have been submitted to the ideation blog, and in the first instance, the most recently added ideas are shown at the top of the list. A brief description of each idea will be displayed in the summary view, and you can click into an idea to view its full details.

Figure 8-5. The Initial List of Ideas in the Ideation Blog



Use the summary page of your ideation blog to get a quick overview of all the ideas that have been submitted. Ideas are displayed with their title and a brief description.

Sidebar: Finding Ideas That You Saved as Draft

When you create a new idea, you can either post it directly to the ideation blog or save it as a draft. When it is saved as a draft, no one else can see the idea until you post it. In order to post it though, you have to be able to find it again, and ideas saved as draft do not display on the summary page of the ideation blog. How do you find them?

The answer is to click the *New Idea* button in your ideation blog, which opens the new idea form. Don't create a new idea, but notice that a couple of additional areas have been added to the base of the left-hand navigation pane. One of those is entitled "Recent Drafts," and the ideas you have saved as draft will be listed under that title. Click on the name of your draft idea to re-open it in edit mode. Make any changes, additions, or other edits required to your idea, and then click *Post* to publish it to the ideation blog.

One comment: the purpose of an ideation blog is to stimulate the creation and exchange of ideas. Saving ideas as draft prevents other people from seeing your ideas, and waiting until you have perfected your idea undermines the intent. Use drafts sparingly.

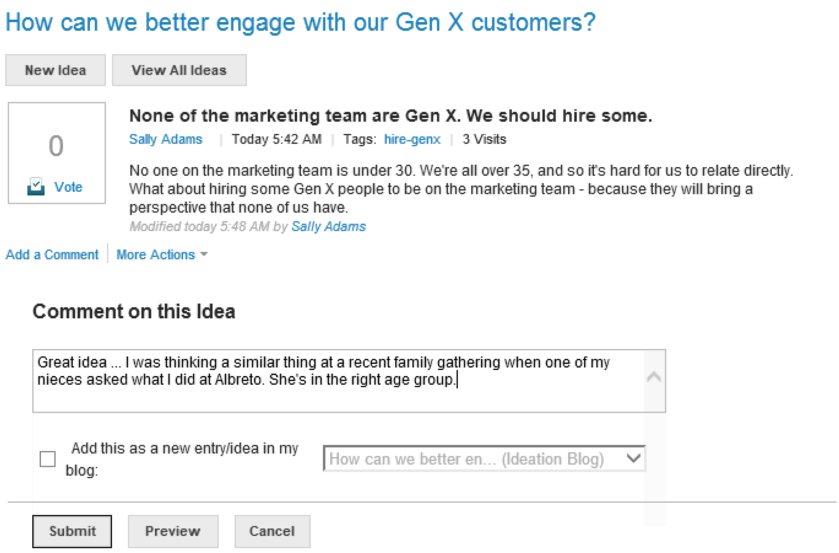
Step 4. Encourage Participation through the Sharing of Ideas

With your ideation blog set up to capture ideas, it is time to encourage the members of your team, group, or community to share their ideas and comment on the ideas submitted by other members. You are looking for involvement and participation from as many people as possible, to broaden thinking, challenge apparent constraints, and push towards innovation. There are three forms of participation to encourage:

- *Creating New Ideas*. In responding to the critical question, idea prompt, or statement posed by your ideation blog, what ideas do people have? These should be created as new ideas in the blog, for everyone else to see.

- *Commenting on Ideas from Other People*. Browse the list of ideas, scanning the titles and brief description displayed in the summary view. When you see an idea you like, open the idea and write a comment. Click the title of the idea to open it, and then click *Add a Comment*. This opens a comment box into which you can type your thoughts and reactions. Click *Submit* when you have finished your comment.

Figure 8-6. Commenting on an Idea



Comment on existing ideas to give support, provide a different view, and encourage further idea sharing. Aim to be constructive in building on the idea your colleague has submitted.

- *Replying to Comments on Ideas*. When people leave a comment on one of your ideas, reply to thank them for their thoughts. If they have asked a question that needs an answer, give the answer in a further comment.

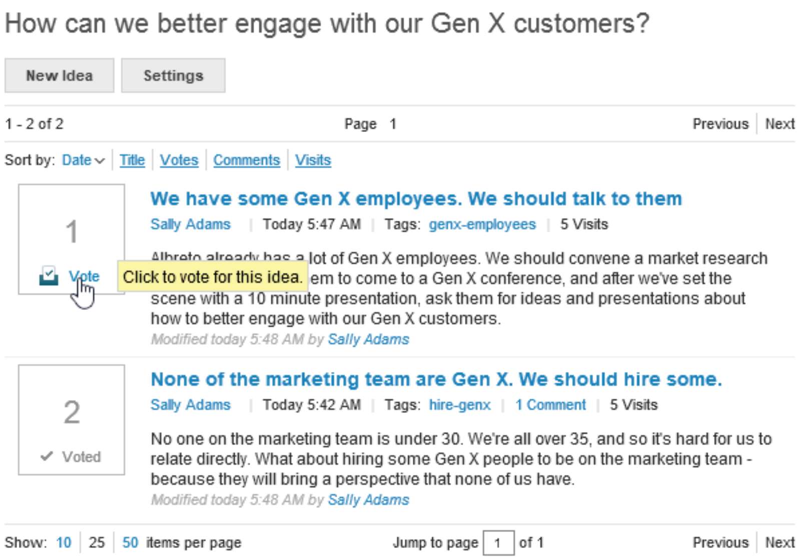
Encouraging participation stimulates people to be involved and share their ideas freely.

Step 5. Vote on Ideas

One of the most powerful capabilities of an ideation blog is its ability to capture numerical data on who supports an idea. This is really helpful because it creates visibility into the spread of support for a given idea before it is implemented, which means that the people making the decisions about implementing an idea have a way of gauging support before pushing ahead. Without numerical data on the support of an idea, the only option is a more intuitive decision making process. That can be a valid approach, and intuition still remains vitally important, but the addition of numerical data gives another slice to the decision making process.

Voting for an idea is very simple. Find the idea you want to vote for, and click the word *Vote* in the square box to the left of the idea. This increases the number of votes by one, and also puts a tick and the word Voted at the bottom of the box to show each person the ideas they have already voted for. Each person can only vote for any single idea once; you can't vote for an idea more than once.

Figure 8-7. Vote on Ideas to Show Support



Vote on ideas to show your support. You can vote for each idea only once, and once you have voted for an idea, the number of votes is updated and displayed next to the idea.

If you change your mind about the vote you have given an idea—for example you have learnt more about the idea and no longer support it—click the word *Voted* to remove your vote. This will decrease the vote count by one, and will change the word *Voted* in the square box back to *Vote*.

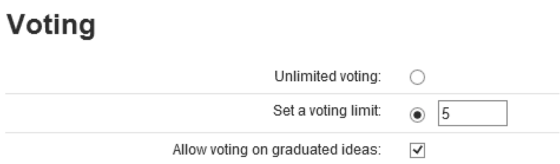
As your fellow team and group members vote on the various ideas, you can sort the summary view of the ideation blog by the number of votes awarded to each idea—click the word *Votes* in the Sort by line (see Figure 8-6). This provides a quick way of seeing which ideas have the most and those with the least support.

Using Unlimited Voting or Limited Voting

When asking team or group members to vote on ideas, there are a couple of ways of thinking about the meaning of a vote. The first is that each person can vote for as many ideas as they like; but such a vote may be a weak indication of support. The second is that each person can vote for a limited number of ideas; such a vote is more likely to be a strong indication of support.

Ideation blogs support both types of voting. The default setting is unlimited voting, but the owner of the ideation blog can change this to limited voting. To do so, click *Ideation Blog Actions* at the top right of the blog, then click *Manage Ideation Blog*. In the voting section, set a voting limit for each person. When done, click *Update Ideation Blog Settings* to save.

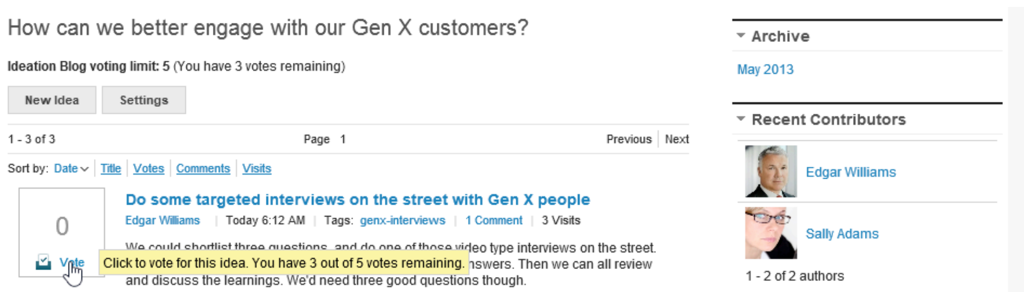
Figure 8-8. Limiting the Number of Votes to Drive Focused Decision Making



Set a voting limit to force team or group members to carefully weigh the idea options and to choose between competing alternatives.

If limited voting is enabled, people are told how many votes they have available and remaining on the summary view of the blog, and are reminded each time they vote.

Figure 8-9. Advising Team Members About the Voting Limit



People are told how many votes they have in total and remaining while working in the blog.

Step 6. Move Ideas to Action

Creating, commenting on, and ranking ideas through voting are a means to an end—that end being the identification of opportunities for innovation that can be acted on. If ideas remain only ideas the organization gets no value. It is only when ideas are put into practice that the real value comes. You have a number of options available for moving an idea to action:

Creating, commenting on, and ranking ideas through voting are a means to an end—that end being the identification of opportunities for innovation that can be acted on.

- *Just Do It*. Some ideas just need to be done, and can be implemented quickly by one or two people acting in concert. If you have an idea like that—perhaps it's a change to a policy, the purchase of a new piece of equipment that will help the department, or a training course on group facilitation skills—just get it done. This assumes you have already adequately talked through the details in the course of exploring the idea, have the support of those affected by the change, and have the appropriate authority to make it happen.

- *Create a Community Space for a New Project*. Other ideas need the full treatment of a new project community space in IBM Connections. If moving the idea to action will require a project plan, the involvement and coordination of multiple people, the development of a new product or service, and a significant budget to implement, the right next step is to set up a project community space. See Chapter 9 for more details on setting up a community for a project.

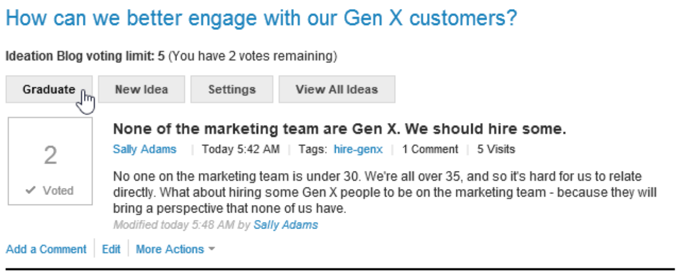
- *Create an Activity*. Other ideas do not need the full treatment of a project community, but would benefit from a more structured way of making progress. The Activities feature in IBM Connections is well suited to this. We have talked in this book about using an activity for managing meetings (see Chapter 4), but an activity can just as easily be used for the purpose of moving an idea to action. In a moment we will talk about how Connections supports this directly.

Regardless of the course you take to move an idea to action—just doing it, creating a project community, or using an activity—there are at least two specific steps you need to take in your ideation blog.

1. *Graduate the Idea*. Explicitly state that an idea has been moved from the idea stage to the action stage. In the language of IBM Connections, this is called "graduating" an idea. Open the idea you are going to move to action, and click the *Graduate* button (see Figure 8-10). Graduating an idea adds a visual indicator to the bottom of the vote count box for the idea, and this is shown in both the summary view of the ideation blog and when looking at an idea (see Figure 8-11).

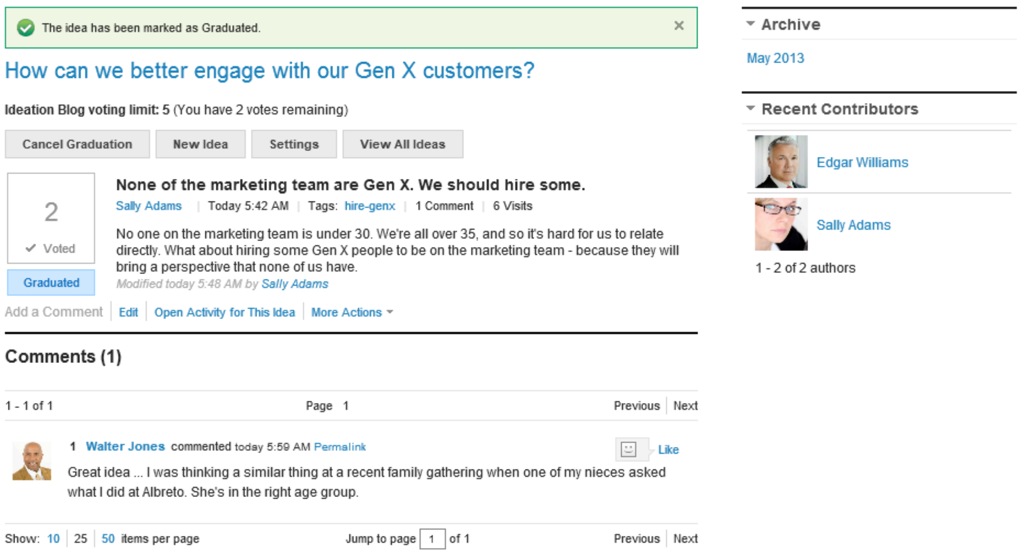
2. *Say What Is Happening Now*. Write a comment to say what is happening with the idea now that it has been graduated. If you are taking the approach of just doing it, note who is just doing it so other people can reach out for an update. If you have created a project community for moving the idea to action, include a link to the new project community. If you have created an activity, IBM Connections will automatically include a link to the Activity; leave a comment only if you want to express more details.

Figure 8-10. Graduate the Idea



When moving an idea to action, click the Graduate button to create a visual indicator on the idea to show that it is being pursued. This clearly signals which ideas have already been moved to the action stage.

Figure 8-11. The Graduated Idea



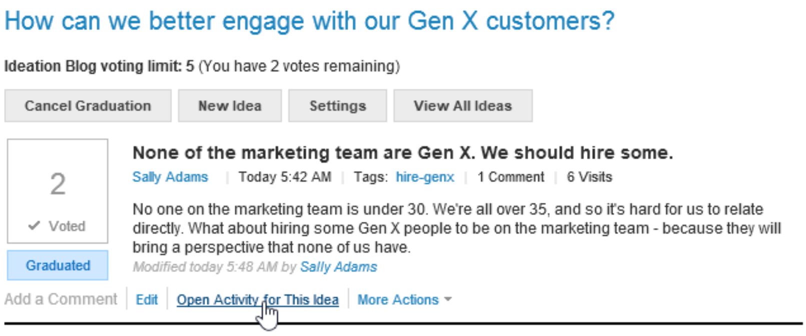
After an idea has been graduated, a visual indicator is displayed to alert people about which ideas have already been moved to action. This reduces the likelihood that people will spend unnecessary time thinking about ideas that have already been implemented.

On Creating an Activity to Move the Idea to Action

When you graduate an idea to show it is being moved to action, you have the option of creating an activity to assist with the subsequent planning and coordination tasks. If you do not create the activity at the point of graduation, you can click the link that says *Create an Activity for This Idea* once the idea has been graduated (see Figure 8-12). This creates an activity for the idea in the community space that holds the ideation blog, and will link the idea to the activity. If your community space does not have an Activities tool in it already, one will be automatically added.

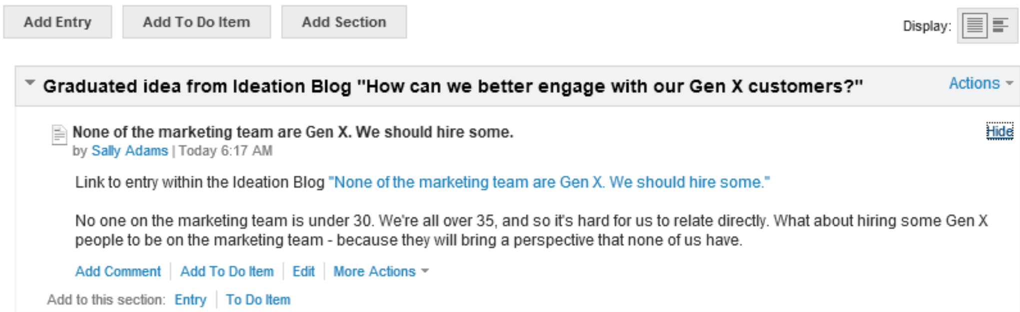
To work on the activity for the idea, open the idea and click the link that says *Open Activity for This Idea*. You can also get to the idea by opening the *Activities* tool from the left-hand navigation pane.

Figure 8-12. Open the Activity for the Graduated Idea



When graduating an idea and creating an associated activity, the idea is displayed as graduated, and people have the ability to open the activity from within the idea.

Figure 8-13. An Activity for a Graduated Idea



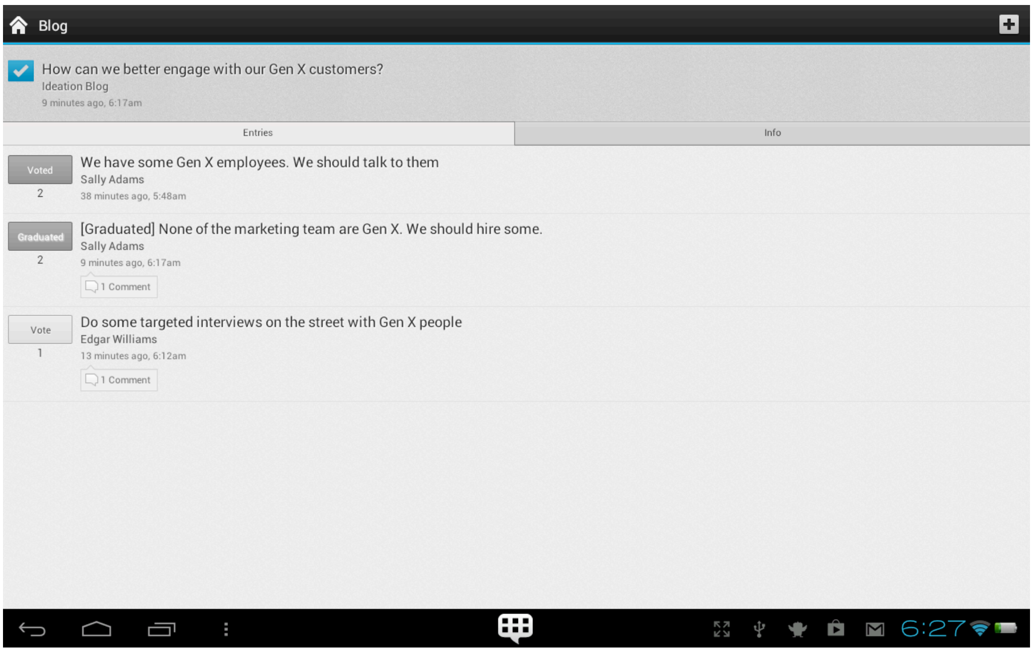
An activity created as a result of a graduated idea links back to the idea in the ideation blog. This creates a good route for reviewing the discussion and voting up until the point at which the idea was graduated.

Working with Ideas on a Mobile Device

The mobile apps from IBM provide an easy way of working with ideas in Connections on a mobile device. The apps make available the core capabilities on an ideation blog:

- *Viewing Ideas*. Review the list of current ideas in the ideation blog by touching into the associated community, and then touching the ideation blog. Or touch an update in your *I'm Following* screen to jump straight to the ideation blog.
- *Viewing Ideas and Comments*. Touch one of the ideas in the main list to open it for further viewing. You can read any comments associated with the idea in here.
- *Adding a Comment*. When looking at the details of a current idea, touch the phase *Add a Comment*. This will give a pop-up box for typing your comment.
- *Adding a New Idea*. Touch the plus sign at the top right of the screen to add a new idea. Give your idea a title, describe it in more details, and give it any relevant associated tags. Touch *Post* when you are done to save your new idea.
- *Voting on an Idea*. Touch the square voting box to add your vote to an idea.

Figure 8-14. Working with Ideas on an Android Tablet



The mobile apps for IBM Connections allow people to view and add new ideas, read and add comments, and vote on ideas.

Step 7. Thank Your Idea People

As new ideas are captured, analyzed, and promoted for execution, make it a habit to thank your idea people. While expressing thanks should be a non-negotiable habit, there are different ways to go about it. Sometimes it will be sufficient to leave a comment to say thank you, while at other times a formal reward will be called for. Here are some possibilities:

While expressing thanks should be a non-negotiable habit, there are different ways to go about it.

- *The Simple Comment*. Write a comment against the idea in the ideation blog to say thank you. You will be thanking the individual who originally posted the idea, as well as the group of people that have formed around the idea.

- *A Phone Call*. When a simple comment doesn't feel good enough, use the phone or IBM Sametime to place a call to the individuals involved. Thank them for their constructive ideas. Such a personal touch goes a long way, and for people who regularly deal with the difficulties of making progress in a large organization, can be of great encouragement.

- *A Coffee*. Take the individuals involved in an idea out to a local café for morning or afternoon coffee. Talk with them about their work, where the idea came from, and how they see it making a difference to the organization. All of that may be in the ideation blog, but talking it through can provide an opportunity for people to stumble on new ideas or angles they haven't previously expressed.

- *A Call-Out at a Company Meeting*. At a company meeting (or in a video blog post from the CEO), highlight the people who have championed an important idea from conception through to delivery. If it is a new process that will positively effect many employees, or a new service for customers, mention the individuals who were involved. You will be contributing towards an organizational culture where good work is shown for what it is.

- *A Bonus or Raise*. If a group of people have identified an opportunity to save $30 million a year by redesigning an organizational process, maybe the organization should contribute a percentage of the realized savings to the group involved in the form of a special bonus or ongoing raise. Clearly there is some work required to make this happen in conjunction with human resources and the finance team.

Perhaps the ultimate form of thanks though—while not negating the need to follow through on the approaches above—is to put ideas into practice so employees, customers, and the wider organization benefits. People can take pride in the good ideas they have contributed towards, and this engenders positive effects all around.

Closing Comments on Capturing Ideas for Innovation

As we conclude our examination of the scenario in this chapter, let's end with a few closing comments:

- *Make It Part of the Culture*. Listening to the ideas of employees is best embraced as the new ongoing way of working, not a one-off, never-to-be-repeated event. As a one-off event, employees will question your motives, have little trust in the process, and hold back from truly engaging. As a new way of working, employees are more likely to develop the requisite trust for posting their ideas for others to view and critique.

Listening to the ideas of employees is best embraced as the new ongoing way of working, not a one-off, never-to-be-repeated event.

- *Call Time-Out on the Ideation Blog*. Computer-mediated forms of interacting confer many benefits on people who are unable to be together in-person. However, such forms also impose limitations in human expression and can become more of a problem than they are worth. If there is an important idea that needs to be analyzed intensively, it is not a sign of failure to call time-out on the ideation blog and put people in a room together for two-to-three days. There will be a cost associated with that, but if the idea under consideration runs into seven or eight figures, spend five figures to deeply assess whether there is a real opportunity.

- *Don't Only Implement the Easy Ideas*. A stream of easy-to-imagine, simple-to-execute ideas will contribute many marginal improvements to your organization. They should be put into place, but not exclusively nor at the expense of never tackling the hard-to-conceptualize, difficult-to-execute ideas that create a new future for the organization. Definitely implement the easy ideas, but also create the necessary space for the more difficult ones.

- *Failure to Successful Execute the Idea Does Not Necessary Mean the Idea Was Wrong*. The process of executing the idea may have been wrong, or the wrong people were put on the team. If your initial attempts to bring the idea to market fail, ask whether you still believe in the vision. If you do, recalibrate what will be required for success and try again.

- *Use Ideation Blogs for More than Capturing Ideas*. The underlying technical constructs of an ideation blog can be used for more than just capturing ideas for innovation. In Chapter 11 on *Making Decisions with IBM Connections*, for example, we use an ideation blog to quickly gain a sense of what the members of the executive team think about a pending decision. There are other many situations where an ideation blog can be used to solve non-ideation problems, so keep your eyes open for opportunities to apply the technology.

Case Studies

Let's look at two organizations using IBM Connections to improve innovation.

CEMEX

CEMEX is a global building materials company, with 47,000 employees working in over 50 countries; but was facing challenges in leveraging the technical expertise of its many employees to drive success.[2] In late 2009, it embarked on a journey to establish a business platform for open collaboration—which CEMEX branded as Shift. Powered by IBM Connections, innovation was a major focus.

To get Shift going, six global initiatives were identified and set up in Connections, with two leaders and a global network of employees for each. Employees used the tools in IBM Connections to drive progress in each of the initiatives—often by sharing best practices from their part of the world. These worked so well that recently the global initiatives evolved to better satisfy the needs of their customers. Adoption across CEMEX was rapid, increasing to 17,000 employees within 12 months, and 35,000 within two-and-half years. No one was forced to use Shift, but employees saw the value as their colleagues recommended participation. The results have been outstanding:

- *Reducing Costs*. The Alternative Fuels global initiative was one of the original initiatives. It was a company-wide effort focused on sustainable energy, and brought together CEMEX's employees working on the use of alternative fuels. Innovative ideas resulted in the avoidance of 1.8 million metric tons of CO^2 per year, US$140 million in savings, and US$80 million from selling CO^2 credits.

- *Speeding Time-to-Market*. CEMEX launched its first global brand of ready-mix concrete within four months of starting the project. Six hundred employees from around the world collaborated on the project.

- *Enabling the New Culture*. The leaders knew from the start that creating a new culture of innovation and collaboration was essential to the future success of CEMEX. Shift provides a mechanism to support this transition.

- *Establishing Other Communities*. Stimulated by the success of the global initiatives, employees have created over 1,600 other communities for sharing ideas, working together, and supporting collaboration.

- *Increasing Visibility for Experts*. CEMEX employees with special knowledge and expertise are now visible beyond their local networks. For example, the Aggregates business group has developed a network of experts who will answer any question within 48 hours. The topics are listed in a wiki in Connections, and questions submitted to the forum connect instantly with the experts.

DuluxGroup

DuluxGroup is an Australian consumer products company listed on the Australian Securities Exchange. It manufactures and markets premium branded products, primarily focussed on the maintenance and improvement of residential homes. Product categories include paints, home improvement products, garden care, concrete protection chemicals, garage doors and electronic openers, and components for cabinets and windows. It employees 3,800 people across the Asia Pacific region, and until 2010 was part of the Orica Group. Now a standalone entity, DuluxGroup is forging its own path to help consumers create better places and spaces in which to live and work.

Although DuluxGroup owns a wide range of products and market-leading brands, it is not content to stand still. Developing new products is seen as a strategy for winning in the market year-after-year, and the company has used a structured New Product Development (NPD) process for many years—even while part of the Orica Group. The process provides a way of logging, investigating, analysing, and deciding whether to proceed with a new product or capability. The problem was where all of that information was stored.

When Peter Risk joined the Marketing group at DuluxGroup in 2009 with responsibility for the NPD process, he had no way of seeing the ideas that had been gathered and analysed across the company. The ideas were there—they were just extremely difficult to access. There was no central holding place for ideas, and the resulting analysis was stored in filing cabinets or people's email inboxes, or carried around in their heads. Something needed to change.

Realizing that he could not make consistent progress if he didn't deal with the existing collections of great ideas, Peter created a NPD Community in IBM Connections, and added a wiki for cataloguing all previous and new ideas. Here's how it works:

- *One Page Per Idea*. Every idea gets its own page in the wiki. Relevant material is entered on the idea page, such as an image or video, a link to a competitor's web site, a copy of an email by the marketing director three years ago, or a pointer to an Excel spreadsheet analysing the prospects.

- *NPD Projects*. Ideas promoted to execution are now being run through a community that is specifically set up for the project. Each idea gets its own project community, which brings all of the information and project team members together, and ensures everyone knows what is going on.

With the NPD Community up-and-running in IBM Connections, Peter is now working on the more challenging task of aligning the NPD processes across all of the DuluxGroup, using the collaborative capabilities of Connections.

Advanced Concepts

There are a number of advanced concepts that can guide our thinking about and working with ideation supported by IBM Connections. These include:

1. Forcing specific behaviors during an ideation session.
2. Preventing a repeat of the "Black Hole suggestion box."
3. The idea of open innovation as an alternative to focused ideation.
4. Extra steps required to bring breakthrough ideas to fruition.

Let's briefly consider each concept in turn.

Forcing Specific Behaviors During Ideation

When using an ideation blog to capture ideas for a specific event or activity, putting a time frame around the various elements of idea creation, commenting, and voting helps to focus people on the task at hand. There are two commands—available to the owner of the ideation blog—to support this. Both are found under the *Ideation Blog Actions* link at the top right-hand side of the blog:

- *Stop Idea Creation*. Click this command to prevent people from creating new ideas in the ideation blog. People will still be able to write comments on existing ideas, and will still be able to vote on existing ideas. If you are going to use this command to shape behavior, don't do it without telling your fellow team or group members what is going to happen. In the ideal scenario, people know how long they have for creating ideas—perhaps three or four days—and the date and time when that will be turned off.
- *Freeze Ideation Blog*. When the purpose for using the ideation blog has ended, either by virtue of having collected sufficient ideas for making a decision, or because the allotted time for ideation is up, you can freeze the ideation blog to create an enduring snapshot of what people said and how they voted. Freezing the blog prevents further changes to ideas, comments, and votes.

Freeze an ideation blog to create an enduring snapshot of what people said and how they voted. Freezing a blog prevents further changes to ideas, comments, and votes.

Both of these approaches allow you to shape the desired behavior in the ideation blog. They will have their place in your repertoire, but with a small, focused team you should be able to achieve the same results without having to be so structured.

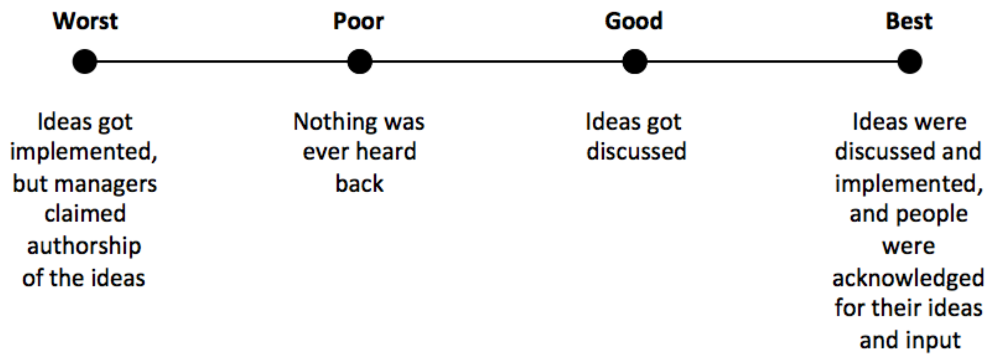
Preventing a Repeat of the "Black Hole Suggestion Box"

In the world before IBM Connections, a physical or electronic suggestion box was commonly used for capturing ideas for innovation—in organizational practices, business processes, hiring techniques, and many other areas. The idea of a suggestion box had wide applicability, but too often suffered from a fundamental flaw: the suggestion box was a black hole into which ideas were sent but seldom came out. Thus the suggestion box represented a possibility that was never grasped, and staff stopped using the system. If not addressed, this same flaw will condemn an ideation space to the same outcome.

The suggestion box too often suffered from a fundamental flaw: it was a black hole into which ideas were sent but seldom came out.

Actually, there was an even worse outcome than never hearing anything back from a suggestion box, and that was when ideas did get implemented but managers claimed authorship of the original idea. This diabolical outcome bred mistrust, cynicism, and undermined the very culture the suggestion box was trying to promote.

Figure 8-15. The Best and the Worse of Suggestion Boxes



The best outcome of a suggestion box was that ideas were discussed and implemented, and people were acknowledged for their ideas and input. Organizations often settled for lesser outcomes, undermining the validity of the suggestion box.

In a world where it is very easy to use technology to capture ideas for innovation, there is an enduring need to remember that such technology flourishes best in the context of human relationship and connection. If the technology is used to write people out of the equation—to extract their best ideas without giving anything back—the benefit will be short-lived. In embracing technology such as an ideation blog, contemplate what the best outcome would look like for everyone involved, and develop the necessary structures, policies, and procedures to make doing the right thing intentional rather than accidental.

In Praise of Open Ideation

We took a focused approach to capturing ideas for innovation in this scenario. The ideation blog used in the *Marketing Albreto to the World* community was given a specific name in order to signal the desired focus in the ideas submitted. There are a bunch of reasons why such focused ideation is a good approach, including clarity of intent, the elimination of irrelevant ideas, and a quick way for potential contributors to gauge whether or not they want to participate. There are also various downsides to focused ideation, and an argument can be made for a more open approach. Let's look at how to embrace such an approach in IBM Connections.

Open ideation means opening an idea space to any and all ideas, without filtering anything. Any idea can be submitted. Every idea has potential value. All ideas should be seen in context with all other ideas. Practically speaking, this requires creating a community with an ideation blog with a very wide scope. It is a return to a suggestion box style of capturing ideas. The sheer volume of ideas, comments, and votes should stimulate participation by other people. The velocity at which ideas are transformed to active projects should demonstrate that the ideation blog is being used for real purposes—the business is finding new vitality for its products and services.

Open ideation means opening an idea space to any and all ideas, without filtering anything. Any idea can be submitted. Every idea has potential value.

Making an open ideation approach work requires a careful balance between the mechanics of using IBM Connections and the associated human disciplines:

- *Differentiating Ideas through Tags*. Ensure that all ideas have an associated list of tags—a minimum of three would be good—to provide a way for people to navigate through the list of ideas. Facing down an ideation blog with 1,600 ideas is whole lot easier if you can use tags to filter what you see.

- *Combining Similar Ideas to Consolidate Support*. IBM Connections 4.5 introduced the ability to combine ideas in an ideation blog, and to have all comments and votes for the two separate ideas combined into a single idea. The ideation blog will require an active moderator to observe the presence of similar ideas and take the required action to combine them.

- *Graduating Ideas for Exploration Instead of Action*. If a group of people are forming around an idea and the ideation blog is not the best forum for fully evaluating the efficacy of the idea, spin up a separate community to look into the details. Get the group to report back on their recommendation, and also include a link to the community so others can see what is being discussed.

Finally, ensure that great ideas are graduated and implemented. That's the real win.

In Search of Breakthrough Innovation

Can breakthrough innovations come from ideas that originate in an ideation blog? In one sense you will only know if you try. Ideas are the seeds to the organization's future, and forcing an artificial differentiation between incremental and breakthrough ideas before starting an ideation process can create an unhelpful level of pressure that suppresses breakthrough thinking. Multiple factors need to line up across the organization for executing on a breakthrough idea, and it will require deep collaboration across teams of people to achieve success. Floating the idea in the first place is a necessary first step, but not a sufficient one by itself. Thus there is no logical reason that a breakthrough idea can never originate on an ideation blog, but when one does, what do you do then?

Ideas that challenge current ways of working need a safe space in which to flourish.

- *Create Space*. Ideas that challenge current ways of working need a safe space in which to flourish before being opened to critique by every employee. Some employees will naturally want to shoot down all new breakthrough ideas, because such ideas make the organization more risky, less comfortable, and will demand that they change. Creating a safe space for further exploration enables the idea and its champions to increase strength in advance of the attacks. If you can see the makings of a breakthrough idea on an ideation blog, wall it off and assign an individual or group to make progress on it.

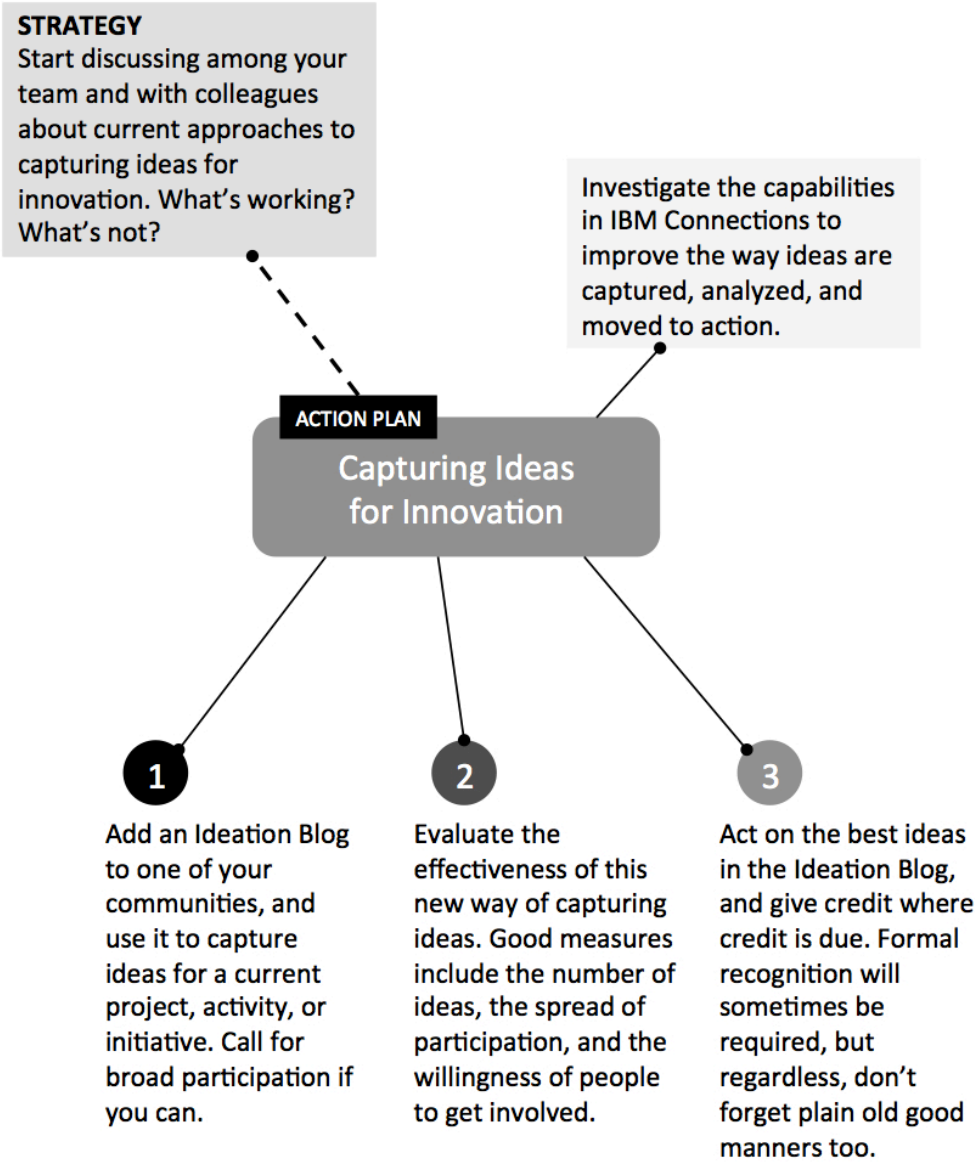
- *Nurture the Idea*. Make determined progress on the idea, by exploring what it means, how best to bring it to life, and how to mitigate the risks it poses to the current organization. Sometimes new ideas will fundamentally transform the organization, but to get to that point the idea and those working on it will need to be protected from entrenched groups.

- *Allocate the Required Resources*. Physical space, people, equipment, travel, and a research budget will be required to execute a breakthrough idea. Find the resources that are necessary, and make them available to the project leader. If you can't do this openly in the initial days, look for ways to trim other expenses.

- *Secure Senior Executive Support*. Once you have been able to prove the validity of the idea, you will need to secure the support of one or more senior executives in order to bring the idea to fruition. They bring political clout, additional budget, and can buffer the breakthrough idea from unwarranted attacks.

Without detracting from the ideas above, there is a lot to be said for capturing and executing on a stream of smaller innovative ideas as well. Don't just try to hit home runs all the time. Getting to first base, and then second, and then third, and then home is also a way of putting a score on the board. Both approaches are necessary.

Action Plan


STRATEGY
Start discussing among your team and with colleagues about current approaches to capturing ideas for innovation. What's working? What's not?
Investigate the capabilities in IBM Connections to improve the way ideas are captured, analyzed, and moved to action.
ACTION PLAN
Capturing Ideas for Innovation
1
Add an Ideation Blog to one of your communities, and use it to capture ideas for a current project, activity, or initiative. Call for broad participation if you can.
2
Evaluate the effectiveness of this new way of capturing ideas. Good measures include the number of ideas, the spread of participation, and the willingness of people to get involved.
3
Act on the best ideas in the Ideation Blog, and give credit where credit is due. Formal recognition will sometimes be required, but regardless, don't forget plain old good manners too.

Summary

Organizations striving to improve by offering better products and services have access to a wealth of ideas in the minds of their employees. Being intentional about capturing these ideas, analyzing the potential benefits, exploring the risks to mitigate, and moving appropriate ideas to action is at the heart of continual innovation. In this chapter we have explored this scenario, and looked at how IBM Connections can be used to deliver significant gains.

Organizations striving to improve by offering better products and services have access to a wealth of ideas in the minds of their employees.

In the next chapter we look at running a project in IBM Connections. While the four Collaboration Scenarios we have looked at so far can operate by themselves, they also often take place in the wider context of a specific project. We look at how IBM Connections supports the integration of these four scenarios, as well as additional requirements that are specific to running a project.

[1] Rosabeth Moss Kanter is a tenured professor at the Harvard Business School. She has written insightful books and many articles on business management during her career, and her work has been widely cited. Kanter's quote at the front of this chapter is taken from her 1983 book on innovation and entrepreneurship in America, *The Change Masters*.

[2] The CEMEX case study is drawn from information available on Web about CEMEX's use of IBM Connections, and an interview with Luis Carlos Garza of CEMEX in April 2013. For the online resources, please see:
- *SHIFTing the way we work* (November 2012) at www.slideshare.net/soccnx/shifting-the-way-we-work-at-cemex
- *Why this massive company's internal social network succeeded where so many fail* (December 2012) at www.citeworld.com/social/21194/how-cemex-leveraged-social-and-collaboration-tools-create-culture-innovation
- *IBM Social Tools Help CEMEX Connect 50 Countries* (September 2011) at www.informationweek.com/thebrainyard/news/231601128/ibm-social-tools-help-cemex-connect-50-countries
- *IBM Connections in CEMEX* (June 2011) at www.youtube.com/watch?v=Bx8lExTRVhE.
- CEMEX's website about its use of IBM Connections, at shiftevolution.cemexlabs.com. See the *Innovation Strategy* brochure at shiftevolution.cemexlabs.com/?page_id=961.

Kudos to CEMEX for the transparency about their work with IBM Connections; it is refreshing to see.

Chapter 9.
Running a Project with IBM Connections

Some days, the large tasks can overwhelm. You stare at the total workload and enter a melancholic fog. In my experience, the only way out is to focus on the completion of small tasks. You run off that document, prepare that file, and identify the first task of the project itself. Do that and then another and another. Stick to small things. Work slowly, with deliberation. The fog may not lift entirely but it will lift. As a zen saying goes: When you are happy, sweep. When you are unhappy, sweep. [1]

Michael Wade

In the five scenarios we have considered to this point, although the activities have been part of a larger process, they have been treated individually. The document was prepared (Chapter 3). The meeting was held (Chapter 4). The discussion was convened (Chapter 5). Updates were provided to other parts of Albreto (Chapter 7). Ideas for innovation were captured and explored (Chapter 8). In this chapter we bring together these threads, examining how they can be used in an integrated fashion for running a project. Projects are a common way of working with other people in today's organizations, and are denoted by a list of members, a desired final deliverable or other outcome, and usually a deadline by which the project should be completed.

In this chapter, we will:

- Look at the theory of running a project, and how a tool like IBM Connections resolves the chaos experienced when using a loose collection of tools.
- Examine how to set up a project space in IBM Connections.
- Consider how two firms are using IBM Connections for running projects.
- Evaluate three advanced concepts, including the great debate with project spaces (should the space be accessible only to team members, or open to everyone?).

The Theory of Running a Project

Email is the most commonly used collaboration technology today. On team projects, people use email to discuss issues, check up on timeframes, swap documents, and much more. But email is not ideally suited to managing team projects, for a variety of reasons:

- *Document Chaos*. When co-authoring a document, no one is sure if they are working on the most recent edition, and at the end someone has to bring together all the suggested changes to create a new master copy. It's messy, error-prone, and takes far too long.

- *Versioning Chaos*. When Edgar is looking for a particular document or spreadsheet, how does he know whether the copy on his desktop, in the file folder, or one of multiple copies in his email inbox is the most current version? Basically he doesn't. It's a wild guess.

- *Communication Chaos*. Using email for conversations leads to chaos. Although modern email clients offer the ability to show related messages in a thread, threading is not sufficient to give a proper and natural ordering of email messages when many people are conversing on an issue over a multi-day or multi-week timeframe. Messages will be sent and received out of order. Some team members will respond to earlier messages in the thread, not the latest one. They're not trying to be malicious (in most cases)—they're trying to contribute—but since their contributions are handled via email and not a more appropriate tool, they contribute to conversation confusion.[2]

> While email clients offer the ability to show related messages in a thread, threading is not sufficient to give a proper and natural ordering of email messages when many people are conversing on an issue. Chaos in communication ensues.

- *Status Chaos*. With documents, discussions, upcoming meetings, and task allocations held in different places across multiple systems, everyone has a different perspective on the status of the project. Edgar believes the project is progressing well and is on-track, based on the information he can see. Andrea has a different take. Sally has a third.

- *Induction Chaos*. While projects usually have a defined list of members at any point in time, that list can change and new people need to be inducted onto the project. However, without a common place for all of the documents, discussions, meetings, and tasks, the process of induction is difficult. Someone has to go through their historical records, forward the pertinent information, and give access to the other places where up-to-date information is stored (in various stages of readiness).

What can be done? Many organizations are experimenting with collaboration sites for team projects—and the increased focus on project teams in the most recent versions of IBM Connections creates an opportunity for using Connections for running projects. A change of collaboration technology introduces changes to the way work is done:

- *Integrated Project Space*. People switch to the collaboration site, and stop using email for the communication, collaboration and coordination work of the team project. The big idea with a collaboration site is that all of the documents, conversations, meetings, and tasks related to the project are brought together in a single application, instead of being separated across several different applications.

The big idea with a collaboration site is that all of the documents, conversations, meetings, and tasks related to the project are brought together in a single application, instead of being separated across several different applications.

- *Document Co-Authoring*. Documents are stored in the team site, and not emailed around. All work on a document, spreadsheet or presentation is done out of the collaboration site; people don't work with local copies any more. That means a document is opened directly from the collaboration site, and after the changes have been made, it is saved directly back into the collaboration site.

- *Discussion Forum*. Communication and discussion happens in a discussion area within the collaboration site, rather than in email. This can be quite a big change for people, because discussions no longer come through to their BlackBerries and iPhones. Although the discussion can be much easier to follow, there is a single version of the truth, and no one has to keep their own copy of the discussion.

- *Task Management*. The coordination around the team project happens within the collaboration site. Tasks are created and assigned to people. Meetings are scheduled, and held. Project time lines are shared, and updated.

- *Inducting New Team Members*. People can be easily added to and removed from the collaboration site, to accommodate changing project membership. New project team members can quickly review what's been happening in the project, and examine the current status of its different aspects.

The benefits of this new approach can be significant. Some firms have reported a 30% to 50% reduction in time taken to complete a project. With this theory in mind, let's examine how to set up a project space in IBM Connections for running a team project.

How to Run a Project in IBM Connections

The forum was proving a fruitful place for the marketing team to bring together their thinking, as well as to engage with others across Albreto. The marketing team had been using the forum for about a month, and while the range of topics had remained unchanged for the past week, the discussions continued to deepen. "We need to move this idea out of discussion mode and into action mode," Edgar said to himself as he wrote a reply to one of the discussion topics. "We need to make plans and determine specific steps to make it happen. Who should I ask take lead charge on the project?"

> *Andrea found Sally's name in her Sametime Contacts list, and clicked to call her.*
>
> *"Andrea, how are you?" Sally asked when she answered the call. Sametime had eliminated the need to say "Hello, Sally here" and given rise to a much more personalized greeting. You already knew who was calling.*
>
> *"Hey Sal. Honestly, I'm a bit freaked out," Andrea said, "but I'm hoping you can give me some advice."*
>
> *"I'll try," offered Sally. "What's up?"*
>
> *"Edgar just asked me lead a new project coming out of one the discussion topics we've been talking about for the past week—that's what's got me freaked out."*
>
> *"It's awesome that he asked you, Andrea," said Sally, the congratulations ringing with sincerity. "You'll do a great job. Why are you freaked out by it?"*
>
> *"He told me I should use a community in Connections for running the project," Andrea started, "but I don't think I have the power to make it all work together."*
>
> *"What do you mean?" asked Sally.*
>
> *"There will be all these different things we're working on," Andrea replied. "Some documents—which I'll do using Files. Lots of meetings—and I really like Activities for that. We'll need a discussion forum too; it's much better than email. But that immediately means we will have three tools to use in Connections. How do I make them work together?"*
>
> *"I don't think you need to be freaked out by that," Sally said, a huge smile wafting down the line. "Let's step back to basics and remember that we have a methodology for doing projects here. The tool serves the methodology, and our challenge is to align the tools and our current methodology."*
>
> *"You do talk sense, Sal," said Andrea, the relief immediately evident in her voice. "How do we get started?"*

Step 1. Define Your Project Methodology

A project space exists to support your project team in reaching its intended outcome. The tool serves the team; the team doesn't serve the tool. To this end, we need to align the design of the tool with the process of the project. Many organizations have an internal methodology for running projects, whether that's loosely defined in people's heads or tightly defined in a 100-page manual. For the purposes of illustration in this book, let's suppose that your project methodology has the following six stages:[3]

1. *Define the Outcome*. What is the purpose of the project? In other words, once the project has been delivered, what will people notice that's different? What will have changed? The outcome could range from better understanding, the presence of a document, a plan for restructuring the organization, or a multitude of other outcomes.

2. *Explore the Options*. Develop a list of options that could be used to deliver the outcome required. By explicitly exploring a variety of options, the team won't prematurely settle on a single best option, and thus become blinded to other ways of achieving success.

We need to align the design of the tool with the process of the project. Many organizations have an internal methodology for running projects.

3. *Analyze the Options*. With the list of options that could be used to achieve success, go into more detail and analyze the pros and cons of each option. The team will need to apply the same analytical rigor to each of the options, so that certain options don't get selected for the wrong reasons.

