

## Making Corporate Virtual Collaboration Work

Virtual collaboration, by its broadest definition, has been utilized since the days of email, fax, phone, and even “snail mail.” With advancement in technology, the term has evolved. Virtual collaboration is now more narrowly defined as using technologies to enable two or more people to work effectively on shared activities or goals without the benefit of face-to-face interaction. Acquis broadens this definition to allow for strategic face-to-face interaction *in conjunction with* virtual collaboration.

A confluence of factors over the past decade has placed a spotlight on virtual collaboration:

- **Technologies are more diverse, more functional, and less expensive.** The advent of new technologies supported by better communications infrastructures (i.e., the ability to transfer more data) has created more options for organizations.
- **Focus on travel avoidance.** Corporations are becoming increasingly focused on reducing travel for their workforce. The primary reason is cost, but considerations such as efficiency and traveler safety are also paramount for many organizations.
- **Employee quality of life.** More organizations are focused on their employees’ quality of life. This has become a competitive advantage for some companies and a necessity in certain industries. As employee loyalty to employers has decreased (even during a sub-par economy), employees have demanded more flexible schedules to improve their quality of life.
- **Infrastructure cost reduction.** One of the most significant indirect costs for corporations, particularly in urban areas, is office workspace and the maintenance of that workspace. As a result, companies have been shrinking offices, asking employees to share workspaces, seating senior staff in cubicles, or employing a “hoteling” system where employees select a desk each day based on availability. The most significant way to reduce this cost is to encourage people to stay out of the office as a default state.
- **Global needs.** Organizations are increasing their global interactions, and virtual collaboration is often the only practical choice for global collaboration. Time zone differences are causing more people to work increased or staggered hours, again increasing the need for workplace flexibility.

Over the past decade, most large organizations have experimented with a variety of virtual collaboration tools, i.e., instant messaging, web-conferencing, and teleconferencing technologies. In most cases, this experimentation has been used to compensate for individuals being apart, rather than providing tools to strategically replace face-to-face meetings.

However, this mindset is changing. If they haven’t already done so, most organizations will develop a virtual collaboration strategy during the next three years that will redefine how employees interact with their peers. The range of solutions, cost considerations, and

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Virtual collaboration simply means two or more people working together without face-to-face interaction.

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security concerns necessitate organizations develop a well thought-out strategy for employees.

## Challenges

The complexities of a holistic virtual collaboration strategy are similar to other multifaceted enterprise-wide efforts involving organizational, process, and technology issues. Strategies need to be developed, business cases approved, requirements gathered, issues resolved, technologies selected, customized, and implemented, support plans developed, communications considered, training delivered, and success measurements evaluated. In addition to the baseline challenges, there are unique challenges that further complicate the effort:

- **Rapidly changing technologies.** Technologies always change rapidly, but the speed of change has increased exponentially. Unlike other technologies with long-term staying power (i.e., financial systems, such as Oracle or SAP or HR systems, such as PeopleSoft), technologies in the virtual collaboration area are constantly evolving. Enhancements or changes to traditional software solutions are relatively easy to implement (in theory), but the variety of virtual collaboration technologies, providers, solutions, and generational differences, make it difficult to create a long-term strategy.
- **Infrastructure impact.** A significant aspect of implementing a virtual collaboration strategy may involve real estate. Unlike traditional system implementations, which only required building computer centers and server rooms, a virtual collaboration strategy is likely to require dedicated conference rooms in multiple locations, and reconfigured office space to allow for new collaboration approaches. This investment is significant and cannot be easily altered if it needs to be expanded or reworked.
- **HR/organizational issues.** Although one goal of virtual collaboration is to improve employees' quality of life, it may not always be the best option for every employee. Some employees enjoy traveling. Others prefer face-to-face interactions. Some employees will not want to, or will not be able to work from home. In addition to work-style preferences, there are other critical change management factors that need to be considered, from perceived inequities, to concerns about performance evaluations from afar, to cultural impacts to the organization. Deciding if virtual collaboration is an option or a mandate will be one of many significant decisions.
- **Investment.** Depending on the approach an organization chooses, moving forward with a virtual collaboration strategy can be a significant investment of time and money. In addition to the infrastructure impact, the cost for the systems themselves, potential telecommunications equipment, additional bandwidth to support the technologies, and tools that employees may need when working remotely are all significant and may take years to yield a return on investment, even if the technologies are used as planned.