4. *Decide on the Approach*. In light of the option analysis from stage 3, the team needs to decide which option offers the best approach for achieving success. This step is likely to also require interaction with the project sponsor and related stakeholders.

5. *Deliver the Outcome*. Work the chosen approach through to completion. This will require ongoing discussions, task allocations, and team decision making. It will also require various checks and balances to ensure the outcome being delivered aligns with what was envisioned in Stage 1 above.

6. *Close the Project*. Once the outcome has been achieved, the project can be closed. This encompasses both the team celebration at achieving success, and a series of information management tasks to tidy up the project space in IBM Connections.

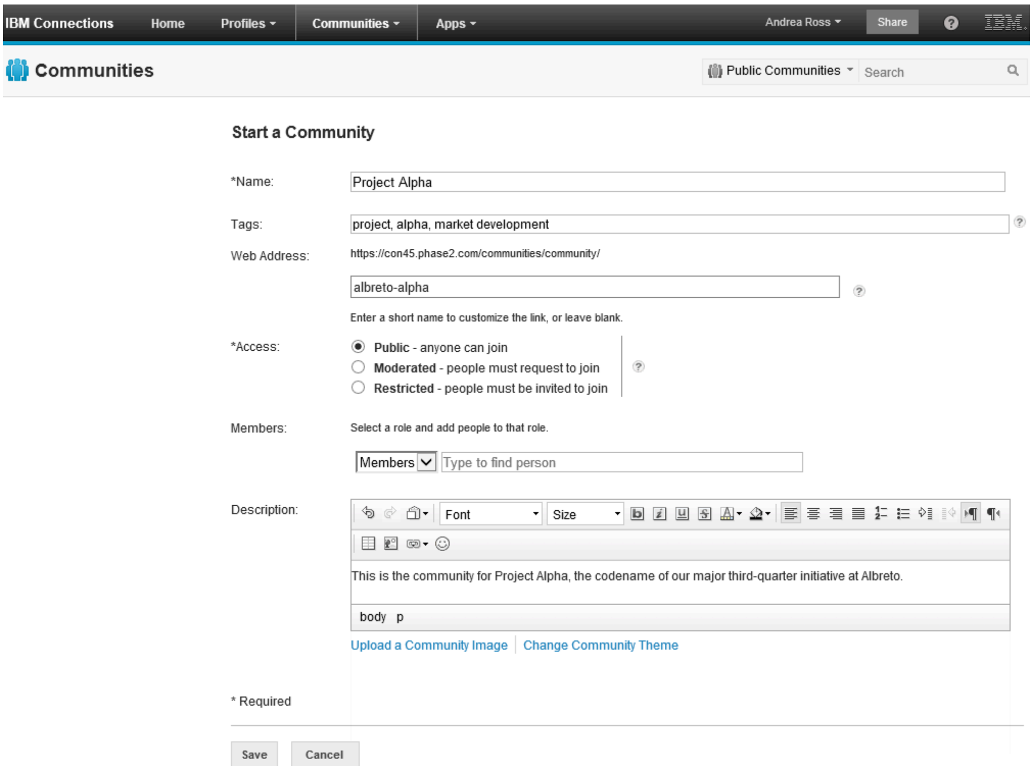
In IBM Connections, this methodology could live in a Methodology Wiki for easy access by all. Now let's consider how to use IBM Connections to support each of the above steps.

Step 2. Create Your Project Space in IBM Connections

A project space in IBM Connections—or more correctly a Community that is used for running a project—is able to contain a collection of the other tools offered by IBM Connections. As we have seen in the previous scenarios, a community brings those tools together, providing access to all of them through a single membership list. A community gives a single place to access all of the content and updates happening within each of the respective tools.

The first step when using a community for running a project is to create the community, into which the other tools will be created. Hover over the Communities tab along the top menu bar in Connections, and click the *I'm an Owner* option. This will open a page listing the communities that you own individually or jointly with other people. Click the *Start a Community* button, and fill out the resulting form with appropriate details for your new project space.

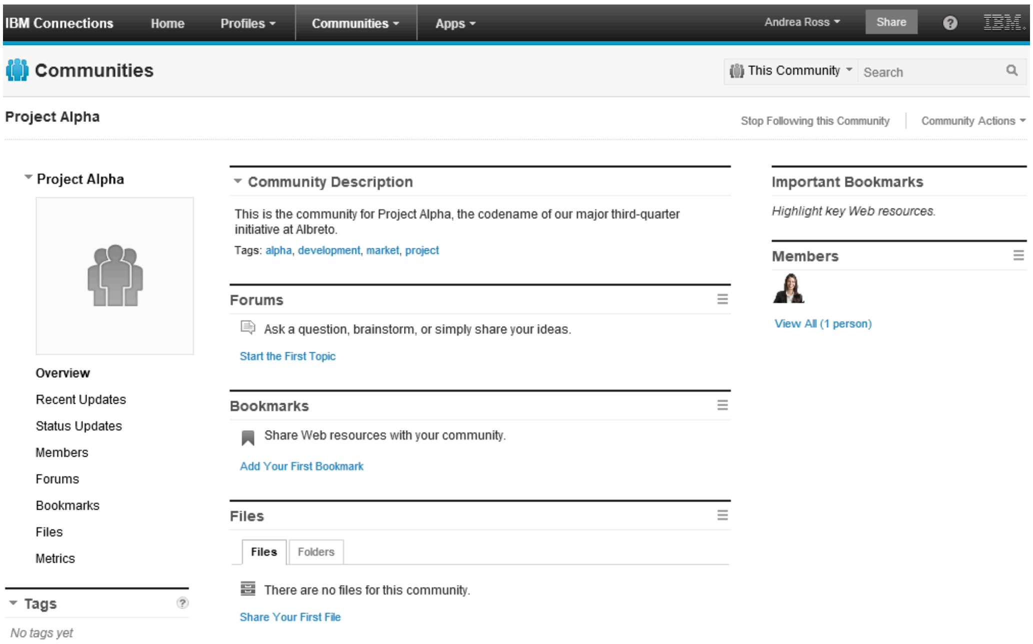
Figure 9-1. Create a Community for the Project



Fill out the Start a Community form to create a specific place in IBM Connections for running the new project. It's good practice to type a few tags, and a description.

When you click *Save* at the bottom of the form, IBM Connections creates the new community for you. The default design puts the description of your community at the top of the middle section, followed by a designated place for discussions, bookmarks, and files. On the right hand side is the membership list.

Figure 9-2. Your New Community for Project Alpha



The default layout of a new community in IBM Connections includes an overview of the community, a discussion forum, a place for bookmarks, and a files area. There's also a members list on the right, and the navigation is on the left.

In Chapter 4 (*Managing Meetings*) we touched briefly on the three levels of access available for a community—public, moderated, and restricted:

- *Public*. A community with public access rights is open to anyone who has access to your organization's IBM Connections system.

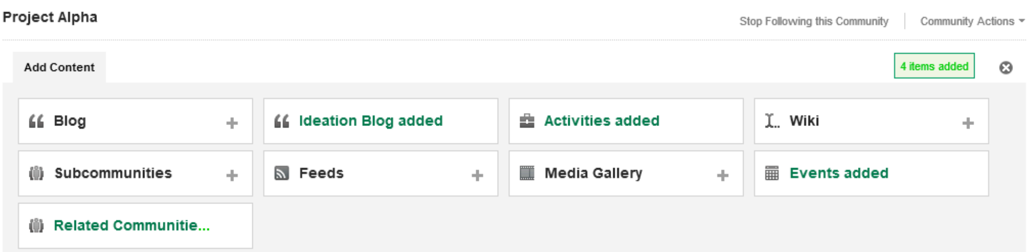
- *Moderated and Restricted*. Two options for limiting the ability for people to join a community. Although people can see the existence of a moderated community, they must request to join it. On the other hand, restricted communities are fully hidden from view, and the owner must issue an invitation to join the community.

In this chapter we will proceed with public access rights for the community. In the Advanced Concepts section we evaluate these options in more depth. See *The Great Debate: That Teams Need Privacy to Do Their Best Work* (pages 246-247).

Step 3. Add the Tools

With the community created for your project, it is time to add essential tools that aren't included in the default community layout. To add tools to your project community, click *Community Actions*, and then *Customize* from the menu list (you will need to be an Owner to do this). This opens the *Add Content* pane at the top of the community (see Figure 9-3). Click the plus (+) sign to add a specific tool. Note that you can only add one instance of each tool to a given community. In other words, you can have one ideation blog, but not two. You can also have one wiki, but not two. And one Media Gallery, but not two.

Figure 9-3. Adding New Tools to Your Project Community



Various tools can be added to the community for your project team, including an Ideation Blog, Activities, and Events. Add the tools you need for working with your team members.

Which tools should you add? In the Collaborative Teams framework for project teams in *Collaboration Roadmap*, there are seven technology-enabled areas a team needs for working together:

1. *Shared Access to Team Data*. One or more tools for working together towards achieving the shared outcome. The specific tools depend on the nature of the work being done by the project team, but will generally include *Files* (for documents) and a *Forum* (for discussions) at a minimum. This represents the things the team works on together. We will be using the Ideation Blog for exploring options, so add that tool. And as we will be using activities for managing meetings and assigning tasks, add the *Activities* tool as well.

2. *Location Independent Access*. For gaining access to the community across devices and networks. You don't need to add a tool for this when customizing the community, because you gain access through a web browser, a desktop plug-in, or an app for an iPad and similar devices.

3. *Real-Time Co-Authoring and Editing*. For working on documents and other artifacts in real-time with other people, as opposed to accessing a common storage area (per 1 above). There isn't a tool to add for this, and the team will use Sametime for screen sharing when this is required.[4]

4. *Team-Aware Calendaring*. For planning and holding meetings, with linkage back to each person's calendar. Therefore add the *Events* tool.

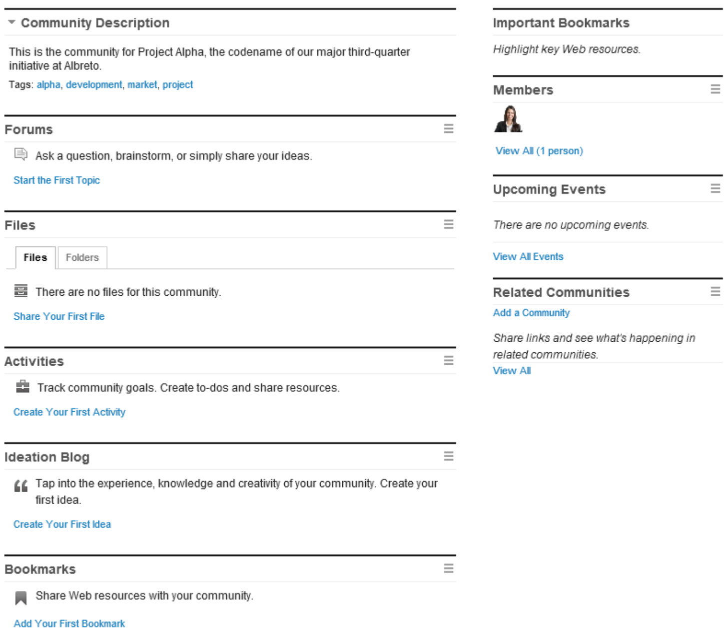
5. *Social Engagement*. For knowing what people are working on, and providing options for making contact. Status Updates and Profiles offer these capabilities.

6. *Team Task Management*. For managing task assignments to each person, and tracking completion of these in a transparent way. We will use the *Activities* tool for this, which we have already added.

7. *Collaboration Auto-Discovery*. For letting Connections highlight other projects that have similar content and happenings to our project. Add the *Related Communities* tool to the community.

Once these tools have been added, rearrange the layout of the tools in your community to match the layout shown in Figure 9-4 below. To move a tool, hover your mouse above the black line at the top of the tool, and then click and drag the tool to its new location. Once it is where you want to drop it, let go of the mouse button and the screen will refresh. In essence we have shifted the *Forum*, *Files*, and *Activities* tools to be central on the screen (note the left-hand navigation is not shown below).

Figure 9-4. The Layout of Your Project Community



Add the core tools you will need in your project for working with team members, and arrange the tools so the forum, files, and activities tools are centered in the layout. Upcoming Events and Related Communities are shown on the right hand side of the community space.

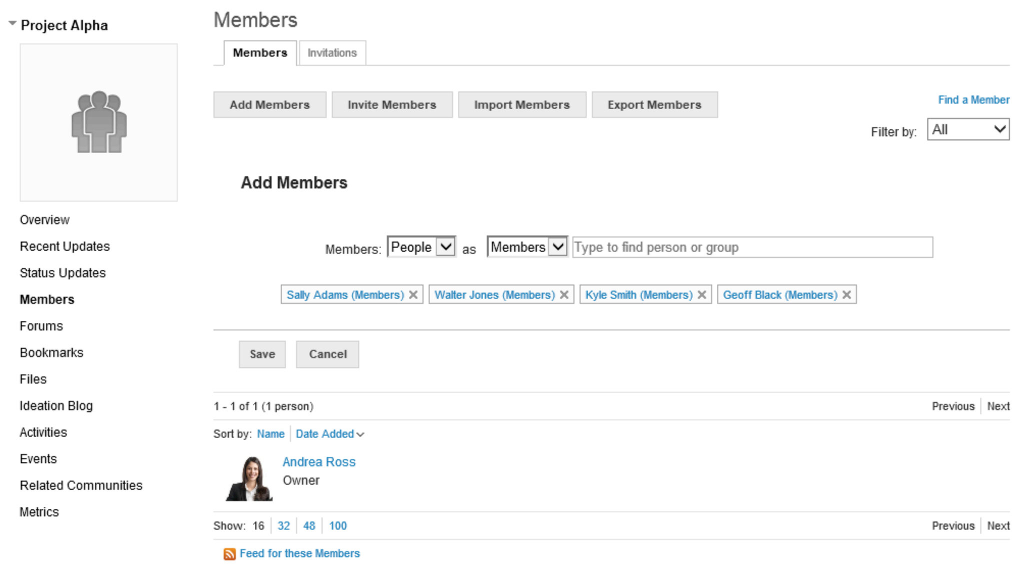
Step 4. Add Your Project Team Members

With the community established for your project, and the necessary tools added into the project space to enable you all to work together, the next step is to add your team members to the community. Click *Members* in the left-hand navigation pane to open the screen where you can add or invite members. Adding a member gives them immediate access to the community. Inviting a member extends an invitation to them to join the community, and gives them the opportunity of accepting or rejecting the invitation. You are likely to need to use a mix of both approaches:

- *Add Members*. Add the people to the project community who already know the project is going to be established and are expecting to be on the team once the project is set up. If you have already discussed their involvement in the project with them, just add them as a member.

- *Invite Members*. Invite people to the project community who you would like to be involved, but who you have not yet had an opportunity to brief personally. You might also invite people who you want to show a part-time interest in the project; they aren't part of the core project team as such, but will give their input when specifically requested.

Figure 9-5. Add or Invite People to Participate in the Project



IBM Connections enables you to add and invite people to join a community. People who are added gain immediate access. People who are invited need to accept the invitation to join.

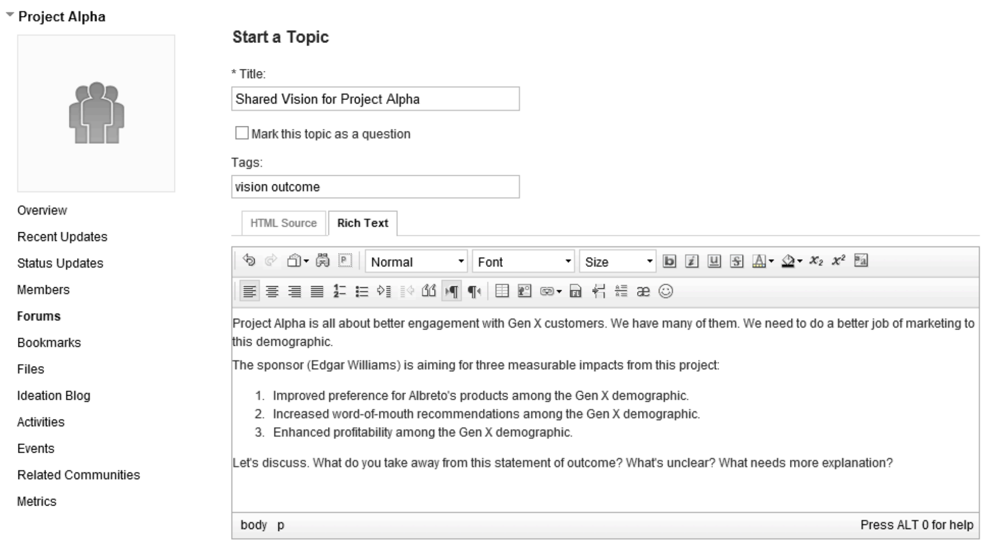
Step 5. Execute on the Project

With your project community established in IBM Connections and your team members added or invited to the project, it is time to move into the real work of the project. Do this by following your firm's project methodology.

Project Methodology Stage 1. Define the Outcome

A shared vision is the crucible around which a team forms. Great teams have a common outcome in view that pulls the team members together, and gives the context for effective collaboration. Without a shared vision, the team is a team in name only, and apart from the feel good benefits team members will enjoy for a short time, there's no reason for the team to exist. Using the Forums tool, create a discussion topic for exploring and defining the team's shared vision. Clearly there will be an opening statement about the intended outcome for the project, as set by those sponsoring the project. This statement should be included in the body of the discussion, or attached as a file.

Figure 9-6. Use the Forum to Define the Outcome



Create a forum topic to explore and define a shared vision for the outcome of the project. Discuss using comments, Sametime, and in-person meetings as needed.

But that's merely the beginning. Ask the team members to review the initial statement, and to ask questions, request clarification, and push the boundaries of the statement with *What if?* and *What about?* questions. For a virtual team these will be raised initially in the forum, and it's likely that some questions will require an interactive voice or video session to answer. Major discussions should be summarized in the forum thread, so the people who were there can recall the discussion, and those who weren't can stay informed.

Project Methodology Stage 2. Explore the Options

The second stage of the project methodology is to explore the options for achieving the shared outcome. The task for the project team members is to brainstorm the options for how the shared outcome could be achieved, without much attention being paid to practicality, budget limitations, and acceptable ways of working at your firm. That comes later—and does need to be done—but for now it is time to dream a little. If the only answers that are permitted are the ones that have always been used, your firm will never be able to leverage innovative and breakthrough thinking. And if you don't do it at this stage of the methodology, it will never happen.

If the only answers that are permitted are the ones that have always been used, your firm will never be able to leverage innovative and breakthrough thinking.

Here's how to make it work in the project community and with your team members:

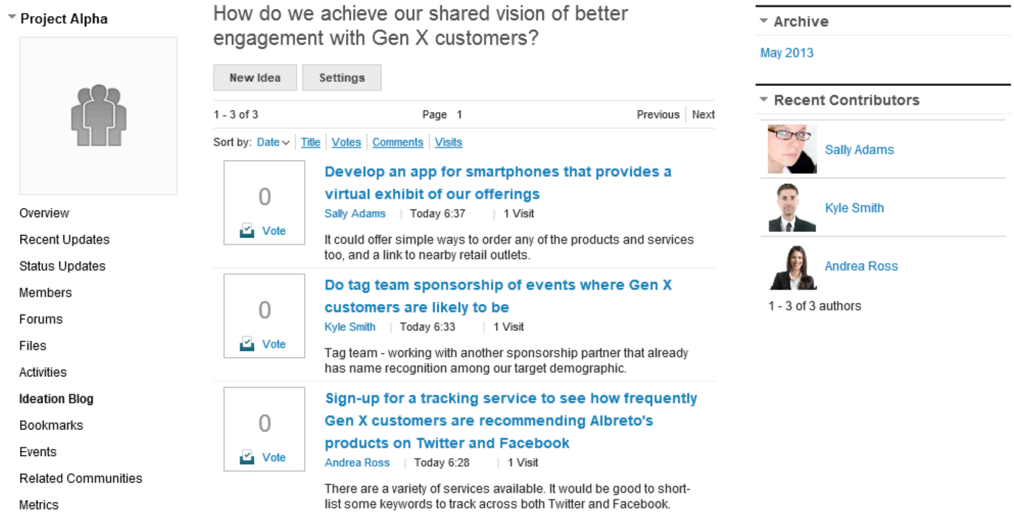
- *Update the Community Description*.
  Edit the description for the community to make it very clear that your team is working on the second stage of the project methodology—with a link to your Methodology wiki. This is vital so that all team members get an immediate visual reminder when visiting the community that you are all working to explore the options. The last thing you want is for a team member to ruin the exploratory thinking taking place in the community by being critical of early-stage ideas.

- *Set Up the Ideation Blog for Capturing Ideas*. Open the Ideation Blog, and then edit its settings and change its name so it asks a critical question (see page 196 for detailed guidance on doing this). You want a name for the ideation blog that will immediately focus team members on coming up with options for achieving the shared outcome. Give the ideation blog a name such as *How do we achieve our shared vision of better engagement with Gen X customers?* It is clear and concise, and focuses everyone on the task-at-hand.

- *Invite Team Members to Contribute Their Ideas*. Write a Status Update in the community to request team members to visit the ideation blog and contribute their ideas. You are likely to have a time limit on doing so, and this should be noted in the status update too. Team members who are invested in the project should be quick to visit the ideation blog, and quick to start contributing their ideas. Others may need a richer social setting in which to come up with great ideas, such as that available in a face-to-face meeting, or even in a conference call. Ideas that are developed in those forums need to be captured in the ideation blog.

- *Encourage Other Forms of Contribution Too*. Submitting ideas is a great way for team members to contribute, but it is not the only form. An equally valid contribution is to leave a comment on other ideas, as long as those comments build on or extend the original idea. All team members need to stay in the moment enabled by stage two of the methodology, and not leap forward to the next stage. Negative comments should be avoided because they will staunch the flow of creativity and ruin the desired effect.

Figure 9-7. Brainstorm the Options for Achieving the Outcome



Use the ideation blog to capture ideas for achieving the shared outcome. Invite team members to contribute ideas as well as supportive comments on other ideas.

- *Review and Merge Ideas*. Once you have a good number of options noted down, one of the project members needs to review all of the ideas in the ideation blog and merge those that are very similar. It is fine initially for duplicate ideas to be submitted, as having to confirm that no-one else has already submitted the same idea can kill the creative spark. But at the end of this second stage, having a clean list of unique ideas is important. Ask one or more team members to review the list of ideas and merge those that are very similar. They will need to have owner access privileges within the community in order to merge ideas.

- *Request an Initial Vote on the Best Ideas*. Once you have a clean list of unique ideas, ask team members to vote for the best one. This would be an appropriate time to set a voting limit in the ideation blog in order to shape behavior. You do not want team members to vote equally for every idea; the purpose of voting is to differentiate the great from the merely good. Depending on the number of ideas you have in the ideation blog, you might give team members between five and ten votes. If you have over 100 unique ideas, you probably need more than that otherwise the cognitive load to identify the top ideas is too high.

You now have a shortlist of ideas to take forward for further analysis.

Project Methodology Stage 3. Analyze the Options

The third stage of the project methodology involves undertaking a deeper analysis of the shortlisted options. Of the shortlisted ideas, which ones have the most promise? Which ones do not stand up to rigorous analysis of the pros, cons, and practical implications of proceeding? As your team gets started into this third stage, update the community description to set a clear expectation about the current state of the project (and include a link to stage three in the Methodology wiki).

Which ideas do not stand up to rigorous analysis of the pros, cons, and practical implications of proceeding?

Here's how to make stage three work in the project community and with your team:

- *Divide the Wider Team Into Smaller Groups*. To enable parallel analysis of the shortlisted ideas, divide the team into smaller groups that will each focus on one idea. If you have 12 people on the project team and a shortlist of four ideas, divide the team into four subgroups of three people each. You will have to base your decision about how many ideas to analyze on your budget and timeframe. More of both gives you increased capability to analyze options. Less of both reduces that.

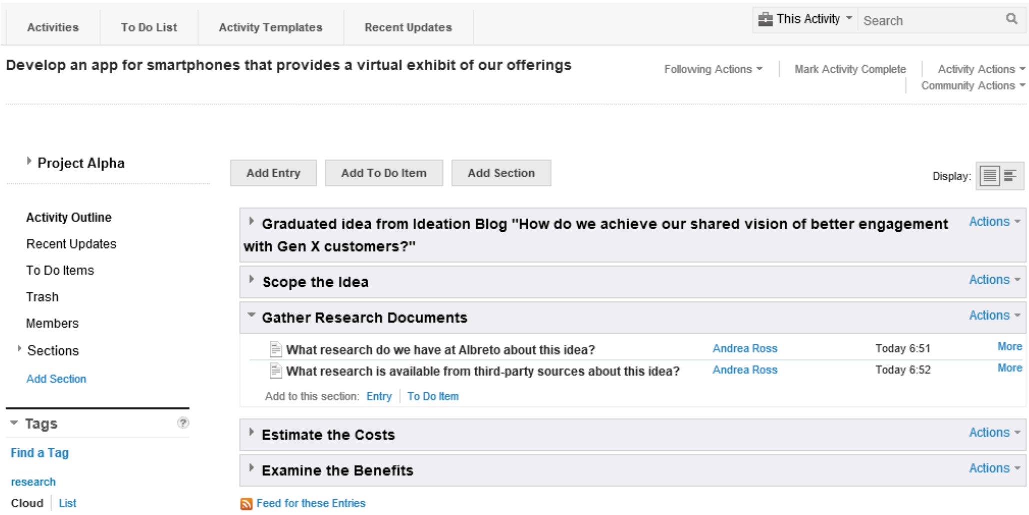
- *Graduate the Shortlisted Ideas*. Use the option in the ideation blog to graduate your shortlisted ideas one at a time, but do not create an associated activity (because you cannot choose an Activity Template at the point of creating an associated activity). Once you have graduated the ideas, your ideation blog will give a visual pointer to the options that are under active consideration.

- *Associate Each Idea with a Separate Activity or Subcommunity*. Create either an activity or subcommunity for each of the graduated options. If you are using an activity, base it off an Activity Template so there is a common structure for the upcoming analysis. In choosing between the two options, an activity should usually be sufficient, but if you want to provide more than just the tools in an activity for performing the analysis, use a subcommunity. In other words, if you want a separate forum for each option, or the ability to restrict access to the analysis being performed on each option, a subcommunity is the better route.

Sidebar: Activity Templates in IBM Connections
Activity Templates provide a way of capturing the design structure of an existing activity and re-using it for new activities. Activity Templates can include entries, bookmarks, file attachments, and a list of to do items for activity members. Creating a template from a current activity means that all of the learning about the process of effectively executing the activity is captured for future use by yourself or other people. It's a great time saver, as well as a great contributor towards effectiveness.

- *Follow a Common Analysis Method for Each Option*. As the subgroup working on a particular option, perform the analysis required to unpack the pros, cons, and practical implications of proceeding with the option. This could include forecasting the cost of implementing the idea, gathering market size information from industry analysts, and preparing the draft of the business case for the idea. It is important that each of the individual ideas are subjected to a common analysis method, otherwise some ideas will be rigorously analyzed while others receive but a cursory glance. Working through the analysis approach is likely to require document co-authoring, online and face-to-face meetings, and discussions. Use the approaches outlined in the respective chapters in this book for help with using IBM Connections in each of these situations.

Figure 9-8. Use a Templated Activity to Ensure a Consistent Analysis Method



Create an Activity based on an Activity Template to streamline the analysis process, giving each subgroup a common analysis method and quick access to all of the required tools.

- *Compare and Contrast the Different Options*. When the individual subgroups have completed their analysis, aggregate the highlights of each of the individual options to see what stands out. Does one option look like the clear winner? Are all options too close to call? Are none of the options workable? Depending on what you conclude, you either take a couple of options forward to the next stage, or you go back to the previous stage in order to generate more options with greater clarity about what's needed. Your team may even need to go back to stage one to more tightly define the desired outcome of the project.

It is not failure to go back to earlier stages in the project methodology. Doing so actually proves that your team is learning vitally important lessons, and the result of that is to increase the prospect of completing the project successfully.

Project Methodology Stage 4. Decide on the Approach

Stage four of the project methodology is to make a decision about which option is the best one to proceed with. In various subgroups of the wider team, team members have analyzed the shortlisted options for achieving the shared outcome. Now it is time to reconvene as the complete team and make a decision about how to proceed. When you switch into stage four of the methodology, update the community description so everyone knows the current emphasis, and create a link to stage four in the Methodology Wiki.

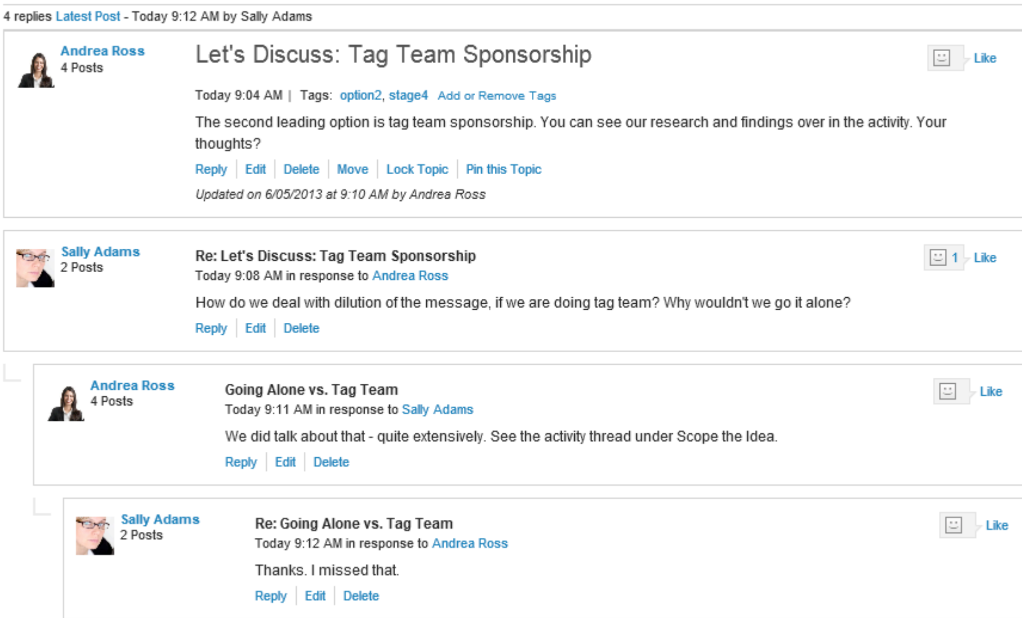
Here's what you need to do to make stage four work in the project community and among your fellow team members:

- *Review the Analysis of the Shortlisted Options*. Individual team members have worked in various subgroups to carry out the analysis on one or more of the shortlisted ideas. As a consequence, each individual will have a high awareness of the options they analyzed, and a low awareness of the rest. Thus the first task is for all team members to gain an awareness of each of the shortlisted options, by reading or discussing the associated analysis documents that were created during the third stage. In your project community, do the following. First, ensure that any subcommunities used during the analysis in stage three are open to all team members. They will need to access them to see the analysis from the other subgroups. If you have used privacy to safeguard focus during the analysis phase, it is time to reinstate openness. Second, assign a To Do item to each team member requesting that they review the analysis for all of the shortlisted options. You will need to specify a completion date so everyone knows what is expected of them.

- *Discuss Your Reactions Through the Forum or Meetings*. Team members will have questions, thoughts, reactions, and comments on the various options. These could be explored in a variety of ways. One approach is to create a discussion topic for each of the shortlisted options, and ask team members to post their reactions as replies (see Figure 9-9). Team members who were in the original subgroup for that option can respond appropriately—with further insight, clarification, or a "we-didn't-think-about-that" acknowledgement. A second approach is to schedule a series of short presentations using IBM Sametime or a meeting room, where each of the subgroups can present their analysis to the whole group. This approach stimulates conversation and discussion, and enables all team members to rapidly get up to speed with each of the options. A third approach is a hybrid of the two earlier approaches, with interactive sessions designed to complement the discussion in the forum.

- *Request a Tentative Vote to Find the Best Option*. Your existing ideation blog lists all the ideas your team has analyzed, and each of the shortlisted ideas were graduated. Ensure there is a voting limit on the blog (which will depend on the number of shortlisted ideas), and ask team members to revisit their voting from stage two. If, as a consequence of doing a deep dive on a particular idea they no longer support it, they can remove their vote. If they still agree with their voting pattern, they can leave as is. If a re-allocation of votes is required, they can remove their vote from unwanted ideas and give it to the better ideas.

Figure 9-9. Discuss the Options in the Discussion Forum



Use the forum to provide team members with the opportunity to ask questions about the options they were not involved in analyzing. Those who were can provide insight as required.

- *Act Accordingly After the Tentative Vote*. The results of the tentative vote highlight the degree of agreement or disagreement among the team. If there is high agreement (one option clearly stands out), you can move swiftly to deal with any outstanding issues, often by using the forum or a few final IBM Sametime meetings. If there is high disagreement (votes are divided across multiple options), you have more work to do. This is likely to require intensive discussions and meetings to uncover the root of the disagreement, and see if the different factions can be brought together.

- *Seek Approval for the Decision (if Required)*. If your team has the authority to decide on the best approach and then get on with it, proceed apace. If not, you will need to seek approval for your tentative decision, often by writing a business case. Use the materials you have gathered during the analysis phase to inform your work here.

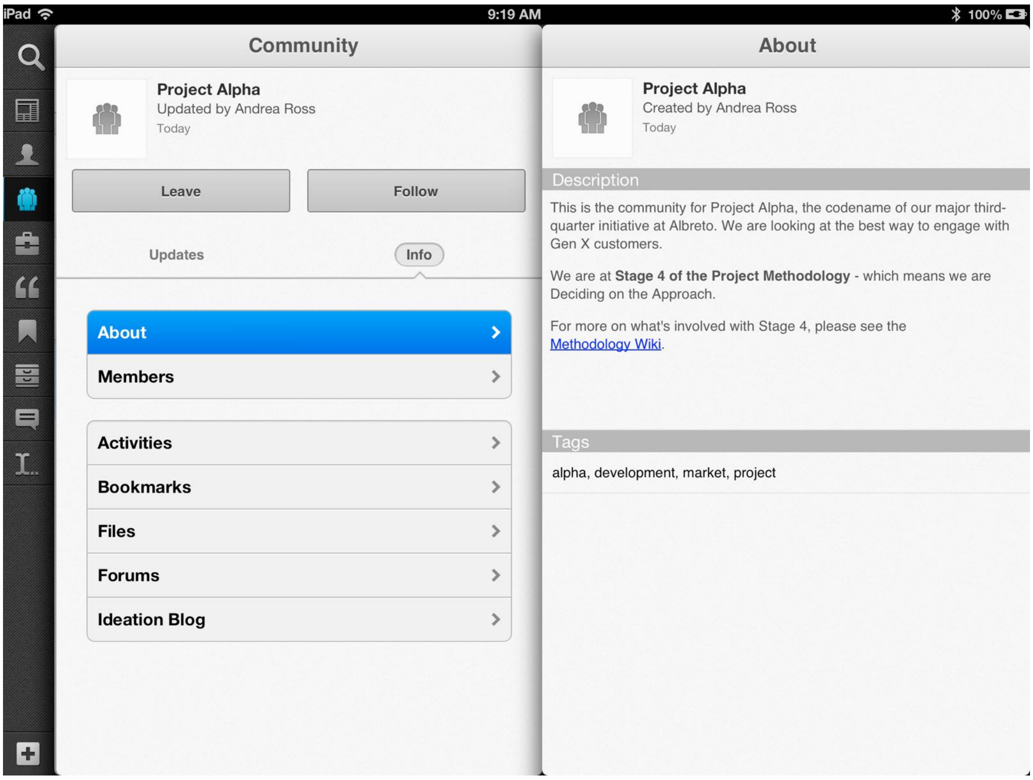
By the end of stage four, you should have an agreed approach on which to execute.

Accessing a Project Community from a Mobile Device

The mobile apps for IBM Connections provide access to communities being used for running a project. With team members being increasing mobile, even just within an office building or campus, being connected to current project work is vital to productivity and effectiveness. Using the mobile apps you can:

- *Access the Community*. Open the mobile app and touch *Communities* in the left-hand navigator. Find the project community in the list and touch to open it.
- *Review the Current Status of the Project*. With the community open, touch *About* to review the description for the project. Your project leader will be regularly updating this with the current stage in your firm's project methodology.

Figure 9-10. Participate in the Project From Your Tablet



Review the About page in the mobile app to check on the current status of the project. This will display the current stage of the project in line with your firm's project methodology.

- *Review and Add Members to the Project*. Review the current members list by touching *Members*. To add new members, touch the plus sign at the top of the list.

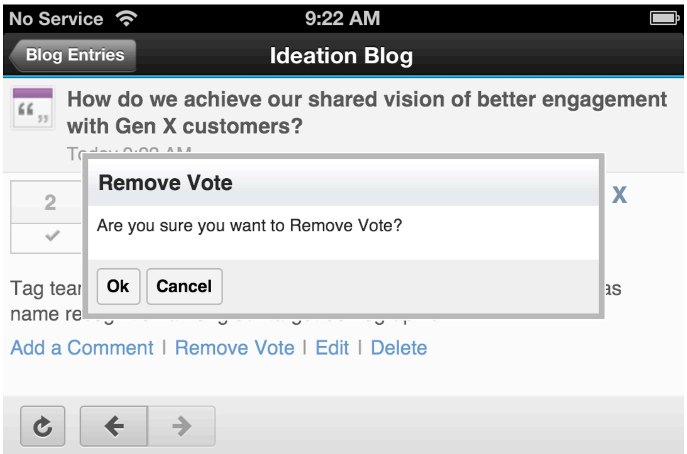
- *Contribute to the Forum (Stage One)*. Add new topics to the discussion forum, or reply to exist topics. In stage one of the project methodology, this allows you to join in the discussion about the shared outcome. For more information, see *Engaging with Discussions in IBM Connections from Mobile Devices* (page 122).

- *Participate in the Ideation Blog (Stage Two)*. Read through the current list of options and add new ones. You can comment on current ideas, and when it is time to create the shortlist of options, you can vote too. For more information, see *Working with Ideas on a Mobile Device* (page 205).

- *Analyze Options in Activities or Subcommunities (Stage Three)*. Access the relevant option you are analyzing in stage three, either through activities or subcommunities. When there are online meetings, use the IBM Sametime mobile apps to attend the meeting. For more information, see *Accessing an Activity from a Mobile Device* (page 95), and the discussion of IBM Sametime on a mobile device (page 97).

- *Review the Options and Vote for the Approach (Stage Four)*. Review the thinking in each of the options, as analyzed in either an activity or subcommunity. You can touch into each of the activities (or subcommunities), read through the analysis that has been undertaken, and engage in follow-on discussions in the forum. When it is time to vote again, you can reallocate your votes in the ideation blog to the options you support now.

Figure 9-11. Removing Your Vote in the Ideation Blog



If you have already voted for an idea and now want to remove your vote, touch the voting box a second time. The mobile app for the iPhone will prompt you about removing your vote.

The capabilities above also give you the ability to work within your project community in stage five of the methodology (Deliver the Outcome).

Project Methodology Stage 5. Deliver the Outcome

Your team has made a great decision about how to win the successful outcome you developed in stage one, and now it is time to deliver that outcome. Deciding how to achieve the outcome is an essential first step, but further work is required to make it happen. Just as you were able to use IBM Connections to support you in working through the first four stages, you can continue to use Connections in the execution phase.

Here's some of the likely activities that will be involved in delivering the outcome:

- *Update the Community Description*. Ensure the community description shows that the project is now at stage five of the project methodology. If your methodology has some variability depending on the scope of what's required in stage five, link to the appropriate page in the Methodology Wiki that describes what's involved.

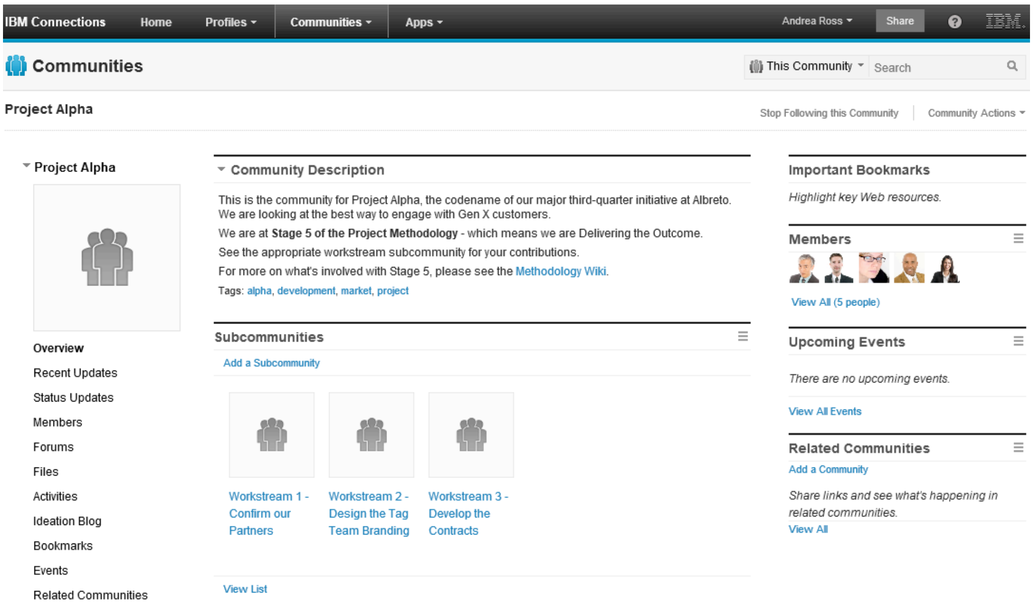
- *Check Your List of Members*. Open the members list in your community and review who is there. The right people may have been involved during the first four stages, but the transition to stage five demands that you re-evaluate who is on the team. Add or invite new people to the project if they have skills you need to deliver the outcome. If you remove people because they don't need to be involved any further, thank them in the forum for their contribution. As the project progresses, it would be good to keep them informed about progress too.

- *Use the Project Community*. Make the project community the central information and collaboration hub for the project. When there are documents to work on, do so using the Files tool in the community, or the wiki. When there are meetings to be held, use an activity in the community to hold the agenda and capture action points, and use IBM Sametime to enable virtual meetings. When you need to discuss a salient point, use the forum. When you need to distribute an update to the team, post the update in the blog, or write a status update in the community. If you need to brainstorm options, use the ideation blog.

Make the project community the central information and collaboration hub for the project.

- *Create Subcommunities for Separate Workstreams*. If you have a large project to deliver, you may need to structure the work into separate workstreams in order to simplify both the management oversight and delivery tasks. Subcommunities in IBM Connections can be aligned with workstreams, meaning that a series of subcommunities can each contain a separate workstream. When creating subcommunities, note that the most recently created subcommunity displays first in the list—both in the left-hand navigation pane and in the array of subcommunities—so if you want the workstreams to display in a particular order, create them from right-to-left.

Figure 9-12. Create Subcommunities for Separate Workstreams



When working on a large project, use separate workstreams to simplify management oversight and delivery tasks. Create a separate subcommunity for each workstream.

- *Tailor Each Subcommunity to the Needs of the Workstream*. If you are using separate subcommunities for each workstream, customize the tools available in each subcommunity to align with the specific needs of the workstream. Some workstreams will require an ideation blog for brainstorming approaches; others will not. While each subcommunity should have a common base of tools—such as Files, Forums, and Activities—all subcommunities do not have to offer exactly the same roster of tools.

Sidebar: Changing the Image for a Community

Communities use a default image—a light grey square box with three people standing inside. If you are the owner of a community you can change this default image in order to provide an immediate visual differentiator for your community. Change the image by clicking *Community Actions*, then *Edit Community* from the drop-down menu list. On the resulting form, click *Upload a Community Image* and select an appropriate JPEG, GIF, or PNG file. Whatever you choose to upload will be constrained to a 90x90 pixel size. If you have a large photo you want to use, scale and crop it before uploading.

If your project is not large or complex enough to warrant dividing it into separate workstreams, you have a very practical choice to make. That is what you do with the historical information in the project community when the focus changes to delivery (stage five). For example, there will be ideas and options in the ideation blog from earlier stages; what do you do with those now, particularly if you want to use the ideation blog in stage five (and knowing that you can't have more than one ideation blog in a given community)? There will be discussion threads in the forum related to earlier stages; what do you do with those? There will be activities, documents, and events too; what is the plan to deal with them? Here are three specific options:

The ideas, discussions, activities, and decision making processes evidenced in the project community are important and should be retained to support the post-project review and inform your lessons learned process.

1. *Delete All Historical Information*. The first option—that you should never do—is to delete all historical information. Open the ideation blog and delete all earlier ideas, comments, and votes. Do the same in the discussion forum, in all activities, and the files tool. Get rid of everything that was there from stages one to four, and re-use the community starting with a clean slate. While this is an option, it's such a bad one that you should never do it. The ideas, discussions, activities, and decision making processes evidenced in the project community are important and should be retained to support the post-project review and inform your lessons learned process. Deleting this information reduces the chances of getting better, and depending on the industry your firm is in, is probably illegal (because it amounts to destroying evidence).

2. *Create a Separate Project Community for the Delivery Stage*. The second option is much better than the first, and that is to create a separate project community for the delivery stage. This means that all of the information in the initial project community for stages one to four remains intact, and all future activity in stage five happens in its own separate location. If you take this route, write a note in the description in both communities to highlight the relationship.

3. *Create a Single Subcommunity for the Delivery Stage*. The third option is to create a single subcommunity in the project community for the delivery stage. This has the advantage over option two of keeping both communities tied directly together, rather than creating two equally placed communities. It also means that if the project does become larger or more complex in the future, that additional workstreams can be seamlessly added to the master project.

In closing, don't delete the information in the original project space—it is important to retain it. Use either a separate project community or a single subcommunity to support the work of the project team in stage five.

Sidebar: User Adoption Strategies for Project Spaces

My book *User Adoption Strategies* offers a four stage model of user adoption for the people who aren't turned on by features and functions in new technology—the so-called "second wave users." Such people make up most of your employees, and helping them over the adoption hurdle is critical to success with new collaboration technology and approaches.

For project spaces, here's an ideal approach to take with your second wave users:

1. *Exemplar Stories (for Stage 1 Winning Attention)*. Find an example (or two, or three) of other project teams at your organization who have already run a project in IBM Connections, and who can point to a meaningful difference as a result. Perhaps there is a hard statistic, such as the team completed the project 20% faster than another similar project. Or perhaps the difference is more subjective, such as all team members always knowing the current status of the project. A real example from your organization of the difference made by using Connections will help with winning the attention of your second wave users.

2. *Web-Based Training (for Stage 2 Cultivating Basic Concepts)*. Record a series of short screen-capture movies about how to use IBM Connections for running a project. The movies need to focus on the actual use of the tools in IBM Connections, such as the discussion forum, the files area, and the community activity stream. Ask the team members to watch the screen-capture movies.

3. *Facilitated Group Re-Imagining (for Stage 3 Enlivening Applicability)*. Hold a workshop with the new project team to explore how to make use of the new project space in IBM Connections. The workshop needs to include an open discussion about how the project team plans on running their project, and an examination of how to use IBM Connections to do so. The other crucial discussion for the workshop is which legacy tools will no longer be used by the team, and which tools in Connections will replace them.

4. *Zero Other Options (for Stage 4 Making It Real)*. In order to make the transition to the new project space in IBM Connections, make previous systems and tools inaccessible for new content, and don't create a shared folder on the file share for working on documents. Team members will need to have a ready answer when another team member asks to see the minutes of a recent meeting: It's in the project space. Or the most recent edition of a document: It's in the project space. Such as approach creates the social conditions required to help the team transition to the new project space.

The above is only one approach that you can take when helping second wave users across the adoption hurdle. See *User Adoption Strategies* for other options.

Project Methodology Stage 6. Close the Project

With the project successfully completed, there are three major tasks to work through to close off the project. The first stresses the human dimension. The other two focus on specific actions to take in IBM Connections. The three major tasks are:

> Your team has achieved great success by working together during the project, so take the time to hold a celebration.

1. *Celebrate Success*. Your team has achieved great success by working together, so take the time to hold a celebration. The size of the celebration will depend on the size of the success you have achieved, but at the very minimum have a special morning break with coffee and cupcakes. If the project win was sizable, you may even be able to organize a dinner at a fancy restaurant. For teams with remote team members, schedule the celebration when everyone is in town, or provide a way for different subgroups to hold their own celebrations—and share the pictures in the community's media library for everyone to enjoy.

2. *Update the Project Community*. Write a summary forum or blog post in the community, in order to pull the threads together and give both current team members and future visitors a sense of what happened throughout the project. Point to the key documents in the Files tool, so people don't have to navigate their way through hundreds of working documents to find the essential ones. Note who people should speak to if they want more information about the project. Update the community description to say that the project is now completed, has been closed, and no further activity is taking place. Append the word "(COMPLETED)" to the name of the community, so it is immediately obvious in search results that no further work is taking place.

3. *Update People's Profiles*. Team members who were involved in the project should update their own profile in IBM Connections to reflect their involvement. As there is no explicit "Past Projects" field on the profile, you will need to set a standard approach for your organization. There are two approaches that have the most validity: a project-specific tag that's common to all team members, or an update to the About Me field. The tag approach means that other people have a clickable way of finding everyone who was involved in a specific project. An update to the About Me field means people will have to use search to find team members. On balance, updating the About Me field is the better approach, as it allows more richness to be expressed about someone's involvement. For example, the individual can include the role they played in the project, the duration of their involvement, and include a link to the project community. It is unwieldy to attempt this with a tag, because few people will have the exact same tag.

The three specific actions above enable the project to be closed appropriately.

Closing Comments on Running a Project with IBM Connections

Before looking at a couple of case studies and evaluating the advanced concepts, let's bring together our discussion on running a project with IBM Connections. There are four closing comments that need to be made:

- *Your Methodology Dictates How To Use IBM Connections*. We followed a generic project methodology in this scenario. While your firm's project methodology is likely to share common elements with this generic methodology, it is unlikely to be the same. Look at your firm's project methodology, and think through how to bring the intent of each stage to life in IBM Connections. For some stages the transition will be easy. For other stages it will require more heavy-duty thinking and reconceptualization of what to do and what not to do.

Look at your firm's project methodology, and think through how to bring the intent of each stage to life in IBM Connections.

- *Seek Success, Not the Greater Use of IBM Connections*. The winning outcome of running a project with IBM Connections is that projects get done better, faster, cheaper, or some combination of the three. If project participants balk at using IBM Connections but are still able to achieve high levels of project success, leave them to it. If they balk but are unable to achieve high levels of project success, coach them on using IBM Connections effectively, or if they are unwilling to be coached, work with other project teams and make them successful. This will give you the needed exemplar stories to win the attention of reticent project members.

- *Enlist Executive Support for Extending Great Results*. The way to enlist executive support is through the results the project teams in your firm have achieved. Don't ask them for support to roll-out IBM Connections, because they will ask why. Do your preliminary work with a few selected project teams, tracking the results they achieve as a consequence of re-imagining how to run a project in IBM Connections. Take those results—such as reducing elapsed time by 20%—and ask for support in making it more common across the firm. Instead of asking why they should approve the deployment of IBM Connections, they will be likely to ask why you are seeking permission to make the firm better.

- *There Is No "One Right Way" to Run a Project*. There are many approaches to running a project in IBM Connections. Some firms just use an activity. Others set up a community and use a selection of the tools available. But there is no right way. Experiment and see what works best in your firm, realizing that a few complementary approaches will probably win out.

In summary, projects are the way things get done today in many firms. IBM Connections offers numerous possibilities for improving how we run these.

Case Studies

Let's look at two organizations who are using IBM Connections when running a project.

W L Gore & Associates

W. L. Gore & Associates, a medium-sized company with 10,000 employees around the world, has always emphasized collaboration in its culture.[5] Bill Gore, the founder, had previously worked at a large company whose bureaucratic ways did not mesh with his desire to get things done. So when Bill left to start his own company, he designed a structure to emphasize the ability to collaborate with anyone, regardless of who they were. Fast forward to today, and everyone is called an associate, there is no hierarchy, and there's a widespread embrace of an open door approach to interaction. Although it offers a diverse range of products, many people know of the company through GORE-TEX® outerwear.

As the world became more global, Gore found it had to be more global. In most cases, it was no longer possible for business teams to have all of their members located in the same regions.

From its earliest days, Gore thrived on a culture of co-located small teams "organized around opportunities." These teams were housed in small plants—ideally of no more than 150 Associates—so that interaction was easy, information was readily available, trust was high, and new input (from customers, from experiences in the lab, and so on) could be quickly integrated into the flow of activity. As the world became more global, Gore found it had to be more global. In most cases, it was no longer possible for business teams to have all of their members located in the same regions. Yet Gore wanted to maintain as much as possible the same highly collaborative culture that was so fundamental to its success. Lots of international travel became a mode of operation, and it remains an important way to facilitate face-to-face communications. But the high cost and the wear and tear on associates meant other options were needed too.

IBM Connections is part of a collection of IT tools at Gore geared toward communication and collaboration. In introducing Connections, the collaboration team has placed its greatest initial emphasis on global project teams. For example, global project teams can benefit from new asynchronous ways of communicating, sharing information, and keeping everyone informed—without having to meet by teleconference at 2am or demand travel from widely distributed associates. When one member of a project team expresses interest in using Connections, they are asked to watch a video that explores the main features of Connections and gives various scenarios of how these might be useful to a project team at Gore. If they want to proceed, the collaboration team then asks the associate to speak with other team members about using Connections. It is felt that wide buy-in to a new way of working is essential, and that by requesting such a discussion early in the process, a greater level of adoption—and therefore value—will be achieved. If the team as a whole wants to proceed, it is asked to identify a couple of team champions to act as on-the-ground advocates for using Connections during the project. The collaboration team is available to support the team champions, and the collaboration team schedules regular check-ins to see how everything is going. Some project teams have made the transition to using Connections, and are finding it helpful in supporting communication and knowledge sharing. Other teams are taking longer to adapt to this new way of working and to make the change to using this toolset versus other tools such as email that they have been using for many years.

> Wide buy-in to a new way of working is essential, and by requesting a discussion among the project team early in the process, a greater level of adoption—and therefore value—will be achieved.

Lynn Wilkinson, a Communication & Collaboration Tools Training Specialist at Gore, says:

> *We created our project on-boarding process to help Associates understand how using Connections can help them carry out their daily commitments and to potentially improve the effectiveness of their team communication and collaboration. Some people often think of Facebook when you mention social collaboration tools and struggle to understand how something like that could be of benefit in the business world. We have found that by using real working examples in our on-boarding process, as well as asking our teams to create an agreement on how they are going to use Connections, people can see where Connections will be of value to them.*

Brian O'Neill, a Social Collaboration Application Specialist at Gore, says:

> *It has been really eye opening to hear about the success stories, and to see that what works well for one team doesn't always resonate for another team. It is often more about existing collaboration styles of the team members, and how quickly they might pick up new computer-based tools. One strong team champion can really make the difference in helping a team make the transition to using IBM Connections.*

Several globally dispersed teams have made the transition to using IBM Connections for much of their regular communication and collaboration, including recording meeting notes, sharing presentation files, and collaborating on document creation. IBM Connections is helping all team members to feel more connected as having one place—the project community—creates a greater sense of transparency around actions and decisions. This allows all team members to feel a real part of the team, irrespective of their geographical location.

GORE-TEX® is a registered trademark of W. L. Gore & Associates.

Luxottica Group

Luxottica Group designs, markets, and sells premium, luxury, and sports eyewear around the world.[6] Among others, Luxottica owns the brands Ray-Ban and Oakley. With subsidiaries in 35 countries and over 60,000 employees (including over 40,000 in retail stores), Luxottica was looking for a new way to enable its people to work together, share information, and stay at the forefront of their industry. After a selection process in 2011, Luxottica chose IBM Connections due to its strengths for project collaboration, social business, and knowledge sharing.

> With projects being staffed by employees across divisions and countries, a better way of sharing documents, assigning tasks, and capturing knowledge was needed.

One of the primary focus areas for Connections at Luxottica is project collaboration. With projects being staffed by employees across divisions and countries, a better way of sharing documents, assigning tasks, and capturing knowledge was needed. Projects have historically been managed by sending attachments around by email, but that approach is no longer sufficient. In a great example of proving the benefit of Connections for project collaboration, various Luxottica teams and external business partners who have been getting Connections ready for the group have used a project space in Connections. Marta Rosso (IT Demand Manager) and Cristina Berteni (IT Junior Project Manager) describe the approach:

> *We have been using a community to manage the roll-out of IBM Connections to the Luxottica Group. We are a geographically distributed team, with members from two teams from Luxottica Italy, a Luxottica team from the United States, an HP team (they are providing the infrastructure for IBM Connections), various IBM personnel, and another consulting firm. Sharing documents and project updates via attachments sent by email would not have worked for this project. It would have resulted in chaos. The whole team is pretty happy with what we have accomplished using IBM Connections, and as the sponsors for wider use of IBM Connections at Luxottica, it has been good to demonstrate the new way of working. Once we make Connections more widely available, we will coach teams on how to effectively use Connections for projects.*

While better project collaboration is one of the primary focus areas for the use of IBM Connections, the platform's ability to support multiple collaboration, social, and knowledge areas was critical to its selection. The group has been exploring the use of communities for sharing learning and best practice, and has seen some interesting adoption dynamics in a recent sustainability initiative, such as the critical role played by a community manager. Those adoption dynamics will inform subsequent efforts to introduce new learning communities. Another area of interest is for identifying expertise across the group, and it is expected that a combination of Profiles, what people actually do in Connections, and how people tag each other will greatly help with this need.

Advanced Concepts

In this section we look at three advanced concepts when running a project in Connections:

- Adding ProjExec for IBM Connections from Trilog Group to gain traditional project management capabilities.
- Debating if teams need privacy to do their best work.
- Looking at how to set up a private space for teams if that is required.

ProjExec for IBM Connections

Trilog Group is an IBM Business Partner headquartered in the United States and active around the world. Its focus is on social project management—that is, on leveraging the concepts of social collaboration within the formal project management discipline. The approach to running a project in this chapter focused on projects that don't require a project manager, resource allocations, and the detailed planning of a GANTT chart. If you do need such capabilities, Trilog's ProjExec for IBM Connections is the answer.[7] It is a third-party add-on solution that brings project management capabilities to Connections.

ProjExec adds a number of significant capabilities to IBM Connections, including:

- *The Project Wall*. An activity stream that aggregates updates from all of the projects an individual is participating in. Individuals can choose to see updates across all of their projects, or drill into a specific project from the Project Wall.
- *Importing of Plans from Microsoft Project*. Plans can be developed by the project manager in Microsoft Project and imported into the project space in Connections for sharing among the project team. Changes made in Connections can be synchronized back to the plan in Microsoft Project.
- *GANTT Chart for Visual Planning*. ProjExec displays a GANTT chart in IBM Connections for visual planning. Tasks can be re-ordered through drag-and-drop editing, and the chart displays task dependencies to assist with scheduling. Progress updates can be shared directly in the GANTT chart too, bringing together people and tasks in an integrated view.
- *Portfolio Aggregation*. For the project manager, ProjExec offers an aggregated view across all of their projects, including current status. The portfolio view can be further filtered to allow focused attention on underperforming projects.

While ProjExec adds capabilities to IBM Connections, it also complements existing capabilities including files, communities, and activities. For example, project participants can share a file stored in Files in IBM Connections in one of their project status updates.

The Great Debate: That Teams Need Privacy to Do Their Best Work

Should you set access privileges on a project space to guarantee privacy for a project team? It's a common question. Let's look at two positions.

For—Privacy Prevents Interfering Others from Derailing the Work

Creating a private space for team members to work on a project reinforces the cultural tenet of competence. The team members have been selected to work on the project, based on competence, availability, and interest. You've given them a place to work in IBM Connections, now let them get on with it without unnecessary interference and second guessing from everyone else.

Creating a private space for team members to work on a project reinforces the cultural tenet of competence.

- Access privileges are essential to guarantee unhindered work towards the completion of the project. By setting access privileges, the team's known roster of members can put all of their creativity and competence towards the shared vision. Team energy isn't dissipated dealing with non-team members who show up and want a say in the project.

- The team can still bring other people into the space when required. Team members have the ability to manage the flow of the project, and can bring other people into the project space in IBM Connections when their involvement is required; access privileges don't eliminate the opportunity for non-team member involvement, they just provide a way of managing it. This remains under the control of the team itself and has greater relevance at particular junctures in the project, but doesn't need to be open at all times. If the team wants an expert to review a deliverable, they can request that. If the team wants wider input from a selected or open group of people, they have the ability to set that up. But they're not bombarded by demands for input all the time.

- Access privileges decrease the likelihood of "drive by" contributions from other people who talk a big game but can never get any real work done. Such people feel a moral obligation to stick their necks into everything that is going on, and their perceived busyness validates the "critical" role they play in the organization. But they can wreak havoc for everyone they come into contact with.

In short, by setting access privileges on the project space and giving the project team a private place to work—until they request input from other people—you set up the conditions for the team to do its best work.

Against—There's a Greater Need for Openness, Transparency, and Serendipity

Giving open access to a project space in IBM Connections reinforces the cultural tenet of openness, provides transparency to project progress, and allows serendipity. These three outcomes result in a greater benefit to the organization than privacy will ever do.

- If your organization espouses the cultural tenet of openness and working together, enforcing restrictive access privileges on project spaces undermines the credibility of the message. The two don't go together. Having closed or private spaces automatically raises the "that's weird" flag, and will encourage subsequent teams to request equivalent privacy. Pretty soon the cultural mandate of openness will be undermined, and you will be back to a closed, silo-based organization. You'll have fancy new technology, but few benefits to show for it.

- An open approach to access to project information creates a culture of transparency, minimizing the likelihood that bad news will be deliberately hidden from view. If all team members know that their work is reviewable by other people, it keeps them focused on doing the best job possible. Transparency has another benefit of highlighting opportunities where other people can lend a helping hand, sharing their expertise on a project.

- As organizations grow larger, more diverse, and more geographically distributed, projects protected by access privileges hide progress being made in other parts of the organization. Restrictive access privileges reinforce organizational silos, prevent cross-fertilization of ideas, and decrease the prospect of serendipity. Where there are no access privileges on project spaces—beyond the need to be granted access to IBM Connections in the first place—it is possible to find out who else is working on similar problems or opportunities. IBM Connections even helps with this, by highlighting related communities.

Restrictive access privileges reinforce organizational silos, prevent cross-fertilization of ideas, and decrease the prospect of serendipity.

In summary, there is a much greater need for openness, transparency, and serendipity. Access privileges do grant privacy and may give teams a quiet space to do their best work, but when set against the greater benefits to be gained through openness, it doesn't add up.

Conclusion—Which is Greater?

There is no universally correct answer in this debate, although the sentiment seems to be shifting more towards the openness end of the continuum. If you can address the potential downsides of an open approach—especially unnecessary interference in the early stages of a project—push for as many open projects as possible.

Creating a Private Project Space in IBM Connections

In my first book, *Seamless Teamwork*[8] (which was about the effective use of Microsoft SharePoint for team collaboration), I proposed setting up a three-space project site for the team. This was due to the three constituencies involved in any project: the core project team itself, the sponsors and stakeholders of the project, and everyone else. That same idea can be applied in IBM Connections, for situations where privacy is required. Let's examine how it works.

Three constituencies are involved in any project: the core project team, the sponsors and stakeholders, and everyone else. You can set up a project space in IBM Connections to keep all constituencies in alignment.

Create a Community Space—The "Everyone Else" Space

Create and name a community space in IBM Connections for the project—call it *Project Alpha (Public)* (see Figure 9-13). This is the master community space, will have no access privileges on it, and will thus be available for anyone to review. The purpose of this community is to create a place for advising non-team members about what is happening in the project. It thus enables a managed flow of information about the project from the team to anyone else who needs to know what is going on. It also allows some degree of serendipity, by highlighting the project's focus and various keywords.

Create a Subcommunity Space—The "Project Team" Space

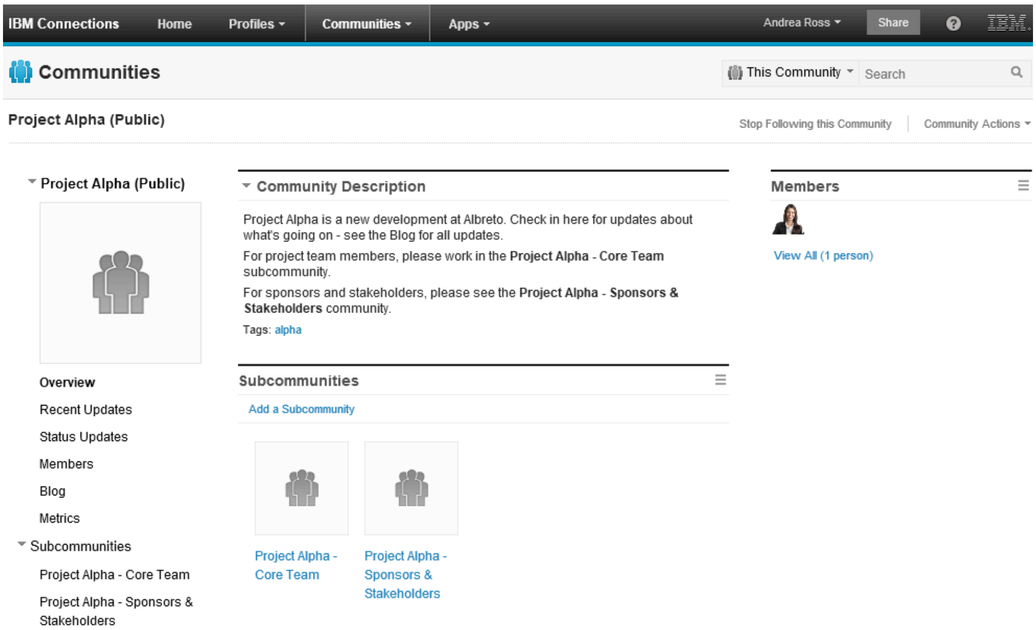
Create and name a subcommunity in the community you have just created; call it *Project Alpha—Core Team*. This is going to be an access-controlled place for the team members to do their work on the project (most likely a "restricted" list, where the space owner will invite team members to join). It will have a restricted list of members, so that only those people actually on the project can gain access. In terms of tools in the space, add whatever you need to enable the team to do its work, as we have examined earlier in this chapter.

The other tool to add to the space is the list of members, so team members can see the list of those people that are on the core team. If you have IBM Sametime for instant messaging and presence in your organization, this list will also light up when team members are online and available for interaction.

Create a Second Subcommunity Space—The "Sponsors and Stakeholders" Space

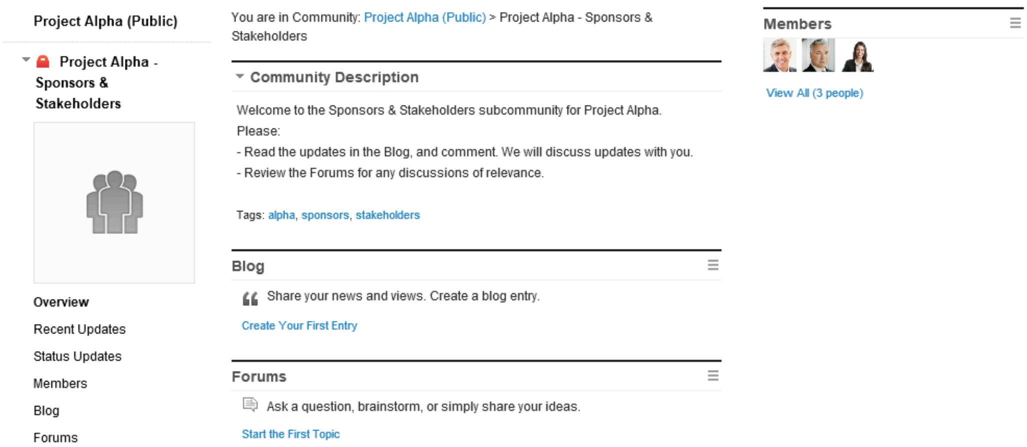
Create and name a second subcommunity in the community you created, and control access to it through a membership list. Call the subcommunity *Project Alpha—Sponsors and Stakeholders* (see Figure 9-14). This will become the primary conduit for interacting with sponsors and stakeholders, for making documents available, and for advising on project progress.

Figure 9-13. The Project Alpha Community



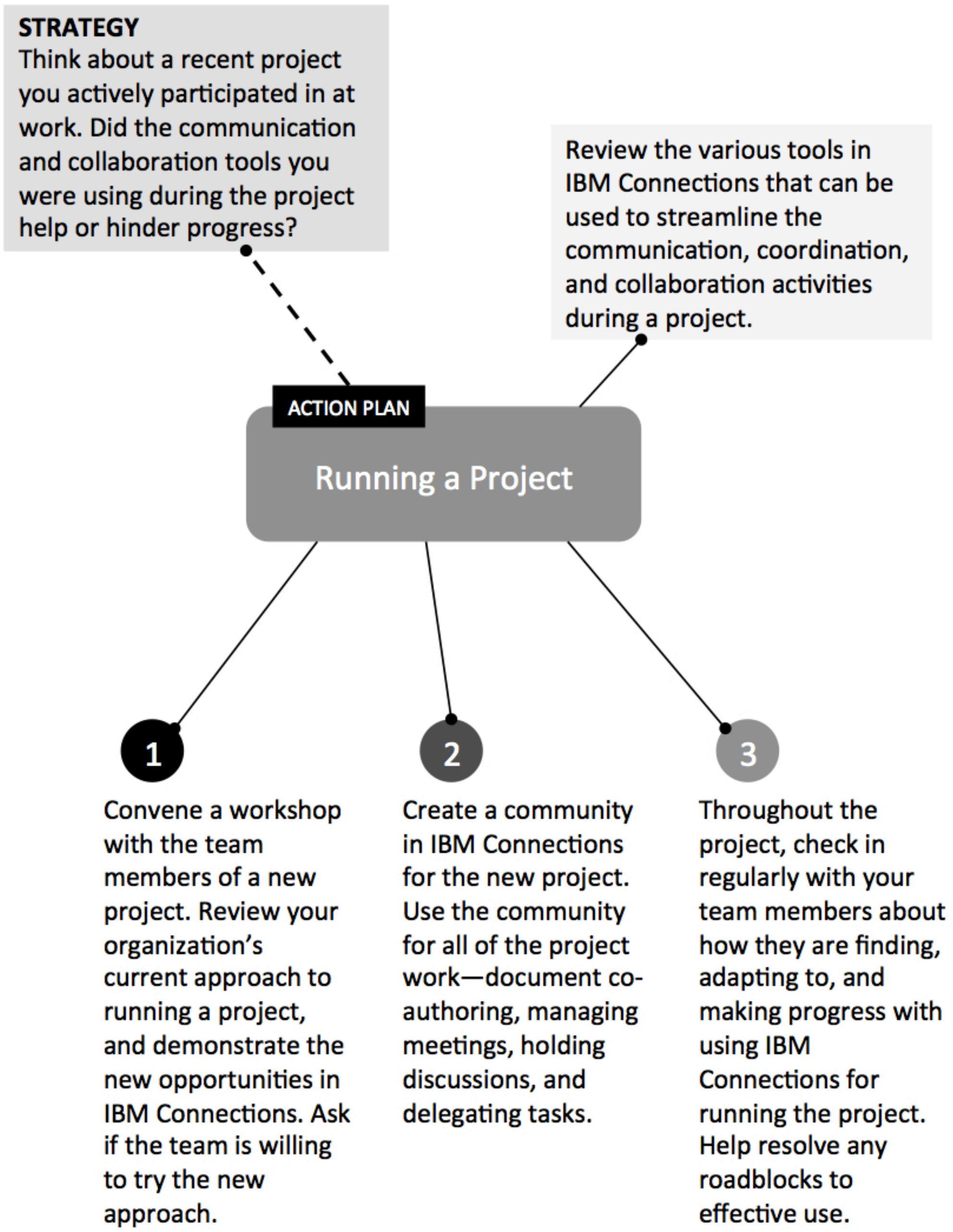
The top-level Project Alpha community is open to everyone, with the Blog tool used by members of the core project team to post updates about what's going on. The real work happens in an access-controlled subcommunity called Project Alpha—Core Team.

Figure 9-14. The Sponsors and Stakeholders Subcommunity



Communication with Sponsors and Stakeholders takes place through a separate access-controlled subcommunity. Discussions, documents, and progress are shared.

Action Plan


STRATEGY
Think about a recent project you actively participated in at work. Did the communication and collaboration tools you were using during the project help or hinder progress?
Review the various tools in IBM Connections that can be used to streamline the communication, coordination, and collaboration activities during a project.
ACTION PLAN
Running a Project
1
Convene a workshop with the team members of a new project. Review your organization's current approach to running a project, and demonstrate the new opportunities in IBM Connections. Ask if the team is willing to try the new approach.
2
Create a community in IBM Connections for the new project. Use the community for all of the project work—document co-authoring, managing meetings, holding discussions, and delegating tasks.
3
Throughout the project, check in regularly with your team members about how they are finding, adapting to, and making progress with using IBM Connections for running the project. Help resolve any roadblocks to effective use.

Summary

With the greater focus in the most recent versions of IBM Connections on using communities for project teams, IBM has laid the foundation for a revolution in where people work together. The integration of many tools into a coherent place for collaborative working means that teams can effectively move away from using email and attachments to run a project. As we saw from the case studies, using Connections for projects helps with demonstrating the power of the product, and getting people across the adoption hurdle due to the driving need to engage and stay informed in the project.

The integration of many tools into a coherent place for collaborative working means that teams can effectively move away from using email and attachments to run a project.

In the next chapter we turn our attention to the collaboration scenario of sharing learning and best practice with IBM Connections.

[1] Michael Wade writes a blog on leadership, ethics, management, and life. This quote is from a May 2012 blog post called *Escaping the Fog*. See www.execupundit.com/2012/05/escaping-fog.html.

[2] I wrote a much longer article in January 2007 about this topic. See *Unresolved Issues with Email: Confusion in Conversation Flow*, at currents.michaelsampson.net/2007/01/unresolved-issu.html.

[3] This six-step project methodology is intended to be reflective of the general steps involved in running a project, while at the same time non-prescriptive. You could use these six steps for running a project at your organization, but their inclusion here is not intended to mandate that you should. For specific consultancy around how to align a project space with your project methodology, please contact Michael via www.michaelsampson.net/contact.html.

[4] Once IBM Docs is available in 2013, there will be the option of real-time, simultaneous co-authoring. Screen sharing in Sametime provides an alternative until then, as well as longer term for document and file formats that are not supported by IBM Docs.

[5] The W L Gore & Associates case study is based on material drawn from a review of Social Connections III by Lynn Wilkinson (nee Russell), published in July 2012 at socialconnections.info/social-connections-iii-a-review/, as well as a phone interview with Lynn in late August 2012. Used with permission by W L Gore & Associates.

[6] The Luxottica Group case study is based on a phone interview with Marta Rosso and Cristina Berteni in late September 2012. Used with permission by the Luxottica Group.

[7] To learn more about Trilog Group and its ProjExec for IBM Connections solution, please see www.triloggroup.com/portal/website/projexecconnections.xsp. You can get a quick 10-minute overview of ProjExec at www.youtube.com/watch?v=ei5RcL8sVk8.

[8] *Seamless Teamwork: Using Microsoft SharePoint Technologies to Collaborate, Innovate, and Drive Business in New Ways* was published by Microsoft Press in 2008. It focused on SharePoint 2007. See www.michaelsampson.net/seamlessteamwork.html.

Chapter 10. **Sharing Learning and Best Practice with IBM Connections**

> *Teams are about knowledge: how to get it, how to improve it, and how to pass it on. In the old days knowledge was a by-product of doing business; today it is the primary driver. The distinctions between working and learning have never been fuzzier.*[1]
>
> Harvey Robbins and Michael Finley

Learning an improved way of accomplishing a task, process, or business outcome is valuable to an organization. The value could be in greater efficiency, where people can accomplish the same outcome with the expenditure of less time and effort. Or the value could be greater effectiveness, where the outcome of one group's work delivers more of what the customer needs. Although learning can confer tremendous value, too often learning that happens in one group remains isolated, resulting in costly duplication of effort to learn the same thing again and again. Or it results in an increasing divergence of capability, so that some groups in the organization are much more effective than others. The solution is the ability to share learning and best practice across the organization.

In this chapter, we will:

- Look at the theory of sharing learning and best practice.
- Discover how to use IBM Connections to create communities focused on sharing learning and best practice.
- Consider the example of two organizations that are using IBM Connections for learning communities.
- Analyze the essential role of a community manager in a learning community, among other advanced concepts.

The Theory of Sharing Learning and Best Practice

When a team puts a lot of effort into understanding a complex topic and developing an answer or framework for understanding it, sharing that learning creates leverage inside the organization. Turning "on-the-bleeding-edge" learning into common understanding supports the spreading of good ideas, the development of best practice, competitive advantage in the market, along with a whole realm of efficiency and effectiveness benefits. Unfortunately, many organizations have an under-developed capability for sharing learning and best practices. Often it's an email to particular staff members with an attached document outlining the idea.

> Turning "on-the-bleeding-edge" learning into common understanding supports the spreading of good ideas, the development of best practice, and competitive advantage.

Sharing learning and best practices in this way has a number of negative consequences:

- Discussion about the learning or new practice is limited to those in the email thread. If you didn't get the email and attachment, you can't see what is being talked about. If one of the recipients fails to "reply-to-all," some people are excluded from the subsequent comments and input.

- New employees joining the organization, or new staff members joining the team, have no way of getting a sense of the state of play. Prior learning and best practice approaches are hidden in peoples' inboxes, and unless someone goes through their email archive and forwards relevant discussions, the new staff member has to start from scratch.

- There is no common understanding of learning and best practice. Since everyone joined in at different points, were copied in on only certain discussions, and have kept only particular ideas, there is an extreme divergence of understanding about the overall body of knowledge. There isn't a "way we do things around here," only "the way I do things."

- Updating, extending, correcting, and clarifying learning and best practice are difficult. Every individual has to attach updates to previous discussions, because there is no shared way of doing so. If someone misses a critical update, their own performance inside the organization suffers.

There are many ways of using the capabilities in IBM Connections to enable a new way of sharing learning and best practice. The essential requirement is to create a shared repository of learning and best practice, and the second is a discussion mechanism for evaluating and synthesizing opportunities for improvement against the current approach.

Lowe's, a major home improvement chain in the United States, found that having such a system available provided a return of $1 million on just a single idea.[2]

Using IBM Connections to share learning and best practice eliminates the negative consequences of current ways of doing so, and opens new ideas across the organization:

- *Conversations are held openly*. Discussion about the learning or new practice takes place openly in a community in IBM Connections. New people joining the community have ready access to all of the past conversations, and can quickly assess which ideas hold merit. Using search, people can see what is currently known across the entire organization, and reach out for more insight as required.

- *New employees can locate and join current communities*. New employees joining the organization have immediate access to a treasure trove of insights about how the organization works, what is known, and who the on-the-ground leaders are across the various disciplines. New employees can get plugged into the learning and best practice communities that are relevant to their work and interests.

New employees joining the organization have immediate access to a treasure trove of insights about how the organization works.

- *Common understanding can be cultivated*. Since everyone is exploring the idea in a shared community, the whole conversation is open to all. Everyone can see the line of reasoning, and gain access to shared artifacts supporting and explaining the idea. Employees aren't left scrambling trying to figure out the line of thinking; it's all there in the community.

- *Updates to learning and best practices can be easily propagated*. Sharing new learning about the applicability of an idea can be done directly in the community, giving immediate access to everyone who has previously expressed an interest. If there are new documents, reports, or other information to share, it can be published to the community for easy access by everyone. There's no guessing required about who might need to receive the update.

Finally, it is not always the case that new technology is required to improve an organization's capability in sharing learning and best practices. One of my recent projects involved looking at this scenario for a client, and clearly I knew there was a wide range of technology that could be used to support it. Ultimately, however, my recommendation was that no extra technology was required, and that the sharing of learning and best practices would simply happen by people talking more. Why? The client was a small government agency of less than 200 people, 98% of whom worked in a single office location. Sharing learning and best practices could be accomplished orally. There was no need for extra technology to bring people together.

How to Share Learning and Best Practice in IBM Connections

A few months after Edgar invited Kyle from the Toronto office to give his perspective on one of the topics in the Marketing @ Albreto forum, Walter noted an up-tick in activity on that topic. He thought it was strange, given they had closed off the topic. On clicking through to the forum, Walter read the stream of recent replies, and shook his head in disbelief. "Who would have thought we'd have that kind of impact?" he said to himself, before looking over to check that Edgar was in his office. Walter knocked softly on the door as he entered without waiting for an invitation, and helped himself to a seat across from where Edgar was finishing off a phone call. Edgar acknowledged his presence, and steered the phone call to its natural conclusion.

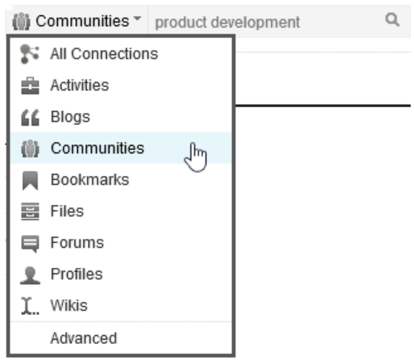
> *"What's up?," asked Edgar, as he turned around to face Walter.*
>
> *"You'll never believe what I just discovered in our Marketing forum," Walter began. Edgar looked at him inquiringly. "You remember that you invited Kyle to share his perspective on one of the topics?" Walter began. "Well he did, and he was great—for us."*
>
> *"Good," said Edgar, "but what does that have to do with an unbelievable discovery?"*
>
> *"In the forum Kyle said that he was working on a new component as part of his product development work," Walter said, "and that the demand for the component had come through strongly from our North American customers. What he didn't know—nor did we—is that Gavin from the London office was also hearing the same thing from his European customers, and they've been developing the same component."*
>
> *"Duplication. Ouch—that's costly," said Edgar. "How do you know this?"*
>
> *"The London office has just been rolled across to IBM Connections, and Gavin happened to see some of the tags from our forum, and on clicking through to see what they were all about, discovered Kyle and his work. They've been having an in-depth discussion in our forum about their individual pieces of market research and the subsequent product development work, and are now planning on working together."*
>
> *"That's is a great story," acknowledged Edgar, and then paused while a frown formed on his forehead. "Is the marketing forum the best place for the continuation of their discussion though?"*
>
> *"No, not at all," said Walter. "But it's got me to thinking about how we could champion the idea of learning communities across Albreto to get away from the 'luck-based collaboration' that just happened. How do we make this type of discovery and the subsequent opportunity for collaboration a normal part of working at Albreto?"*

Step 1. Search IBM Connections for an Existing Community

Before rushing to create a new learning community in IBM Connections, let's stop for a minute and think this through. If your new community works it will require a high investment of time and energy to get the right human dynamics happening. So it makes sense to see if there is a current learning community in IBM Connections that you could join and participate in. Sometimes a new community will be required—but not always. It would be a good investment of one to two hours to work through the following steps:

- *Search for your keywords*. Search for the keywords that will become part of your community, using the search box at the top right hand screen anywhere in Connections. Change the scope of the search to *Communities*, type the word or phrases you would expect to find, and see what already exists.

Figure 10-1. Search for Keywords in Communities



Search for existing communities in IBM Connections using the same keywords you expect to use in your new community. You may be able to join a current community.

- *Browse the tag cloud or tag list*. Open the Public Communities page in IBM Connections, and read through the tag cloud or tag list in the left hand navigator. These tags are the top-level tags that were defined by community owners when setting up their community. If there is a tag of interest, click to see which communities exist. Once you have clicked a tag, Connections offers the ability to filter the list of communities with additional tags, either by typing another tag, or by clicking on the list of related tags that is automatically displayed.

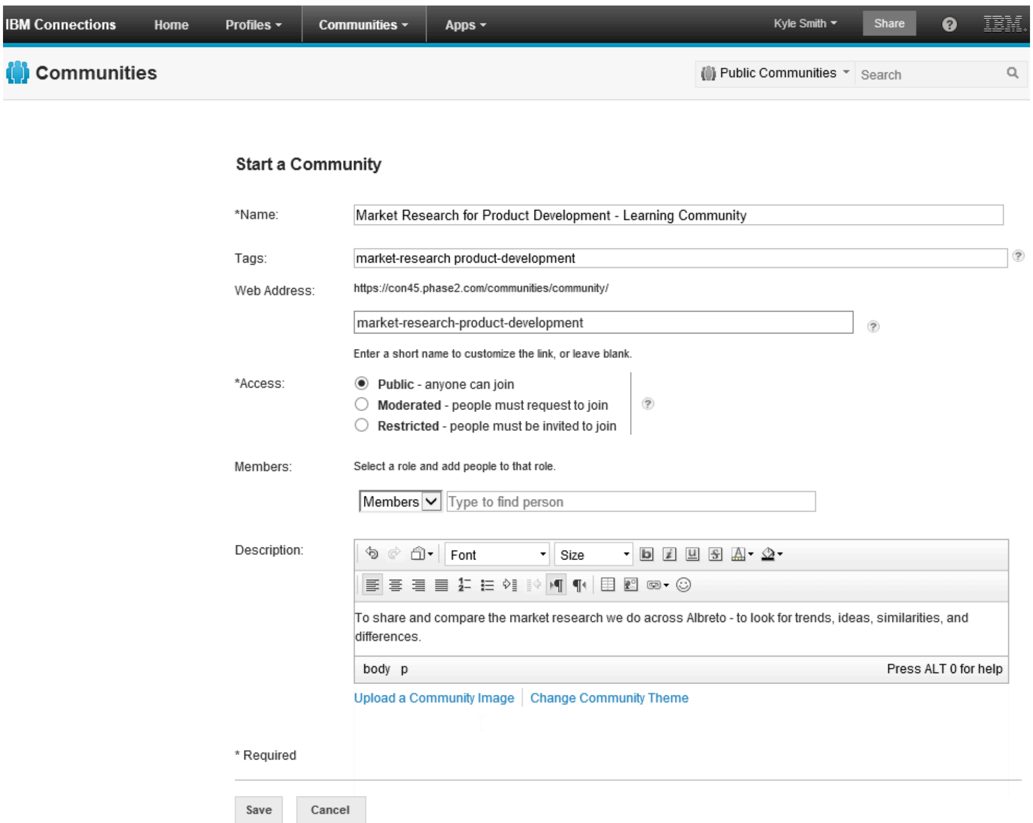
- *Review where your potential community members are active in Connections*. Open the Profile pages of the potential members for your new community, hover over their name, and click to open their business card. Click the *Communities* link to see which communities they are involved in, or scan their *Recent Updates*.

If you find a relevant community to join (rather than starting a new community), take your full passion for the topic into the new community. Join in a full-hearted way.

Step 2. Create the Learning Community

If there is no existing learning community that provides sufficient overlap or scope to join and participate in, create a new community. Hover over the Communities tab along the top menu bar in Connections, and click the *I'm an Owner* option. Click the *Start a Community* button, and fill out the resulting forum with the overview of your new learning community.

Figure 10-2. Create Your Learning Community



Use the Start a Community form to create a place in IBM Connections for sharing learning and best practice. Use the description field to explain the initial vision for the community.

When you click *Save* at the bottom of the form, Connections creates the new community for you and displays it onscreen.

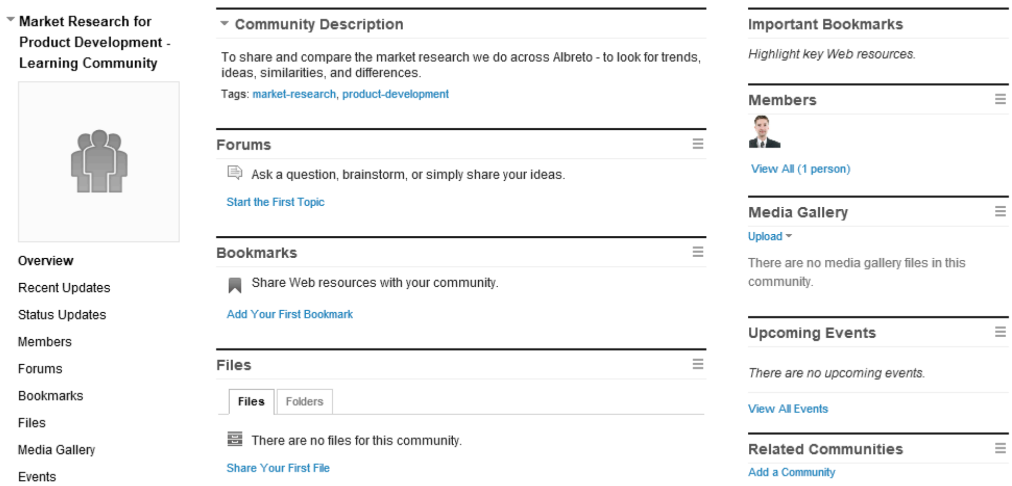
Step 3. Add the Tools

The default layout of a new community in Connections has a left-hand navigation pane, a middle column with a variety of specific tools, and a right-hand column with areas for displaying important bookmarks and the list of members. There are a few additional tools to add to this default layout. Click *Community Actions*, and then *Customize* from the menu list (you need to be an Owner to do this). Add the following tools—based on the prescription for the design of a learning community in *Collaboration Roadmap (2011)*:[3]

- *Common Area for Conversation and Discussion*. The default design of a learning community includes the Forum tool. You do not need to add anything extra.
- *Common Storage of Shared Artifacts*. The default design of a learning community includes areas for files (Files) and web links (Bookmarks). If your community will be sharing photos, videos, and other images, add the *Media Gallery* tool as well.
- *Common Calendar for Upcoming Real-Time Events*. Add the *Events* tool for scheduling real-time events in the learning community.
- *Surfacing of Related Groups and Communities*. Add the *Related Communities* tool to your learning community, so as to highlight similar work and learning efforts taking place in other communities.

Add other tools if you see a clear need for them in your learning community, but the above list should be the minimum standard. Close the *Add Content* pane when you have finished.

Figure 10-3. The Layout of Your Learning Community



Your learning community provides a place for sharing learning and best practice, mainly through the Forums, Bookmarks, and Files tools. There are other supporting tools too.

Step 4. Set the Initial Scope

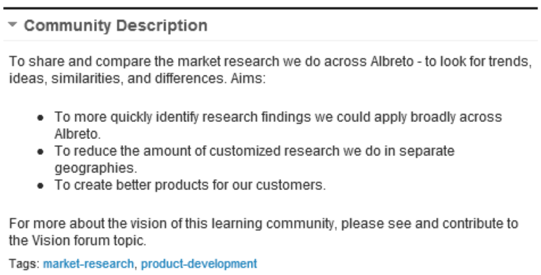
When you created your new learning community at Step 2, what you entered in the *Description* field of the new community form was transferred across to the *Community Description* tool that displays at the head of your new community. With your new community now created and the right tools added, and before you invite your list of initial participants, it is worth spending a couple of minutes revisiting what you entered and ensure that it adequately reflects the scope of the learning community. Remember that success in your learning community depends on a strong purpose to pull people together around a common learning vision.

Success in your learning community depends on a strong purpose to pull people together around a common learning vision.

There are a couple of practical issues to consider when setting the initial scope:

- *Don't Overwhelm the Overview Page with the Community Description*. Connections makes it possible to display a very long description of the initial scope in the Community Description section. But doing so will overwhelm the overview page for community members. Limit what you write in the community description to between three and five lines. If you need more—and you probably will want to have a full statement somewhere that is open for input and discussion from other members—create a link to the scoping discussion topic in the Forum.

Figure 10-4. Set the Initial Scope in the Community Description



Ensure your Community Description sets a strong purpose to pull people together around a common learning vision. Link to a discussion topic for more detail and the conversation.

- *Remember That It Is Just the Initial Scope*. Be clear in stating what you have in mind for the learning community, but remember it is just the initial scope. The scope will change over time as the community gets its own rhythm. You don't have to state it perfectly at the beginning.

To edit the Community Description, click *Community Actions* at the top right-hand of the screen, then *Edit Community*. Click *Save* when you have finished.

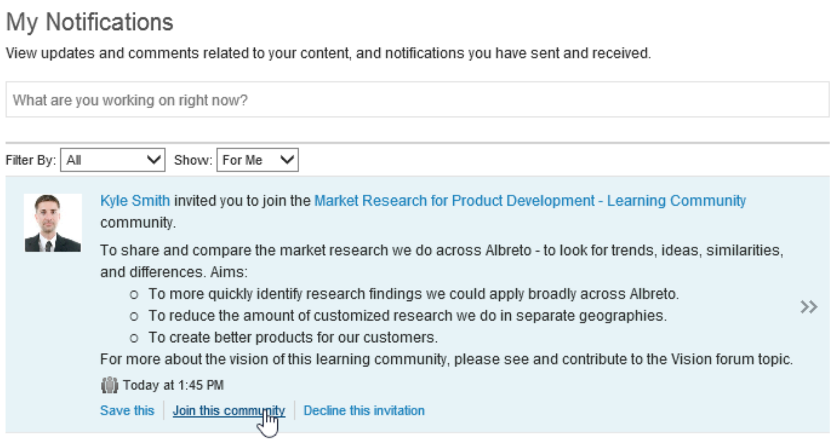
Step 5. Invite Your List of Initial Participants

When you first considered creating a learning community, you will have had in mind potential participants. You should already have spoken with most of them one-to-one about being involved in the community. Now it is time to formally add or invite them. Click on *Members* in the left-hand navigation pane, and then either *Add Members* or *Invite Members*. Here's the difference:

- *Add Members*. For adding people as either an owner or member/participant to the community. People you add here will be immediately added to the community, and will gain immediate access. Use this approach for people who have already expressed interest in joining the community, and have given you permission to add them as soon as it is ready. To add a member directly to a community, start typing their name in the field and Connections will show you a list of current members in the Connections directory. You can add one or more people this way. Click *Save* when you have finished adding members.

- *Invite Members*. For giving people the opportunity to become part of the community, but leaving the decision whether to join or not up to them. Inviting members does not add people immediately to the community, but gives them the option of doing so. When issuing an invitation, the invitation will show up in the other person's update streams (see Figure 10-5), and will also generate an email message to them. Both forms of notification will display the Community Description, hence the need to have it up-to-date and scoped appropriately. To invite one or more members, start typing their name in the field and Connections will display a type-ahead list of current people in the directory. Click *Send Invitations* when you have finished.

Figure 10-5. Invited Members Receive an Invite Notification



Inviting people to join your community results in an invitation being displayed in their update streams. They can accept or decline the invitation from the notification message.

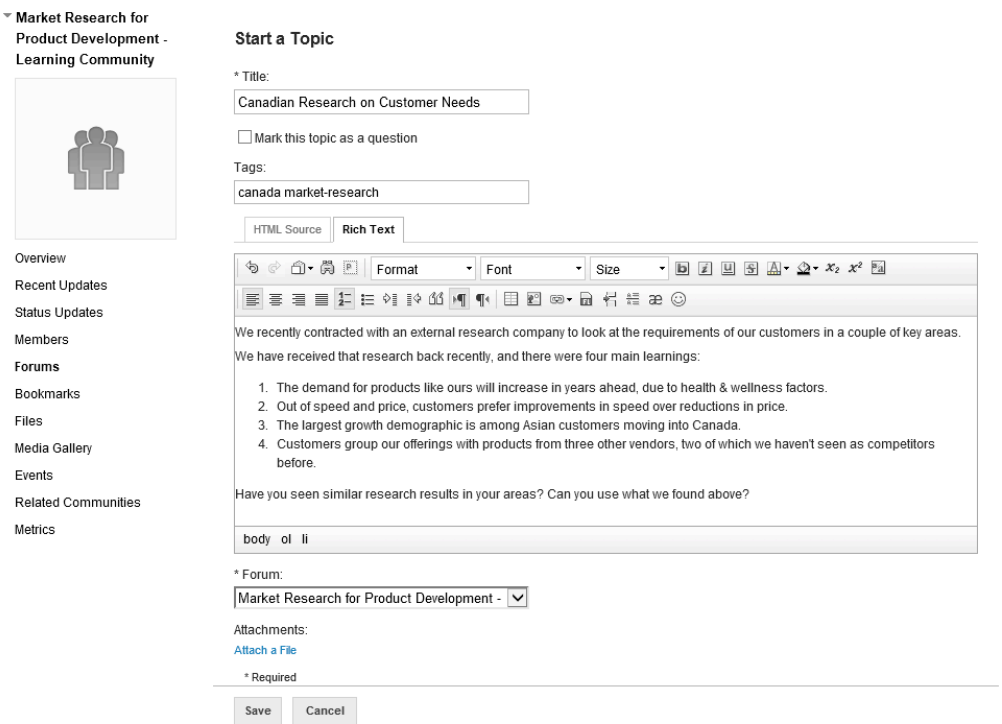
Step 6. Create the First Discussion Topic

Conversation and discussion around topics of shared and common interest are at the heart of what happens in a learning community. The initial scope of the community sets the context, the members provide the potential range of experiences, and the actual discussion topics are the specific focal points around which the members collaborate. In establishing a new learning community, the first discussion topic and subsequent initial topics are important because they give examples of what the community will be focused on, they give a specific instance that someone can contribute towards and learn from, and they create initial social bindings between people that draw out future contributions. In other words, make the first discussion topic a real issue of significance to the organization, not merely a space filler.

Discussion on topics of common interest are at the heart of what happens in a learning community.

To create the first discussion topic, click *Forums* in the left-hand navigation pane, and then click *Start a Topic*. When you have finished, click *Save* at the bottom of the topic form.

Figure 10-6. Create the First Discussion Topic

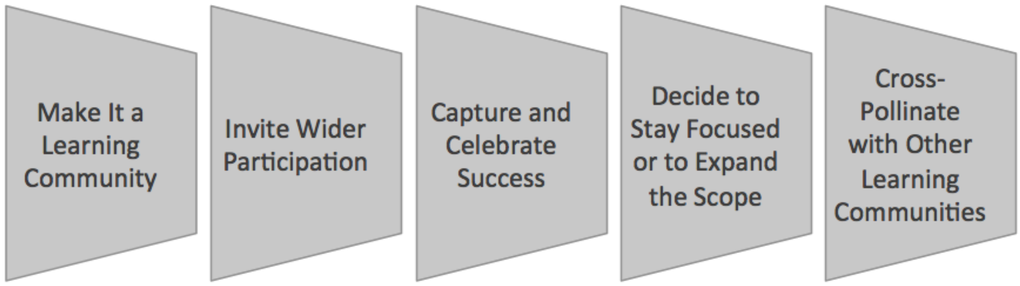


Create a first discussion topic that addresses a real issue of significance to the organization. This demonstrates that the learning community will focus on substantive issues.

Step 7. Make It a Learning Community

It has taken six steps to get to the point of making it a learning community, but you will have invested only two to three hours of time so far. The initial six steps were essential to create a place for people to meet around and form into a community. But the real work of sharing learning and best practice starts with Step 7, and continues through to Step 11. Living out these five steps are the true work for the owner of a learning community.

Figure 10-7. Building a Community That Learns Together



The real work of a learning community involves discussing matters of common interest, inviting participation, and creating an environment for success. Communities need to decide whether to stay focused on their initial scope, and can learn from other communities too.

There are a number of specific actions to take when creating a learning community:

- *Discuss Current Topics*. Contribute your thoughts to current discussion topics, and encourage other members to do the same. Sometimes just commenting is enough to stimulate others to contribute themselves. Other times you need to ask directly.

- *Ask New Questions*. Raise new questions in the discussion forum, and see what people think about the answer. In Connections there is an option to mark a topic as a question, and subsequently mark a reply as the answer.

- *Define What Normal Looks Like*. Have a discussion about what normality looks like in the process area, research area, practice area, or other interest area the community is focused on. There are likely to be a range of expectations.

- *Share Checklists*. Share and discuss the checklists people have created to use when following a process, doing research, or undertaking a particular activity.

- *Explore Post-Project Implementation Reviews*. Without contravening privacy or confidentiality requirements, share and discuss recent post-implementation project reviews. It is good to share and spread these (often costly) lessons.

A real learning community forms as these activities start happening on a regular basis.

Learning from Shared Files and Documents

Members of your learning community will regularly come across reports, white papers, press releases, position papers, research notes, and other forms of documentation from which learning can be drawn. They are likely to find blog posts in IBM Connections too, that have a bearing on the learning area. Encourage community members to bring all of these to the attention of the wider community by creating topics in the forum. As a forum topic, the file or document can be highlighted for other community members, and also discussed to facilitate shared learning. Here's how to go about it:

- *Create a New Discussion Topic*. Open the discussion forum and start a new discussion topic for the file or document you want to highlight. Include some identifying details in the title of the topic so other members of the community can quickly see what it is about. Give the topic one to three tags to help classify it.