## Approach

The strategic planning behind a virtual collaboration effort will provide the best indicator of success or failure. While this is true in most technology-related projects, the complexity and pace of change places increased importance on this phase of development. With so much heavy lifting related to investment, infrastructure, and employee impacts, the initial strategy must be well planned to ensure success. For those familiar with a standard systems development life cycle (SDLC) approach, all of these steps, skills, and disciplines will be required, but the actual development/programming will probably not be a significant part of this effort.

The final consideration likely to determine actual and perceived success is the strategy and execution of change management and communications. This will be uniquely challenging due to the number of people impacted and the range of uncharted issues. Further, as the “chain is as strong as its weakest link,” all participants must buy in and utilize the technologies correctly or else the benefit of the solution will not be fully realized.

The remainder of this paper will detail the steps organizations must take to successfully implement a virtual collaboration strategy. The focus of each step will vary based on an organization’s culture, existing technologies, budget, size, collaboration needs, timeframe, and philosophies, and each step must be considered on its own and as part of the holistic approach. While these are generally in order as to when they will first impact the effort, many of these steps overlap or must be iteratively considered.

### Step 1: Strategic Vision

In simple terms, a vision is a model for the future state. This term is often applied to an organization as a whole, but a strategic vision is necessary for virtual collaboration as well. Whether the organization is given a mandate to reduce travel, provide remote working solutions, deploy more virtual meetings, or determine an entire virtual collaboration (or mobility) approach, it is imperative that all stakeholders are on the same page as to what the effort will and will not accomplish. Piecemeal efforts, such as deploying limited technologies and reserving conference rooms for telepresence meetings, do not qualify as a vision. Allowing your organization to have a culture of collaborative meetings resulting in reduced face-to-face meetings and related costs of 40%, for example, does meet those standards.

While strategic visioning should be performed up front, Acquis recognizes that this may need to be an iterative process. This vision is likely to be reevaluated as further research is performed, surveys are conducted, costs are assessed, and impacts are determined.

**Unique Consideration:** *Unlike common projects throughout an organization, such as an ERP (financial system) implementation, a virtual collaboration strategy means very different things to different people. Procurement may view this as a technology sourcing effort. Corporate Travel may view it as a travel avoidance effort. HR may view it as an employee benefit effort. IT may view it as a technical infrastructure project. Users may think of it as a social networking strategy. They all may be right, but the vision of what the end result will be needs to be clearly communicated and agreed upon so that expectations are set appropriately.*

## Step 2: Information Gathering

It is important for an organization to “know itself” and be able to answer questions such as: What HR policies are currently in place? What technologies are currently used? How are they paid for? What are management’s priorities? What is important to our employees? Are there conference rooms available to support this effort?

The answers to these questions are likely to involve interviews with relevant departments (i.e., HR/legal, IT, procurement, etc.) as well as employee surveys. For employees, it is not only important to ensure they are willing and able to utilize the solutions provided, it is also important they realize the significance of their feedback and how it helps shape the project, which in turn will increase their likelihood to adopt the solutions.

A parallel stream of information gathering will surround the various solutions and technologies that exist in the marketplace. The more the options and trajectory of the technology are understood, the more likely an appropriate mix of technologies will be selected for the organization.