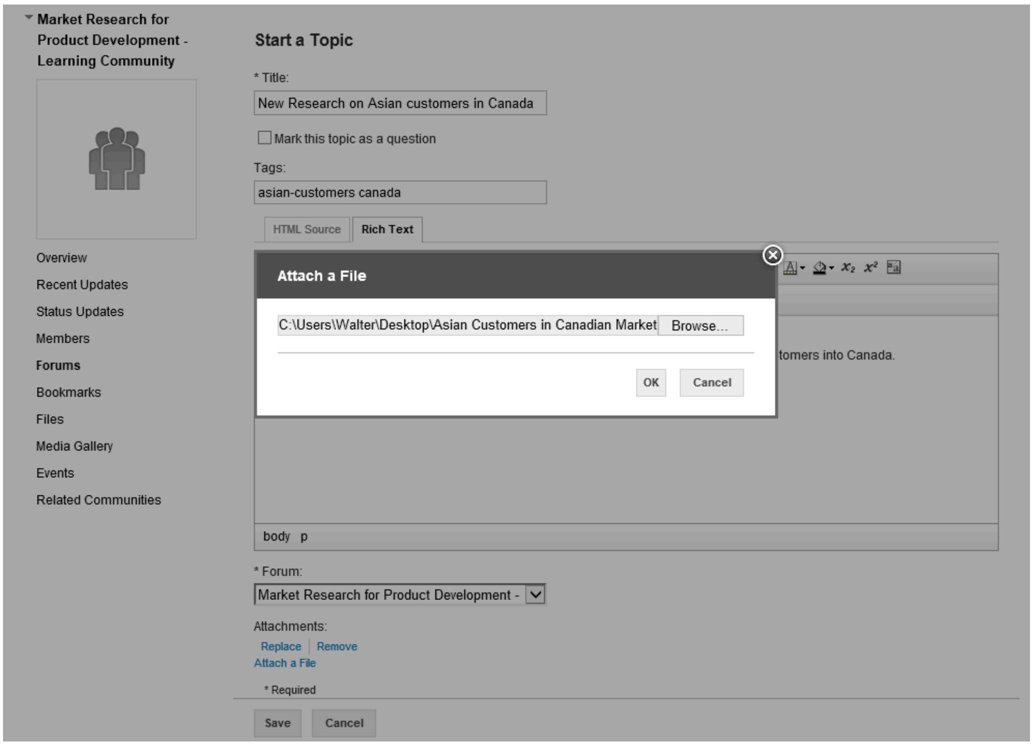
- *Note Your Key Learning Points*. Use the body of the discussion topic to write why you are sharing the particular file or document. If there is a specific part of the file or document you want other people to see, reference it directly (by page number if appropriate). If there are particular learning points you took from the file or document, note them down too.

- *Attach the File*. Click the *Attach a File* link at the bottom of the topic form. This will open a pop-up box for attaching and uploading the file or document. Click the *Browse* button, and navigate to the file or document on your computer. Once you have located it, click the *Open* button, and then click *OK* on the pop-up box. Once the file is uploaded, you will see it referenced at the bottom of the topic. If you chose the wrong file, click *Replace* to find the correct one. To get rid of it from the topic, click *Remove* instead.

- *Encourage Participation in the Discussion*. Once you have shared the file into the forum, encourage participation from others. Ask community members to write a comment saying what they learnt from the file or document. Ask them to point out other files or documents that support or contradict the one you found.

Sidebar: Attaching a File Versus Referencing It in Files
As an integrated container for learning together, it would be perfect if attaching a file to a discussion thread would also put it into the Files tool. Likewise, that instead of having to attach a file, it would be perfect if you could cross-reference a file in the Files tool from the topic. These two approaches would enforce a pure boundary between discussions and files, and give a consistent and unified approach to working with both. As at IBM Connections 4.5, these two capabilities are not yet available. In a future edition of Connections, it is likely that they will be. When that happens, although the step above will not change for an individual, the technical-stuff-in-the-background will.

Figure 10-8. Attaching a File to a Discussion Thread



Create discussion topics with attached files to stimulate discussion and promote shared learning. Ask community members to participate in the discussion by sharing their thoughts and reactions to the document.

The main output of a learning community is invisible: greater shared learning among people. Files or documents are usually a visible output of a project team, but the relationship is different in a learning community. In *Collaboration Roadmap*, the difference is highlighted in this way ("collaborative group" is used instead of "learning community"):

> *Broadly speaking, artifacts play an opposite role in a collaborative group compared to a collaborative team. In a collaborative team, artifacts are created as a consequence of conversation and discussion, either for the team's internal use (a project plan) or delivery to an outside party (the request-for-proposal, the product design, or the pricing strategy). In a collaborative group, artifacts are referred to so as to inform conversation and discussion. The artifact is the starting point for a conversation, or a reference point within a conversation, but not the outcome of it. Clearly there are exceptions to this principle.*

In summary, learn what you can from files and documents through discussion.

Planning Real-Time Learning Events

A learning community greatly benefits from its ability to bring its members together around a topic or theme from wherever they are, whenever they can. Being in the same place at the same time is not needed, because the tools in IBM Connections create a shared place for people to meet together. They don't have to be physically together or even together at the same time in order to create value. Nevertheless, an opportunity within learning communities is to create real-time learning events that bring people together—from wherever they are—but at the same time. For example, you could create the following learning events in a community:

- *Discussing a Breakthrough Idea*. A member of your learning community creates a breakthrough idea in their work, and wants to share it with other community members. Instead of asking him to type out all the details, schedule a real-time learning event so the member can present his idea to the community, and then engage in interaction with other community members. Members get the opportunity to learn about the new idea, and clarify any aspects that are unclear.

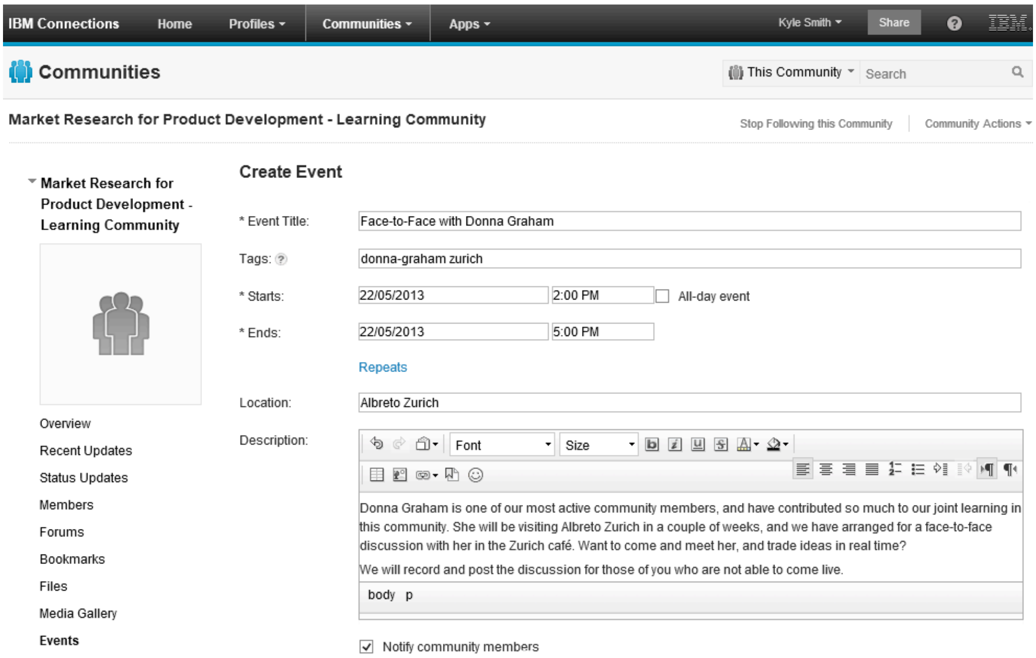
- *Engaging with a Visiting Specialist*. One of your most active community members works out of Mexico, but is visiting head office in Zurich for a week. While she is in town, schedule a number of live discussions to give other community members an opportunity to engage with her. Holding these events with your visiting specialist is much easier given the closer time zones when she is in Zurich.

- *Learning from an External Expert*. Your community is focused on enhancing a particular body of knowledge within your organization. However, there are experts in complementary industries who are working with similar ideas. If you can engage with them without compromising competitive information, your community gains the opportunity to learn from the external expert. Schedule a real-time event for discussion and engagement.

Real-time learning events confer a number of benefits within a community, but the most significant is reinvigorating the human touch. Hearing the passion in someone's voice for an idea is a refreshing change from engaging with other people only through the written word. It adds a degree of humanity that is normally missing.

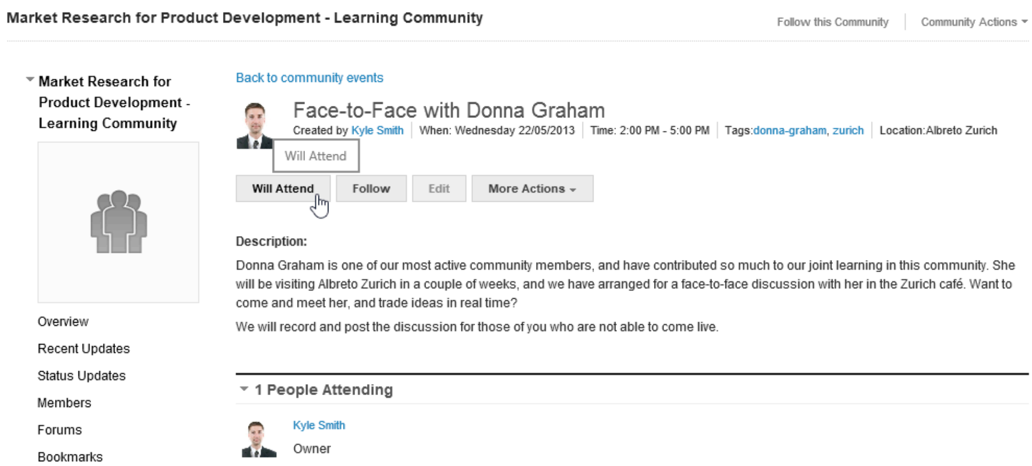
When planning real-time learning events, use the Events tool in your community. It is a very appropriate tool to use because learning events are opportunities not demands; people can opt-in to participate if they want to. When you create and schedule an event, click the *Notify community members* option to inform all members about the upcoming event. It would also be a good idea to create a forum topic pointing to the event, giving more of the background and putting the event notification in the stream of discussion. When it is time to hold the learning event, use an IBM Sametime meeting. You will need to include the Sametime meeting details in the event description, and should record the session and post the recording into your community for future reference.

Figure 10-9. Create Real-Time Learning Events in Your Community



Use an event to signal an opportunity to participate in a real-time learning event. Notify people about the event, and create a forum topic to highlight the opportunity.

Figure 10-10. Events Signal Learning Opportunities for Community Members



Community members can say whether they will or will not attend the learning event by clicking the appropriate button.

Creating a Collection of Learning Resources

In making your community a learning community, one part of your objective should be to create a collection of learning resources. These provide current community members with a quick reference guide to relevant material. Community members can also contribute what they find to the shared pool of learning resources. Each current member benefits from this style of collective contribution, because they get access to a much wider pool of resources than they would be likely to create themselves. Future community members stumble upon a rich treasure trove of resources across the firm that they would otherwise never know about or have to assemble themselves. Indeed, many hands make light work.

Future community members stumble upon a rich treasure trove of resources across the firm that they would otherwise never know about or have to assemble themselves.

Use the Bookmarks tool in your learning community to create this collection. Bookmarks in IBM Connections are the equivalent to the bookmarks you create in your Web browser to save a reference to a helpful web page. As part of your web browser, your bookmarks are just for you. As part of a community in Connections, they are shared with everyone.

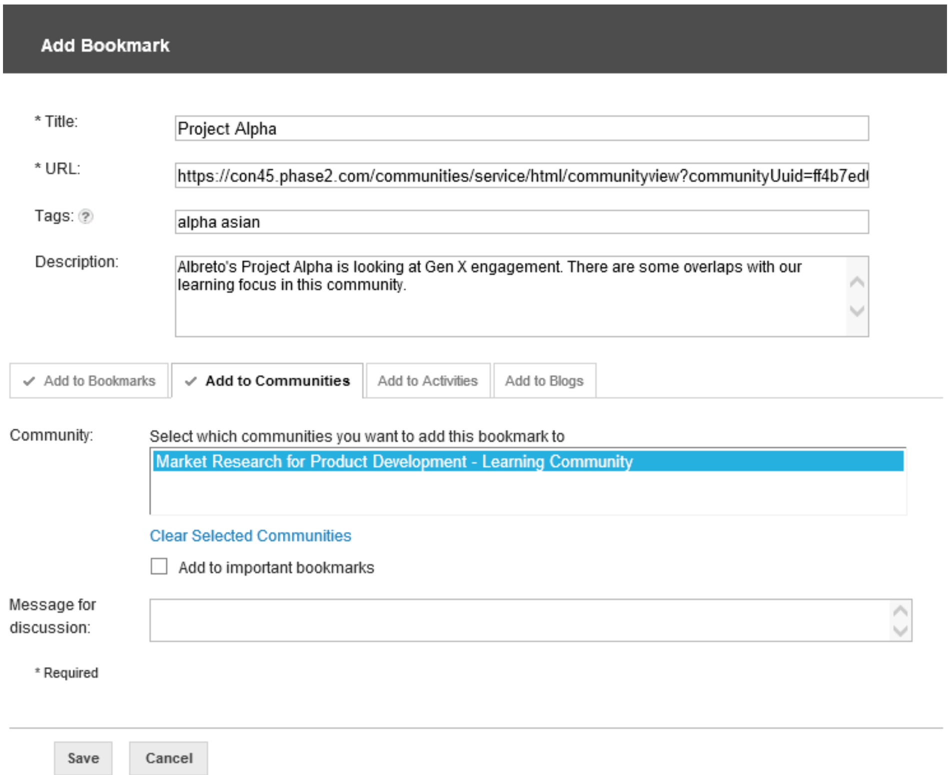
To use Bookmarks to create a collection of learning resources, follow these three steps:

1. *Install the Add Bookmark Button in your Web Browser*. The Add Bookmark button enables you to add bookmarks to your learning community as you find them, without requiring you to go back to your community and add it manually. You can find the Add Bookmark button through the *Bookmarking Tools* link at the bottom of most pages in IBM Connections. Once you find it, simply drag the button to the toolbar in your Web browser. If you need assistance, ask a colleague or the IBM Connections contact person in your IT group.

2. *Do Your Work and Add Bookmarks as You Find Them*. As soon as you see a page you want to add, click the button in your web browser, give the bookmark one to three tags, select the community to add it to, and click *Save* (see Figure 10-11). This adds a bookmark to the page into your community without requiring you to open the community and add it manually.[4]

3. *Navigate the Bookmarks*. Use the collected resources in the bookmarks tool to see what is known. There are multiple options for this: page through the collection of bookmarks to browse what is there, search the community for keywords you are looking for, or use the tag cloud or tag list within the bookmarks tool under the left-hand navigator to focus on specific tags.

Figure 10-11. Add a Bookmark to the Learning Community



Add a link to a learning resource using the Add Bookmark button. Tag the bookmark to enable people to find related bookmarks in your resources.

There is a whole range of bookmarks you could add into a collection of learning resources. Here's five examples:

- *Links to Internal Projects*. Learning communities provide a place for continual learning and experimentation beyond the lifecycle of a specific project. If there are current projects happening in your firm on related issues, bookmark them.

- *Links to Current Products*. Create links to your firm's products or services that relate to the learning community. This gives a good grounding in the current context of where the learning could be applied.

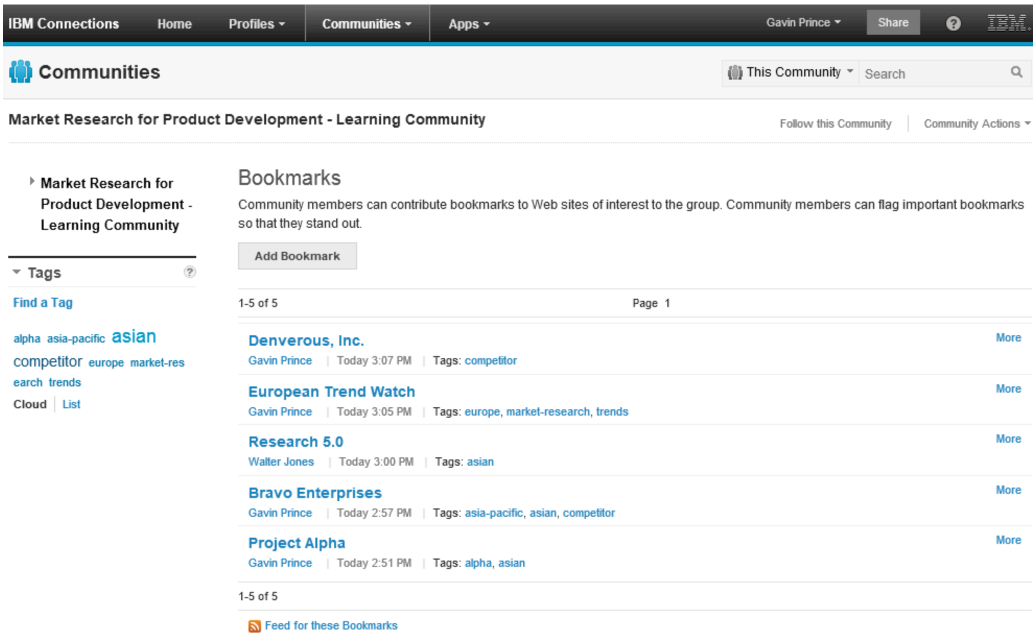
- *Books and Articles*. When you find books and articles about the focus of the learning community, create a bookmark. This helps other people discover current thinking about the topic outside of the firm.

- *Links to Industry Conferences*. Relevant upcoming industry conferences can offer a new slant on topics of interest to the learning community. When you find one, create a link for other community members to see.

- *Links to Competitor Websites*. Your competitors will be active in the same learning areas that you are, and it doesn't hurt to have a link to what they are doing within your learning community. Their products and services in the same area may stimulate new thinking about how to better serve customers.

As community members submit bookmarks into the community, the collection of learning resources will grow and provide increased value to the community.

Figure 10-12. The Collection of Learning Resources



Navigate the set of collected bookmarks by browsing, using search, or navigating the tag cloud or tag list. For the latter, click a tag to quickly refine the list.

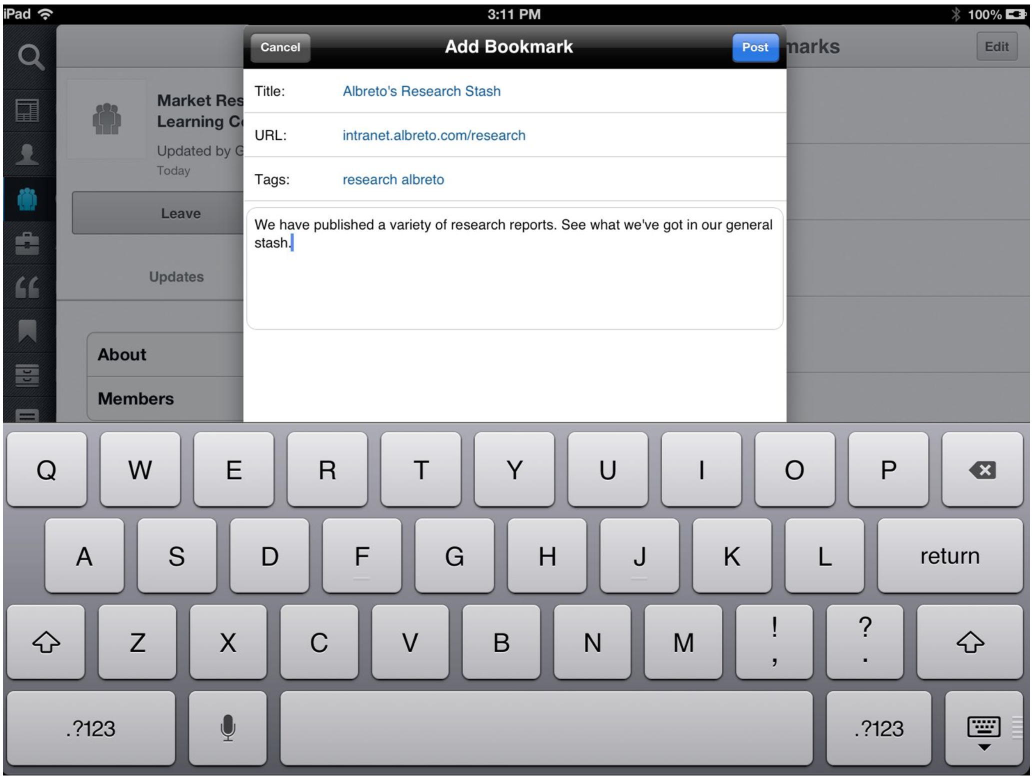
Finally, it is possible to mark a bookmark as important. A community member can do this for their own bookmarks when creating the bookmark, and the community owner can do it for any bookmark. To upgrade a bookmark to important, click *More* at the end of the row for the bookmark, and then click *Edit*. Tick the option at the bottom of the form that says *Add to Important Bookmarks*, and then click *Save*. Important bookmarks show on the Overview page of the community.

Working with a Learning Community When Mobile

Many of your community members will often be away from their laptop or desktop computer, and will want to get access to your learning community from a mobile device. We saw in previous chapters how easy it is to do so through the mobile apps available for IBM Connections. All of the individual capabilities we have looked at transfer across to the use of a mobile app for accessing a learning community. For example, these include working with documents (Chapter 3), attending a Sametime meeting (Chapter 4), and participating in a discussion (Chapter 5).

The mobile app is just as fluid for accessing and contributing bookmarks into the community. Use the app to open the community, touch into the Bookmarks tool, and touch a bookmark to open it. To add a bookmark, touch the plus sign at the top of the list of bookmarks, and fill out the resulting pop-up dialog. When adding the URL, it would be a good idea to copy it to the clipboard within your browser—such as Safari on iOS—so you can paste it into the Add Bookmark dialog, thus decreasing the chance of spelling it wrong.

Figure 10-13. Working with Bookmarks on a Mobile Device



Access your learning community from a mobile device, for documents, attending events, and participating in discussions. You can even access and add bookmarks into the community.

Sidebar: "I Don't Have Time for This; I Have Real Work To Do"

Your learning community is in full swing, and it is going great. One day you happen to bump into a colleague that is deeply involved in the specific subject area, has a history of doing great work, but whom surprisingly is not involved in the community. As you assume this is an errant oversight, with great enthusiasm you invite them to join. Their response stops you dead in your tracks: *I don't have time for that; I have real work to do*.

If your learning community is real, is functioning effectively to share learning and best practice, and has some notable exemplar stories, the assertion above is the height of arrogance. The best answer I have heard to this objection is to look the person in the eye, and with as much fearlessness as you can muster say, *How do you not have time to be involved?* By making the assertion that time prevents participation—and that the learning community isn't "work" nor "real"—here is what they are implying:

1. *I'm capable of creating all of the best ideas myself*. My past success in doing great work was solely about what I came up with, and I will keep doing that into the future. My ideas are the best ones. Your ideas are worse than mine.

2. *I have sufficient time to do everything unaided*. My experiences and expertise are not only sufficient to the tasks I have to do currently, but they are completely sufficient for all of the tasks I will have to do into the future. I do not need your help.

3. *There is nothing I can learn from you and other colleagues*. The work I am doing is providing the context for learning everything I need to learn. I can learn what I need to learn by myself. I do not need to compare notes or share experiences with other people to see common themes, identify outliers, and know what to do. You can't teach me anything.

4. *I choose to be ignorant of current advances in my field*. No one else is capable of contributing ideas and concepts that have any validity in my view. If it doesn't come from me, it is worth nothing. The work my colleagues are doing is irrelevant and unnecessary.

What's the best way to respond to a colleague who takes this view? Aside from the line above, make an offer to show them the community on a one-to-one basis. Graciously point out the contributions being made inside the community, highlighting the ones that have made the biggest difference. If there are topics your colleague is current working on, see what community members are saying about the area.

On the other hand, if your learning community is not meeting these conditions, perhaps the individual has a point. What could you learn from them in order to make the learning community sufficiently attractive so that they would join?

Step 8. Invite Wider Participation

Your learning community started with a core group of members, but keeping it going—and growing in quality—will involve gaining wider participation. That means finding more people who will join the community and contribute on a regular basis. You know how to invite people (see Step 5), and here is who to seek out to join your community:

- *Invite Others Doing the Same Work in Different Places*. If your organization has similar operations in other cities, countries, or continents, invite other people who are doing the same work in those places to join the learning community. They will benefit from being exposed to how work is done in other places, and your current members will benefit from gaining different perspectives on what they do. Ideas that work in one country may translate directly to other countries, thereby reducing the cost of learning. Or they may work only to a partial degree, thus increasing the richness of understanding about the line between what works globally and what has to be customized for local markets.

- *Re-Invite the People Who Initially Declined*. When you started your learning community, some of the people you initially invited will have declined—for various and sundry reasons. Contact them again and invite them to visit the community to see the real discussions that are taking place. They may decide to join this time, and even if not, at least you will have sown a seed for the future.

- *Invite Others Doing Very Different Work*. Innovative ideas are often found at the intersection of multiple disciplines, practices, and research areas. If everyone in your learning community is doing the same work and has the same background, your community will offer some value but is likely to stagnate over time as the diversity of information gets less and less. Invite new people doing very different work to join and contribute to your community—either as a one-off event, or on an ongoing basis. They will bring a diversity of expertise, experience, and ways of thinking that people who are too similar will not have.

Innovative ideas are often found at the intersection of multiple disciplines, practices, and research areas. Invite new people doing very different work to join and contribute to your community.

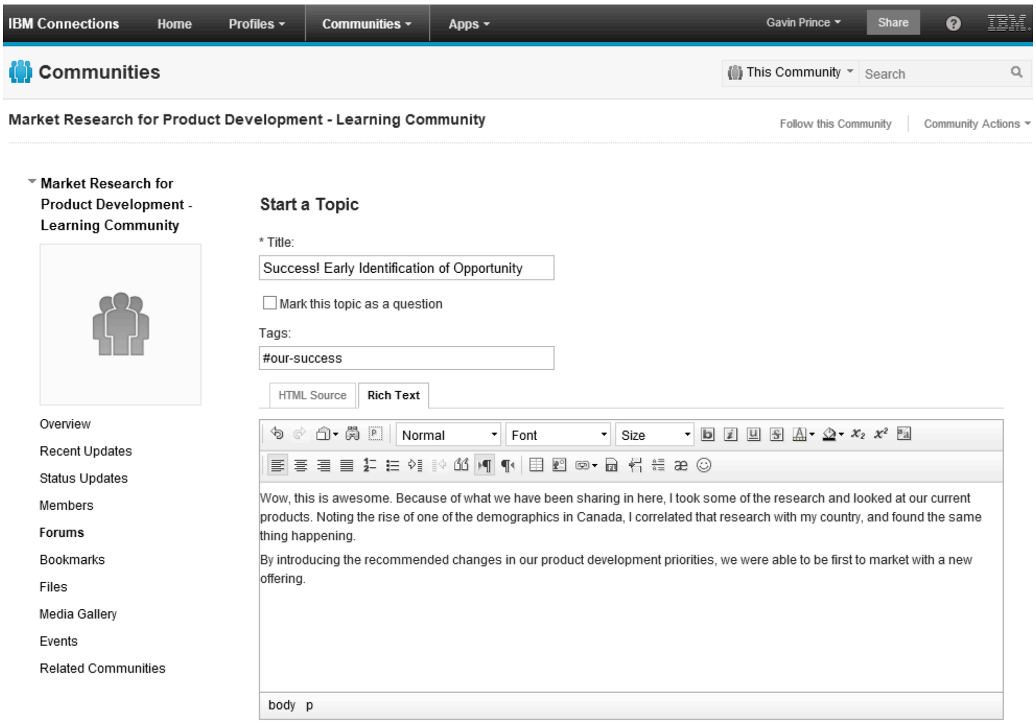
- *Invite Specific Customers*. Getting input from your customers can add clarity to what is being discussed, and urgency to do things better. With the appropriate agreements in place, invite specific customers to join your learning community.

Inviting wider participation is not solely the responsibility of the community owners. Encourage your current members also to invite their colleagues, peers, and other interesting people to join.

Step 9. Capture and Celebrate Success

The purpose of your learning community is not to create a place where people come to have a good time. That could be a byproduct, but it is not the primary purpose. Achieving better success together for the individuals, groups, and departments represented in the community is the aim. As the community develops and people learn together about what does, doesn't, and could work, there should be a growing number of specific instances that highlight this success. Capture what happened, document it in the forum, and give it a specific tag so all of the success stories can be reviewed quickly.

Figure 10-14. Capture and Highlight Success in the Forum



Keep a record of the success being achieved as a result of investing in the learning community. Give success stories a specific tag to enable easy reference in the future.

In the example above the tag *#our-success* was used for the new discussion topic. The use of the hash at the front will elevate it to the top of the tag list in the Forum. When clicked in the tag list (or cloud) a list of all forum posts with that tag will be displayed.

Capturing success stories is helpful for a number of reasons:

1. *It Encourages Your Current Members to Keep Learning Together*. As members see the value that other people are achieving through their participation in the

community, it encourages them to keep sharing, talking, and learning together. The value is partly theirs too, because they have been involved directly or indirectly in cultivating the learning community.

2. *It Provides Evidence of Real Value*. When an executive asks about the value being achieved as a result of the learning community, you won't be at a loss for words or have to fall back on the useless metric of number of active users. You can open the forum, click on the tag, and start reviewing the specific success stories. Some will have direct monetary gain attributed to them, but most will indicate a quick win, a lesson transferred, or a new connection made. If the executive wants more details, encourage him or her to join the community and ask their questions directly to your community members.

What will spike their interest are success stories—real instances of success and value that have been achieved in your organization as a result of hosting a learning community on IBM Connections.

3. *It Wins the Attention of Non-Members*. A few employees will join your community because they think that IBM Connections is cool technology. Most won't join for that reason. What will spike their interest are success stories—real instances of success and value that have been achieved in your organization as a result of hosting a learning community on IBM Connections.[5]

4. *It Encourages Other People to Start New Communities*. Members who see the success that is being achieved in one community will be encouraged to start another community. What you have done is to prove that learning communities that deliver value and success can actually work in your organization, which is an encouraging thought for someone looking at the possibilities but feeling daunted by the challenges in making it work. The effects can even be felt outside of your direct community, as other people hear about what happened and feel emboldened to give a learning community a try.

5. *It Deflects the Critics and Detractors*. Employees and executives who hate what you are doing will seek to undermine your efforts by questioning the value being gained as a result of learning communities. Their words will have a ring of truth about them, which is why they are so insidious. Having a plethora of specific instances to point to will help with deflecting their attacks.

Encourage community members to document their own success stories in the forum. Getting it in their own words is more powerful than having a sanitized version of record. If members are uncomfortable about writing it up themselves, by all means offer to write it up and post it in the community forum.

Step 10. Decide to Stay Focused or to Expand the Scope

As you bring together individuals and create a community of like-minded people to share ideas, think together, and learn better ways of working, some members—and maybe even you yourself—will toy with the idea of expanding the scope of the learning community. The thinking would be that you have succeeded in bringing people together (tick), you have a diversity of experiences to draw on (tick), and it is likely that this community could also weigh in on other topics too (tick). Should you do it?

Regardless of the community involved, you have to manage the trade-off between two dynamics, both of which impact on membership:

- *More Attractive to New People*. The introduction of new ideas to a community will raise the attractiveness of the community to new people. Those people who would not previously have joined because the focus and scope was not of interest, will be increasingly likely to join as the focus and scope expands into areas they are interested in.

- *Less Attractive to Current Members*. The introduction of new ideas to a community will dilute the focus and scope of the current community, and thus become less attractive to some of your members. They will dislike the disruption brought about by adding new people and content to their community, and will leave.

How do you decide? Unlike when you started the community, you now have a group of people to run the idea past. Ultimately it is your current members who will have to participate in any expanded scope, so raising the question in the forum gives you a way of assessing the affinity of the community to the idea. Give specific details about how you think the community will change if you expand the scope, and what types of new people will be likely to join. Ask current members to weigh in with their thoughts.

Ultimately it is your current members who will have to participate in any expanded scope, so raising the question in the forum gives you a way of assessing the affinity of the community to the idea.

As a result of the discussion, if you decide to stay focused, thank your current members for their input. If someone else wants to create another community to focus on the specific expansions you were thinking about, include a link to the new community so interested members can click across and join. If you decide to expand the scope, revisit and update the Community Description so it correctly reflects what the community is about. In line with the two dynamics above, be aware that while you will likely gain new members, some current members will drop away as a result of the expanded scope. Reach out privately and thank them for their past input; be gracious when they leave because they may join again in the future.

Step 11. Cross-Pollinate with Other Learning Communities

One of the disturbing consequences of the effective use of new collaboration technology to create new communities of people across departments, divisions, and geographies, is the recreation of silo-based thinking. Where the old silo was a particular department, the new silo is the learning community that doesn't see value, validity, and potential contribution from other people and communities. Deliberate cross-pollination with other learning communities—bringing in and engaging with ideas from other communities into your community—provides the necessary antidote to this disturbing consequence.

Three ways to make cross-pollination with other learning communities a common practice in your organization are:

- *Update the Related Communities Tool*. Identify other communities in Connections that are forming around similar and related topics, and create a link to these in the Related Communities tool. This gives your members a quick way of accessing other communities and gaining a wider perspective.

- *Introduce Discussions from Other Communities*. As you come across interesting discussions in other communities, bring a snapshot back to your own community. Propose that your members visit the topic in the original forum to share their thoughts and ideas, rather than creating another place for the same discussion to take place. Your community gets the direct benefit of a new perspective, and the other community potentially gains some valuable ideas from your members.

- *Invite Participation from Other Communities*. Arrange a week-long virtual event for cross-community sharing.[6] Identify another appropriate community and reach out to the Community Owner to invite their membership to join your community for a week to share their thoughts about what your members are learning about, and vice versa. This gives the benefit of two specific communities exploring what the other is focused on, will introduce new ideas to both communities, and will give rise to new connections between people that may result in future collaborations—in addition to the immediate benefit of new ideas that can be applied in the short-term.

As you come across interesting discussions in other communities, bring a snapshot back to your own community. Encourage members to share their thoughts and ideas in the original discussion.

In summary, fight the tendency of a learning community to become restrictive in its thinking by bringing in new ideas on a regular basis. The success of other learning communities will give sufficient fodder to mix things up a bit and give people an expanded way of thinking through current issues.

Case Studies

Using IBM Connections to support learning communities is a very common collaboration scenario in organizations today. In this section we look at two case studies—Lowe's Home Improvements, the Australian Bureau of Statistics.

Lowe's Home Improvements

Lowe's Home Improvements operates over 1750 stores across the United States, Canada, and Mexico, selling home improvement supplies to people.[7] It has over 250,000 staff. With such a sprawling footprint across a large geographical area, it's basically impossible to bring people with similar interests together for sharing learning and developing best practice. For example, Lowe's has staff with deep expertise in specific areas, such as kitchen design, but there's usually only one person per store, and they never get to meet their counterparts at other stores. A few years ago Lowe's turned to IBM Connections to make possible in a computer-mediated environment what was impossible in a face-to-face environment.

Paint staff in other stores took on board her idea, implemented it at their stores, and they too sold out of Teflon paint trays. The net result was a $1 million increase in annual revenue.

The internal collaboration team ran a pilot with 4000 staff for 12 months, with the intent being to explore the opportunity presented by Connections for a new way of working. Various approaches to user adoption were introduced, and at the end of the pilot project, a case was made to executive management to transition from pilot to full production. This was approved, and IBM Connections was rolled out the entire organization.

Having operated IBM Connections for a few years and worked at building sharing and learning communities, Lowe's has some good stories to tell. One such story involves a paint tray. A staff member in the paint department at Lowe's store came up with a new way of displaying a Telfon paint tray. She poured paint into the tray, left it to dry, and then pulled the now dry paint mould out of the tray—leaving a clean paint tray. She placed the clean tray and the new paint mould on display. People coming into the store saw the two together, and the store quickly sold out of Teflon paint trays. She turned to the internal procurement system to order more of the hot selling item, but to no avail. The procurement rules didn't allow her to purchase more. So she turned to IBM Connections, told the story of what she had done, and asked for ideas on how to get more Teflon paint trays. That too was to no avail because no one could tell her how to get more, but many of the paint staff in other stores took on board her idea, implemented it at their stores, and they too sold out of Teflon paint trays. The net result was a $1 million increase in annual revenue, due to a single idea being more widely implemented. Imagine if this type of story was repeated a hundred times each year.

Australian Bureau of Statistics

It's rare to find a collaborative innovator in government, but the Australian Bureau of Statistics (ABS) is one such agency.[8] In its official role, it collects, collates, and communicates a wide range of statistics for use by the Australian government and the community. In its organizational culture, the ABS has emphasized openness, working in teams, and knowledge sharing—cultural tenets that are currently in vogue but have been mainstay realities for the ABS for over 15 years. Teams have shared databases for email messages, and various Lotus Notes databases are used for knowledge sharing, instead of relying on email messages. These cultural tenets and the way they have been implemented has led to the ABS being recognized as a best-in-class government agency for knowledge and records management in Australia, while spending only 15% of what other similarly-sized agencies spend. Talk about a great statistic!

The ABS have been using IBM Connections since mid-2010, as an extension to its Lotus Notes environment. The ABS has a well-entrenched approach to supporting team collaboration through a customized Lotus Notes database. Therefore one key area that offers a significant opportunity to the ABS is to provide new ways for cross-team, cross-office, and cross-organizational collaboration.

Stephen Wellington, an Infrastructure Consultant at the ABS, describes it this way:

> *The ABS already had a successful workgroup-based collaboration environment, but we recognised that despite this success there were shortcomings. Being highly workgroup focused meant information tended to become siloed and hard to find. We felt that the introduction of an enterprise social collaboration tool would help to encourage collaboration at a broader enterprise level. At the same time we had to be sure that we didn't undermine the success of the workgroup model, damaging the investment we'd made over 15 years. "Coupling" Connections with our workgroup databases gives us the best of both worlds and positions us for the future.*

In the future, the ABS plans to make greater use of IBM Connections in a number of areas, including:

- *Profiles and Expertise*. IBM Connections raises the visibility of the contributions made by people throughout the system. You can see what Jack has been doing, rather than that being hidden and fragmented.

- *Aggregation of project updates from across multiple projects*. People work on multiple projects, and being able to gain a consolidated view of what's going on is expected to provide signifiant value.

In closing, because the ABS works with statistical agencies in other countries, it is expected that by using IBM Connections internally, staff will be better equipped to bring a more social style of collaboration to these engagements.

Advanced Concepts

As we draw this chapter to a close, let's consider four advanced concepts:

1. The essential role of a community manager.

2. When seeding Connections with Communities makes sense, and four steps for doing so.

3. How IBM Connections creates a fabric for collaboration from anywhere.

4. Whether to support non-business communities in IBM Connections.

Let's start with the role of a community manager, and then address the other three in turn.

The Essential Role of a Community Manager

Creating a space in IBM Connections for a new learning and best practice community takes but seconds. Getting from the availability of that space in Connections to having a self-sustaining community of people who regularly share learning and best practice will take at 12-18 months. Making it work will almost always require a community manager—one or more individuals who spend part of most days inside the community. Here's what your community managers do on a daily basis:

- *Start Discussions*. Open new discussion topics of relevance and interest to the community. The community manager should have their finger on the pulse of the wider industry, and therefore know the key trends, as well as the work that is being done inside the organization across those key ideas.

- *Encourage Participation*. With the community underway and key topics being raised, the community manager needs to stimulate participation from the best people in the organization. This will frequently require a personal invitation in the early days, and ongoing nudges over time as the community comes alive.

- *Make Connections*. Identify and recommend connections between different strands of thinking, and different groups of people in the organization. Help other people see new possibilities for products and services that are hidden in plain sight.

Assigning a low-level employee who knows nothing about the topic as the community manager isn't going to work. The role of community manager requires credibility with the desired community, not mere availability. You need a respected member of staff who has been in the trenches, has seen what works (and what doesn't), and who by virtue of some combination of their expertise, personality, and passion for the topic can coalesce a community of people to make something great happen.

Seeding Connections with Communities

When introducing a new approach to working together through technology like IBM Connections, a common fear of the management group is that it will be used for inappropriate purposes. As a result, people will waste their time at work, and what was supposed to be used for improving the organization will weaken its ability to perform at a high level. One strategy to counteract the fear of Connections being used for inappropriate communities and discussions is to seed the system with business-aligned communities. That means creating communities that will bring people together for sharing learning and best practice around the critical disciplines of the organization. As a result of participating in a business-aligned community, people will learn to see Connections as a business tool not the latest toy foisted on an unsuspecting organization by the IT department. And management will see that important matters of business are being discussed in the system—thereby alleviating their fear.

> Counteract the fear of Connections being used for inappropriate communities and discussions by seeding the system with business-aligned communities.

Here's the four steps required to seed Connections with business-aligned communities:

1. *Brainstorm Which Topics Would Benefit from a Community*. You should have a good sense of what your organization does, and the particular topics that would interest the people who work with you. One option is to look for people who are doing similar jobs but who don't have the ability to meet face-to-face each day. A learning community could provide a place for them to share what they are doing, and to ask questions of their far-flung colleagues. Another option is to look for established communities who meet infrequently, and therefore lack a means of more regular interaction. If you are unsure about the business topics that form the basis of your firm's go-to-market approach, start interviewing staff and executives.

2. *Choose a Small Number of Topics to Begin With*. With your list of options, make a decision about which business topics provide the best place to start. It's likely you'll need to discuss this list with others in your firm, to gain their input and see what they regard as being important. Between two and five communities is a good number to start with; more than that will stretch your support resources too far and risk diluting the learning and capability development you are trying to do when seeding communities.

3. *Identify the Right Person to Lead the Community with Passion*. Seeded communities on a business topic need a business person who is invested in the topic to lead the community with passion and strength. The right business person will have the existing networks, trust of colleagues, and credibility within the firm to make a go

of the community. If leading a community is new to this person, you will need to provide coaching and support so they can excel in their role as a community leader.

4. *Use the Community for Business Discussions*. If your community is focused on project methodology, discuss how to improve the project methodology. If it is on new ways of merchandising paint trays and similar products, do so. If it's about designing new food stores in train stations, share examples of how this is happening in various train stations around the world—complete with photos and video overviews. If it's about improving the way new acquisition targets are integrated into the main organization, review recent approaches to explore what worked well and dissect what could have been improved.

Follow these four steps and you will lay the foundation for a good set of business-aligned communities focused on learning and best practices.

Creating the Fabric for Anywhere Collaboration

At a recent conference one of the presenters said that six thousand people were about to meet in their city for a week of comparing notes, learning together, and sharing ideas. The week-long meeting was designed to bring together people from the front lines doing great work in their respective countries. Once the week was up they would head back to their own countries and work away at their various initiatives for the next 51 weeks—until the meeting happened again the next year.

It hit me afresh that while such meetings are often essential to fostering a willingness to collaborate as well as a great opportunity for building trust between people, organizations can no longer rely on such meetings as the dominant approach to supporting collaboration. If you put in a hard day at the above meeting and worked for 12 hours a day for all of the 5 days, you could only fit in 120 30-minute one-to-one discussions with other people. What about the other 5,880 people who were also there, but who you never had the chance to meet? Was there nothing you could learn from them?

> Collaboration tools provide a new connective fabric for enabling and sustaining collaboration between people in organizations, regardless of where they're located.

Collaboration tools like IBM Connections provide a new connective fabric for enabling and sustaining collaboration between people in organizations, regardless of where they're located. The week-long meeting is probably important, but it needs to take second place behind a vibrant online community for learning and sharing best practice. Only then do organizations have the ability to transcend time and space, to bring the best people together, and make the most of all 52 weeks of the year, not just the one week where everyone happens to be in the same conference center.

What about Non-Business Communities?

In Chapter 5 of my book *Collaboration Roadmap*, I examine the topic of governing collaboration at work.[9] One of the governance themes—basically a decision that has to be made with respect to how new collaboration technology will be used—is whether to support non-business-oriented learning and best practice groups.

Collaborative groups provide a means of sharing learning and developing capability across the people in an organization, and there is clear value from doing so. Good ideas get tested and refined, and learning in one part of the organization can filter across networks of internal relationships to improve the performance of the whole organization. But the same technology that supports business-oriented learning could also be used for non-business learning—such as providing a place for runners to discuss running clothing, a place for people to list stuff they want to sell, and people seeking ride-sharing arrangements for getting to the office. The governance question, then, is what is the desired alignment of group spaces to business activities, and the degree of support for non-business aligned groups.

There are three broad options:

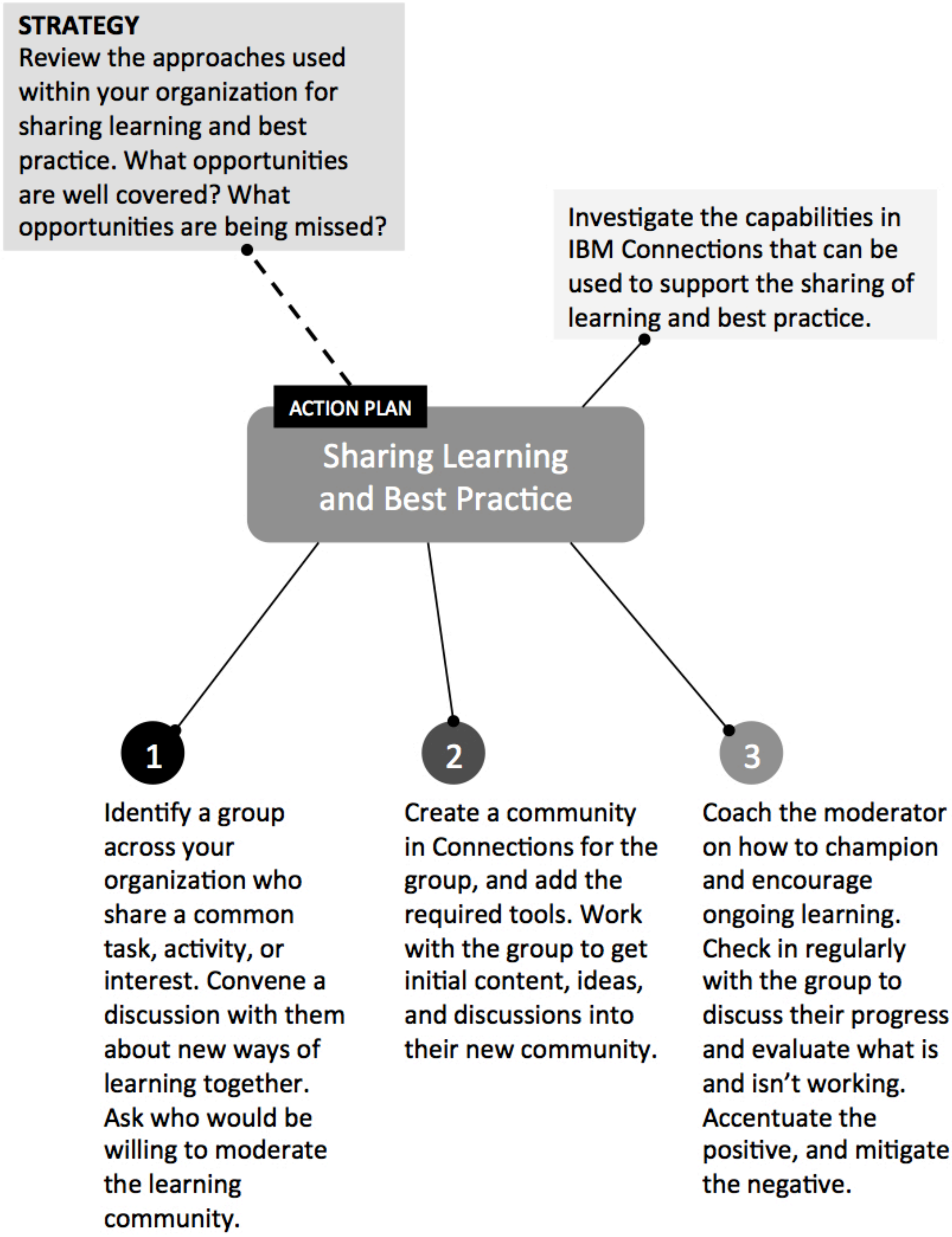
1. Only business-oriented groups will be supported. Group spaces must show a direct linkage to the learning and capability development needs of the organization, and an alignment with current job responsibilities. The Strategy and Steering Group will approve the creation of specific group spaces, and employees are welcome to join any of these spaces.

2. Some non-business-oriented group spaces will be permitted. The intent is that these should be widely applicable, instead of being narrowly-targeted at a small number of people. If there is wide applicability, the creation of the group space will be approved by the Strategy and Steering Group.

3. A wide diversity of non-business-oriented groups can be created by employees. Permission to create a group is widely delegated, and employees are encouraged to take an active role in creating and supporting any such group.

Many firms—using many different technologies—have found that supporting some non-business-oriented groups helps with the adoption of the technology in business-aligned areas. The non-business groups draw people back into the system on a frequent basis, thereby making it a normal place to visit. The regular use of non-business group spaces creates competence in using the technology for holding conversations, a skill which rapidly transfers into business-aligned spaces. Finally, finding other employees with common interests builds relationships between people that could create opportunities for future collaboration. On-the-other-hand, the risk is that these non-business spaces become a distraction and people spend too much time playing around instead of getting their work done. But if that's the case, you have other issues to deal with.

Action Plan


STRATEGY
Review the approaches used within your organization for sharing learning and best practice. What opportunities are well covered? What opportunities are being missed?
Investigate the capabilities in IBM Connections that can be used to support the sharing of learning and best practice.
ACTION PLAN
Sharing Learning and Best Practice
1
Identify a group across your organization who share a common task, activity, or interest. Convene a discussion with them about new ways of learning together. Ask who would be willing to moderate the learning community.
2
Create a community in Connections for the group, and add the required tools. Work with the group to get initial content, ideas, and discussions into their new community.
3
Coach the moderator on how to champion and encourage ongoing learning. Check in regularly with the group to discuss their progress and evaluate what is and isn't working. Accentuate the positive, and mitigate the negative.

Summary

As organizations get larger and more geographically distributed, it becomes increasingly difficult for staff to share learning and develop best practice. Innovations championed by one group remain isolated from the rest of the organization, due to the lack of a connective fabric between people that works regardless of their location. While some organizations attempt to address this lack of connectivity by bringing people together once or twice a year, such an approach is costly, divorced from where the real work gets done, only allows sharing of generic ideas, and doesn't allow in-the-flow learning. IBM Connections offers a new way for sharing learning and best practice between staff, and in this chapter we have explored how to use Connections towards this end. As we showed in the two case studies, there are significant benefits to be gained by taking this approach. We concluded the chapter by looking at a number of advanced concepts, including the importance of community leaders.

IBM Connections offers a new way for sharing learning and best practice between staff, so that innovations championed by one group don't remain isolated from the rest of the organization.

In the next chapter we examine how to use IBM Connections for making decisions.

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[1] Harvey Robbins and Michael Finley wrote the book *The New Why Teams Don't Work: What Goes Wrong and How to Make it Right (2000)*. This quote is from page 136.

[2] *Lotus Connections Update from Lowe's Companies— "Valuable"*, Michael Sampson's Blog, October 2011. See currents.michaelsampson.net/2011/10/lowes-lotus-connections.html.

[3] See the Four Connectors framework in Chapter 2 of *Collaboration Roadmap (2011)*, available at www.michaelsampson.net/collaborationroadmap.html. Note that while the framework is stated as being applicable to Collaborative Groups, that title is equivalent to the intent of the phrase "learning community" as used in this book.

[4] To manually add a bookmark, open your learning community, click *Bookmarks* in the left-hand navigator, and then click the *Add Bookmark* button. This will open a similar form to fill in, but you will have to paste in—or type out—the bookmark. Make sure you give the bookmark one to three tags, to help other people identify the best resources.

[5] In *User Adoption Strategies 2nd Ed. (2012)*, these are called Exemplar Stories. Survey respondents gave this strategy a high rating for the Winning Attention stage of the User Adoption Model. See www.michaelsampson.net/useradoption.html.

[6] IBM and other leading global companies frequently run Innovation Jams to achieve these short-term and long-term benefits.

[7] See my October 2011 blog post *Lotus Connections Update from Lowe's Companies — "Valuable*", at currents.michaelsampson.net/2011/10/lowes-lotus-connections.html. Clearly for a large firm with revenue of almost $50 billion in 2010, $1 million is a minuscule rounding error. But it signals an opportunity, and imagine what would happen if Lowe's could repeat this episode 100 times a year.

[8] The Australian Bureau of Statistics case study is based on material drawn from a presentation at IBM Connect 2012 (see currents.michaelsampson.net/2012/01/ls12-ccs104.html), as well as a phone interview with Stephen Wellington in mid-September 2012. Used with permission.

[9] See *Collaboration Roadmap (2011)*, at www.michaelsampson.net/collaborationroadmap.html. Note that the Strategy and Steering Group is one of three groups in the governance structure I proposed in Chapter 5 on governance, and they are responsible for making the decision on this topic—in consultation with other people in the firm.

Chapter 11.
Making Decisions with IBM Connections

> *So do all who live to see such times. But that is not for them to decide. All we have to decide is what to do with the time that is given us.* [1]
>
> J.R.R. Tolkein, The Fellowship of the Ring

Decision making is a regular fact-of-life. Our decisions range from the mundane (which breakfast cereal to eat, what route to take to work, and which pair of shoes to buy) to the sublime (who we choose as our life partner, what we believe about the purpose of life, and what we train to become). This range of decisions is also true in organizational life, as the decisions we make individually and collectively define what we spend our time and resources on, and by implication, what our organization becomes known for in the market place. The process by which decisions are made—how the decision is framed, who has input into the decision, and who holds the decision making rights—is therefore extremely important.

In this chapter, we will:

- Look at the theory of making decisions, and how new collaborative approaches can make a difference.
- Learn how to use IBM Connections to support decision making activities.
- Examine four brief examples about how organizations today are using IBM Connections to enable new decision making approaches.
- Explore a variety of advanced concepts, to inform our decision making activities.

The Theory of Making Decisions

Studies into how decisions are made has resulted in a large body of work. One topology of decision making approaches proposes seven distinct types, and notes that each approach has advantages and disadvantages: [2]

1. *Consensus*. All team members can air their opinions. All must agree on the outcomes, and discussions must continue until everyone can agree. Advantages include the high-quality decisions, and strong commitment. Disadvantages include the need for a significant investment of time and psychological energy. It is difficult to make consensus decision making work under time pressure.

2. *Majority Rule*. The team votes, and the majority wins. Advantages include faster decision making, and that it provides a way of quickly handling issues of low importance. Disadvantages are that commitment to the decision may be low, and the minority may become alienated.

3. *Minority Rule*. Where a subset of people from a larger group studies an issue, and makes a decision recommendation, such as what happens in subcommittees. Advantages include pragmatic considerations (when not everyone can participate due to location), and when some people have specialized expertise for the decision. Disadvantages include potentially low commitment to the decision, and that various conflicts and controversies are left unresolved.

4. *Averaging*. Team members negotiate an intentional middle position, leaving few people happy with the outcome. Advantages are that extreme positions cancel each other out. Disadvantages mean that opinions of the least knowledgeable person can cancel out the specialized knowledge of the most informed members. Can result in low commitment to the decision.

5. *Expert*. Find or hire the person who knows the answer, and do what they say. Advantages include speed to decision. Disadvantages abound in the form of difficulties when identifying the right expert to listen to, low commitment to the decision, and the low use of current team member's experiences.

6. *Authority Rule without Discussion*. A higher authority makes a decision, and everyone is supposed to do as they are told. Advantages include speed to decision, and can lead to a high quality decision if the higher authority has the best information available to them. Disadvantages include low effectiveness of the decision if team members disagree with the decision, and therefore exhibit low commitment to carrying it out.

7. *Authority Rule with Discussion (Participative Decision Making)*. A leader retains the right to make the final decision, but first participates as an equal in discussing the issues, pros, and cons. All team members have the right (and obligation) to fully

explore the issues, but know the leader will make the final decision. Advantages include high commitment to the decision, and the potential use of everyone's opinions and expertise. The caveat is that both the leader and team members need good communication skills and trust to make the process work.

Teams have to decide in advance of making a decision which decision making approach they will use. The team has to decide how to decide.

While these seven approaches to decision making are intended to be distinct in theory, they can be merged in practice. Doing so can negate some of the disadvantages of each distinct approach. For example, input from an expert can be discussed and debated among the team as part of a consensus or participative decision making approach. Regardless, the authors strongly note that the team has to decide in advance of making a decision which decision making approach it will use. Some decisions will be naturally suited to one approach, and other decisions will be more aligned with a different approach.

There are various ways that each of these seven decision making approaches can be can supported, enabled, and enhanced through IBM Connections. For example:

- Team members that can not be together in the same place to engage in a face-to-face discussion can use the forum capabilities in IBM Connections to raise issues and integrate their thinking. This could preclude an interactive discussion, or entirely take its place.

- Documents, reports, and other information can be collated inside a community, in order to provide background information and insight in advance of an upcoming vote. While the majority vote may carry the day, everyone has the opportunity to share resources, debate ideas, and become informed in advance of the vote.

- Experts can be invited to share their views on an upcoming decision, by working through the discussion forum and raising issues, leaving comments, and challenging current perspectives by sharing a wider or alternate viewpoint.

- Leaders who make an autocratic decision can share the thinking and rationale behind the decision, and invite discussion for future decisions.

- Monthly face-to-face meetings to make decisions about funding requests can be replaced with a community where requests can be listed. Decision team members can view each funding request at any time, providing their input and decision vote. Most decisions can get made without requiring a meeting as such, leaving any actual meeting time to debating particularly difficult issues, or to reviewing the strategy of the group and how effective it is in getting its work done.

Let's now look at a specific example of how to support a decision using IBM Connections.

How to Make a Decision in IBM Connections

Edgar summarized his presentation and scanned the faces of the senior executives sitting around the table in Albreto's magnificent executive board room, a place Edgar usually didn't get an invitation to visit, let alone speak in. However, with the string of successes his marketing team had experienced over the past six months, he had been asked to outline what had made the difference. His comments highlighted three major changes: being more focused, including new people, and getting better technology. Although he had left the discussion on IBM Connections to his last point, he knew that it was the essential change that had made the other two possible. Edgar took his seat.

"It's not often we get such immediate positive results from an initiative we've approved," Jonathan said. "In my tenure as CEO, a fair share of what we saw as brilliant ideas have gone all wrong once they've left this room."

Adelaide, Albreto's CFO, nodded her agreement. "I signed off on the IBM Connections implementation," she said. "I believed it could happen—it was logically consistent with what I'd been hearing elsewhere—but I did have my reservations. You and your team have demonstrated the results we were hoping for. Thank you."

Edgar acknowledged the thanks, and looked to Jonathan to see if he could leave the meeting. Jonathan seemed momentarily lost in thought, and then he turned to Antoine—the Senior VP of Alliances at Albreto—and said, "Perhaps this could help us with the Project Green initiative. What do you think?"

"I was wondering the same thing myself," Antoine replied, while holding Jonathan's gaze. "As Edgar was speaking, I was wondering if there would be a way of using IBM Connections to help us make the decision we face."

"Do you want to explain briefly?" asked Jonathan.

Antoine nodded, and looked over at Edgar. "The executive team at Albreto is facing a major decision to do with our global strategy. I can't go into too many details for confidentiality reasons, but suffice to say, we need to do the due diligence on a particular decision. All of our previous decisions of this nature have been centered here in the United States, so it was easy to jump on a plane and do the work in person. Most of the information for the pending decision is located much further away, and we're searching for a better way of collecting the information, analyzing the options, and making the decision. By the way, we have six days in which to make a decision."

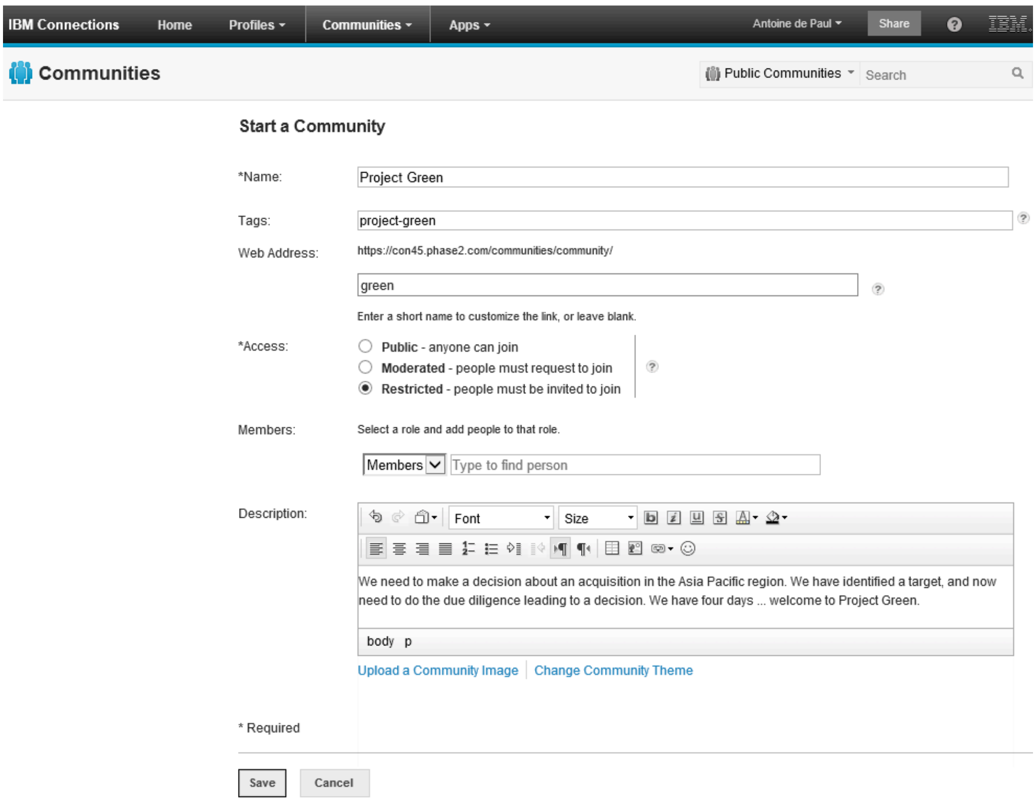
Edgar smiled to himself as he thought back to his first tentative steps with IBM Connections, and acknowledged internally how far he'd come. "Yes, you can definitely use IBM Connections for this," he said. "There is a way, and you will be amazed at how easy it is to make it happen. Would you like me to explain how I see it working?"

Step 1. Create a Community for the Decision, with Restricted Access

As a "social" platform, it is tempting to think that IBM Connections only supports open and unrestricted information sharing in an organization. That's not true. IBM Connections can just as well handle situations where confidentiality is required, such as the acquisition decision faced by the executive team.

To enforce such confidentiality, create a new community that has restricted access rights from the moment it is created.[3] This makes the new community invisible to everyone except to those people who will be explicitly invited to join (which we will do in Step 3). One essential recommendation: all restricted communities should have at least two owners. If there is only one owner, and they get hit by the proverbial big red bus, you will lose the ability to manage the community. Getting hit by the bus and losing managerial capabilities over the community are not nice things to happen.

Figure 11-1. Create a Restricted Community for the Decision Space



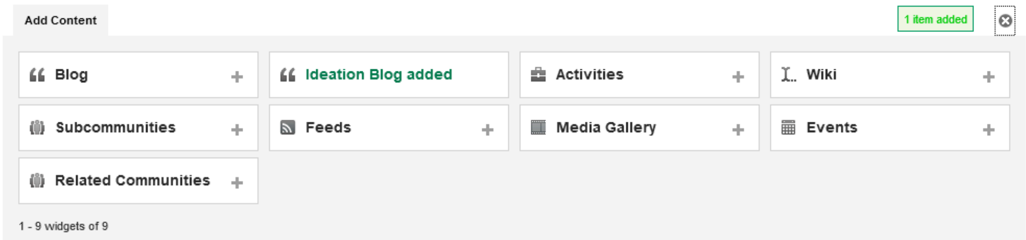
Create a new community in IBM Connections for the decision the Executive Team has to make. Set the access rights to "Restricted" when you are specifying the details of the community in order to enforce the confidentiality requirements of the decision.

Step 2. Add the Essential Tools to the Decision Space

Using a community for making a decision requires a number of tools, most of which are included in the default setup, such as the discussion forum and a place for storing files. One other tool to add now is the ideation blog, which is required later in the decision process for evaluating the group's sense about proceeding with the decision.

To add an Ideation Blog, make sure you are on the *Overview* page of your community, click *Community Actions*, and then click *Customize* in the drop down menu list. Click *Ideation Blog* to add the tool into the community.

Figure 11-2. Add the Essential Tools to Your Decision Community



Add any other essential tools to your decision community. For example, the Ideation Blog will be used to provide a structured way of evaluating whether to make the decision or not.

When you have added the Ideation Blog, click the X in the circle to close the pane.

Step 3. Add the Members of the Executive Team

Add the members of the executive team to the new restricted-access community for this decision. Since the members of the executive team know this decision community is being set up, you can can add them (rather than inviting them). Click *Members* on the left-hand navigation pane, and then click the *Add Members* button.

You have two choices:

- *Add People as Members*. Add all of the individual members of the executive team to the decision community. Use type-ahead to find the person's name.

- *Add Groups as Members*. If a Group has been specifically set up in Connections for your executive group by an IT administrator, just add that. Make sure the membership is correct though, given the sensitivities of the pending decision. If in doubt, add people as individuals.

Click *Save* when you have finished.

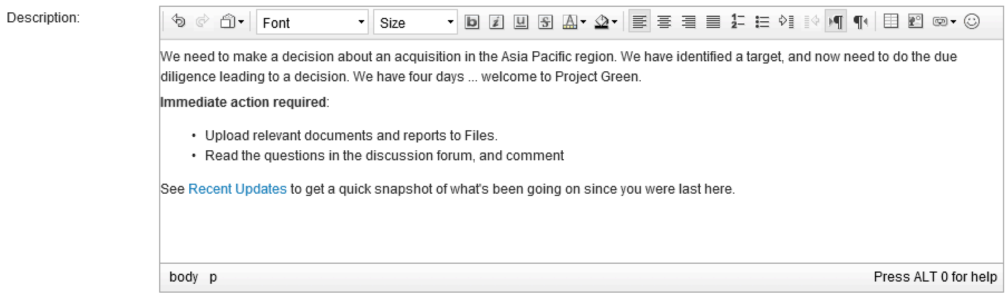
Step 4. Write the Intent and Current State in the Community Description

When opening the new decision space, members need an immediate way of assessing the current state of the decision and knowing what they are expected to do. The *Community Description* tool is always shown at the top of the community's Overview page, and therefore it is the ideal place to provide this insight to members.

To edit the Community Description, click *Community Actions* at the top-right side of the Overview page, then click *Edit Community* in the drop-down menu list. Write a brief statement of intent in the description field, including a couple of specific bullet point items that members should be doing immediately (use the numbering button icon or the bullet point icon button in the tool bar to create a numbered or bulleted list). This serves as an orientation device, and means that your members are not left guessing what they have to do on opening the decision space.

Write a brief statement of intent in the description field, including a couple of specific bullet point items that members should be doing immediately.

Figure 11-3. Edit the Community Description to Set the Intent and Current State



Click *Save* when you have finished.

A couple of comments about using the Community Description:

- *It Needs To Be Kept Up-To-Date*. As the status of the decision changes, along with the specifics of what people are expected to do, update the description. It should not contain specific directions that are no longer required.

- *The Recent Updates Tab is a Great Tool*. Pointing your members to the *Recent Updates* tab is a great way of automatically highlighting what has happened since they were here last. It means they can quickly see what's changed, without having to click through each of the tools one at a time.

Step 5. Collect Documents, Reports, and Other Relevant Information

Analyzing the best available information about the pending decision is a critical step in ensuring that a high quality decision is made. There will be documents, interview notes, past annual reports, future financial projections, analysis of the industry by independent experts, and much more to collect, analyze, and come to some agreement on. The first task to request from the members of the decision space is to gather this information into one place.

Analyzing the best available information about the pending decision is a critical step in ensuring that a high quality decision is made.

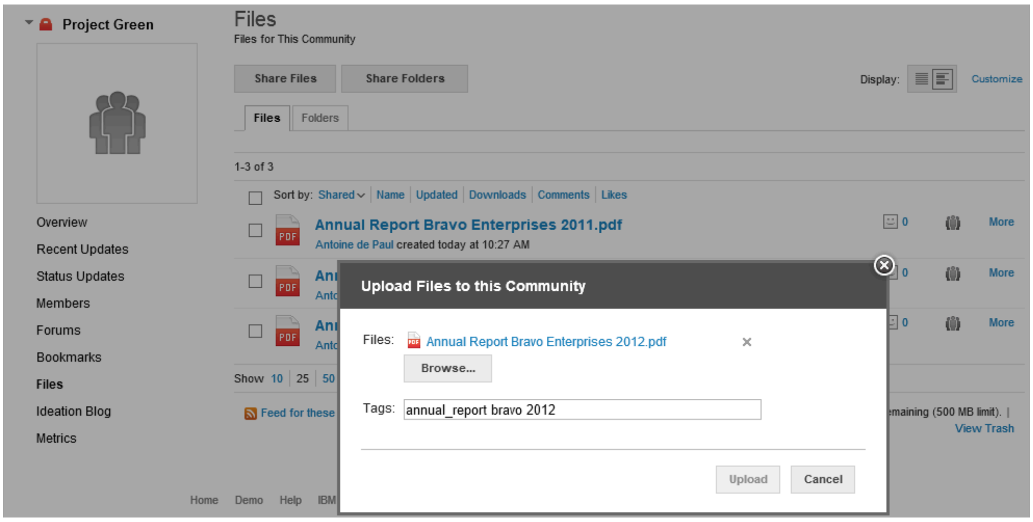
The Files tool provides a jointly accessible location for storing any type of document, thereby giving all members of the decision team a common base of information from which to evaluate the decision options. There are three approaches to using the Files tools for the decision at hand, but note that the first approach should be avoided in situations where the decision is confidential:

1. *Share Documents into the Files Tool*. IBM Connections makes it easy to share files that have already been uploaded into another part of Connections into your new Files tool, but don't do it. When your members click on the file they will be taken to another location in Connections, and any comments they make on the file will be available to anyone with access to the file. This will very quickly compromise the confidentiality mandates of the current decision. If the nature of the decision is less confidential than the one discussed in this chapter, sharing files from other places in IBM Connections into your current Files tool could be an appropriate approach. However you will still have the problem that any comments made on the file will be located where the file is actually stored. If that is not an issue for your team, go ahead and share files into your current Files tool.

2. *Upload New Copies of Documents into the Files Tool*. Given the need to create a place for confidentially viewing and discussing source documents, reports, and other information, the second approach is to upload new copies of all documents into the Files tool. By uploading new copies you are guaranteed that any discussion on a specific document—when one of your members leaves a comment on the file—is held within the confines of the decision space, rather than anywhere outside of the decision space. Creating new copies enables you to build a secure perimeter around the collected material and subsequent analysis. To upload a new copy of a document that you have stored or saved to your own computer, open the Files tool, click the *Share Files* button, and then select *Browse Files on My Computer*. Once you have selected the necessary files from your computer to upload, and entered one to three tags to help classify the new file, click the *Upload* button. When entering your tags, remember that a space is used to divide the text you enter into separate tags, so if you want to enter a multi-word tag, you will need to join the words together with a hash or underline. For

example, the tag “annual report” will be divided into two tags—annual and report. If you want the tag to be a single phrase, enter it as “annual_report” or “annual-report”.

Figure 11-4. Upload New Copies of Documents into the Files Tool



Upload new copies of documents, reports, and other information into the Files tool, so that people can reference and discuss them in light of the decision to be made. Uploading new copies—as opposed to sharing them into the Files tool from other places in IBM Connections—imposes an information security perimeter around the files and the resulting comments.

3. *Create New Documents in the Files Tool Using IBM Docs*. While existing documents will give some information on which to examine the contours of the pending decision, it is likely that you will also need to create new documents, spreadsheets, or presentations to capture thinking and communicate ideas. These could be interview notes, financial calculations, and charts to help with forecasting. With the integration of IBM Docs inside IBM Connections, any of these new files can be created directly inside the Files tool, and without having to use anything except a web browser. To create a new file, click the *New* button, and then select either *Document*, *Spreadsheet*, or *Presentation* from the drop-down menu list. Give your new file a name, click the *Create* button, and the appropriate blank canvas will be opened in edit mode inside your web browser. The words you write, numbers you enter, and slides you craft will be saved directly into the Files tool.

Use IBM Docs to create new documents, spreadsheets, and presentations to capture thinking and communicate ideas.

Step 6. Discuss the Salient Points, Highlighting Pros and Cons

As new documents, reports, and other relevant information are collated into your decision space using the Files tool, stimulate discussion on the salient points of each. The purpose of collecting these resources is to create a shared place for conversation, analysis, and debate. Such conversation would have previously been held via email messages or in a face-to-face or online meeting, so the new approach represents a transition of the current work practice into the decision space in IBM Connections.

> As new documents, reports, and other relevant information are collated into your decision space, stimulate discussion on the salient points of each.

Discussing the salient points means you need to do the following:

- *Read the Documents and Write Your Comments*. Read the documents that are relevant to you and write out your reactions as a new comment. In the Files tool, click the phrase *Add a comment*. This gives you a way of sharing your thinking, as well as giving other people a way of seeing how you are reacting to a piece of information.

- *Review and Respond to Comments from Other People*. Your fellow team members will have their own reactions, responses, and thoughts about the various information sources that are being collected into the decision space. Read their reactions to the documents, and if you have something to add or challenge in their thinking, respond with a comment of your own.

- *Prompt Input from Other People in the Decision Team*. If you are reading a document and know that another team member has a particular interest in its contents, or that they will have an important comment to make, call it to their attention. One way of doing so is to mention them by name in your comment, preceded with the @ symbol—which is called an @Mention. This will generate an alert in Connections for them, notifying them that you are seeking their input.

- *Convene an Online Meeting to Discuss a Particular Issue, and Capture Your Notes*. Some documents will need more than a stream of comments against the file. You will actually need to talk through the issues interactively with a subset of the decision team. Convene an online meeting using IBM Sametime, have the conversation and debate, and then record your meeting notes as a comment against the specific file. It is very important to share your analysis and conclusions with the rest of the decision team, and it also provides a marker for those included in the meeting itself.

Such discussions and interactions give team members a sense of where everyone is at.

Sidebar: Sowing the Seeds of Mistrust

Approaches to how work is done and tools to enable those various approaches all take place within the context of an organizational culture. If there is alignment between the approach, the tool, and the prevailing organizational culture, it is likely that the three will work in harmony. The approach and the tool reinforce the culture. The culture gives approval for the use of the approach and the tool. If there is a toleration of the approach and the tool, even if the approach or the tool is different to the current culture, it is likely that it will take root and start developing—and then at some point will either just quietly become the new way of working, or it will lead to a serious debate about the relevance of the new approach and the tool, or it will be rejected (thereby causing a lot of angst and uncertainty). If there is a stark difference between the approach and the tool and the current culture, it is likely that the new approach and the tool will be squashed by the culture; it will never take root.

Figure 11-5. Approaches and Tools Are Used Within an Organizational Culture

New approaches to work and new tools to support those approaches take place within the context of an existing organizational culture. In a battle between the two, organizational culture usually wins out over new approaches and tools.

Seeds of mistrust are sown when a clear discrepancy between the approach and tool, and the current culture are minimized in word but not in action. If the current culture allocates decision making rights to specific individuals based on their position in the organizational hierarchy, the introduction of IBM Connections to make decisions more open and transparent is not going to spontaneously create a new culture. The tool is constrained or enabled by cultural tenets. If those managers holding decision rights say that they support the use of IBM Connections to examine decision attributes, but then make final decisions unilaterally and without paying attention to the discussion in Connections, people will not trust the process. There is no point, because nothing has changed. The approach and the tool are rendered ineffective by the actions of people operating according to the tenets of how decisions are made in the current culture.

Step 7. Integrate Findings through Meetings and the Forum

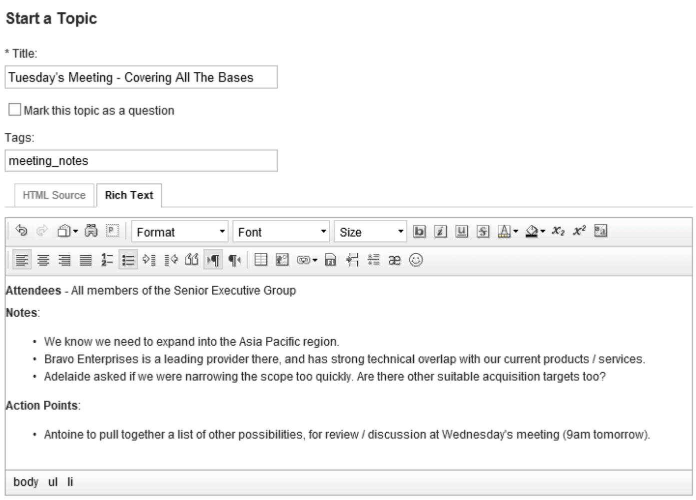
The discussion comments in Step 6 provide a way of analyzing individual documents, reports, and other information. These individual learning points need to be integrated in order to see the big picture—what is often called the helicopter view, or being able to see the forest from the trees. Such integration of thinking will happen in at least two ways—meetings, and the SWOT analysis in the forum—but both are linked by the use of the forum as a shared place to document the integration.

Integrate Findings through Meetings

Meetings provide an ideal stage for integrating the analysis and learning points from the multiple inputs stored or created inside the decision space. Whether the meeting is held face-to-face or via an online meetings tool like IBM Sametime, the highlights of the conversation should be noted as a new topic in the discussion forum. This creates a shared record of the outcome of the meeting for all team members, whether they were involved in the meeting or not, thus ensuring that people are not excluded from the thinking shared during the meeting.

To create a new topic, open the Forums tool, and click *Start a Topic*. Your topic will need a title (which should include the date of the meeting), and one or more tags. At least one of the tags should be "meeting_notes" so that all meeting notes can be accessed quickly. To save having to write up meeting notes after the meeting has finished, take your notes directly into the topic during the meeting itself.

Figure 11-6. Create a New Topic in the Forum to Record Meeting Notes

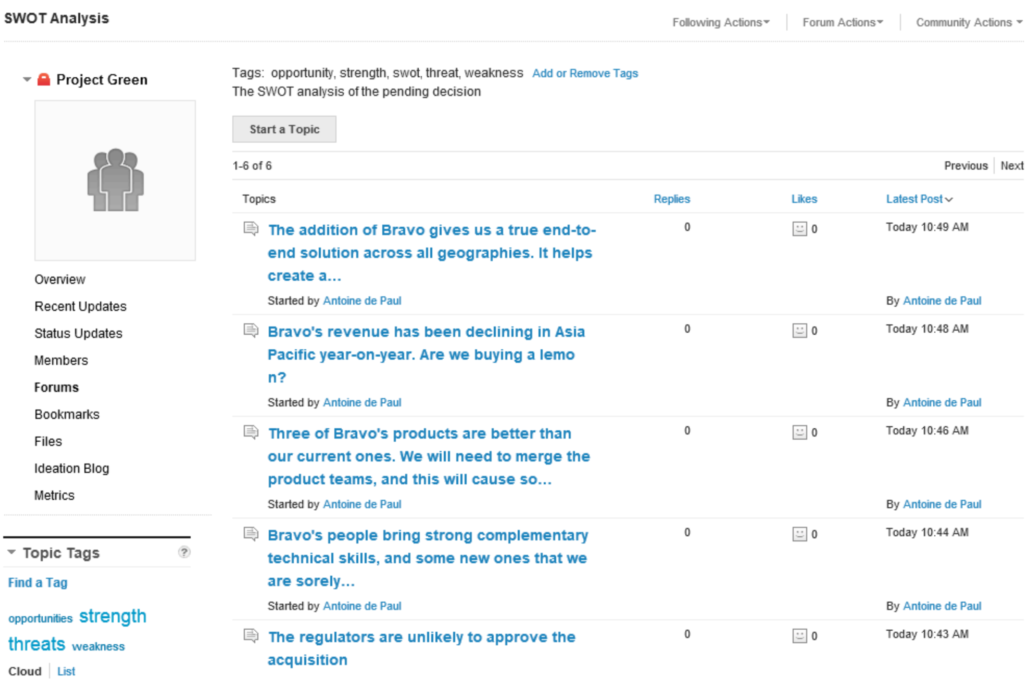


Use meetings as a way of integrating the analysis and learning points from collected documents, and giving people a way of talking through the issues. Capture the discussion as a new forum topic, to provide access to team members who were not at the meeting.

Integrate Findings by Updating the SWOT Analysis

The second approach for integrating findings from the various documents, reports, and other information is to use the forum to create a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis—either in the main forum or in a separate forum set up specifically for a SWOT analysis. A SWOT analysis is a useful tool in decision making because it provides a lens for considering different aspects of a decision. When a team member finds an argument that highlights a strong point about the pending decision, he or she should create a new forum topic and tag the forum topic with the word "Strength." If they come across an idea that highlights a weak point in the decision, or a weakness that will accrue to the organization if a decision to proceed is made, a forum topic should be created and tagged with the word "Weakness." The same approach is used for opportunities and threats. What the team gets from this integration in the forum is a way of analyzing the different dimensions of the decision, commenting on how other people see the decision, and driving towards a shared perspective.

Figure 11-7. Create a SWOT Analysis in the Forum



Use the forum to integrate the analysis and learning points into a SWOT analysis—a decision tool for highlighting different aspects of the decision. Tagging different discussion topics with the word Strength, Weakness, Opportunity, or Threat creates a clickable tag cloud for analyzing the different dimensions of the decision.

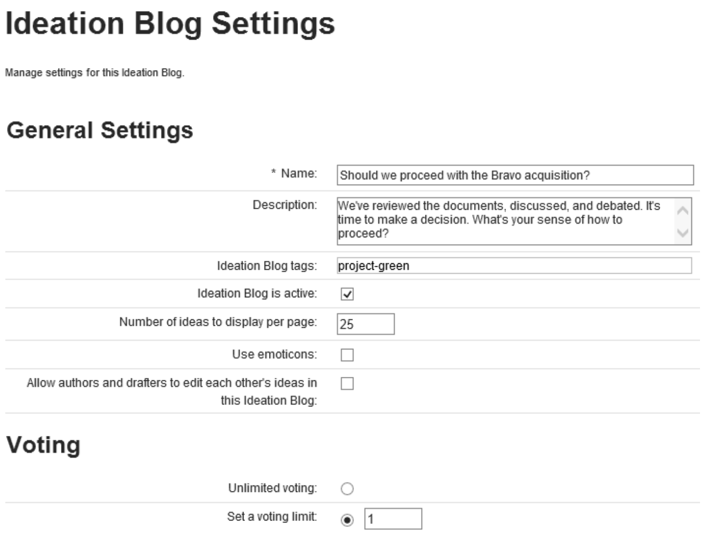
Step 8. Request a Tentative Vote on Proceeding

At a certain point in the decision process you need to get a reading on where the team is at—do they support the proposed decision or not? Team members should have read the material, attended meetings to discuss the salient points, and contributed to and examined the SWOT analysis. Based on everything each team member has done, what is their tentative recommendation?

Based on everything each team member has done, what is their tentative recommendation?

Use the Ideation Blog to set up a way of quickly gauging where the team is at with the decision. Open the Ideation Blog, click the *Settings* button, and give the Ideation Blog a specific name in the form of a decision prompt: *Should we proceed with the Bravo acquisition?* While on the settings page, set a voting limit of one (1) vote per person. When finished, click *Update Ideation Blog Settings*.

Figure 11-8. Prepare the Ideation Blog to Gauge the Decision Sense

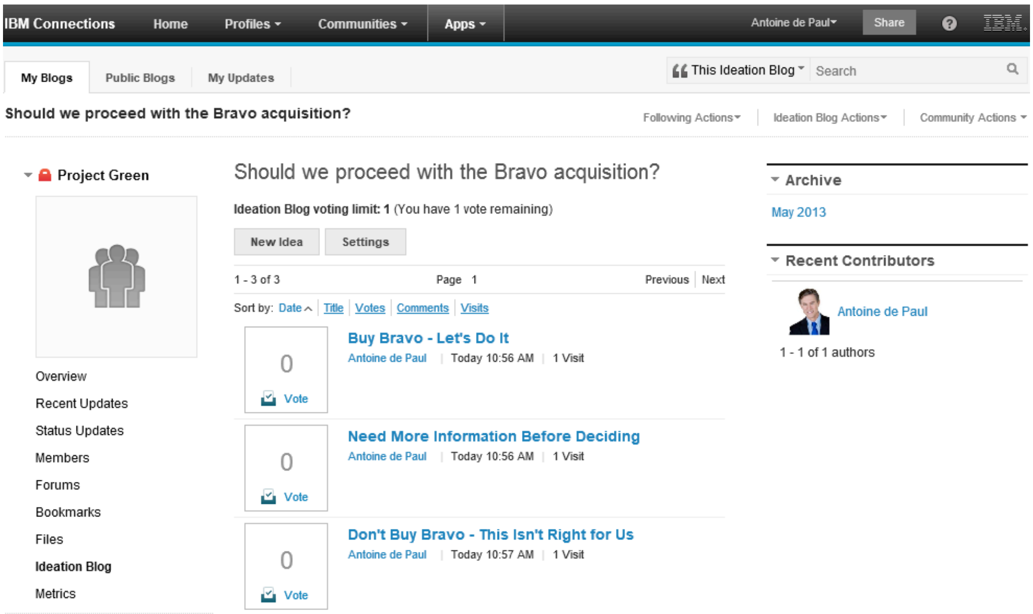


Prepare the Ideation Blog to be used as a way of gauging the general sense of the pending decision by team members. Give the blog a specific name, and set a voting limit of one vote per person.

Once back at the main page of the Ideation Blog, create and post three ideas:

1. Buy Bravo - Let's Do It.
2. Need More Information Before Deciding.
3. Don’t Buy Bravo - This Isn’t Right for Us.

Figure 11-9. Create Three Ideas as the Three Decision Options



Create three ideas in the Ideation Blog, for gauging the general sense of the decision. The ideas need to be sufficiently different from each other to create distinct decision points.

Now ask your fellow team members to vote for one of the decision options in the Ideation Blog. Your request could take the form of a verbal request during your next face-to-face or online meeting, a status update in the Community, a change to the Community Description, or even an email message. It doesn't matter which form it takes as long as most of your team members get in there and make their selection. It could even be done live during your next meeting, where everyone clicks to vote and then the results are immediately accessible to everyone. If you can do the vote live, the team can immediately see the outcome and transition to the next step.

The team will use the outcome as a signaling device to gauge the current decision sense, and then plan what to do next. This means that everyone needs to vote.

One concept that is really important to stress when asking people to vote is that this is not the final decision nor the final activity within the decision. The team will use the outcome as a signaling device to gauge the current decision sense, and then plan what to do next. This means that everyone needs to vote. The team can't see the general sense of the decision if people hold back from voting. If you support the decision based on current information, vote that way. If not, vote to abstain. If you are uncertain, take the "need more information" path. But everyone needs to vote.

Step 9. Make the Decision to Proceed or Not

Use the results of the tentative vote to decide what to do next. For example:

1. *Make the Decision Either Way*. If everyone or almost everyone says "Buy Bravo" or "Don't Buy Bravo," you have clear alignment within the team after each has worked through the various materials, discussed what they mean, and used the SWOT analysis to identify and elaborate on its various dimensions. That means you can probably just go ahead and make the decision to proceed or not. Note that if your decision making approach is guiding by specific organizational policies, you will need to ensure compliance with those.

2. *Do More Work Before Deciding*. If your team is split down the middle, you clearly have more work to do. If time is running out on making the decision, you may have to shift into surge mode. Get the group together, virtually or in-person, and work through the decision points at which people differ.

If your team is split down the middle, you clearly have more work to do. If time is running out on making the decision, you may have to shift into surge mode.

If your team is evenly split on the decision, bring together the whole group to work through the points of difference. If getting everyone together is not practical, convene a subset of the whole group to do the work. The following steps will be required in moving towards a decision:

- *Identify the Differences*. Talk through and identify the discrete differences that people have about the decision. Each person's perspective will be informed by their general background and colored by the specific information gathered for the decision at hand.

- *Examine the Differences*. Select an appropriate strategy for examining the differences that have been identified. A small group discussion of the pros and cons may suffice. You may need to collect more information. You might have to engage an outside expert to provide targeted input. For more substantive issues, you might need to convene a working group to do a deep dive. Your selected strategy will be influenced by the nature of the difference, your available timeline, and in the case of an outside expert, budget to pay their professional fees.

- *Vote Again*. Once these discussions have come to their conclusion, use the Ideation Blog to vote again. Ask your decision team members to review the three options, and decide whether to leave their vote where it is, or to remove their current vote and give it to another of the three options. Based on the results of this second vote, proceed accordingly.

Closing Comments on Making Decisions with IBM Connections

There are lots of decisions in organizational life, and some need to be treated with a high level of rigor. This chapter has focused on one approach to supporting that within IBM Connections. Decisions that are significant to the ongoing life and vitality of the organization, that require collecting input from multiple people and sources, and that happen under time pressure benefit from a structured approach like we have explored.

There are other decisions that are less significant or complex and don't require the level of rigor outlined in this chapter.

Other decisions are less significant or complex and don't require this same level of rigor. Following the approach in this chapter would be way too much given the dynamics of the decision. Those decisions:

- Can be handled in less structured ways, such as through a discussion topic on a forum, ending with a request for interested parties to leave a comment stating whether they support or don't support the decision. Collecting and analyzing separate strands of information is not required.

- Could be dealt with through a teleconference among people who know each other well, or an ad-hoc stand-up meeting in the hallway with all of the required people. If the decision making processes in your organization support such an approach and the specific decision is suitable to that approach, decide quickly and move on.

Equally, although at the other end of the continuum, some decisions are even more significant and need greater structure in IBM Connections than what we explored in this chapter. For example, you may need to:

- Separate the decision into subcomponents, or different outcomes, and assign different working groups to investigate each part. In IBM Connections, this would mean creating a subcommunity for each of the main decision elements, to give people the opportunity to focus on the part of the decision they are working on. Set access rights on the various subcommunities to enable people to focus on their part of the decision, and prevent cross-community spillage and in-fighting.

- Set up a physical "war room" in a specific office and bring everyone together to address the decision under urgency. Rather than having paper piled around the room, and flip chart sheets up around the walls, use an IBM Connections community in conjunction with multiple data projectors to focus on the specific aspects of the decision that are being discussed.

In summary, IBM Connections offers flexibility in how it is used to support decision making. Take the approach that makes most sense for your organization, but don't be afraid to test different approaches before settling on the best way for your decisions.

Case Studies

There are many organizations using IBM Connections to support decision making processes. Let's review four brief examples.

Implicitly Improving Decision Making

Improving the efficacy of decision making processes using IBM Connections is a common theme laced throughout many of the case studies already presented in this book. Instead of presenting a new case study that explicitly focuses on decision making, let's re-evaluate three case studies through the lens of implicitly improving decision making.

- *CEMEX*. The Alternative Fuels innovation initiative brought together CEMEX employees with an interest or specialization in the use of alternative fuels. As a consequence of using IBM Connections to share current approaches to adopting alternative fuels, best practices were spread more rapidly across CEMEX. Plant managers in under-performing locations were able to embrace innovations from high-performing locations, with higher confidence that their decision would pay off. For more on CEMEX, see the case study on page 208.

Plant managers in under-performing locations were able to embrace innovations from high-performing locations, with higher confidence that their decision would pay off.

- *Lowe's Home Improvements*. The staff member who came up with the idea for a new way of merchandising the Teflon paint tray turned to IBM Connections for direction on how to get more paint trays. Although her colleagues were unable to help on that front, many decided individually to adopt her merchandising innovation, which flowed through to higher sales and annual revenue for the paint tray line item. For more on Lowe's, see the case study on page 278.

- *Bayer MaterialScience*. With 15,000 employees in more than 30 countries, Bayer MaterialScience needed a better way of allocating resources to research projects. Researchers in different offices were inadvertently working on the same compounds, but didn't know about each other's work. IBM Connections brought greater visibility to the efforts of Bayer staff, and enabled decisions to be made on integrating current projects. For more on Bayer, see the case study on page 329.

Finally, a large North American organization has achieved good success by explicitly focusing on improving decision making through its use of IBM Connections. Examples include decisions that required input from employees on operating conditions, improving processes through innovation, and how to share bad news with customers.

Advanced Concepts

Let's examine a number of advanced concepts on the decision making scenario:

- How IBM Connections can help with "small" decisions.
- Other ways of using IBM Connections in decision making.
- Evaluating the security of IBM Connections for storing confidential information.
- Escaping groupthink by injecting new people, ideas, and perspectives.
- The limits of collaborative approaches in decision making.

In Praise of "Small" Decisions

As stated earlier in this chapter, organizational life is infused with many small decisions each day. Using IBM Connections as a connective tissue across a team, group, or the entire organization can deliver benefits in each of these decisions. For example:

- Sales leaders can provide directive coaching in a sales community about which opportunities their teams should focus on week-by-week. Ultimately this translates into deciding to call one prospect instead of another. And that could lead to a significant win.
- Discrete pieces of information about something bad going on can be pieced together, highlighting what is actually a common problem a global level but uncommon for any specific individual. Seeing the trend unfold in a forum by piecing together the discrete signals allows management to intervene early, thereby avoiding an expensive lawsuit downstream.
- Doctors that can see the current state of a patient—drawing together all of the information about their care—can make the decision to discharge a patient earlier, thereby freeing up a bed for the next patient and pulling forward their care. A one-day saving in bed usage, done a few thousand times a year, can rapidly add up to significant cost savings and better health care all round.[4]

> Seeing the trend by piecing together the discrete signals allows management to intervene early, thereby avoiding an expensive lawsuit.

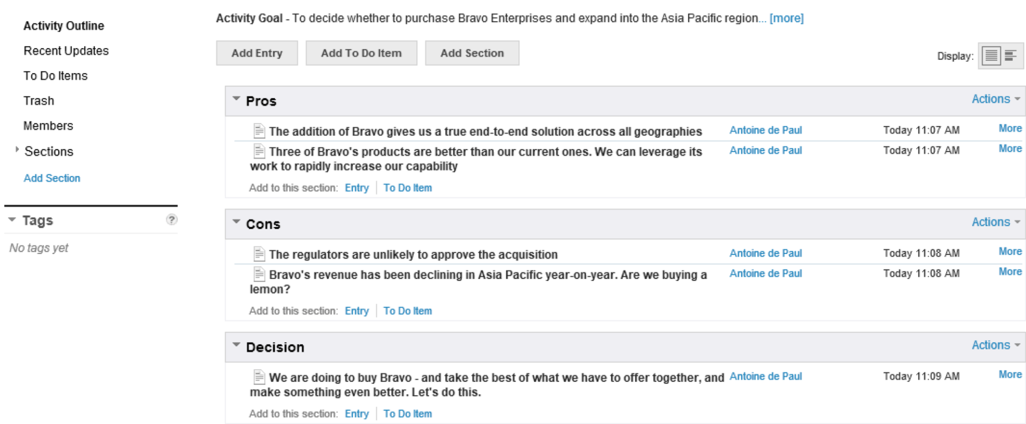
Perhaps there are no "small" decisions in the true sense of the word, because the implications that flow from small decisions can change the face of the organization for years to come.

Other Ways of Using IBM Connections in Decision Making

We used a restricted community to support the decision making requirements of Albreto's senior executives. In other decision making scenarios, a restricted community is not required, and often a community itself represents too much structure. However, you can use other tools in IBM Connections to support your decision making, gaining the benefit of structure without going overboard. Here's three alternative approaches:

- *Use an Activity*. Create an activity for the decision you need to make, and create three sections: Pros, Cons, and Decision. Either alone or in conjunction with a small team, fill out the Pros and Cons sections with relevant ideas. Look over the assembled list and make a decision—and document it in the Decision section.

Figure 11-10. Use an Activity to Support Decision Making



Use an activity to provide a light structure for analyzing the pros and cons of a decision. Invite other people to participate in listing pros and cons, or work through the issues alone. When you make the decision, note it down in the Decision section as a continual reminder.

- *Set Up A Wiki*. Create a wiki page for listing the pros and cons of an upcoming decision, or performing a SWOT analysis on current state. Each of these can be major headings on the wiki page, and it gives you a way of externalizing your thinking in order to facilitate greater clarity on how to proceed. Once you have made your decision, write it down on the wiki page too.

- *Do a Random Survey through a Status Update*. If you can tolerate more risk, post a status update noting the decision you need to make. Ask for feedback from your followers, and use the resulting input to push you in the right direction. If the decision is about acquiring a new firm, though, it's not the right approach.

In summary, there are many ways you can use Connections to support decision making.

Do You Trust the Security of IBM Connections?

This chapter has pushed the boundaries on the security of information contained in IBM Connections. By using the scenario of executives sharing information about a forthcoming acquisition, the need for information security is paramount. If unintended people gained access to the executive's decision community, viewed the documents, or even caught a whiff of the intended decision, serious legal, financial, and regulatory problems would result. While starting with this specific scenario at your organization is not recommended, evaluating the security of information within IBM Connections in order to ascertain whether it really will work for your organization is a necessary task. Here's one way to go about it:

> If unintended people gained access to the executive's decision community, serious problems would result.

- *Testing as an End User*. Set up three computers each with different user accounts. As one user, create a community with restricted access and upload and tag various new files. As the other two users, see if you can find the community, the tags, or the files. Use search in IBM Connections, in your enterprise search application, and through other tools you have available.

- *Testing as an IT Administrator*. IT administrators often have ways of getting access to IT systems that they have no valid business reason to access from a data perspective. A back door method of access exists, however, so that if all users inadvertently lock themselves out of the system, IT administrators can get back in to restore access. Is this true for IBM Connections, and if so, what is the process for accessing the back door? If it is easy to access and can be done without approval at any time, you have a security vulnerability to address.

- *Hiring a Specialist Security Firm*. Various specialist firms offer services for testing security vulnerabilities. If it absolutely has to be secure, engage the best firm you can find.

The benefit of this security testing can be lost in a minute if an executive misplaces an unsecured laptop or loses an unlocked iPad with the IBM Connections mobile app. The person finding the device will be able to browse the community and access all of its information. Information security isn't solved with one solution, but requires an end-to-end approach. It is also not solely—or even mainly—a technology issue, as poor human practices with respect to confidential data can quickly undermine security.

In closing, the opposite question should also be asked: do you trust the security of the current way of sharing confidential information? If this is currently being done via unencrypted email, accessed on laptops over public WiFi networks, or responded to on unencrypted mobile devices, the answer is ... you don't really care about security. The push-back is a smokescreen intended to obfuscate forward movement, not a real concern.

Escaping the Pull of Groupthink in Decision Making

Teams and groups that work together for an extended time run the risk of getting pulled into "groupthink" in the decisions they make. Given their shared history of discussions, debates, negotiations, and past successes, team members will internalize the attributes of decisions that will and won't work in the team, and members will unintentionally or otherwise avoid starting down the path of arguing a specific point because they know it will get rejected by the team. The team has a defined profile of information that is seen as valid or not, and will overemphasize information that confirms its current approach. Although the team's decision making processes will be highly efficient, when operating amidst changing environmental conditions, its effectiveness will falter.

The solution to groupthink is the introduction of new people, ideas, and frameworks, along with a sufficient level of force to break the current decision making patterns.

The broad solution to groupthink is the introduction of new people, ideas, and frameworks, combined with a sufficient level of force to break the current decision making patterns. For example:

- *Provide coaching on group dynamics and decision making processes*. If you have a good group of people on a team and are loath to change the mix, provide coaching and mentoring on group dynamics and effective group decision making processes. With the right input and an opportunity to stand back from the moment-by-moment pressures felt by the group, they may be able to identify and fix what's become broken in their approach.

- *Require an external review of the team's recommendations*. Put together a secondary group to review one or more of the team's recommendations, and to issue a written analysis of its effectiveness. Require that the team consider the analysis and judge the validity of each recommendation.

- *Replace people on the team*. Remove people on the current team, and add new people in their places. You need to change a sufficient number of people so that the newcomers aren't shoehorned into the team's current ways of working, but not too many so the team dies altogether. Depending on the severity of the problem, change between 30% and 70% of the team in order to bring in new perspectives and force the team to renegotiate how it makes decisions.

- *Disband the team and start afresh*. If all else fails, disband the current team and convene an entirely new team. This is should be the last resort though.

Effective decision making in teams requires both efficiency and effectiveness. Groupthink threatens the latter, and needs to be dealt with head on.

The Limits of Collaboration

Collaboration is not a panacea, a silver bullet to all good things. There is a time and place for collaborating—for working with others, for gathering and exploring ideas, for joint work, for seeking common ground—but there is equally a time for a leader to make a clear decision. As a king might say to one of his trusted officials, "You have given me your input; now I need your obedience."

Various organizations have struggled with introducing "collaboration" over the years. The senior leaders at one large organization decided to make a big push into "collaboration," replacing the traditional command-and-control culture with what they called a collaborative one. What this meant was that decision making rights were pushed down from the senior leaders to a new collection of internal boards, each made up of people from across different functional groups. The idea—the grand idea even—was to create a new style organization that dispensed with the challenges of command-and-control and embraced collaboration as the new way forward.

> The grand idea was to create a new style organization that dispensed with the challenges of command-and-control and embraced collaboration.

All did not work out as was hoped:

- Decision making became torturously slow. "Collaboration" was equated with complete consensus, so the only decision made out of the internal boards was "to have another meeting."

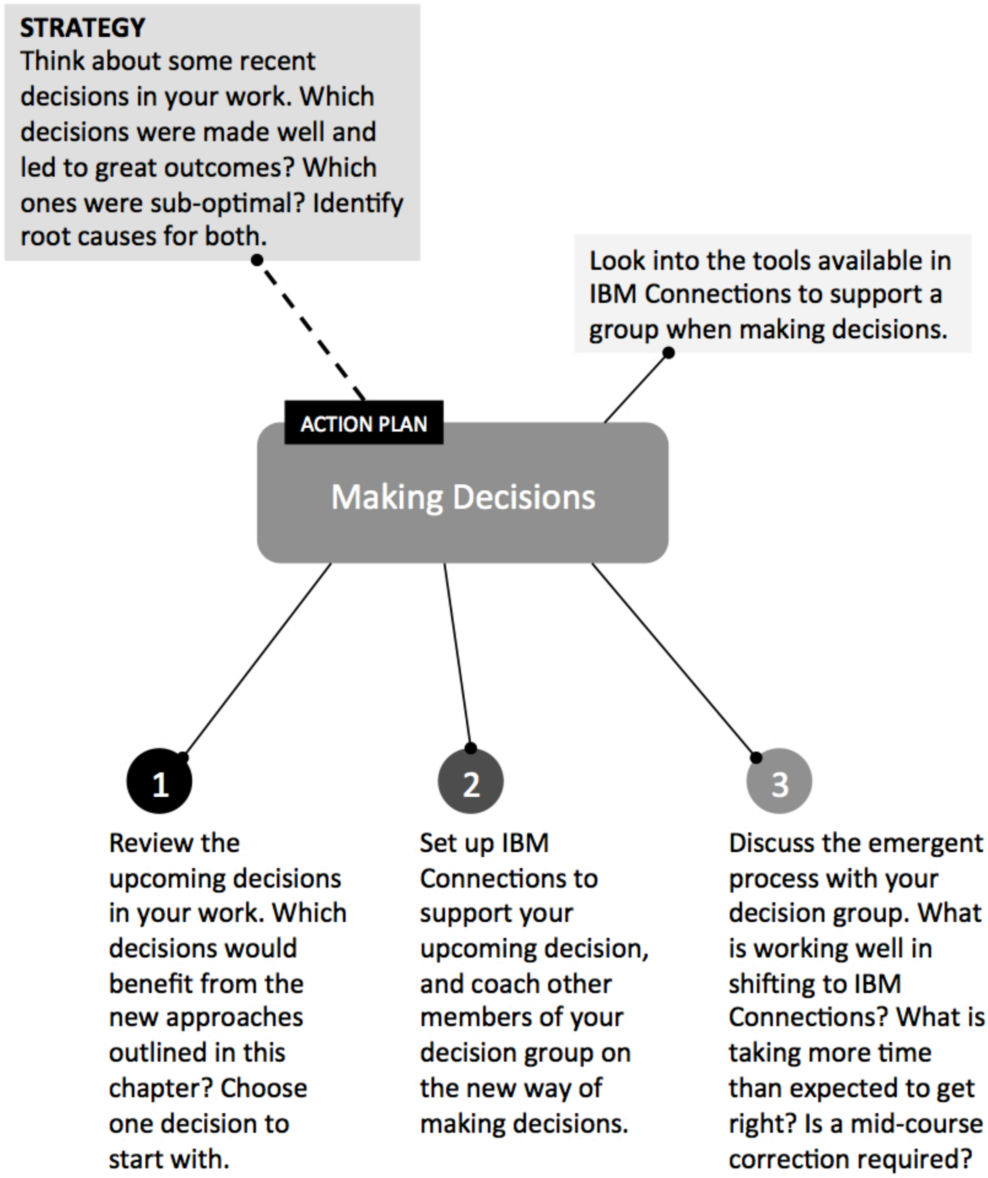
- Execution in the market suffered, with new products and services failing to go from concept to market. Grand product ideas remained just ideas.

- Financial indicators went backwards, meaning that collaboration had a negative impact for stockholders.

- Employees put on a bold face about the new approach when dealing with external people, but over a quiet discussion, they confided that all was not right.

What do we learn from this? From the above case, we must remember that collaboration is not the end goal—it's merely one means of winning in the market. If the pursuit of winning in the market is hampered by our styles of "collaboration," we need to go back and see whether "collaboration" is really happening or not. Are people collaborating towards a great outcome, or are they running in circles and mired in the swamp of uncertainty? Collaboration means that people have something to collaborate towards, and if the goal posts are undefined, if the rallying point is unclear, then get a leader in to listen, understand, and make a clear decision. For senior leaders, this is their clear mandate in governing collaboration.

Action Plan


STRATEGY
Think about some recent decisions in your work. Which decisions were made well and led to great outcomes? Which ones were sub-optimal? Identify root causes for both.
Look into the tools available in IBM Connections to support a group when making decisions.
ACTION PLAN
Making Decisions
1
Review the upcoming decisions in your work. Which decisions would benefit from the new approaches outlined in this chapter? Choose one decision to start with.
2
Set up IBM Connections to support your upcoming decision, and coach other members of your decision group on the new way of making decisions.
3
Discuss the emergent process with your decision group. What is working well in shifting to IBM Connections? What is taking more time than expected to get right? Is a mid-course correction required?

Summary

Making decisions is a regular activity in organizational life, and there are various ways that IBM Connections can be used to support decision making processes. In this chapter we explored the scenario of a confidential decision on whether to make an acquisition or not, and examined how to use IBM Connections to respect the required levels of confidentiality. We also noted that some decisions will require less structure in IBM Connections than the approach taken in this chapter, and that some complex decisions will require more structure.

Making decisions is a regular activity in organizational life, and there are various ways that IBM Connections can be used to support decision making processes.

In the next chapter we look at the scenario of finding expertise, and explore the various ways IBM Connections can be used to this end.

[1] In *The Fellowship of the Ring*, Frodo swiftly realizes the cost of bearing the one ring, and voices his complaint to Gandalf. J.R.R. Tolkien wonderfully captures the wisdom of focusing on what you can do about a situation, instead of becoming inert due to what you cannot do.

[2] These seven types of decision making are extracted from Chapter 6 (Bad Decision Making) of Harvey Robbins and Michael Finley's book, *The New Why Teams Don't Work: What Goes Wrong and How to Make it Right* (2000).

[3] The community for the decision could alternatively be created as a sub-community within the existing community for the Executive Team. If the Executive Team already has a working community, and the membership for the decision space will be the same as the membership of the Executive Team's community, go ahead with a sub-community. If the Executive Team does not have a functioning community, or if the members of the decision space will be wider than the current Executive Team, make it a separate community. On balance, and specifically in this situation given it is a decision with a short lifecycle, making it a separate community is the right approach.

[4] David Coleman's white paper, *Developing an ROI for Collaboration Projects or Programs* (2009) includes a worked example of how an HMO could save $1 million per year through faster decision making on the timely discharge of patients. It's a good example of how a number of small decisions can lead to big outcomes. See www.docstoc.com/docs/5491961/Developing-an-ROI-for-Collaboration-Projects-or-Programs.

Chapter 12.
Finding Expertise with IBM Connections

> *The key challenge for aspiring expert performers is to avoid the arrested development associated with automaticity and to acquire cognitive skills to support their continued learning and improvement. By actively seeking out demanding tasks—often provided by teachers and coaches—that force the performers to engage in problem solving and to stretch their performance, the expert performers overcome the detrimental effects of automaticity and actively acquire and refine cognitive mechanisms to support continued learning and improvement.*[1]
>
> Anders Ericsson

In the theme song of the 1984 movie Ghostbusters, the key line was about expertise. When faced with a ghost, "Who you gonna call?" The answer: "Ghostbusters." They had the interest, skill, and equipment to take on the ghosts threatening the city. Few organizations have those particular needs today, but the call to expertise in the moment remains unchanged. How do we find the best person to deal with this issue from a customer? Who knows about market expansion into China? What do we know about risk mitigation? These questions of expertise can all be addressed through the use of IBM Connections.

In this chapter, we will:

- Look at how experts are usually found in organizations, and note that there are better ways of approaching this.
- Explore a variety of ways of finding expertise in IBM Connections.
- Consider a couple of organizations that are using IBM Connections for finding expertise today, and the approach they have taken to this scenario.
- Evaluate a number of advanced concepts that add insight into the way we approach finding expertise.

The Theory of Finding Expertise

How do you find experts within your organization? For many people it's a hit and miss endeavor. You know someone, who knows someone, who knows someone, and eventually you get linked up to ask the question. But often it takes too long ("*We'll get back to you in a week*"), and the customer on the other end of the phone isn't getting the answer they want. Or it does sort-of work. You get through to someone who is apparently the expert, but they can't understand what you are trying to say. Unfortunately this work practice is all too common in organizations today, leading to lost opportunities, disappointed customers, and much wasted time.

You know someone, who knows someone, who knows someone, and eventually you get linked up to ask the question. But it takes too long.

With new collaboration technologies, locating experts can be done in a different way—through a different work practice.

- *People have a profile*. People have a profile within the collaboration technology, where they describe what they see as their areas of expertise—such as strategic analysis, financial projections, facilitating group discussions, or automotive industry analysis . Other people are able to browse through the profiles and expertise areas, to see who has expertise and experience in a particular area.

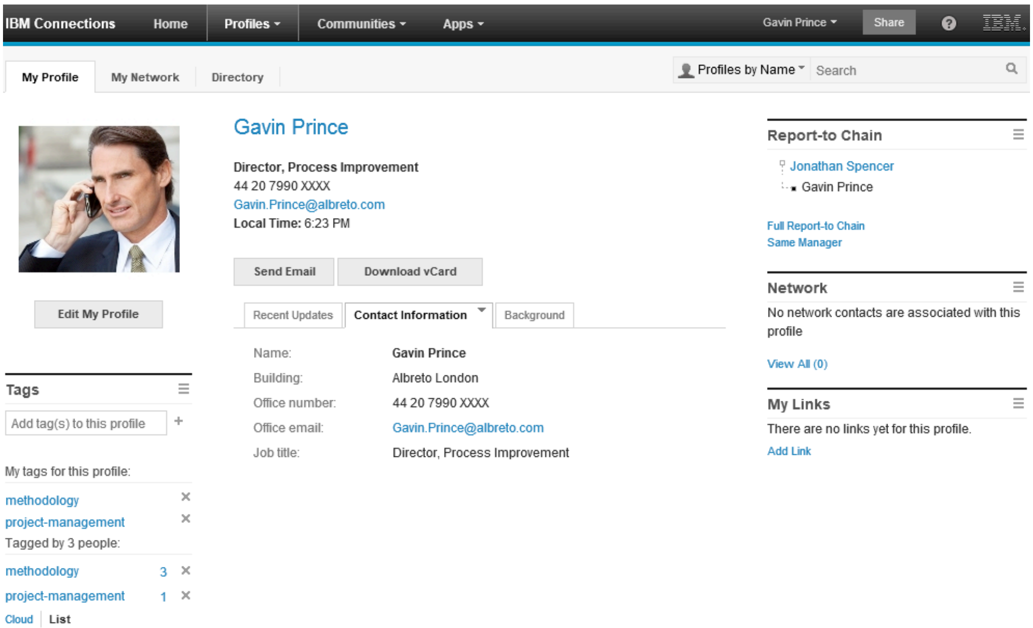
- *The profile gives evidence of expertise*. When looking at a profile, there are links to the person's current work projects, some recent blog posts, and some items they have posted in discussion forums. Before you make contact, you are able to read the source material and evaluate for yourself their expertise.

- *The profile provides means of interacting*. Once you have found the person you want to speak with, embedded presence and availability information tells you if they are currently online and available for interaction. If they are not available, through a link to their electronic calendar, you can see where they are and when they expect to be back.

- *A profile can show areas of commonality*. Newer expertise profile systems also highlight areas in which the other person has a common interest to you, and lists people who both of you know. The point of this is to convey their trustworthiness, put the person in a wider social context, and to suggest some topics to talk about when making contact with the other person for the first time.

One of the core design principles in IBM Connections is people-centricity. This means a person's profile is a fundamental design construct in Connections, and is intended to link people to other people through shared content.

Figure 12-1. Discovering and Evaluating Experts via Profiles



IBM Connections includes a personal profile page for each person, which displays key information about their work and areas of contribution. Contact information is also displayed, to speed time-to-contact.

The profile part of IBM Connections started life as an internal system at IBM to help people find experts—it was called BluePages. One of the enduring challenges with expertise profiles is that asking people to manually keep their profile up-to-date doesn't work, and secondly, the experts in the organization may not want to be found because of the extra requests for assistance they'll receive. IBM found that having ways for experts to share their knowledge through non-real-time means made adoption much easier:

> *Once we gave Contributors the choice about how to share their knowledge and experience, we found that they were more likely to contribute using these social options, since they realized that the result would be fewer emails, IMs and phone calls asking for their basic expertise. Once Seekers find an expert via Profiles, they are able to consume some of their knowledge and expertise without disrupting them. The nature of the remaining email/IM/phone requests from Seekers were about their deeper experience, their knowledge that will always remain tacit. In effect, Contributors sharing their more 'basic' expertise online enabled Seekers to accelerate whatever collaboration they further required from Contributors.*[2]

Let's explore the use of IBM Connections for finding expertise.

How to Find Expertise in IBM Connections

Albreto's executive team quickly decided to acquire Bravo Enterprises to support its strategy of global expansion. Once the acquisition closed, the team moved quickly to the task of integrating the two organizations. Each member of the executive team knew that success would hinge on their talent management abilities. There was no doubt that both organizations had great people, and while Bravo's employees could in theory continue to act alone, the executive team knew that integration would provide much stronger opportunities over the long-term. One strand of the integration strategy was to create connections between the new employees from Bravo and the existing employees at Albreto.

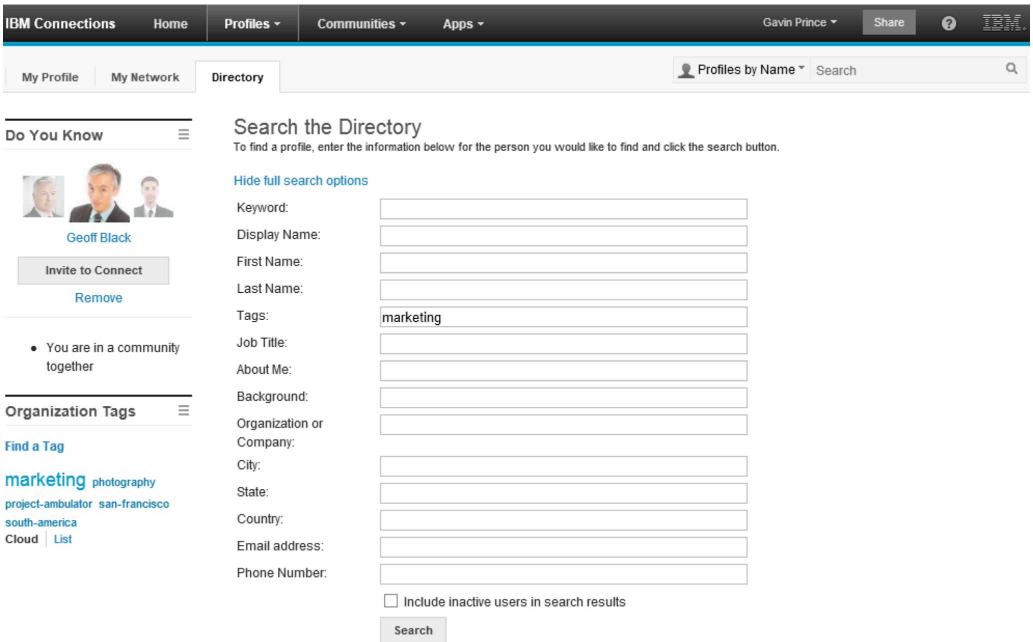
> *"Let's get started," Jonathan said, opening the executive team meeting. "We agreed last week to ask Edgar for a recommendation on how to use IBM Connections to drive talent integration across the new Albreto. Our agenda today has three items, and Edgar's recommendation is first up."*
>
> *Edgar rose and walked to the lectern at the front of the executive board room. "Thanks for the invitation to be here, and congratulations on the acquisition of Bravo. My team is definitely excited about the greater opportunities ahead." He paused momentarily. "The challenge we face with talent integration is two-fold. First, our new Bravo colleagues and our existing employees need to become aware of the expanded expertise available across the new Albreto. Second, we need to provide real opportunities for all employees to contribute to current projects, initiatives, and activities—becoming integrated by virtue of action and forward momentum."*
>
> *"When I was here a month ago, we talked about how you could use IBM Connections to support your decision making processes, although at the time you were unable to share specific details. I applaud you for the effective way you used the decision community for making your decision re Bravo Enterprises. However, Connections offers capabilities to support much more than decision making activities. There's a whole set of capabilities for creating connections between people on the basis of shared work activities, common interests, and expertise."*
>
> *"I see the path ahead needing three specific actions," he said. "First, we need to get our new Bravo colleagues into IBM Connections, and up-and-running with their own profile information. That's largely a technical task, although there are some specific guidelines we need to provide. Second, we need to brief them on how to use IBM Connections for locating people based on activities, job roles, interests, and other pertinent information. Finally, we need to get our new Bravo colleagues integrated into appropriate current communities, and bring their current activities under the Connections umbrella."*
>
> *A murmur of approval rippled through the board room. "We want you to take the lead on this initiative," said Jonathan. "It's vital to the success of the new Albreto."*

Step 1. Search the Directory in Profiles for Skills

Once people have filled out their profile in IBM Connections, as we explored in Chapter 6, you can use search to find people who have particular skills, interests, and other attributes. To open the directory, click *Profiles* along the top menu bar of IBM Connections, and then click *Directory* in the drop-down list. The standard search option of the directory allows you to search only based on a person's name, but if you click *Display full search options* it opens a more advanced search form—as shown in Figure 12-2.

To search for people who have particular skills, interests, and expertise, use the search fields Tags, About Me, and Background in the full search pane. The tags field will search for people who have either tagged themselves with a particular tag, or have been tagged with that tag by someone else. Using the Job Title field will match people with that word in their official role. Using the About Me or Background fields will assess what people have written about themselves, and match the attributes you are searching for.

Figure 12-2. Search the Directory Using the Full Search Option



Search the directory for people who have particular skills, interests, and expertise. Use the Tags, Job Title, About Me, and Background fields to search on these attributes.

Note also the tag cloud of Organization Tags. This tag cloud displays the most commonly used tags for people across the organization. You can click on a tag and immediately see a list of people who have that tag—it's a way of prompting people about what they are most likely to find in the directory.

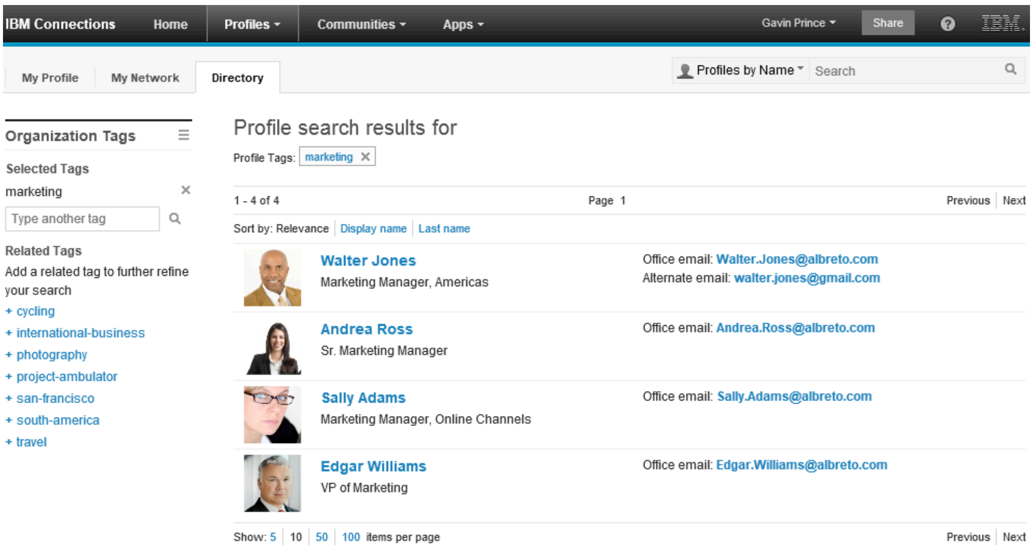
Step 2. Refine Your Search

Once you have conducted an initial search of the directory, you often want to reduce the number of results presented. Too many results are not actionable, and you have two choices for narrowing the set of people. The first option is to return to the initial full search pane and enter additional attributes—another tag perhaps, or a word in the job title, or even a country if your search requires geographical alignment.

The second option is to further drill into the list of people by using Organization Tags. Either type another tag into the box at the top of the left-hand pane, or click one of the tags shown in the Related Tags list. Typing another tag will add that to the search criteria, so that the initial list of people will be searched again to see which people now match both tags. The list of Related Tags is automatically generated by IBM Connections based on the most common tags used by the people in the initial list of search results. Clicking one also adds it to the search criteria, and will re-filter both the search results and the list of Related Tags.

Further drill into the list of people by using Organization Tags. Either type another tag into the box at the top of the left-hand pane, or click one of the tags shown in the Related Tags list.

Figure 12-3. Use Additional Organization Tags to Refine Your Search



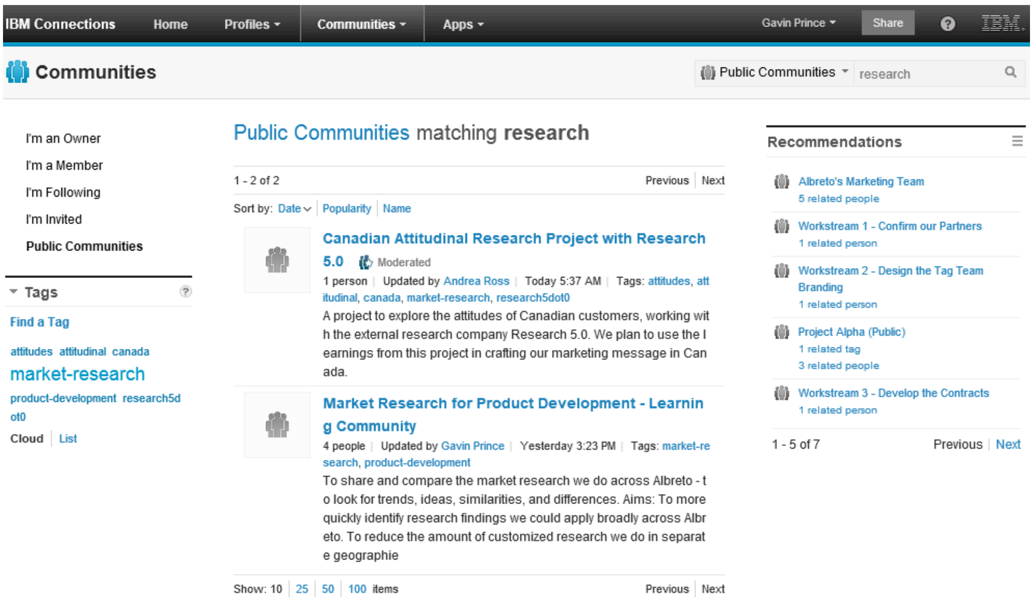
If you get too many people in the search results, either refine your initial search criteria or add further Organization Tags to re-filter the list of relevant people.

Step 3. Search Communities to Gauge Contributions

Using the directory to search for people finds what is noted on their profile in IBM Connections. It doesn't, however, reveal the contributions they are making in communities. You can of course discover that after opening someone's profile by reviewing their Recent Updates for relevant activity, but you have limited yourself to a list of people who were originally found through a directory search. There are times when it is more beneficial to come at the problem from the opposite direction.

To find people who are demonstrating expertise through their contributions to communities, click *Communities* along the top menu bar of IBM Connections, and then click *Public Communities* in the drop-down list. This opens a list of all of the Public Communities in your organization that are in IBM Connections. Use the search field at the top right to narrow the list of communities. You are not looking for a person just yet, but rather a project name, a keyword, a product name, or a tag. Your search will filter the list of public communities, returning those that use the search phrase in the community title, description, or list of tags. That is, it doesn't search the contents of the entire community.

Figure 12-4. Search Public Communities for Keywords



Search Public Communities for the keyword or key phrase you are looking for. The search will try to match the word in the community title, description, and tags.

Once you have found a list of relevant public communities, take a look around in each and see who the members are, and who is actively contributing.

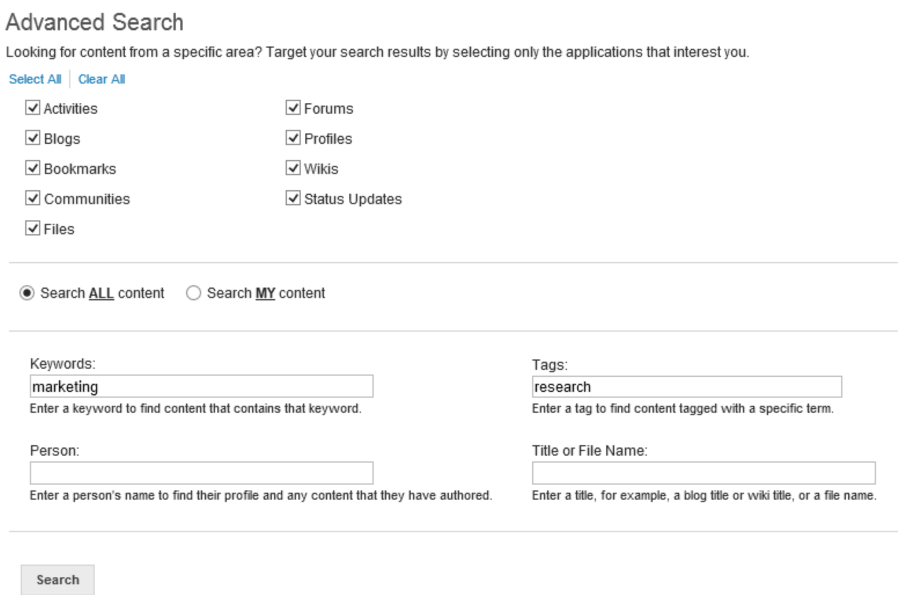
Step 4. Use Advanced Search to Get an All-of-Connections Perspective

To get an all-of-Connections perspective on the contributions that are being made on a particular topic, and by implication to find the people who are making such contributions, use Advanced Search. In the search box at the top-right of Connections, choose the *Advanced* option at the bottom of the drop-down list. You will be able to search all public content in IBM Connections, as well as the content that is hidden from public view that you have access to by virtue of your membership in various communities and other tools.

Advanced Search permits the careful creation of a search string. You can specify the following options:

- *Setting the Scope*. Search across all areas in IBM Connections, or just Activities, or Activities, Blogs, and Bookmarks.
- *Choosing All Content or Your Content*. You can choose between searching all content in IBM Connections or just your own content. The latter is good for finding something you contributed but can't recall where you put it.
- *Text Search*. There are four search fields—Keywords, Tags, Person, and Title or File Name—for specifying what you are looking for.

Figure 12-5. Get an All-of-Connections Perspective with Advanced Search



Use Advanced Search to search all public content for relevant contributions. Advanced Search will also search the moderated and restricted content you have access to.

Given the emphasis on finding expertise in this chapter, use Advanced Search to this end by mainly using the keywords field and the tags field, combined with setting the scope on which activities to search. Start with a wider search, and progressively narrow what you are searching for in order to find good contributions, and by implication, finding the people who are making those contributions on a regular basis.

Sidebar: Avoiding Accidental Expertise Discovery

There are some really sad stories of how people have accidentally stumbled across expertise that was sorely needed. While the stories make for funny reading, they are sad in the sense that these types of accidents just shouldn't happen. Organizations should have better ways of sensing who is an expert in a particular topic.

Here's two examples:

1. *The Chemist*. A research manager at a pharmaceuticals company was talking with the HR director in an elevator. He was bemoaning his inability to find anyone inside the firm with a specialization in a particular chemical compound. As a result, he told the HR director, he needed to instigate a search for a new external candidate to fill the gap. A woman in the elevator—a current employee of the firm who worked in the same building—overheard the conversation, turned to both of them and said, "I have a PhD in that chemical compound. How can I help?"

2. *The Project Manager*. A new design project was kicking off at a manufacturing firm. The intent was to significantly update the current in-market product—the one that generated significant revenue for the firm—increasing its attractiveness to current customers and new prospects alike. The problem was finding the design documentation, project plans, and the discussion documents from the previous design project. The project manager was talking about this one day with a colleague, and an engineer in the next cubicle stood up to speak to them. "I was on that project," he said, "and I know where to find those files on the file server."

The good news is that the required expertise was found in each of the examples above, but it was entirely accidental. The bad news is that there are many times when the required expertise is not found, and either new people have to be hired, or the organization has to learn again how to undertake a particular process, activity, or project—both of which are very costly approaches to finding expertise. New ways of finding expertise should reduce the likelihood of trusting to luck.

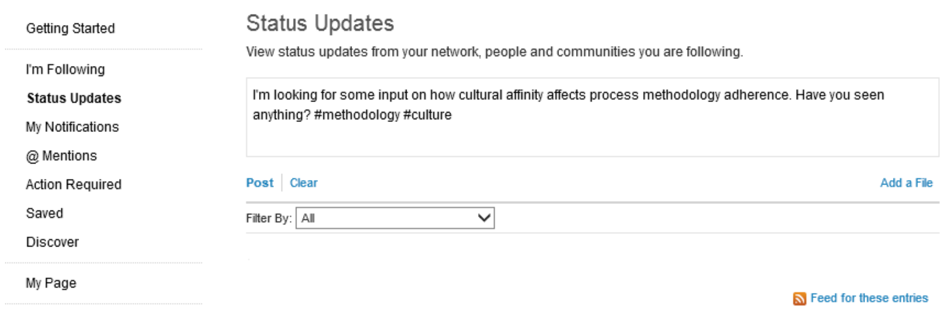
Step 5. Post a Status Update Asking for Leads

As its name implies, IBM Connections is about creating connections—between people, and with content. The first four approaches to finding expertise in this chapter have focused on connecting people with content that already exists in the system, and once the relevant content is found, with the people behind that. For example, if your search of IBM Connections turns up a blog post that addresses the topic you need help with, you gain specific help via the content and potentially even more directive help by connecting with the blog's author.

The second broad approach to finding expertise in IBM Connections is to engage directly with people and seek their input. One approach to doing this is to write and post a status update that outlines the help you are seeking. A status update is a short statement or question that can be used to quickly gain input from other people. Everyone who follows your updates in Connections will see your post, and if you include hashtags in your post as well, people who are interested in those hashtags will also see your post.

To write a status update, click *Home* along the top menu bar of IBM Connections, and then click *Status Updates* in the left-hand navigation. Write your statement or question in the field that says *What are you working on right now?* Include the hashtags that will highlight your status update to people who don't follow you. When you have written your status update, click *Post*.

Figure 12-6. Use a Status Update to Ask for Input



Write a status update to seek help from people in your direct network in IBM Connections. Include hashtags to widen the circle beyond those people who follow you directly.

When other people see your status update, they have a number of choices in how to engage with you. The first is that they can respond to your status update with a comment, holding a conversation that is displayed in the format of a threaded discussion. The second choice they have is to push out your status update to their followers in IBM Connections, thereby widening the circle into their direct network. This gives added exposure to your request, and may lead to the identification of other people to help. A third choice is to engage with you in real-time—via an instant message or a phone call—thus sharing their expertise and providing a way of answering your questions immediately.

Step 6. Pose a Question and Assess Responses

Once you have found people who might have the expertise you are searching for, and assuming you have time to assess the situation, pose a question to draw out their expertise. Give them an opportunity to exhibit what they know, and for you to gauge their usual method of interacting with other people.

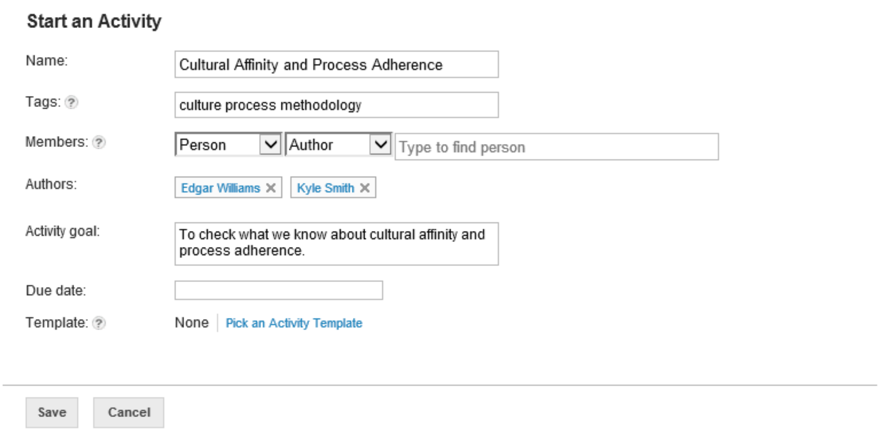
How you do this depends on where the various people are in Connections—if they are all members of one community, for example, or if their activities are scattered across many different places. Here's three options:

- *Each person is in a common community*. When all of the people who you think have something to offer are members of a common community, created a topic in the forum. Ask a question or pose a thought and assess the responses gained from the various people.

- *They aren't in a common community*. When all of the people are not in a common community, or if your question is quite different in focus to that of the community they are a member of, write a blog post with your question, and use a status update with @Mentions to get their attention. They may respond with a status update of their own, or they may write a comment on your blog post.

- *They aren't in a common community (an alternative)*. If you need to be more directive in seeking help, and a blog post is not going to be sufficient, create an Activity and invite your list of potential people to become members. In being directive, make sure you clearly state what you are about and where you need their input. If greater interaction was needed, you may need to start a community.

Figure 12-7. Create an Activity and Request Input



To assess people's expertise on the issue you have, create an activity and invite them to become members. Request their input on a particular topic in the activity.

Sidebar: Being Left Behind—A Refusal to Participate Leads to Isolation

Having knowledge of a domain lays the context for being asked to contribute that knowledge to a topic, a project, a cause, or an initiative at your organization. When tools such as IBM Connections are used to bring people together in these situations—or just in preparation for such situations—today's experts with hard won knowledge have to choose whether to participate or stay on the sidelines. Their active involvement can cement the effective use of IBM Connections, but equally their active resistance can negate its effectiveness, slow its adoption, and contribute to failure.

There are some good sounding reasons for refusing to participate, whether in subtle or less subtle ways:

- *Too much to do already (busyness)*. Experts with a full plate of work can shrug off participation in IBM Connections by noting how busy they are. Any involvement in discussions, learning activities, and providing a thoughtful response to requests for help will take them off of their current work. By claiming busyness, experts hope that others will see that their participation would negatively impact their current work, which would be bad, and therefore not a good path to pursue.

- *Poor use of time (insufficient value)*. When Connections is first being introduced to an organization, the ultimate value is uncertain. Sure there is a vision of improvement, but it hasn't been achieved yet. There are many variables that need to line up in order for the organization to get value and individual people to benefit. Experts can hold off from immediate participation in case the system does fail, because that would mean they had wasted their time.

- *Too senior to get involved (pride)*. Long-standing employees may feel that they are too senior to get involved. IBM Connections is for "the new kids," the "young turks" who are infiltrating the organization. They don't want to sully their wisdom with the ill-formed ideas of the younger employees.

If these reasons are accepted and today's experts can remain on the outside, they will gain more time to work on their own activities. An expert is going to see that as a benefit. There is a cost, however, which is less immediately seen: by being left to work on your own current activities, you become relegated to the past. Isolation from the new real work of the organization will rapidly result.

If IBM Connections doesn't get adopted, the experts may not have lost much by refusing to participate. But if it does get adopted and becomes an essential business tool, today's experts will be on the back foot and will rapidly become the experts of yesterday. They will have lost reputation, presence, and the capability to contribute. Expertise is forged in the heat of work, but if the willingness to participate in that process goes away, today's experts will be passed over for a new generation.

Step 7. Connect with People to Stay Up-to-Date

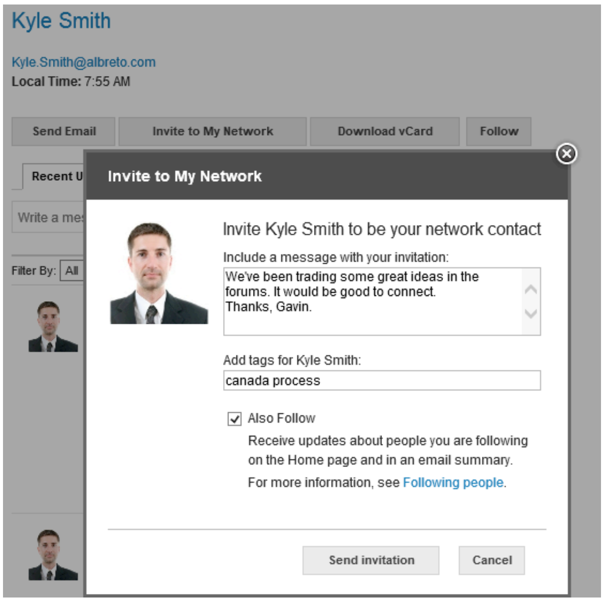
When you locate a person in IBM Connections with relevant expertise, you are likely to have an immediate need to engage with them. Ask the question, get the information, thank them for their collaboration and assistance, and see if you can offer something in return. As this immediate situation unfolds, however, you may realize that you want to stay in contact with what they are doing over the coming months. Using IBM Connections you can connect with people and receive updates on their activities in an automated way. They don't have to do anything extra to update you. You don't have to do anything extra to request updates on their activities.

There are two approaches to connecting with people in IBM Connections: following, and inviting them to your network.

- *Follow*. When you follow someone, it's a one-sided event. You are requesting that IBM Connections flows their updates to you. While the other person will be told you are following them, they do not have to authorize you to follow them.

- *Invite to Your Network*. When you invite someone to your network, it is more formal and bilateral. The other person will receive your invitation to connect, and if they agree, they will show in your profile as a connection. When sending an invitation, you can also follow them for their updates.

Figure 12-8. Connect with People to Stay in Contact



IBM Connections offers a couple of ways of keeping track of what other people are doing. Following is a one-sided event, while inviting them to your network requires their approval.

Step 8. Be Intentional About Onboarding New Employees

As IBM Connections becomes a widely used tool for doing business at your organization, there will be an increasing amount of content, contributions, and collaborative endeavors taking place inside Connections. Getting new employees into Connections—both to meet other employees, and to start making their own contributions—should become an essential step in your onboarding process. The manager of a new employee should help them to get started in Connections. For example, within the first couple of days of joining the organization, the following tasks should be undertaken:

> Getting new employees into Connections should become an essential step in your onboarding process.

- *Filling Out Their Profile*. The new employee should fill out their profile. Their manager should use the approach outlined in Chapter 6 of this book, or something contextually relevant to the organization.

- *Searching for Learning Communities.* In light of the job responsibilities and expected contributions of the new employee, their manager should sit with them (physically or virtually) and search for relevant Public Communities in IBM Connections. Once these are found, encourage the new employee to join the community and become a participant. Introducing themselves is often a good first step, as well as commenting on current forum topics and questions.

- *Searching for Relevant People*. In line with the employee's job role, focal areas, and work interests, perform a directory search to find people with matching or complementary roles, areas, and interests. By connecting with them and following what they are doing, the new employee has the opportunity to quickly become embedded in the daily flow of work.

- *Joining Project Communities*. The employee is going to need access to the project communities in IBM Connections related to their work. Their manager should help them find these communities and request access if the communities are moderated. For restricted communities—for confidential projects—the manager should coordinate with the community owner and request access.

Being able to streamline the onboarding process for new employees is a major advantage to an organization. The new employee can more quickly tap into the organization's work, its formal and informal networks, and its learning communities. Rapidly transforming a new employee into a productive and contributing employee is of tremendous financial value to the organization. It is not a one-sided benefit though. By being able to make significant contributions to current activities more quickly, the employee gains increased job satisfaction, and is likely to feel more positive about their new employer than those that are left to flounder and learn by trial-and-error.

Closing Comments on Finding Expertise with IBM Connections

Being better able to find expertise is a common refrain among organizations, and IBM has addressed this market opportunity through IBM Connections. In this book we have dealt with finding expertise as an outcome of the effective use of Connections within an organization. It hasn't been a core driver for using Connections, however, due to the historical weaknesses of collaboration systems that relied on people filling out their profile as the sole means of claiming and advertising expertise. There are various philosophical and practical problems underlying the name-it-and-claim-it mentality to expertise (see Advanced Concepts for more). In theory you could use IBM Connections just for the expertise profiling capabilities, and ignore all of the other tools. However, that is like buying the most capable Swiss Army Knife and merely using its toothpick. It's an expensive item for such a simple need, and it ignores the many opportunities available from the other tools.

In this book we have dealt with finding expertise as an outcome of the effective use of Connections within an organization.

Expertise should be demonstrated first and identified second, not the other way around. Thankfully IBM Connections offers many ways of achieving this stated intent.

- *From Hidden to Open*. The demonstration of expertise is no longer hidden in email messages, and automatically deleted when people leave the organization. Expertise is publicly stated in communities, but more than being stated, it is actively formed and enhanced through the interaction with other people.

- *From Disparate to Integrated*. IBM Connections provides a coherent, consistent, and integrated suite of tools in which work can be carried out, questions can be posed and answered, and people can learn together. Activities aren't separated across hundreds or thousands of disjointed collaboration sites or databases, which lack the ability to garner an overall perspective.

- *From Content to People*. An individual needing expertise can quickly connect with expertise-laden content in IBM Connections. If greater depth is required, or an added perspective, they can connect directly with experts responsible for the content too. Any new content that is created as a result of these interactions is captured and stored in IBM Connections for future requirements, thus creating a way of improving the identification and sharing of expertise in the future.

In summary, there are many ways of finding expertise in IBM Connections. They are not difficult to do, but the approaches thrive best when employees are actively using IBM Connections for getting work done. Having an up-to-date profile that declares expertise is a good start, but the real gold comes when people demonstrate their expertise on a daily basis within IBM Connections.

Case Studies

Enhancing the ability of firms to find expertise is a common reason for using IBM Connections. Let's look at two case examples: LeasePlan, and Bayer MaterialScience.

LeasePlan

LeasePlan offers fleet management to business and public sector organizations around the world.[3] It has over 1.3 million vehicles under management in 30 countries. LeasePlan needed a better way of finding expertise among its 6,000 employees, and introduced IBM Connections to counteract the sheer inefficiency of email. In the two years since LinkedPeople—the internal brand name of its IBM Connections deployment—has been available, LeasePlan employees have embraced many of the capabilities of Connections to streamline expertise location.

LeasePlan needed a better way of finding expertise among its 6,000 employees, and introduced IBM Connections to counteract the sheer inefficiency of email.

- People in a customer service community actively share good ideas so they can learn from each other. This includes providing links to useful phone numbers, how to guides, process maps, and teams within LeasePlan.

- People are encouraged to post a status update each day, saying what they are working on. In early 2013, LeasePlan was able to discern a much broader interest in a new product among its employees than it thought existed, which adds leverage when negotiating for procurement.

- With the rise of Bring Your Own Device at LeasePlan, people can ask questions in the *Apple - iPad and iPhone - Tips and Tricks* community. The IT support team in Ireland provide support through the community, and LeasePlan employees help each other with common issues too.

- A big emphasis has been placed on people filling out their profiles, and using tags to describe their expertise and interests. This then allows the identification of expertise through tag searches. A video was developed to describe the benefits of LinkedPeople, and features LeasePlan employees describing what LinkedPeople means for them. In the video, Vahid Daemi, LeasePlan's CEO and Chairman of the Managing Board, encourages staff to fill out their profiles and to get their colleagues to do the same.

Finding expertise is one of the important drivers for LinkedPeople, but it is not the only one. Described as the "corporate brain" of LeasePlan, other drivers include enhanced knowledge sharing, better communication, and improved product development.

Bayer MaterialScience

With 2012 sales of EUR 11.5 billion, Bayer MaterialScience (BMS) is one of the world's largest polymer companies.[4] Business activities are focused on the manufacture of high-tech polymer materials and the development of innovative solutions for products used in many areas of daily life. The main segments served are the automotive, electrical and electronics, construction, and the sports and leisure industries. At the end of 2012, BMS had 30 production sites and employed approximately 14,500 people around the globe. Bayer MaterialScience is a Bayer Group company.

Similar to other multi-national corporations, BMS had to face the big issue of effective and efficient collaboration. For instance, several research groups in different regions were working on the same topic, but the respective groups didn't always know about each other. Such duplication of effort is costly in financial terms, but also signals a strategic opportunity for collaborating on better and deeper research instead of having individual groups squirreling away on their own initiatives. Although a relatively new Microsoft infrastructure including SharePoint was available wall-to-wall at that time in the Bayer Group, the collaborative and social aspects of SharePoint were found to be insufficient to the specific needs of BMS. After an extensive evaluation of SharePoint add-ons and other vendor offerings, a relationship was established with IBM.

Discovering expertise across the Bayer Group has been a key focus in the use of IBM Connections. The desire was to have a technology toolset that would give life to this vision: *Imagine using just a few clicks to find an expert who knows what you need to know about a topic. Imagine if you could see which communities this person is a member of and what communities, topics and people this person follows. Imagine if you could easily get an overview of the contributions this person has made, both in general and in specific areas.*

Beyond discovering expertise, a Connections community platform enables the reduction of email traffic and increases work efficiency as well. Kurt De Ruwe, former CIO of Bayer MaterialScience and one of the executives driving the effective use of Connections at Bayer, describes the following example:

> *A 35-person group of customer service representatives had been receiving 15,000 team-internal emails each month. The No-Email-Month initiative showed them how to replace emails with collaborative tools including Connections, chat and video conferencing. Through appropriate tagging users were notified when relevant content was shared. At the end of the month, the group had eliminated 6,000 email messages, as conversations and communications were shifted into new ways of working. The group decided to keep collaborating in this new way even after the initiative ended.*

Bayer MaterialScience was the first company in the Bayer Group to work with Connections, and it caught the attention of the entire Bayer Group. IBM Connections is now available to all Bayer staff across all subgroups and legal entities worldwide. There is still room for improvement, but it's a start that shows the power of working in a new way.

Advanced Concepts

In this section we look at three advanced concepts to inform your work when using IBM Connections for finding expertise:

1. Steps to mitigate the risk of today's experts rejecting IBM Connections.

2. The dangers of pushing expertise discovery too far.

3. The three levels of expertise, and why asserted expertise isn't the best approach.

Let's take each concept in turn.

Engaging Today's Experts: Mitigating the Risk of Rejection

I love the stories of success where the most active contributors to a new tool like IBM Connections are older workers. They've got a vision of contribution, and while the tools they use to contribute have moved on from memos, newsletters, and fax, they are still pushing themselves to learn, to contribute, to grow, and to further develop their effectiveness. In the sidebar earlier in this chapter on leaving today's experts behind, one extreme was explored. That is not, however, the full story.

From an adoption perspective, bringing today's experts along for the journey with IBM Connections should be seen as a measure of success. If they join the journey and become an active contributor, that's one good measure of success. If they resist joining, that's a sign of failure—and it could be failure on their behalf (which the sidebar noted), or it could be failure by the collaboration team. To mitigate the risk of it being a collaboration team issue, consider the following potential causes for low involvement:

- *The vision may not have been explained*. No one has explained the vision in a way that makes coherent sense.

- *The vision may not have been translated into specific steps*. The vision is too lofty; they have no idea what it means in practice.

- *How they can contribute has not been demonstrated*. No one has coached them on how to contribute, or how to find their way around Connections.

- *They haven't been given login credentials*. They don't know their username or password, or where to find Connections on the intranet.

As part of your adoption approach, make a specific effort to engage with today's experts in particular areas. Seek to understand how they contribute expertise today. Learn from them about ways of improving access to expertise. Demonstrate what Connections brings, and clearly show where and how they can be involved. Offer coaching to get them started.

Dangers of Pushing Expertise Discovery Too Far

There is a lot of buzz—although hype is probably the better term—around the collaboration scenario of improved expertise discovery. And for good reason: used appropriately and to a good measure, being able to discover the right person to ask about a pressing issue is valuable for things like process efficiency, organizational effectiveness, and the cost of communication. But if expertise discovery is pushed too far, or relied on for the wrong reasons, the danger is that the desired value will not be gained, and more fundamentally, that the power of expertise discovery will be written off as a fad when in reality the problem was something different.

Here are three problems that will undermine the effective use of expertise discovery:

- *Poor Job Design*. The way jobs are designed is broken in some organizations, and insufficient attention is paid to laying out the roles, responsibilities, and required knowledge of people. It is unclear which type of person would is best suited for a particular job, and opportunities are filled without regard to future implications of hiring decisions.

- *Wrong People Hired*. Your organization has hired the wrong people. Current staff are unsuited to the demands of their jobs, and lack the training to make the decisions they should be making. They are constantly turning to others for a second, third, and fourth opinion, and lack the capability to make hard choices. The best course of action is either more training for current staff, or new staff.

- *Insufficient Knowledge Management System*. The current internal system for capturing and socializing knowledge among staff members is insufficient. Conversations are hidden in email. Documents are impossible to find. Search doesn't work. Experts are repeatedly getting asked the same question, and have no effective way of sharing what they know for use by other staff.

If expertise discovery is used appropriately, there are situations where the value is significant. But if the organizational context is broken, no amount of new technology for expertise discovery will fix that.

In summary, if expertise discovery is used appropriately, there are situations where the value is significant. But if the organizational context is broken, no amount of new technology for expertise discovery will fix that. More fundamental changes to job design, hiring processes, organizational culture, and internal systems will be needed.

Three Levels of Expertise

An important role for collaboration technology at an organizational level is to figure out what your people are good at.[5] It needs to address two issues. First, for any given person, what expertise do they hold? Second, for any given topic, which people hold the expertise? Being good at something is often a precursor to being invited to take part in a project, to assume a particular responsibility, or to help out with an issue. Having a clear picture of expertise across the organization is useful in the following scenarios:

- When recruiting a project team, because the project leader is able to discover people in the organization who have expertise in a particular field or area.
- When facing a challenge during the execution of a project, because someone on the project team can reach out to other people with needed expertise.
- When searching for a person to help with a customer support call.

> Asserted, or declared expertise, requires self-knowledge for accuracy. Keeping assertions up-to-date is separated from real work.

Figuring out expertise, however, requires a deeper understanding of where it comes from and how it is recognized.[6] At the most basic level, expertise is asserted by an individual. "I'm good at international marketing design," is an assertion that Walter might make about his expertise. But without evidence to back it up, his current colleagues—not to mention people inside his organization who don't know him yet—have no way of evaluating whether it's true or not. Asserted, or declared expertise, requires self-knowledge for accuracy, and making the assertion and keeping the assertions up-to-date is an activity that is separated from real work. This is one of the main reasons why traditional expertise profiling systems have failed in organizations.

There is a second level to expertise that mitigates some of these weaknesses: expertise that is deduced by a technology system based on the day-to-day activities of an individual. What the person reads can indicate an interest in a topic—and therefore point in the direction of expertise. What a person writes in a document or on a wiki goes further, since they are contributing expertise to a particular topic. The same applies for their email messages and contributions to discussion threads in team and group conversations. The major benefit of deduced expertise over declared expertise is that evidence is available to back up the expertise labels, because in order to achieve expertise, you have to live it. If we return to Walter, if the system notices that he frequently contributes to discussions and current thinking about international marketing design, that label will be automatically associated with him.

The third-and-final level is discerned expertise, which means that someone else has recognized expertise in another person and has stated it in a way that other people can benefit from. At this third level, expertise has been previously "consumed" by another individual—they have received benefit from it, and their recommendation to others seeking similar expertise is to talk with the same person. Thinking about Walter again, if Sally had read one of Walter's blog posts about international marketing design, and had then spoken with him about a design issue she was experiencing that he was able to clear up, Sally would freely tell others that Walter was the person to speak to about "international marketing design."

In order for expertise identification to work, the system has to show up-to-date expertise labels, and be built on a basis that people can trust what the system states. Using technology to achieve this comes with four core requirements:

1. The ability for people to gift expertise to another person, that is, a descriptive label that states what the expertise is. It's a summary of what they see the other person being good at.

2. A system-level analysis engine to reason out the main themes that people contribute expertise and knowledge on, through the items they write, read, and contribute towards. This is system interpretation of expertise—or deduced expertise. It's complementary to the gifting of expertise (requirement 1).

3. An aggregation or summarization interface, through which people can search for or navigate through expertise topics, and discover appropriate people. Once a person has been found, the interface should link to their profile for wider insight into the person and their work. For example, the profile should link to relevant blog posts, past and current team membership, and group involvement.

4. The ability to see where the expertise descriptor has come from—to track back and see who has gifted the expertise to the individual, or the actions the individual has taken to make the system gift that expertise. Provenance of expertise is important for establishing credibility and trusting the assertion.

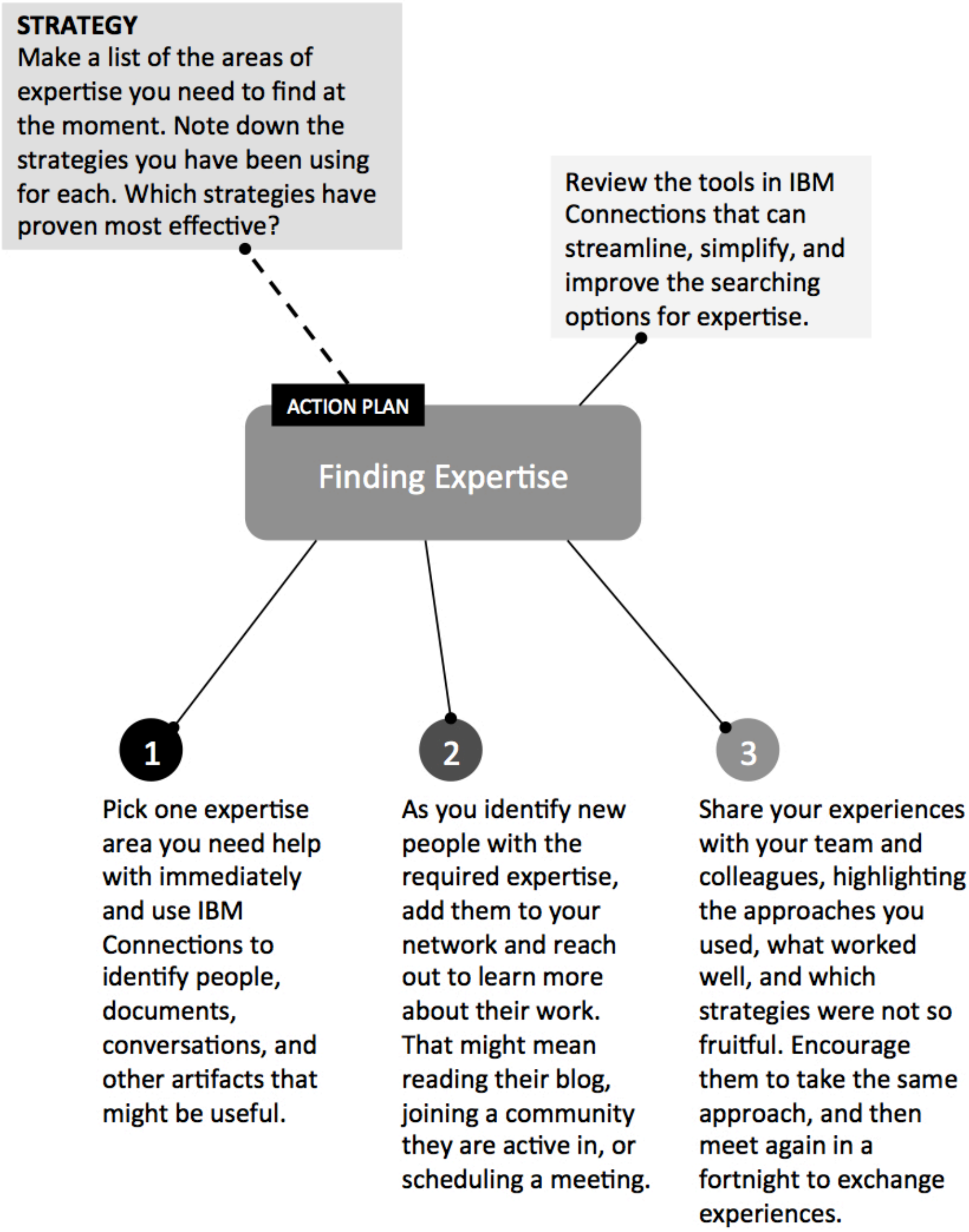
With respect to IBM Connections, there are specific capabilities at each of the three levels of expertise identification:

- For Level 1, individuals can fill out their own profile with descriptive information about what they are good at using the About Me and Background fields. They can also add tags to summarize what they see as their key areas of expertise.

- For Level 2, the Recent Updates tab on an individual's profile shows the recent topics they are contributing to, commenting on, and have engagement with. The design of Recent Updates allows anyone to quickly review what other people have been doing.

- For Level 3, people can gift expertise to others by adding one or more descriptive tags on the other person's profile, although note that provenance of expertise tags is not yet offered in IBM Connections.

Action Plan


STRATEGY
Make a list of the areas of expertise you need to find at the moment. Note down the strategies you have been using for each. Which strategies have proven most effective?
Review the tools in IBM Connections that can streamline, simplify, and improve the searching options for expertise.
ACTION PLAN
Finding Expertise
1
Pick one expertise area you need help with immediately and use IBM Connections to identify people, documents, conversations, and other artifacts that might be useful.
2
As you identify new people with the required expertise, add them to your network and reach out to learn more about their work. That might mean reading their blog, joining a community they are active in, or scheduling a meeting.
3
Share your experiences with your team and colleagues, highlighting the approaches you used, what worked well, and which strategies were not so fruitful. Encourage them to take the same approach, and then meet again in a fortnight to exchange experiences.

Summary

When IBM Connections becomes a natural way of doing business, the ability of people inside the organization to find the best expertise increases exponentially. Contributions are no longer hidden in email messages, people don't have to rely on hit-and-miss methods for assessing someone's expertise in advance of engaging them, and there's a greater sense of "being in this together." In this chapter we have explored a number of approaches to finding expertise using IBM Connections, such as a directory search for expertise that is stated, and a community search for expertise that is exhibited.

> Contributions are no longer hidden in email messages, and people don't have to rely on hit-and-miss methods for assessing someone's expertise in advance of engaging them.

Finding expertise is the second-to-last collaboration scenario we will explore in this book. The next chapter evaluates the scenario of individual coherence in the light of collaborative endeavors.

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[1] Anders Ericsson, Neil Charness, Paul Feltovich, and Robert Hoffman are the editors of *The Cambridge Handbook of Expertise and Expert Performance*, published in June 2006. One of the core ideas in the book is the role of deliberate practice in the formation of expertise, reinforcing the view that natural talent alone is insufficient. This quote is from page 696.
See www.amazon.com/gp/product/0521600812.

[2] Gia Lyons, *SharePoint My Sites: It ain't just about profiles, people*, December 2007. See www.giatalks.com/2007/12/sharepoint-my-sites-it-aint-just-about-profiles-people/.

[3] LeasePlan's experiences with and approach to IBM Connections is based on two presentations and a discussion in April 2013 with Peter Staal, the Online Communications Manager at LeasePlan. For the presentations, see *LeasePlan's Approach to Adoption of Social Business with IBM Connections* (July 2012) at currents.michaelsampson.net/2012/07/leaseplan.html, and *Notes on SW303 LeasePlan and Pensco Trust* (January 2013) at currents.michaelsampson.net/2013/01/sw303.html. Make sure you watch LeasePlan's internal video about LinkedPeople, at www.youtube.com/watch?v=SOPoKStGACI.

[4] This case study is based on a series of presentations, blog posts, and an interview with Kurt De Ruwe from Bayer MaterialScience. Head over to my blog at currents.michaelsampson.net and search for "Bayer" to find the relevant items.

[5] The material for this Advanced Concept is extracted from Chapter 2 of *Collaboration Roadmap (2011)*. For the other models used to evaluate and understand technology to support collaborative teams, groups, and organizations, see www.michaelsampson.net/collaborationroadmap.html.

[6] For a more detailed look at declared, deduced, and discerned expertise, see my August 2008 article in Messaging News, *Identifying the Genuine Expert: Three Stages of Expertise Surfacing*, at www.messagingnews.com/story/identifying-genuine-expert-three-stages-expertise-surfacing.

Chapter 13.
Achieving Individual Coherence with IBM Connections

> *Whenever we find orderly, stable systems in Nature, we find they are hierarchically structured, for the simple reason that without such structuring of complex systems into sub-assemblies, there could be no order and stability—except the order of a dead universe filled with a uniformly distributed gas.*[1]
>
> Arthur Koestler

There are many capabilities in IBM Connections to support people in teams, groups, and across organizations working together. While we have examined nine collaboration scenarios in previous chapters, two things stand out. First, there is a lot more that can be done with IBM Connections beyond these nine scenarios; see Chapter 14 for a more expansive view of additional possibilities. Second, we haven't yet spoken about how all these capabilities come together in a coherent way for individuals. We each use Connections as individuals, across multiple situations, projects, learning communities, and teams. How do we, as individuals, make sense of all the richness going on within IBM Connections? This is our focus in Chapter 13.

In this chapter, we will:

- Evaluate the importance of achieving individual coherence.
- Look at the capabilities in IBM Connections that address individual coherence.
- Consider how two individuals are making Connections "work for them."
- Analyze an advanced concept on the importance of knowledge and methodology.

The Theory of Achieving Individual Coherence

As individuals, we collaborate with others across teams, groups, and the organization. As individuals, we bring our own skills and capabilities to bear on shared projects and learning opportunities. In the best collaborations, these both play with and play off the skills and capabilities of others. However, collaborative activity has implications for the individual too, and thus the focus of the Individual Coherence collaboration scenario is to examine those implications when introducing new collaboration technology.

The essential question is to ask how relevant activity in collaborative team and group spaces becomes noticed by the individual that must, should, or could do something in response. The pragmatic separation of collaborative activity into particular sub-spaces gives both teams and groups the ability to focus on their particular project work or learning activity, but it equally isolates that activity from everything else that is happening. Inside the Albreto's Marketing Team community, Edgar and his fellow team members don't see the current status of work in other communities. But outside of their team community, in his capacity as an individual involved in many things at the same time, Edgar needs a way of bringing everything back together. For example, consider the following questions:

- *Notification of Current Discussions*. How does the individual gain an awareness of current discussions they could contribute toward across team and group spaces? For team spaces, which discussions have changed since they last visited the discussion area? Does the individual need to check on each of the discussions, or is there a method for alerting them to recent changes? Ditto for discussions in group spaces.

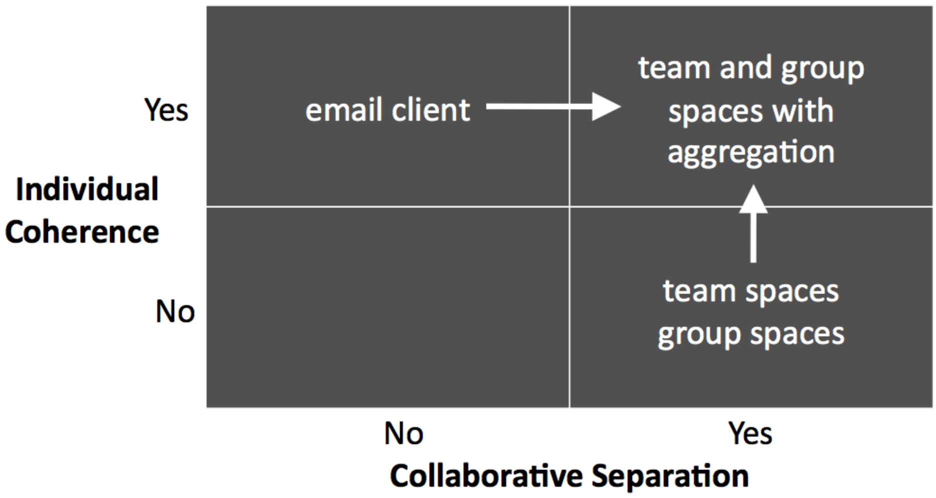
- *Coherence of Meetings*. Do meetings scheduled in team spaces automatically flow into the individual's calendar? Are there any limitations on which calendars are supported, and given the calendaring products used at your organization, is that a problem? Are meetings from team spaces taken into consideration during a free-busy search? For events in group spaces, what happens? Is there any integration between the event opportunity in the group space and the individual's calendar?

- *Coherence of Task Assignments*. When an individual is assigned a task in a team space, is there a way for each individual to get an overall view of their current task assignments? Will the collaboration technology being used for collaborative teams automatically aggregate all task assignments? If tasks are assigned in other systems, how does each individual gain an integrated view of what they're supposed to do?

- *Limitations on Device Access*. Corporate IT departments used to have the ability to mandate that employees would use only particular mobile devices—such as the Research In Motion BlackBerry or a Microsoft Windows Mobile device—but those days are slipping away. Like it or not, individuals are exerting much greater control over the devices they use for business, resulting in an explosion of iPhones, iPads, and Android-based devices. What support does your collaboration technology offer for mobile device access, and what is not provided? Is access by browser or app?

While it struggles with many collaborative challenges, email provides an excellent standard for individual coherence. Everything of relevance to an individual flowed to a single place—the inbox—and only when the individual dealt with the matter signaled in each message did it go away. We risk losing the simplicity of this aspect of email as collaborative activity is shifted into separate team and group spaces. Many collaborative tools re-integrate with email by sending email alerts of new happenings—either as they happen, or in a summarized form at the end of each day or week.

Figure 13-1. Examining Individual Coherence



Current email clients provide individual coherence—email messages, calendar events, and task allocations flow to a single place—but lack the separation of these into team and group aligned spaces. Team and group spaces provide the separation of activities into collaborative spaces, but often lack the aggregation capabilities required for individual coherence.

The alternative to providing individual coherence at a systemic level is to rely on the individual to do it themselves. They have to remember that meetings have been scheduled in different team spaces, and at the appropriate time, open the team space and look up the meeting details. They have to remember they have task assignments in different team spaces, and keep checking the different spaces to see what's new for them. They have to remember how to use the browser on their mobile device to check on relevant discussions. Unfortunately, this demands perfect human behavior by perfect people—and this doesn't happen. Systemic coherence is a must.

How to Achieve Individual Coherence in IBM Connections

Six months after using IBM Connections to help write that first document in advance of the board meeting, Edgar and his marketing team were spending a couple of days at an off-site planning retreat. Team members located elsewhere had flown in for the retreat. Travel had become a whole lot less frequent given the capabilities available to them in IBM Connections, but it was good to get together again. The team spent the first day reviewing their wins and losses during the previous year, and were just getting into the looking ahead tasks on the second day when Sally spoke up.

> *"Something has been bothering me with how we are using IBM Connections," she began. "I think it is essential that we get this cleared up—both for us and for everyone else that's looking to us for guidance."*
>
> *"Is this the issue I spoke to you about yesterday?" Edgar asked.*
>
> *"Yes," said Sally, "and sorry to interrupt the flow we were getting into here, but I think this is important, and is also related in some ways."*
>
> *Edgar nodded his approval for Sally to continue, and she moved to the front of the room to be near the flip chart. She drew a matrix on a clean sheet, and noted down a few key words.*
>
> *"Here's the problem," she said. "We have gotten very good at using Connections to keep each other informed about what's going on. We are using our team community for almost everything we do now, and our public community has been a resounding success. At the team level, I couldn't be happier with how far we've come." She paused and scanned the room. Her colleagues were nodding their heads in agreement. "The problem is making it work for me," she said, pointing emphatically to herself.*
>
> *"I have the same problem," Edgar said.*
>
> *"Me too," chimed Walter and Andrea at almost the same time. Walter added, "I'm struggling with staying up-to-date with what's going on, and balancing that with getting my work done while not getting drawn into the vortex of just responding to the latest change. I want to stay up with the play," he said, "but also make progress on the longer term deep work."*
>
> *"I have some ideas," Sally said, pleased to see that her apparent interruption of the morning's session was a valuable addition to the agenda. "There are some ways that we can make use of IBM Connections to help us as individuals, but this needs to be informed by a good methodology. We're not trying to take what Connections offers and build methodology around that," she said. "We need to be strongly grounded in the principles of productivity and effectiveness, and then evaluate where and how IBM Connections can help us bring those to life."*

Step 1. Get Your Mindset Right

The first step toward achieving individual coherence when using IBM Connections is to get your thinking straight. That is, coherence is first of all a mindset issue, and secondarily a technology issue. This means we need to step back from the tool, question our motives, and plan accordingly.

As a toolset to enable improved collaboration among people (which is a second order benefit in service to a greater goal), the use of IBM Connections should drive first-order benefits such as improved productivity, efficiency, and effectiveness. Getting to these first-order benefits requires that we embrace a methodology for working on the right things at the right time to the right degree. Given the presence of other people in IBM Connections —a prime feature but a factor that adds complexity nonetheless—we need our methodology to take into account both the specific things we want to achieve and those things that other people expect of us. It must also differentiate both types of obligations from other things that signal an opportunity to get engaged but do not create a direct obligation. If our methodology can manage these differences, we have a strong possibility of becoming better together and having a sense of control during the process.

Mapping obligations and opportunities against the source from where they originated gives us a matrix to use when seeking individual coherence. The four quadrants in the matrix provide a way of differentiating the flood of information available in IBM Connections, thereby enabling us to make solid progress towards our first-order goals. The matrix also lists the tools provided in IBM Connections to support us in each area.

Figure 13-2. Productivity Methodology in IBM Connections

Things I Want To Do	**QUADRANT OF INTEREST** Recent Updates in Communities I'm Following To Do List *(Created by Me)*	**QUADRANT OF FOCUS** To Do List *(Assigned to Me)*
Things Other People Want Me To Do	**QUADRANT OF BEING INFORMED** My Notifications	**QUADRANT OF EXPECTATIONS** Action Required @Mentions
	Opportunities	*Obligations*

Differentiating obligations from opportunities, and things chosen personally versus those raised by other people, provides a methodology for working towards individual coherence and working on the right things at the right time to the right degree.

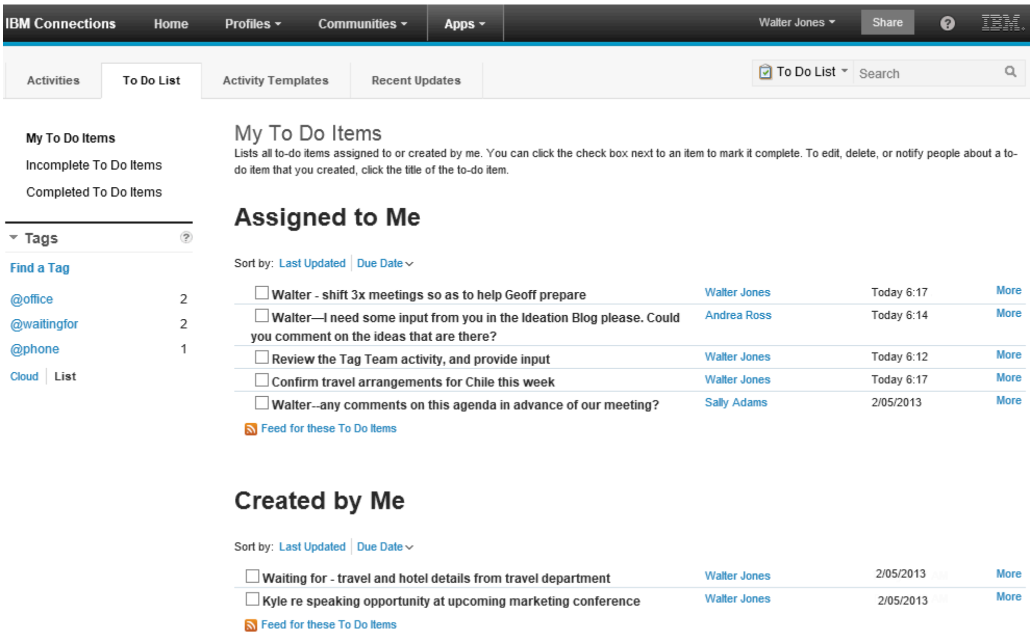
Step 2. Actively Work in Your Quadrant of Focus

Actively manage your work in IBM Connections so you can see a consolidated list of all the tasks that have been assigned to you—either by yourself or by another person. If a task has been assigned by someone else, hopefully you were in the conversation during which the assignment was made, or if the assigner is your manager, take it as part of your job.

Actively manage your work in IBM Connections so you can see a consolidated list of all the tasks that have been assigned to you.

To see all of the tasks that have been assigned to you, click *Apps* along the top-menu bar, and then click *To Do List* in the drop-down menu array. This displays your to-do items, separated into to-do items assigned to you, and those you have created (and either not assigned to anyone, or actively assigned to someone else).

Figure 13-3. Work from Your My To Do Items



Use the My To Do List to keep a close watch on the tasks you have to complete. Tasks that have been assigned to you, either by yourself or another person, show at the top of the list.

In order to make coherence over task assignments work, there are four behaviors you need to put into practice:

- *Make Your Tasks Explicit*. When you see something that needs to be done, create a to-do item for yourself. Write down the tasks you need to complete in IBM Connections as you see them, or during one of your review sessions during the week. Don't leave them as ephemeral thoughts that never get captured.

- *Assign Tasks to Yourself*. If you intend to complete a to-do item yourself, assign it to yourself. If you don't assign it to yourself, it will hover in the *Created by Me* section, and may get lost among the noise. By assigning it to yourself, you signal your intent to make progress on it, which is helpful for your own prioritization of activity, and in letting other people know what they don't have to worry about.

- *Use Tags to Set the Context*. David Allen, creator of the *Getting Things Done* approach and author of the associated book, recommends categorizing your task list according to the context in which you will do them.[2] For example, if there are a set of tasks that you need to do in your home office, set the context as @homeoffice. When you are next in your home office, you can see everything you have to do there rather than having to trawl through everything to see what you should do there. If you adopt David's approach with context-based tasks, use the tag field to set the context. This will give you a clickable context list when looking at your list of to-do items.

By assigning it to yourself, you signal your intent to make progress on the task, which is helpful for your own prioritization of activity, and in letting other people know what they don't have to worry about.

- *Push Back on Inappropriate Assignments*. If someone else creates a direct assignment for you on which you had no input, are unable or unwilling to complete, or just think is inappropriate, push back and renegotiate. Of course it will depend on who the other person is—a direct assignment from your manager may give you less room to negotiate than an assignment from a colleague. Get into the habit of doing it earlier rather than later. If you leave a direct assignment unchallenged for a month, the assigner will take your silence as an implicit acceptance of the task.

At a minimum, you should be reviewing the to-do items assigned to you on a daily basis. As IBM Connections becomes increasingly used in your organization, you may need to checking in more regularly than that.

Step 3. Frequently Review Obligations in Your Quadrant of Expectations

As an enabler of people working together, IBM Connections provides various ways for other people to signal that they are expecting something from you. Perhaps it is an invitation to join a community. They have used IBM Connections to extend a direct offer, and it is only courteous to accept or decline. The Quadrant of Expectations brings together those social signals from other people that create an obligation on you, and there are two specific tools in IBM Connections that display these.

Review Your Action Required List (Daily)

Items that require a response from a specific individual are displayed in aggregate in the *Action Required* list. These items arise from actions taken by other people in many different parts of IBM Connections, but the common theme is that a direct response is expected. To view your Action Required list, click *Home* along the top-menu bar in IBM Connections, and then click *Action Required* in the left-hand navigation list.

Items that require a response from a specific individual are displayed in aggregate in the *Action Required* list.

The following items are displayed on your *Action Required* list (this is an indicative rather than an exhaustive list):

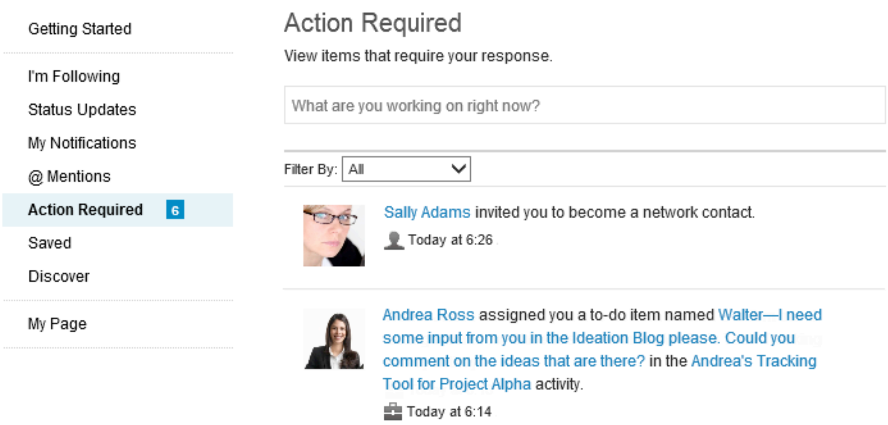
- *To-Do Items from Activities*. Anytime you are assigned a to-do item in an Activity, your assignment will display in the Action Required list. When hovering over the assignment you can choose to save it for later, or to click the double arrows on the right-hand edge to get more information. Once the To-Do item has been completed, the assignment will be removed from your Action Required list.

- *Invitations to Join a Community*. When invited to join a community, your invitation will be displayed in the Action Required list. When hovering over the invitation, you can accept, decline, or save the invitation for later. If you accept or decline, the invitation will be removed from your Action Required list. Saving the invitation keeps it in your Action Required list.

- *Invitations to Join Someone's Network*. When invited to join someone's network, the invitation will show in your Action Required list. Such an invitation results from another individual clicking on *Invite to My Network* on your profile page. Clicking on the invitation opens a pane that displays the specific invitation message, if one was included. You can *Accept* or *Ignore* the invitation from this pane too, both of which remove the invitation from your Action Required list.

The *Action Required* list includes a range of tasks that are expected of you by others. If you are making appropriate use of your To Do Items list to track your direct task assignments, ignore those in the *Action Required* list but make decisions on everything else.

Figure 13-4. Use the Action Required List to Check Invitations and Obligations

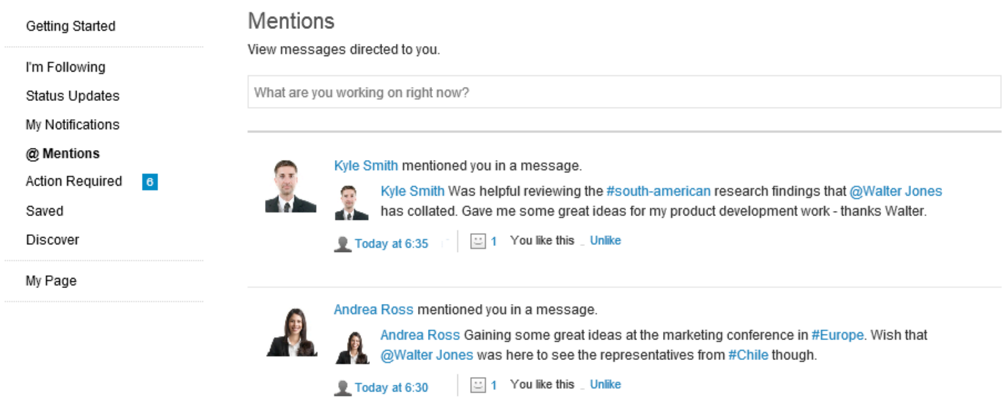


The Action Required list aggregates all of the task assignments, invitations, and other items that require your action or attention across IBM Connections.

Review Your @Mentions List (Daily)

An @Mention is way of calling someone's attention to a conversation in a status update that they should be involved with or could have an interest in. @Mentions work in status updates from an individual and within a community, and in both cases, the person including your name via an @Mention has an expectation of a reply, acknowledgement, or answer. To view the @Mentions for your name, click *Home* along the top-menu bar in IBM Connections, and then click *@Mentions* in the left-hand navigation list. Respond as needed, by clicking the *Like* option, or opening the status update and posting a reply.

Figure 13-5. Use the @Mentions List to Check for Inclusion in Status Updates



Review your @Mentions in IBM Connections via the @Mentions list to see where other people are seeking your input within a conversation. @Mentions only work in status updates.

Step 4. Be Aware of Happenings in Your Quadrant of Interest

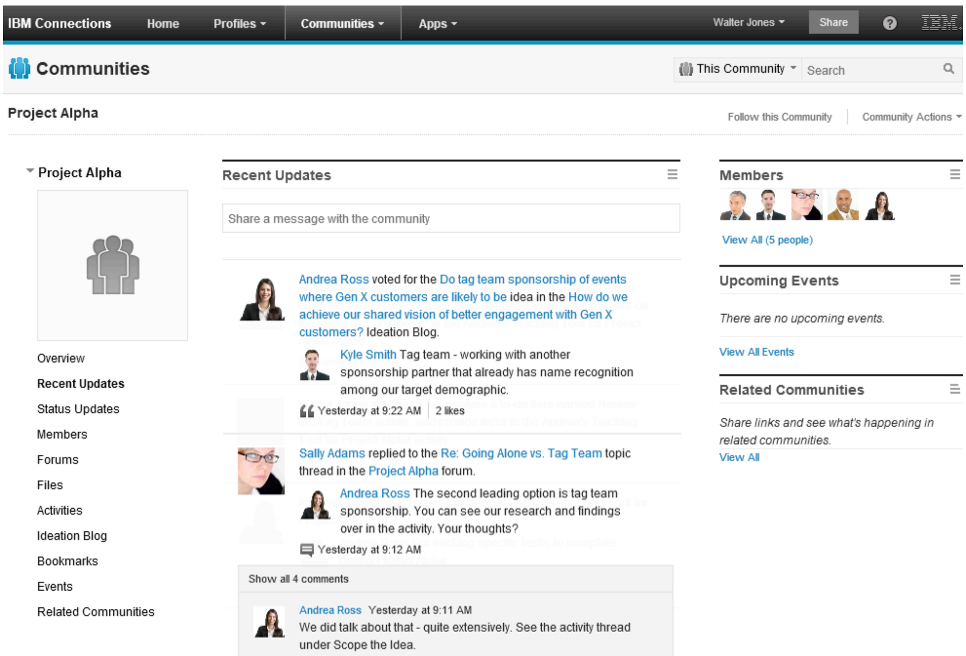
As you start doing business with IBM Connections, there will be various updates in areas of specific interest. There are two tools in IBM Connections to work with in this respect.

Check Recent Updates in High Priority Communities (Daily)

The beauty of separating projects into different communities is that it provides a natural boundary to differentiate between activities that happened within the community and those that don't. The *Recent Updates* view in every community gives a snapshot of everything that has been happening across all tools in the community.

When you are actively working on a project in a community, you will get a natural sense of what is going on through your moment-by-moment participation. If you have been away for a few hours—or a few days—click into the *Recent Updates* view to quickly get up-to-speed with what everyone else has been doing in your absence. Doing so may signal a range of timely opportunities. There may be a discussion thread you want to comment on. You may see a new idea in the ideation blog you want to vote for. You may note that a colleague has updated a file you have been working on. To see the full details for an update, click the embedded link to open the specific item in the community.

Figure 13-6. Regularly Visit the Recent Updates List in Your Communities



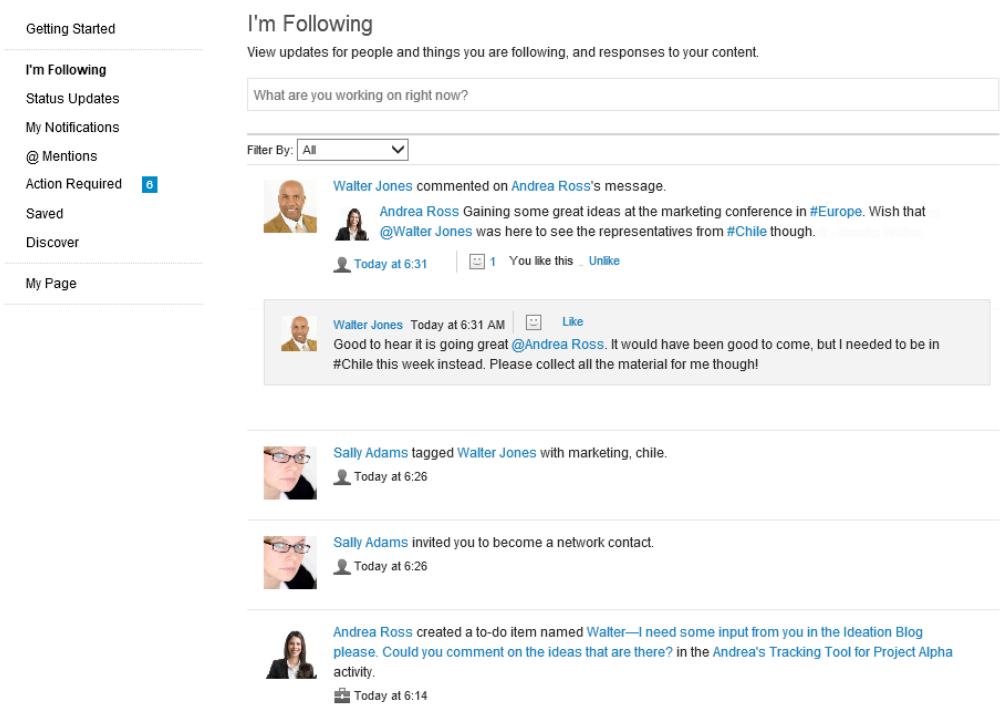
The Recent Updates list shows all of the updates in your community. Some updates will be "good-to-know," while others will signal an opportunity to contribute.

Check Your I'm Following List (Daily)

The "following" capability enables you to opt-in to receive updates on people, communities, blogs, files, and the other tools across IBM Connections. Following indicates that you are interested in what people are doing, what's happening in specific communities, and when new blog posts or versions of a file have been released. All updates for the people and tools you are following are displayed in the *I'm Following* list, which you access by clicking *Home* along the top-menu bar, and then *I'm Following* in the left-hand navigation pane. Updates are displayed in reverse chronological order, so the most recent updates appear at the top of the list.

The concept of "following" allows you to create a targeted list of updates that you are interested in seeing. In other words, you have created a set of obligations for yourself, although they are less intense than specific to-do items or tasks to complete. Review this list once a day, or more frequently if you have followed many happenings. You can stop following specific updates that are no longer relevant to your work, save updates for future reference, and filter the list of updates to focus in on specific tools.

Figure 13-7. Review Your I'm Following List



Review the updates from the people and tools in IBM Connections you have followed. The I'm Following list automatically aggregates all such updates, giving you a single place to review.

Step 5. Give Limited Attention to the Quadrant of Being Informed

Task assignments are demands for action—please do something for me. These demands show in your *Action Required* list. Notifications are different: they are offers of information, or items that raise a possibility. You can act on them if you chose, or ignore them entirely. To see your notifications, click on *Home* along the top-menu bar in IBM Connections, and then click *My Notifications* in the left-hand navigation list.

Notifications are offers of information, or items that raise a possibility. You can act on them if you chose, or ignore them entirely.

The following types of notifications are displayed—although this is not exhaustive:

- *Files That Have Been Shared with You*.
  When a file is shared with you, it will display in your My Notifications list. Sharing a file is treated as an offer of information rather than as a demand for action—hence the notification does not display in your *Action Required* list. Clicking on the notification opens a pane that shows key information about the file. From there you can open the page about the document in Connections, download the file, or leave a comment. You can also save the notification..

- *Tags People Have Given You*. When your profile is tagged by another person, the act of being tagged is displayed as a notification. The notification shows the name of the person who tagged you, and what your profile was tagged with. You have the option of clicking on the other person's name to view their profile. You can also save the notification for future reference.

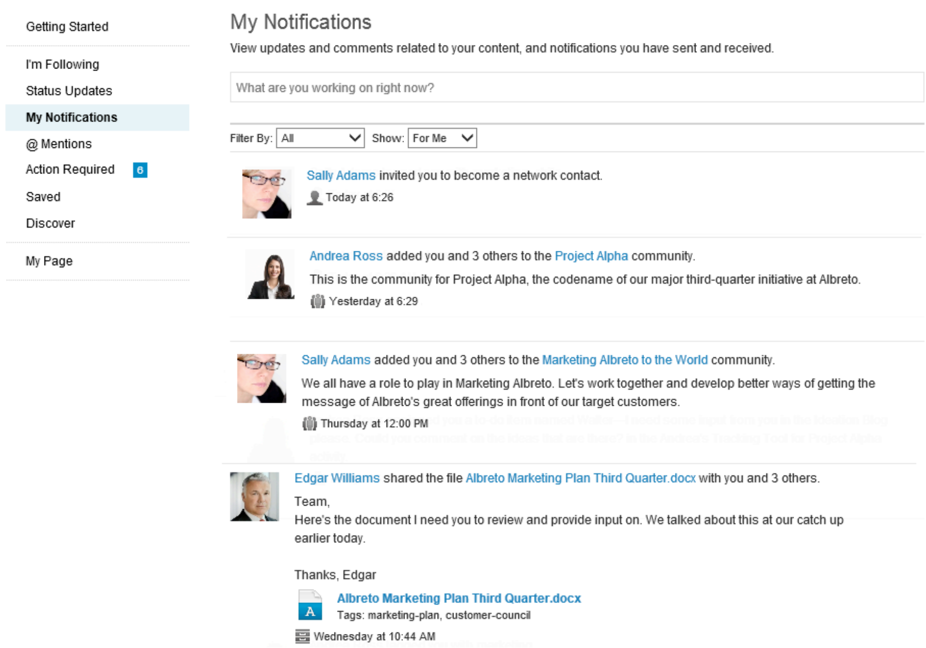
- *People Who Have Followed You*. When another person clicks in your profile to follow you, you are alerted via an entry in your *My Notifications* list. The notification shows the name of the person who followed you, and you have the option of clicking their name to open their profile. You can save the notification.

- *People Who Have Accepted Your Invitation to their Network*. When another person accepts your invitation to join your network in IBM Connections, the alert is displayed in your *My Notifications* list.

- *Broken URLs on Bookmarks*. If one of your bookmarks has a broken URL—meaning that it no longer works—another person can notify you that it is broken. This is treated as a notification about which you may do something about, rather than a task assignment that you have to do something about.

- *Comments on Your Entries and To Do Items in Activities*. When another person comments on one of your entries or to-do items in an activity, the comment is displayed in your *My Notifications* list. An entry belongs to you if you created it. A to-do item belongs to you if you created it or have been assigned responsibility for completing it. Note the distinction on to-do items that have been assigned to you though—the task assignment will display in your *Action Required* list, but any comments made will be displayed in your *My Notifications* list.

Figure 13-8. Check Your Notifications for Ambient Awareness



Your My Notifications list shows actions and activity that have occurred on your content and various items. It is a list of what has happened. Any response is optional and not expected.

The treatment of sharing a file as a notification rather than as a task assignment raises a potential social problem. If the person who initiates sharing of the file expects that the other person will take a particular action on receiving the file, the act of sharing is not displayed in the right place for signaling that expectation. If there is going to be an expectation of response, the best approach is to create an Activity for reviewing the document, add the file from the Files application, and then create direct assignments using To-Do items in the Activity. These will then display in the *Action Required* list, and set the right social expectation.

A couple of final points about using the My Notifications list:

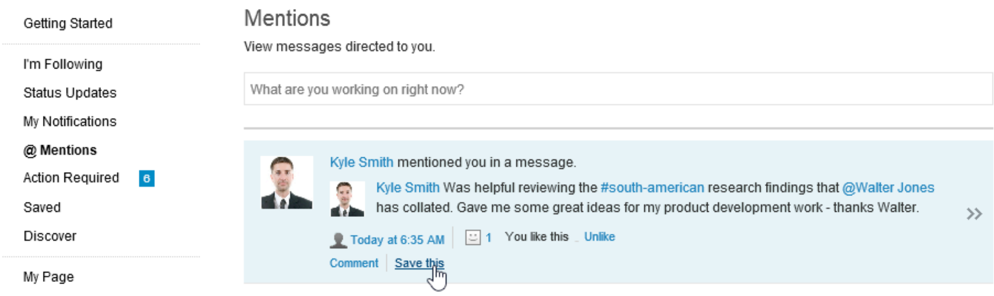
- *Use the Filter By List*. You can focus in on particular items using the Filter By drop-down list. It allows filtering by tools, such as Blogs, Status Updates, and Files.

- *View Notifications You Have Sent*. You can also view the notifications from you to other people. Select *From Me* in the *Show* field next to the Filter By field to do so.

Step 6. Save Items for Future Reference

You can save items from the various lists for future reference. When hovering over any item in your *I'm Following*, *My Notifications*, and *@Mentions* lists, among others, the phrase *Save this* is displayed at the bottom of the item. Click *Save this* to retain a copy.

Figure 13-9. Save Items for Future Reference



Save any items you want to reference later by clicking Save this when hovering over an item in your lists. Access saved items from the Saved list, but get into the habit of deleting items you no longer require.

To view items you have saved, make sure you are at the home page in IBM Connections, and then click on *Saved* in the left-hand navigation list. When looking at your Saved items, you have the following options:

- *Most Recent Items Are Displayed First*. Your saved items are sorted by reverse date order, meaning that the most recently occurring items appear at the top of the list.

- *Filter By Tool to Speed Your Search*. If you want to find a specific item, use the *Filter By* dialog list to filter by type. This will help you find an item quicker, assuming you can remember the item type you are looking for.

- *Delete Items You Don't Need Again*. You can remove items from your saved list by clicking the X at the top right of the item—and actually this is a good habit to get into once you have completed something. For example, if you can't deal with a task assignment immediately, save it to your Saved list. When you have completed it, delete it from your Saved list so you don't see it anymore.

One option you have is to use your Saved list as a way of quickly getting into the communities you are a member of. In other words, it is possible for you to save all of the invitations to communities to your Saved list, and then whenever you need to access one, view the list. It is possible, but it is really not the best way of doing it. A much better way is to rely on IBM Connections to maintain the list of your current communities, and to access them from the *Communities* item in the menu bar. Don't make more work for yourself by duplicating something IBM Connections does by default.

Step 7. Set Your Notification Preferences as a Backup

The final step is to treat email notifications as a backup plan for when life gets too busy, or just to make sure nothing important falls through the cracks. Email notifications are automatically sent by IBM Connections, in line with the options you have selected. To change your preferences, click on your name towards the right-hand end of the top menu bar, and then click *Settings* in the drop down list. This opens the Notifications Preferences page (see below). There are five basic preferences that you can set up:

1. The email address at which you wish to receive notifications. Note that IBM Connections can be configured to prevent changes to this email address.

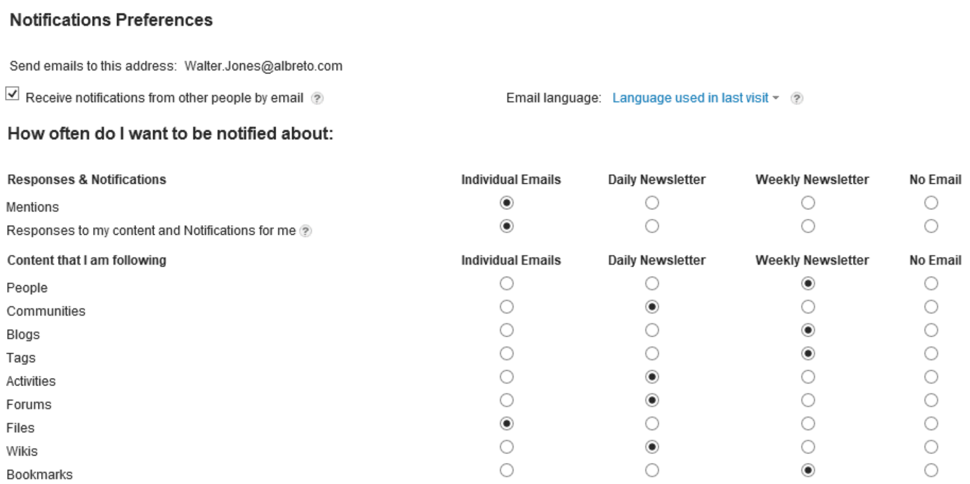
2. Whether or not to receive notifications sent to you by other people. If you don't want to receive such notifications by email, uncheck the box.

3. The language in which you want to receive notifications—either the language you used in your last visit to IBM Connections, or a specific one you select.

4. How frequently you want to receive a notification about responses to your content and notifications directly for you. Options are on each event, a daily or weekly summary, or never.

5. How frequently you want to be notified about content you are following, such as People, Blogs, and Wikis. The options are per event, daily, weekly, or never.

Figure 13-10. Set Up Email Notifications as Backup



Email notifications provide a backup approach to staying up-to-date with important events in IBM Connections. Use the Notifications Preferences page to setup the relevant alerts.

Final Comments on Achieving Individual Coherence

Achieving individual coherence in IBM Connections is a work-in-progress, and we should expect greater capabilities in future versions of Connections toward this end. There is a lot more that IBM should do to help end users achieve coherence. While this is true in the context of IBM Connections, it is doubly true when end users must coordinate their work across multiple tools—for example, IBM Connections, IBM Notes, and IBM Sametime.

Daily Schedule for Achieving Individual Coherence

This chapter highlighted the role of various tools in IBM Connections to help with achieving individual coherence. The schedule below translates the recommendations given on the frequency of checking each tool into an example of what that might look like for someone who works from 8am to 5pm. The bulk of their day is filled with focused work and meetings, which are driven from the to-do list and the individual's calendar. Checking in with other tools are intermingled through various times during the day.

Figure 13-11. Daily Schedule for Achieving Individual Coherence

Time	Task to Focus On	Tools to Use in IBM Connections
0800	Quick scan of recent changes	My To Do Items List, Calendar Action Required, @Mentions
0900	Focused work, including meetings	My To Do Items List, Calendar Community Updates
1000	Focused work, including meetings	My To Do Items List, Calendar
1100	Focused work, including meetings	My To Do Items List, Calendar
1200	Lunch	Action Required, @Mentions
1300	Focused work, including meetings	My To Do Items List, Calendar Community Updates
1400	Focused work, including meetings	My To Do Items List, Calendar
1500	Focused work, including meetings	My To Do Items List, Calendar
1600	End of day debrief	I'm Following My Notifications
1630	Planning for tomorrow	My To Do Items List, Calendar

Follow a productive schedule for getting work done, regularly checking in throughout the day to check on obligations and opportunities.

What About Meetings and Events?

The capabilities provided in IBM Connections to help users run an effective calendar are insufficient in the area of individual coherence. You are best to rely on your existing calendaring and scheduling tools in IBM Notes or Microsoft Outlook. Here are the reasons why:

The capabilities provided in IBM Connections to help users run an effective calendar are insufficient in the area of individual coherence.

- *No Global Calendaring Feed*. Events is the only tool in IBM Connections that has an associated date/time construct. Each individual must add the Events calendar feed to their personal calendar, but this must be done for each community. If you are involved in ten communities, you have to do it ten times. There is no global calendaring feed for all events a person is committed to attending across IBM Connections.

- *No Free-Busy Capabilities*. Events added to an individual's calendar in IBM Notes or Microsoft Outlook have no impact on free-busy searches. In other words, events scheduled in IBM Connections are ignored by the free-busy search algorithm, which means the ability of the firm to find good meeting times will be broken as IBM Connections is used more and more.

Schedule meetings for project teams using Notes or Outlook; don't use the Events capability in IBM Connections. For learning communities where an event is an opportunity to get involved, not an obligation to attend, the Events tool could work. It will require each person attending the event to remember to add the event to their personal calendar, and for each to remember the proviso about free-busy searching excluding event data.

Slow Down Your Moves

One piece of final advice. When you are learning any new skill—ballroom dancing, sword fighting, or touch-typing (although hopefully not all at the same time)—teachers will slow down the moves. Put your foot here. Thrust to the arm. Touch the P key with your little finger. As you increase in skill and competence, small moves are combined into bigger sets. Do the third movement. Build to the finale. Type the sentence. It's the same in IBM Connections. There is likely to be a lot happening, and it may feel overwhelming. If that is happening to you, slow down the moves. Work on your Action Required list, and check I'm Following once a day. If that's too much, sign up for individual email notifications on everything, and then deal with each notification one-by-one. Seen that. Delete. Read that. Delete. Didn't know that. Delete. As you beginning to get a sense of the rhythm and flow of using IBM Connections, you comfort level with it will increase. Pull back to daily newsletters by email, or try again with the tools in the table below. The most important thing to stress is this: make the time to figure it out. Don't be afraid of small steps.

Case Studies

The case studies in the previous chapters have given an insight into how teams, groups, or an organization are making use of IBM Connections. In this final chapter we use a different focal point, in that we look at how two individuals are making effective use of IBM Connections and achieving coherence in doing so.

How I Make Use of IBM Connections for My Work (by Luis Suarez, IBM)

The first time I used social software tools 2001 I knew they were different.[3] I knew there would be something special about social networking, and that it would change the way we share knowledge, collaborate, and innovate together. That it would make knowledge workers more open, public, transparent, and trustworthy; in short, more human. As the years went by, I saw these ideas becoming integrated into new ways of working.

Becoming a social business is not an easy transition. It takes some getting used to: the social mindset has a new set of behaviours and habits to model in order to become more open and collaborative. And that takes time—for all of us (me included). But thanks to IBM Connections I have moved about 98% of my daily interactions into open social spaces where I collaborate and share my knowledge to helping others achieve their goals.

I rely heavily on IBM Connections to get my work done. I listen actively to what's happening around me through Status Updates, Forums, Bookmarks, and Files. Over time I have built 40-50 scenarios that I previously did through traditional collaboration tools, such as email or instant messaging, and now rely on IBM Connections. Essentially, that's what adoption or adaptation of social software is all about. Study yourself first, how you work, what your outcomes and deliverables are, and develop a list of use cases for your work. Then move them one-by-one into IBM Connections.

Today, I carry out the vast majority of my action items in the open through Connections. I answer most of the questions I receive through Status Updates. Over time I have openly shared a large amount of my knowledge through files, forum posts, communities, bookmarks, and activities. I know these help other people accelerate their decision making processes, or just be better informed. The mindset change is to "narrate your work" or "work out loud," sharing what you know to help everyone become more self-sufficient. This has helped me become more autonomous and have the freedom to own my workload. More importantly, it has given me more time and energy to invest in the more complex problems.

Through empathy, caring, and resilience each and everyone of us has the opportunity to redefine how we work using social software tools to eventually become more effective in finding the right information and the right experts, while getting our work done. The main benefits are openness, clarity, lower friction, empowerment, reduced time, less attrition, and above all, a sense of owning your work by taking more responsibility and ownership than ever before. In other words, higher employee engagement.

Sasja Beerendonk, e-office (Netherlands)

e-office is an IT consulting company in the Netherlands, with specializations across Microsoft SharePoint, Office 365, IBM Connections, and mobile, among others, and a strong focus on user adoption. Within the firm, IBM Connections is becoming the main way of communicating and collaborating. Sasja Beerendonk, a trainer and consultant at e-office, is one of its most prolific users.[4] Sasja says that through the use of IBM Connections at e-office, she has greater control over her work, is more up-to-date with what's going on, and is better connected with her colleagues.

Through the use of IBM Connections at e-office, Sasja has greater control over her work, is more up-to-date with what's going on, and is better connected with her colleagues.

Sasja makes IBM Connections work for her—as an individual—using the following strategies:

- *Join Relevant Communities*. Do your actual work inside of communities. With all of the discussions, documents, activities, and other information in the community, it is automatically coherent. Updates are not fragmented across multiple channels. Check the community for the current state. If you are involved in multiple communities, check the next one.

- *Switch Off Email Notifications*. If you are actively using IBM Connections throughout the day, email notifications about changes are unnecessary. You will already know what's going on. Don't sign up for an additional set of notifications to tell you things you already know.

- *Trust the Action List*. If someone has a specific task for you, trust your action list. To-Do items assigned to you across all activities will automatically be displayed in the list. Sasja overlays tasks from Connections in her Notes Calendar to keep her to-do items in the context of her calendar and various meetings.

- *Follow Tags and Review Regularly*. Follow specific tags to keep an eye on everything happening in that area, especially when it is not addressed in a specific community. Check the updates for these tags regularly, which for Sasja is about twice a week.

- *Make Use of I'm Following*. The I'm Following view gives a consolidated list of all changes across everything you have intentionally followed. Check in and skim through the view, giving it a quick read. If there is something you need more detail on, dive deeper. You can also filter the I'm Following view to just show updates from blogs, or status updates, or communities. Filtering the list and narrowing the scope of updates gives another way of quickly reviewing what's going on.

Advanced Concepts

Eric Mack, the Founder and CEO of ICA.COM, Inc., in the United States, has a great way of explaining the capacity for creating value. [5] Let's look at Eric's value equation, V=KMT

The Value Equation (by Eric Mack)

The value equation offers a simple approach of assessing three inputs to value:

Value = Knowledge x Methodology x Technology

Each of the inputs in the equation are multipliers—which means that, for better or for worse, each will have a significant impact on the total value created.

When we consider the value equation in the context of IBM Connections, we see that it takes more than great technology alone to create extraordinary value. When an organization has a particular business outcome in mind, such as increasing productivity or reducing time-to-market, Connections can have a role to play, but there are two other inputs:

- *Knowledge*. What is known about a domain or subject area, along with the ability to use that knowledge for specific purposes. Knowledge can be shared directly between people who work alongside one another, or it can be captured to transmit to people who do not work in the same place. Exchanges of knowledge include experience, process awareness, and knowing what's important.

- *Methodology*. A body of practices, procedures, or workflow that describe how to get something done. With the right methodology, some people can achieve with a legal pad what others can't achieve with the latest technological tools.

The combination of these three variables determines the level of value achieved, but the weighting of the variables are not equivalent. Knowledge and methodology make a much stronger contribution to value than technology—combined, perhaps as much as 80% of the value equation. Thus technology may contribute up to a maximum of 20%.

Consider an organization with IBM Connections available to them. We will rank that as having a high level of technology available, and give it a 90% rating (out of 20 possible points). Let's look at the value equation for a group holding a discussion under four scenarios where we change the inputs:

1. *Low Knowledge and Methodology*. The wrong people are involved, and they have no shared approach to resolving conflict.

2. *Medium Knowledge and Methodology*. Some of the right people are involved, but others obfuscate the issue. There is no process for aligning different perspectives.

3. *High Knowledge and Methodology*. The known experts are given more scope for sharing their expertise, and the group has a structured approach for incorporating feedback from others.

4. *High Knowledge and Methodology, Medium Technology*. IBM Connections is not available. A high performing group has to fall back to email for the discussion.

Quantifying the inputs in these scenarios highlights the impact on total value.

Figure 13-12. Achieving Value When V=KMT

Scenario	**Knowledge** (40 points)	**Methodology** (40 points)	**Technology** (20 points)	**Value** (V=KMT)
1	Low (10%)	Low (10%)	High (90%)	288
2	Medium (50%)	Medium (50%)	High (90%)	7,200
3	High (90%)	High (90%)	High (90%)	23,328
4	High (90%)	High (90%)	Medium (50%)	12,960

Differing levels of knowledge and methodology have a more substantial impact on value than adjusting the available technology.

What's immediately evident is that even with a less effective tool in Scenario 4 (email), the highly effective group (high knowledge and high methodology) are more likely to create greater value than a group with medium levels of knowledge and methodology, but with access to high technology (Scenario 2).

How can we use the value equation in our work with IBM Connections? Here's three ideas:

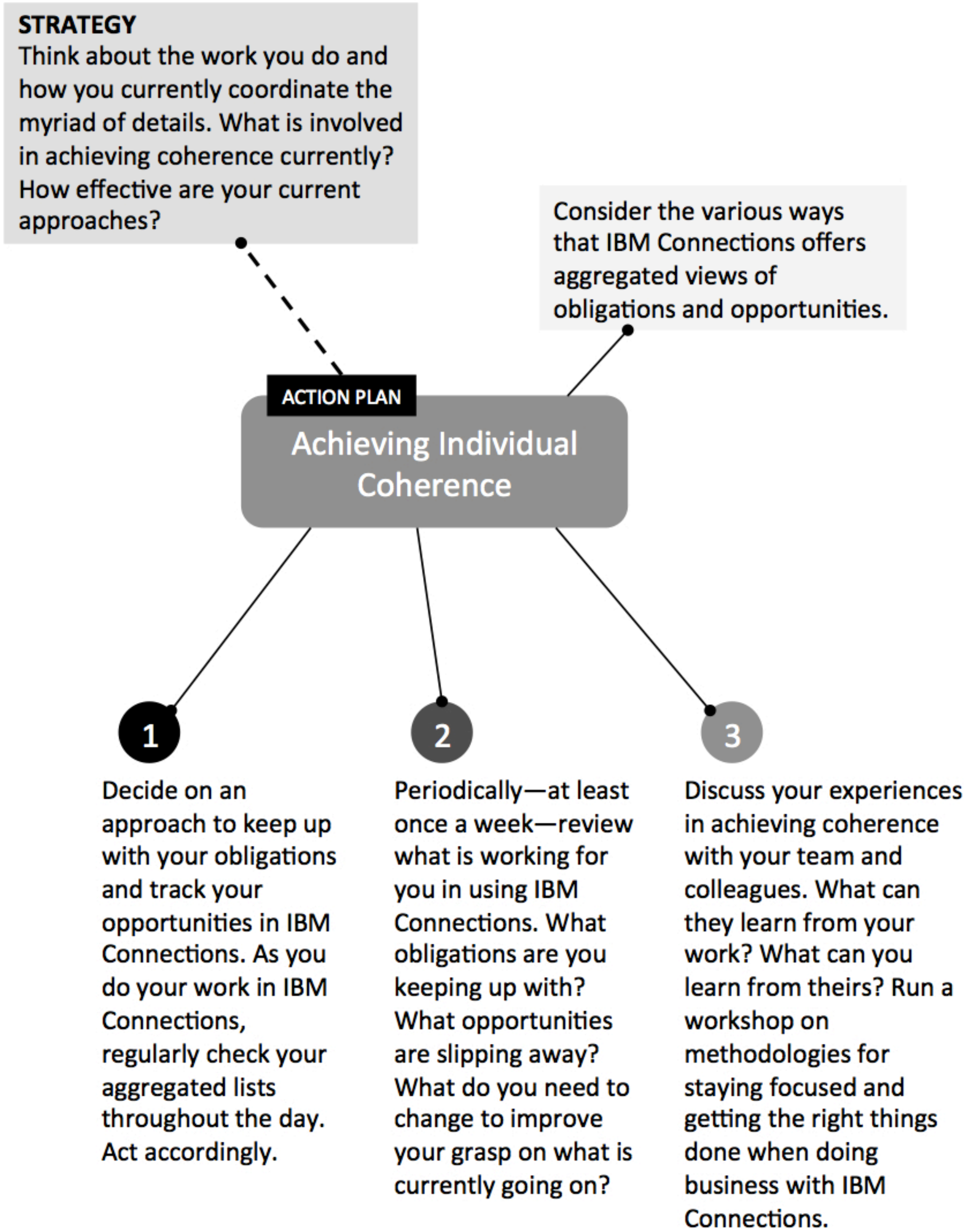
- *Knowledge Counts*. Locate the right people for the current task, connect them, and get them involved. Their knowledge may mean the difference between success and failure.

- *Methodology Matters*. How you make decisions, run projects, and share learning matters. Discover and invest in excellent practices for knowledge sharing, and keep improving them.

- *Technology Transforms*. Having good technology is worthwhile, but not in isolation. High technology can't make up for lack of knowledge or poor work methodology.

In summary, having access to IBM Connections is good. Knowing how to use it effectively to share what you know is vastly better.

Action Plan


STRATEGY
Think about the work you do and how you currently coordinate the myriad of details. What is involved in achieving coherence currently? How effective are your current approaches?
Consider the various ways that IBM Connections offers aggregated views of obligations and opportunities.
ACTION PLAN
Achieving Individual Coherence
1
Decide on an approach to keep up with your obligations and track your opportunities in IBM Connections. As you do your work in IBM Connections, regularly check your aggregated lists throughout the day. Act accordingly.
2
Periodically—at least once a week—review what is working for you in using IBM Connections. What obligations are you keeping up with? What opportunities are slipping away? What do you need to change to improve your grasp on what is currently going on?
3
Discuss your experiences in achieving coherence with your team and colleagues. What can they learn from your work? What can you learn from theirs? Run a workshop on methodologies for staying focused and getting the right things done when doing business with IBM Connections.

Summary

The tools in IBM Connections provide many opportunities for teams and groups to work together more effectively, something we have explored in the nine preceding collaboration scenarios. We have adjusted the focus in this chapter, looking instead at IBM Connections through the lens of the individual. Various tools in IBM Connections provide approaches for individuals to know what is going on, stay informed about important happenings, and plan their contributions effectively within IBM Connections.

> Various tools in IBM Connections provide approaches for individuals to know what is going on, stay informed about important happenings, and plan their contributions effectively.

In the penultimate chapter we step up from the ten core collaboration scenarios we have explored in this book, and quickly highlight a range of other scenarios that could be enhanced through IBM Connections. It's a proverbial "million and one" list of the possibilities.

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[1] Arthur Koestler (1905-1983) was an author and journalist. Living during the tumultuous war years contributed to his political writings. Born in Budapest, he lived much of his adult life in Great Britain.

[2] For an introduction to David Allen's approach, see the book *Getting Things Done: The Art of Stress-Free Productivity* (2002). I was introduced to David's work in the late 1990s, and as a young professional at the time, have often said that his work "saved my life." It gave me a way of navigating the increased complexity I was facing in building my first business, and while that business is long since gone, David's approaches have been a mainstay in my own productivity methodology ever since. See www.amazon.com/Getting-Things-Done-Stress-Free-Productivity/dp/0142000280/.

[3] Luis Suarez is the Lead Social Business Enabler for w3 and www IBM Connections within IBM's CIO Organization. This means that he leads the overall effort to transform the way IBM employees work using social software as the core part of their work. Follow Luis on Twitter at @elsua, and read his blog at elsua.net.

[4] Sasja is a regular speaker at events on being effective with IBM Connections. Follow Sasja on Twitter at @sbeerendonk, and read her blog at thoughtsoncollaboration.com.

[5] Eric Mack is a consultant in productivity and high performance knowledge work. Through his company, ICA.COM, Inc., works with leading companies around the world. See www.ica.com.

Chapter 14.
A Million and One

> *The moment one definitely commits oneself, then providence moves too. All sorts of things occur to help one that would never otherwise occurred. A whole stream of events issues from the decision, raising in one's favor all manner of unforeseen incidents and meetings and material assistance which no man could have dreamed would have come his way. Whatever you can do or dream you can, begin it. Boldness has genius, power and magic in it. Begin it now.*[1]
>
> *Attributed to Goethe*

When life gets stressful in my house, I claim to have "a million and one" things to get done. It is never "a thousand and one." It is always the magic million. But I'm not stressed here—honest. Instead, as this book draws to its close, it is with a sense of wonderment that I present a proverbial rather than a literal million and one things you can do with IBM Connections. What we have talked through in the ten core collaboration scenarios is but ten ways of thinking about the use of IBM Connections. It is good to start with a few ways, and it is good to end with the possibilities. I don't want you to leave this book with the sense that all you can do with Connections is the ten scenarios I outlined. There is much more that is possible, and it is your journey to apply the concepts in this book to the situations that make most sense in your organization.

In this chapter, we will:

- Examine the major parts of most organizations, and the types of common scenarios each handles on a regular basis.

- Aim to fire your imagination with a tremendous range of possibilities for doing business with IBM Connections.

Take a deep breath, and let's get going. There's a million and one ...

Product Development

There are many scenarios in product development teams that can be enhanced with IBM Connections. Here's 12:

1. Publishing the guidelines for writing a business case for a new product, and including sample documents and template spreadsheets for making the case to the executive board.
—*Tools in IBM Connections*: Files, Communities

2. Coordinating the review cycle for the chapters of a new user manual, giving technical reviewers and content editors access to the actual chapters in line with the overall project plan. Chapters for the manual don't have to be shipped around by email; they are all contained in a single place.
—*Tools in IBM Connections*: Activities, Communities

3. Working through the steps involved in releasing a new version of a product to market, coordinating updates and tasks between people in different groups.
—*Tools in IBM Connections*: Activities

4. Sharing news and views on current market events that impact on your product roadmap, and debating how to respond effectively.
—*Tools in IBM Connections*: Forums, Blogs, Bookmarks

5. Capturing all of the documentation for a clinical trial, including authorization forms, patient profiles, and research findings. All of the relevant information is stored in a secure location.
—*Tools in IBM Connections*: Communities, Libraries

6. Collecting links to the various internal and external case studies about how your customers are making use of your products and services.
—*Tools in IBM Connections*: Bookmarks

7. Creating a knowledge-base on a particular product, including links to key historical documents, and the various project communities in Connections that have been used for building the product over time.
—*Tools in IBM Connections*: Wikis

8. Linking to the top news stories of the day, and posting an analysis of the impact of the news on a given product or department. Product managers can share their thoughts too, and brainstorm together how to respond to changing market conditions.
—*Tools in IBM Connections*: Blogs

9. Asking staff to submit ideas for new features to be added to a product, as well as features that could be removed to eliminate unnecessary complexity. Product managers can review the ideas, ask questions, and ask their colleagues to help prioritize the development agenda for the upcoming release.
   —*Tools in IBM Connections*: Ideation Blogs

10. Developing a database of competitors, profiling their current products and services, and including a list of bullet points outlining competitive differentiation.
    —*Tools in IBM Connections*: Wikis

> Develop a database of competitors, profiling their current products and services, and including a list of bullet points outlining competitive differentiation.

11. Coordinating a response to an unexpected new product release from a major competitor. People from different business units can provide input and ideas, and once a good list of options have been developed, can vote on how best to respond.
    —*Tools in IBM Connections*: Ideation Blog

12. Creating a collection of links to analyst reports on a particular market segment.
    —*Tools in IBM Connections*: Bookmarks

What are the common scenarios in your product development teams? How could these be improved by using IBM Connections?

Research Department

There are many scenarios in a research department that can be enhanced with IBM Connections. Here's two:

1. Writing a research journal, with observations from recent experiments. The journal can be used to jog your own memory, and to create opportunities for collaborating with peers in your research lab. Photos of setting up an experiment can be included to coach up-and-coming scientists
   —*Tools in IBM Connections*: Files, Wikis, Media Library, Blogs

2. Creating a collection of articles, presentations, and white papers about a current area of research interest. Researchers in the area can collaborate on integrating current knowledge, and then push the boundaries to new horizons.
   —*Tools in IBM Connections*:

What are the common scenarios at your research department? How could these be improved by using IBM Connections?

Marketing Team

There are many scenarios in a marketing team that can be enhanced with IBM Connections. Here's eight:

1. Planning a breakfast seminar at your office, including the list of invitees, the catering requirements, the slide deck to use, and contact details for the speakers. Everyone involved can contribute, getting away from hidden sub-plans. Once the seminar is completed, the team can prepare and post a review to guide the planning for future events.
—*Tools in IBM Connections*: Activities, Communities

2. Discussing how to expand into a new market, and the tailoring of the organization's message and product portfolio that will be needed to succeed. People with experience in the current markets can explore ideas with those responsible for the new market.
—*Tools in IBM Connections*: Forums, Communities

3. Making your upcoming user conference happen with excellence. Subcommunities are used for specific aspects of the conference, such as one for deciding on the venue, another one for planning the agenda, and a third for managing travel for the external speakers.
—*Tools in IBM Connections*: Communities

4. Releasing a new product to market simultaneously in multiple regions around the world. The project team work openly on current tasks, create the required marketing collateral, and keep each other up-to-date with the release schedules.
—*Tools in IBM Connections*: Communities

5. Enabling marketing staff to engage in an extended conversation about the relevance of social media. Thought leaders from outside the organization can offer seminars and workshops, or join the community for a moderated chat. As ideas are developed and explored, they are all held in a common place, thus creating a rich treasure trove of insights.
—*Tools in IBM Connections*: Communities, Forums

6. Sharing success stories from new marketing campaigns in cities around the world. Photos can be included to provide a visual context. Video interviews can be posted to give people an almost first-hand insight into the campaign.
—*Tools in IBM Connections*: Blogs, Media Library

7. Gathering ideas for the entertainment to be given at an upcoming conference. High-ranked ideas can be promoted to activities, so that further cost and logistical information can be gathered.
—*Tools in IBM Connections*: Ideation Blogs

8. Posting photos of the new company stores being opened around the world, along with a photo tour of the inside for everyone to see and learn from.
—*Tools in IBM Connections*: Media Library

What are the common scenarios for your marketing team? How could these be improved by using IBM Connections?

Sales Team

There are many scenarios in a sales team that can be enhanced with IBM Connections. Here's five:

1. Creating a collection of sales collateral for use by mobile sales staff. Updated files are always saved here, so all staff have immediate access to the latest versions from their mobile devices while out-and-about with prospects.
—*Tools in IBM Connections*: Files

2. Collating a set of proposals that have been used to successfully win new business, to guide the creation of new proposals, and to improve the run rate on new work.
—*Tools in IBM Connections*: Files

3. Documenting recent meetings, noting future agenda topics, capturing agreed action points, and centralizing updates related to a specific customer account. The Account Manager can see everything that is going on, and track progress on agreed tasks.
—*Tools in IBM Connections*: Activities

Document recent meetings, noting future agenda topics, capturing agreed action points, and centralizing updates related to a specific customer account.

4. Sharing ideas on being more effective when selling to customers, and for providing links to teaching and coaching material. Sales executives on-the-go can seek feedback from their colleagues on a difficult question from a prospect.
—*Tools in IBM Connections*: Communities, Forums

5. Enabling traveling sales executives to provide updates, coaching, and encouragement to their staff. On-the-go sales personnel can stay in contact with their colleagues, pushing each other toward excellence.
—*Tools in IBM Connections*: Blogs

What are the common scenarios for your sales team? How could these be improved by using IBM Connections?

Internal and External Communications

There are many scenarios in internal and external communications that can be enhanced with IBM Connections. Here's seven:

1. Drafting a press release, getting input from colleagues, sign-off from the senior VP, and then shooting it off to the website team for publication.
   —*Tools in IBM Connections*: Files

2. Curating the best presentations given at the recent company conference, and giving access to the ideas in those presentations for future reference to the staff that attended the event. Those unable to attend the conference can browse the presentations.
   —*Tools in IBM Connections*: Files

Curate the best presentations given at the recent company conference, and give access to the ideas in those presentations for future reference to the staff who attended the event.

3. Debating the use of external social media services, and how the organization can manage its commitments in line with giving employees a voice.
   —*Tools in IBM Connections*: Forums

4. Documenting emergency procedures, contact details, and external resources in the case of an earthquake, fire, or flood.
   —*Tools in IBM Connections*: Wikis

5. Noting the catering details for particular office locations, along with selections available for employees and visitors with special diets.
   —*Tools in IBM Connections*: Wikis

6. Holding a naming contest for the new intranet. Employees can submit their ideas, comment on other ideas, and vote for the names that hold the most potential.
   —*Tools in IBM Connections*: Ideation Blog

7. Providing an interactive channel for executives to talk about current initiatives, and engage in discussion with employees. The new channel could be just for one executive, or shared among many.
   —*Tools in IBM Connections*: Blogs

What are the common scenarios for internal and external communications? How could these be improved by using IBM Connections?

Human Resources

There are many scenarios in human resources that can be enhanced with IBM Connections. Here's eight:

1. Discussing strategies for succeeding when managing remote employees. New managers who have to manage remote employees for the first time can discuss strategies for success with those who have been doing so for a long time.
—*Tools in IBM Connections*: Forums

2. Writing and publishing your organization's travel policy for employees, and collecting input from employees for the next edition of the policy.
—*Tools in IBM Connections*: Files, Wikis

3. Developing an approach to a pay raise for a key individual who has just received an excellent offer from a competitor. Increased pay options can be worked out in the document, and once it is ready it ready for approval, it can be routed to the individual's manager, the human resources manager, and the legal team.
—*Tools in IBM Connections*: Libraries

4. Creating a set of onboarding tasks for a new employee to complete, so they can more quickly get up-to-speed with how your organization work. Any questions can be asked and answered in the context of the activity.
—*Tools in IBM Connections*: Activities

5. Planning for the upcoming staff Christmas party. Different discussion topics can be used for planning the menu, entertainment, and logistics.
—*Tools in IBM Connections*: Forums

6. Talking through the issues about how a new policy affects employees, and gaining perspectives from different employees in the organization.
—*Tools in IBM Connections*: Forums, Blogs

7. Initiating new employees into the organization, by giving them a place to share their experience of joining the firm and to meet other new employees on the same journey. Long-term employees can reach out to welcome the new employees, and suggest people to connect with based on common work interests.
—*Tools in IBM Connections*: Communities

8. Maintaining a list of commonly used acronyms in your organization. New employees will thank you for reducing the difficulties of learning your language.
—*Tools in IBM Connections*: Wikis

What are the common scenarios for human resources? How could these be improved by using IBM Connections?

Executive Team

There are many scenarios in an executive team that can be enhanced with IBM Connections. Here's six:

1. Assembling the presentations and briefing papers for the next Board of Directors Meeting. The materials are available on tablets, so that it does not have to be printed and distributed.
   —*Tools in IBM Connections*: Files

2. Planning an international trip for an executive, with copies of flight confirmations and hotel reservations saved in the appropriate place. The information can be shared with the executive, and any modifications made during the trip can be seamlessly amended.
   —*Tools in IBM Connections*: Activities

Planning an international trip for an executive, with copies of flight confirmations and hotel reservations saved in the appropriate place.

3. Enabling executives to engage with staff about the new re-organization, for answering questions, clarifying issues, and adding transparency to the process.
   —*Tools in IBM Connections*: Forums, Blogs

4. Coordinating the weekly meetings for the Senior Executives Team, with all discussion papers posted for reading on an iPad. Discussion papers are stored securely, and new executives can be added to the secure space as required.
   —*Tools in IBM Connections*: Communities

5. Providing a place for senior executives to share their vision for the organization, and to discuss the priorities for the upcoming quarter. Executives can share their thinking through the written word, or a recorded video briefing.
   —*Tools in IBM Connections*: Blogs

6. Assessing the quality of hotels and restaurants for executives and senior managers traveling on business. Ideas can be tagged with the location (e.g., *London*) and the type of amenity (e.g., *restaurant*). Executive assistants can request feedback from executives on what they did and did not like while traveling, and translate that feedback into votes for preferred options.
   —*Tools in IBM Connections*: Ideation Blog

What are the common scenarios for your executive team? How could these be improved by using IBM Connections?

Managers

There are many scenarios managers face each day that can be enhanced with IBM Connections. Here's nine:

1. Preparing the job description for a new position, gaining input from the human resources team and other relevant people inside your organization.
   —*Tools in IBM Connections*: Files, Libraries

2. Sharing a recent presentation you gave at an industry event, inviting comments from your peers for the next version, and coaching other people on how to tell the company's story in the best way possible.
   —*Tools in IBM Connections*: Files

3. Analyzing an upcoming decision by gathering evidence for a range of possible options. Each option is examined separately, and updates to the options are summarized for all to see. When it is time to make the decision, the people involved have the information and discussions immediately accessible.
   —*Tools in IBM Connections*: Activities, Forums, Communities

4. Requesting internal approvals for a presentation at an upcoming conference, and tracking which departments have and have not yet approved the presentation.
   —*Tools in IBM Connections*: Activities

5. Developing a list of possible ways to cut expenses, in the face of wider budget cuts. Employees can suggest ideas based on their experience in the organization, and everyone has the ability to contribute their perspective.
   —*Tools in IBM Connections*: Ideation Blogs

6. Providing a space for exploratory discussions on a topic that is going to be vital to the future of the organization. People with an interest in the topic can form a group and share what they already know collectively, to analyze what is not known, and to think together about the best path forward. As people build greater clarity on what's needed, a strategy can be developed.
   —*Tools in IBM Connections*: Communities

7. Giving open praise to an employee for a job well done. Thank them for their efforts in front of their peers and colleagues.
   —*Tools in IBM Connections*: Status Updates, Blogs

8. Briefing your team on the key projects for the upcoming week, and noting when various people will be out of the office due to business travel. Any changes during the week can be posted as comments.
   —*Tools in IBM Connections*: Blogs

9. Ranking the candidates for a new job role, in a team that follows an open hiring process where potential candidates work among the team for a day or two so that both parties can assess the potential fit. Team members can share their perspective on particular candidates using comments, and then the team can vote.
   —*Tools in IBM Connections*: Ideation Blogs

What are the common scenarios for managers across your organization? How could these be improved by using IBM Connections?

All Employees

There are many scenarios employees have to deal with regularly in their work that can be enhanced with IBM Connections. Here's nine:

1. Providing peer-to-peer coaching on the use of new technology at work, such as great apps for the latest iPad, whether to buy the new Android phone, and which laptops are best suited to frequent travel.
   —*Tools in IBM Connections*: Forums

2. Asking if anyone else is experiencing problems with the same product, based on customer feedback in stores. If a common problem is identified, steps to mitigating the issue can be discussed and actioned.
   —*Tools in IBM Connections*: Forums

3. Querying if anyone has experience with a specific new product, and asking for input on the decision you have to make. Quickly find internal experts, and link to their published resources.
   —*Tools in IBM Connections*: Status Updates

4. Surfacing an isolated complaint from a customer in one store to see if anyone else is hearing the same feedback. If a pattern is identified, the decision can be made to withdraw the offending product from market.
   —*Tools in IBM Connections*: Communities

5. Sharing notes and observations from an industry trade show. Blog posts can summarize the key presentations, and tidbits of information gleaned from discussions at the vendor booths can be posted too. Marketing collateral from other vendors can be made accessible too—by linking to where it is stored.
   —*Tools in IBM Connections*: Files, Blogs

6. Advising your followers of a conference you will be attending in a couple of weeks, and seeing if anyone else is planning to attend. For those who live near the target region, it raises the possibility of getting together.
   —*Tools in IBM Connections*: Status Updates, Blogs

7. Evaluating the options for a possible career move, and noting the pros and cons of each. The individual can vote for a particular option, and then revisit the ideas the next day to see if his or her preference has changed. If it has changed, the current votes can be removed and then re-allocated across the options.
   —*Tools in IBM Connections*: Ideation Blogs

8. Linking to an article you just read on the Web, and noting a couple of salient learning points you took away. Encourage other people to read the article too, thereby getting more eyes on the topic.
   —*Tools in IBM Connections*: Status Update

9. Watching video tutorials on a newly updated product. All videos are presented by the respective product managers, so the message is the same and doesn't get diluted as it moves through the organization.
   —*Tools in IBM Connections*: Media Library, Blogs

What are the common scenarios for your employees? How could these be improved by using IBM Connections?

Legal Team

There are many scenarios in a legal team that can be enhanced with IBM Connections. Here's four:

1. Storing a copy of the contracts your organization holds with customers, ensuring they are within easy reach of everyone who needs access.
   —*Tools in IBM Connections*: Libraries

2. Writing a contract for a new customer, incorporating the standard clauses for your organization, as well as the specific contractual demands and conditions from the customer.
   —*Tools in IBM Connections*: Files, IBM Docs

3. Working with external counsel to understand a specialized area of the law and its bearing on your organization. Enabling a new way of interacting, holding discussions, and keeping track of the current status of the initiative.
   —*Tools in IBM Connections*: Communities, Forums, Activities

4. Discussing the implications of an impending change to the law on the legal structure of your organization, and working out if the current structure will be satisfactory or will need to be revised.
   —*Tools in IBM Connections*: Forums

What are the common scenarios for your legal team? How could these be improved by using IBM Connections?

Finance Department

There are many scenarios in a finance department that can be enhanced with IBM Connections. Here's three:

1. Working on the next annual report for your organization, pulling in content, ideas, and sign-off from participating managers and executives. People are given access to the community and its information as needed, and confidential information is never floating around freely in email.
   —*Tools in IBM Connections*: Communities, Files, Forums

2. Seeking sign-off for content that needs to be approved before being included in the annual report. Content can be routed to the appropriate individuals for approval, and it is secured in the library until it is ready for wider dissemination.
   —*Tools in IBM Connections*: Libraries

3. Comparing experiences with a new supplier for various projects across the country, and examining the supplier's performance in supporting remote offices as well as the head office.
   —*Tools in IBM Connections*: Communities

What are the common scenarios for your finance team? How could these be improved by using IBM Connections?

IT Department

There are many scenarios in an IT department that can be enhanced with IBM Connections. Here's two:

1. Bringing together the IT developers who are writing code using the same language but are separated across multiple projects. The community provides a way for developers to trade tips, request help, and share success stories.
   —*Tools in IBM Connections*: Communities, Forums

2. Listing approved applications to install on company-provided laptops, and links to approved apps on the Apple, Google, or Microsoft app stores for their respective tablets and smartphones. Employees don't have to waste their time asking what is and isn't approved.
   —*Tools in IBM Connections*: Wikis

What are the common scenarios for your IT department? How could these be improved by using IBM Connections?

Facilities Management

There are many scenarios in the facilities management group that can be enhanced with IBM Connections. Here's three:

1. Making the decision about which new office location to lease in a particular city, with photo and video tours of the respective buildings, and a place for debating the pros and cons of each location. When it is time to make the final decision, employees are invited to vote for their preferred location.
   —*Tools in IBM Connections*: Communities, Forum, Media Library, Ideation Blog

2. Advising of an upcoming fire alarm test in a certain building, so that employees in the building know what is going on, and so that employees in other cities don't freak out when they can't reach anyone at their desks.
   —*Tools in IBM Connections*: Status Updates, Blogs

3. Alerting staff in an office building about upcoming facilities management work, such as floor renovations and lift closures.
   —*Tools in IBM Connections*: Blogs

What are the common scenarios for your facilities management people? How could these be improved by using IBM Connections?

Travel Department

There are many scenarios in a travel department that can be enhanced with IBM Connections. Here's two:

1. Building an understanding of great hotels and restaurants in various cities, to support employees, managers, and executives when they travel.
   —*Tools in IBM Connections*: Wikis

2. Writing a list of places to see in various cities for when staff are traveling on business but have the weekend available for personal pursuits. Ask colleagues to share their experiences in particular locations after returning from a business trip.
   —*Tools in IBM Connections*: Wikis

What are the common scenarios for your travel department? How could these be improved by using IBM Connections?

Summary

Phew. There is a lot you can do with IBM Connections, as we have explored in this chapter, and my head is spinning with the extensive range of possibilities. The great thing is that for all of the ideas in this chapter you will be able to find an example of someone who has already done it at their organization. Find the story, read the case study, make contact and ask them questions, but most of all be bold and give it a go.

There is a lot you can do with IBM Connections, and my head is spinning with the extensive range of possibilities.

In our final chapter we review the journey we have walked together through this book, and preview the next stages of your journey in doing business with IBM Connections.

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[1] This quote is attributed to Johann Wolfgang von Goethe, a German writer, artist, and politician who lived from 1749 to 1832. See en.wikipedia.org/wiki/Johann_Wolfgang_von_Goethe. For the quote, see www.goodreads.com/author/show/285217.Johann_Wolfgang_von_Goethe

Chapter 15.
Final Comments and Next Steps

> *One doesn't discover new lands without consenting to lose sight of the shore for a very long time.*[1]
>
> André Gide

We are almost done.

In this book we have taken a sweeping journey through the possibilities of using IBM Connections to improve the way work gets done in our businesses, government agencies, and organizations. In doing so we have looked at ten core scenarios that make up many of the collaborative activities people do on a day-to-day basis. In light of André's quote above, in order to achieve the benefits outlined in this book we will all need a willingness to give up on some of the approaches to getting work done that have become ingrained behavior. In this final chapter, let's review where we have come from, and consider where to from here.

In this chapter, we will:

- Review the journey we have taken in this book around exploring the potential for using IBM Connections in our work.
- Ask and answer the question "How do you take the learning in this book and make it work at your organization?"
- Learn about workshops and consulting services on collaboration strategy and user adoption for organizations wanting to do business with IBM Connections.
- Be invited to discuss your approach to doing business with IBM Connections.

Review of Doing Business with IBM Connections

The vision that drove the writing of this book was to be able to put a helpful guide into the hands of business people charged with making great use of IBM Connections. With an increasing number of organizations making the decision to deploy IBM Connections, the real test of its value is in the difference it makes to the people who use it. This book was all about exploring what that value might look like, and laying the foundation for great use.

We have explored a lot of areas in this book. Let's review the high points:

- Newly at Version 4.5, IBM Connections has been in the market since its initial release in June 2007. Its roots go back to in-house research on creating collaboration futures at the IBM Watson Research Center, as well as an internally-developed system at IBM to help make IBM work. IBM Connections is achieving great results in the market, with end-user organizations purchasing Connections in line with various strategic drivers. Industry analyst firms give IBM high marks for the Connections offering. This discussion was the focus of Chapter 1.

- The world of business and organizational life is changing, with ongoing high demands for innovation, connectedness, and knowledge. One flow-on implication of this constellation of changes is the need to re-think how people in organizations share information and collaborate, and IBM Connections offers such a "new way."

- To explore the possibilities available for re-thinking work using IBM Connections, the Collaboration Scenarios approach was used in this book. The approach starts with a list of ways that people collaborate today—such as working on documents, managing meetings, and capturing ideas for innovation. Against the backdrop of that list, we looked at how to use IBM Connections to innovate beyond current practices. The intent with collaboration scenarios is to explore what's possible, and to take from those possibilities the ones that are relevant to a specific organization. The intent is not to say that you have to do everything. Setting this scene was the focus of Chapter 2.

With the background and context established, we took the list of ten collaboration scenarios and examined each one in a separate chapter. For each scenario, we explored the underlying theory, how to innovate the scenario using IBM Connections, how other organizations are using IBM Connections today, and a set of advanced concepts that impact on the efficacy of the scenario.

The ten scenarios were:

- *Co-authoring documents, in Chapter 3*. Documents state a position or make an offer, among other purposes, and are often worked on by multiple people. We looked at how to use the Files capability to enhance document co-authoring.

- *Managing meetings, in Chapter 4*. People regularly meet to share information, discuss ideas, and make decisions. We looked at how to use the Activities capability in IBM Connections to enhance meetings.

- *Holding discussions, in Chapter 5*. Discussions and conversations provide a structured way of exploring what's known in a team or group. We looked at how to use the Forums capability in Connections for holding online discussions.

- *Distributing team and organizational updates, in Chapter 7*. Keeping other parts of the organization informed about what's going on can stimulate opportunities for collaboration. We look at using Blogs and Status Updates to this end.

- *Capturing ideas for innovation, in Chapter 8*. Capturing the ideas of your employees (and customers) can be a powerful way of making innovation a way of life. We examined how an Ideation Blog can enhance this process.

- *Running a project, in Chapter 9*. Project teams are a common form of collaboration in organizations, but many projects are run through email and other less-than-optimal approaches. A community space for a project team offers a better way.

- *Sharing learning and best practice, in Chapter 10*. Learning happens in organizations, but it's often isolated from other people who would benefit from the learning. We looked at creating learning communities in IBM Connections.

- *Making decisions, in Chapter 11*. Decisions often require input from many people, and can set the stage for organizational success for years to come. We looked at how to use a Community space for making a decision, along with an Ideation Blog.

- *Finding expertise, in Chapter 12*. Knowing who to ask about a particular topic is important as organizations become more diverse, distributed, and complex. IBM Connections offers a variety of ways for finding expertise.

- *Achieving individual coherence, in Chapter 13*. Although IBM Connections supports collaboration between people, there's a great need for people as individuals to have tools that work for them. We looked at how IBM Connections supports this.

Chapter 6 dealt with the importance of getting people to fill out their profile in IBM Connections, and provided a roadmap for achieving this.

There is a lot more that can be done using IBM Connections than the ten scenarios above, and this was the focus of Chapter 14. It laid out a proverbial million and one ways you can use IBM Connections for doing business. However, it is essential to remember that while this book has captured, cataloged, and conveyed a lot of things you could do with Connections, the lists in this book aren't intended to limit what you do. They are given to spark your imagination about what's possible in light of what's needed at your organization.

What Do You Do Now? An Action Plan

You have almost worked through this entire book—congratulations! Success will come, however, from applying its principles in your work and across your firm, not by reaching page 400. Therefore the question is what do you do now? How do you make best use of the learning available in these pages? Here are four steps to get you going:

1. *What Capabilities are Offered in IBM Connections?* You need to understand the capabilities offered by IBM Connections. We have dealt with Connections 4.5 in this book, so definitely review Chapter 1. However, you need to work with your IT department to understand which version of Connections you have available at your firm, whether any capabilities have been deactivated, and if any third-party products have been added. The technology of IBM Connections creates an opportunity to re-imagine common collaboration scenarios; thus a grounding in the technology that is actually available to you is essential.

2. *What are the Common Collaboration Scenarios at Your Firm?* After working through the ten common collaboration scenarios presented in this book, you should have an immediate sense of which scenarios are commonly done in your area, or more widely across your firm. The scenarios in this book are descriptive, not prescriptive, so while it is possible that all ten scenarios will apply, it is very likely that some will not. Use Figure 15-1 to grade the applicability of each scenario to your area or firm—as Low, Medium, or High—and note down some of the target groups for which these scenarios would make most sense.

> What specific work scenarios are commonly done at your firm?

3. *What Other Scenarios are Commonly Done at Your Firm?* The ten core scenarios presented in this book are commonly done across organizations, but not exclusively so. What specific work scenarios are commonly done in your area? How are they carried out today? What are the problems or issues faced by staff in using the current approaches? Building on your understanding of IBM Connections, how could these be improved or enhanced through a new approach? If you are unsure of other common work scenarios, start discussing with the various teams and groups in your firm about the work they do.

4. *Engage with Your Identified Target Groups (for IT Departments)*. Start a dialogue with the target groups you identified above about the scenarios you think have high relevance for their work. Seek to understand what is and isn't currently working for them, and provide opportunities for them to learn about how the scenarios of high value can be re-imagined in IBM Connections. As their awareness of the possibilities increase, test the concepts with selected groups, assess the improvements, make any modifications required, and introduce it more widely.

Figure 15-1. Rank Your Common Collaboration Scenarios

Collaboration Scenario	Low Value	Medium Value	High Value	Target Groups for High Value Scenarios
Document Co-Authoring				
Managing Meetings				
Holding Discussions				
Distributing Team and Organizational Updates				
Capturing Ideas for Innovation				
Running a Project				
Sharing Learning and Best Practice				
Making Decisions				
Finding Expertise				
Achieving Individual Coherence				
Other Scenario 1				
Other Scenario 2				
Other Scenario 3				

Rank the value of each of the ten core collaboration scenarios for your area, and more widely across your firm. Identify target groups that would get high value from each. Also rank any other work scenarios that are commonly done at your firm.

Host a Workshop on Collaboration with Michael

As a Collaboration Strategist, I run in-house workshops with organizations on making collaboration work. These workshops are designed to help organizations gain a rapid boost towards being effective with collaboration and collaborative approaches. Three of the workshops I offer are Doing Business with IBM Connections, Collaboration Roadmap for IBM Connections, and User Adoption Strategies for IBM Connections.

Doing Business with IBM Connections

The Doing Business with IBM Connections workshop provides a forum for bringing together interested parties from across your organization to explore the real-world applicability of IBM Connections. The collaboration scenarios in this book are explained, explored, and analyzed during the workshop, and time is allocated for thinking together about how to best use IBM Connections for doing business at your organization. The workshop is therefore a mixture of "here's what's possible with IBM Connections," and "what makes best sense for our organization in light of our needs?"

The Doing Business with IBM Connections workshop provides a forum for bringing together interested parties from across your organization to explore the real-world applicability of Connections.

The workshop is presented over two days, giving ample time for exploring each of the ten collaboration scenarios, and for developing a draft strategy for doing business with IBM Connections at your organization. The general schedule for the workshop is as follows:

- The workshop opens with introductions, followed by a presentation to set the scene on collaboration.

- Each of the ten collaboration scenarios are explored, with live demonstrations to bring each of the scenarios to life. Attendees do more than just hear the ideas; they also get to see each of the scenarios being worked out before their eyes. Exploring the ten scenarios, and dealing with the issue of filling out your profile, takes most of day one, along with the first half of day two.

- The second half of day two is devoted to thinking together about how to most effectively use IBM Connections for doing business at your organization. This is a facilitated conversation, and the intent is to quickly develop an initial sense of where to go for your organization in its use of IBM Connections.

See michaelsampson.net/doingbusinesswithconnections-workshop.html for further details, along with a list of the required equipment to make the workshop run effectively.

Collaboration Roadmap for IBM Connections

The Collaboration Roadmap for IBM Connections workshop focuses on what's involved in making collaboration work at your organization. The workshop is about the business and human factors essential for success, rather than a deep dive into the technical features of IBM Connections. Core topics in the workshop are:

- The role of technology, and the need for a greater focus beyond the technology.
- Developing a vision for collaboration at your organization.
- Establishing an appropriate governance structure and decision process, and the need for effective business engagement and user adoption strategies.

The workshop is based on two of my books: *Collaboration Roadmap: You've Got the Technology—Now What? (2011)*, and *Doing Business with IBM Connections (2013)*. See michaelsampson.net/collaborationroadmap-workshop.html for further details.

User Adoption Strategies for IBM Connections

The User Adoption Strategies for IBM Connections workshop focuses on exploring a range of possible strategies for encouraging adoption of new approaches to getting work done in the context of IBM Connections. The workshop is rich with possibilities, grounded in real-world experience, and aims to help you rapidly create an effective user adoption approach for your organization. Core topics in the workshop are:

- The importance of focusing on user adoption, and a conceptual model to guide your work.
- A range of strategies that can be used for user adoption, along with an analysis of which strategies are effective based on survey data and case study material.
- How to develop a user adoption approach at your organization.

The workshop is rich with possibilities, grounded in real-world experience, and aims to help you rapidly create an effective user adoption approach for your organization.

The workshop is based on two of my books: *User Adoption Strategies (2nd Edition): Shifting Second Wave People to New Collaboration Technology (2012)*, and *Doing Business with IBM Connections (2013)*. See michaelsampson.net/useradoption-workshop.html for further details.

Engage Michael for Consulting on Collaboration

As a Collaboration Strategist, I advise end user organizations on making collaboration work. This means I bring expertise and facilitation skills to bear on specific collaboration challenges for clients. The common elements of these are an external viewpoint, the development of capability among internal staff, and review or development of the collaboration strategy. I also work across collaboration technologies, harking back to my comment in the introductory pages of this book about being non-vendor aligned.

Here's the type of consulting projects I have worked on during recent years:

- Development of scenarios for new ways of working based on the availability of a range of new collaboration offerings from IBM—including Connections, Sametime, FileNet P8, and Lotus Notes/Domino—as input into the collaboration strategy for a multi-office professional services firm.

- External review of the intranet at a central government department in New Zealand, with recommendations on improvement. The project also involved writing position papers assessing the applicability of various knowledge management and collaboration strategies for the department.

- External input into the collaboration and SharePoint strategy for a law firm, both through position papers and by "holding court" at their premises. For the latter, we meet for a day once a year to discuss and explore their current challenges and issues. I offered my perspective as an interested but removed outsider.

- Strategic audit of the intranet and collaboration strategy at a high-tech organization, and their use of Jive to support different forms of collaboration.

- Facilitation of capability development in the area of user adoption strategies for new collaboration tools and approaches at a risk management firm in Europe, along with drafting the initial strategy.

- External input into the collaboration strategy and decision approach for a new collaboration technology platform for a global professional services firm.

How can I help you achieve success with collaboration?

If one of your projects would benefit from my direct involvement, let's schedule a discussion. It's always a delight to work directly with people around the world, and see them make significant improvements as a result of joint work.

For a longer list of recent consulting projects, see michaelsampson.net/clients.html. To discuss how you can engage me to assist with your collaboration projects, please contact me via michaelsampson.net/contact.html.

Summary

In my travels around the world, one of the final comments I often leave with people at a user adoption workshop or conference presentation is this:

> *IBM has invested over 10 years in getting IBM Connections ready for you and your organization. IBM has done its part (and is continuing to do its part in developing great technology), but it is over to you to make Connections a success in your organization. You owe it to your organization to spend an appropriate amount of time focusing on how to make it succeed.*

My great hope is that this book—as well as my other books on strategies for making collaboration work—will help you in your journey to success. If there's a way I can add value to your work, please contact me at michaelsampson.net/contact.html.

Go and do great work!

[1] André Gide, a French author, won the Nobel Prize in literature in 1947. He lived from 1869 to 1951. Many thanks to Jim Hays (about.me/jimhays) for posting this quote on Facebook during 2012. It migrated quickly to my whiteboard, and has stayed there during the writing of this book.

Appendix 1.
Detailed Table of Contents

I provided a graphical Table of Contents on page 8—a one-page snapshot of the book to come. Now that you have read the book, here's a full Table of Contents for reference. Use it to find quickly a particular section you want to read again.

Appendix 2.
Table of Figures

About the Author

Michael Sampson is a Collaboration Strategist. He advises end-user organizations around the world on strategies for making collaboration work. He is the President of The Michael Sampson Company in New Zealand.

Beyond consulting engagements with clients and in-house workshops, Michael shares his research on strategies for making collaboration work through multiple avenues:

- Michael's blog on current happenings in the collaboration world, covering collaboration thinking, philosophy, approaches, and technology. See currents.michaelsampson.net.

- Resource centers on aspects of making collaboration work—including collaboration strategy, governance, user adoption, and the human practices of collaboration. See michaelsampson.net/resourcecenters.html.

- Books on strategies for making collaboration work, with a focus on culture, governance, and adoption. Current titles are *Seamless Teamwork* (2008), *SharePoint Roadmap for Collaboration* (2009), *Collaboration Roadmap* (2011), and *User Adoption Strategies 2nd Edition* (2012). *Doing Business with IBM Connections* is Michael's sixth book. See michaelsampson.net/books.html.

- Presentations at conferences around the world, both in-person and remotely. Michael has presented at conferences in the United States, the United Kingdom, Netherlands, Belgium, Denmark, Australia, and New Zealand, among others.

Michael holds an MCom with first class honors in telecommunications-based IT from the University of Canterbury in New Zealand.

To stay fit, Michael enjoys cycling, running, and swimming.

Michael lives in New Zealand with his wife Katrina, and their ten children—David, Matthew, Philip, Daniel, Timothy, Susanna, Jonathan, Elizabeth, Joseph, and Joshua. Michael and Katrina home school their children.