*Unique Consideration: Virtual collaboration has many components, and therefore one is unlikely to find an expert in all of them. IT may be very familiar with messaging technologies. Consultants may be very familiar with content management and sharing solutions. Solutions providers will be very familiar with their own products and services. However, it is important to collect all of the information in an organized, consistent, and digestible manner, so it can be reviewed, shared, and considered after the information gathering effort is complete.*

## Step 3: Strategic Planning

Once a vision is developed and initial data has been gathered, it is time to determine how to best execute that vision. What steps will be needed to execute the strategy? What groups and people in the organization need to be involved? What is the timing? Will there be a pilot group? What are measurements of success? What are the cost considerations?

Varied approaches will work to determine and document your plan, but Acquis recommends a high level virtual collaboration plan and/or an initial (high level) project plan. A high level virtual collaboration plan is similar to the executive summary of a business plan. It is a way to document the mission/vision of the effort and detail the core functional requirements, cost approach, communication strategy, project approach, etc. What is needed to effectively summarize this information will vary between organizations, but it is crucial to document this information for roadmap, approval, and communication purposes.

A high level project plan, while on the more tactical side of strategic planning, will provide the organization with a systematic way of thinking through the various steps, interdependencies, timing, and resourcing of the project, supporting the strategic planning and associated communications. Often, many obstacles are uncovered, and potentially avoided, while conducting this effort.

## Step 4: Business Case Development

In some organizations, a business case is not required. Others mandate an approved business case before a project can move forward. It is important to consider the costs (not

just financial) and benefits of going through with this effort, whether a mandate exists or not. While Acquis believes, and others will argue, that organizations need to move in the direction of virtual collaboration, it is not right for every organization. Perhaps employees are already accomplishing what they need using existing technologies. Perhaps the organization won't adopt the technologies and a mandate is not an option. Or perhaps it is simply too expensive in relation to the potential benefits. In other words, the organization may not receive an acceptable return on investment.

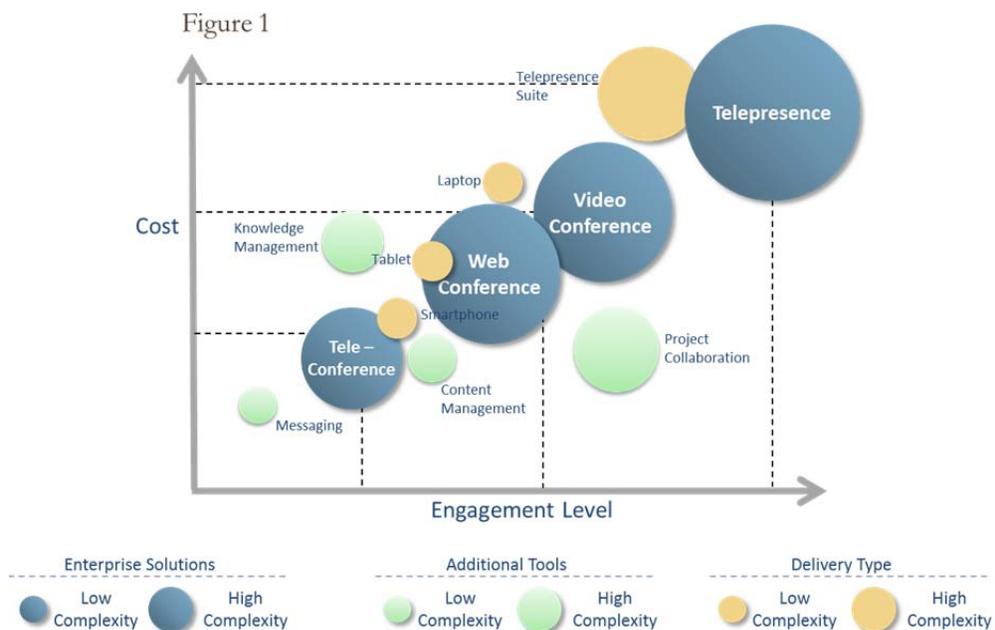
The investment comprises all of the associated costs including the technology and related infrastructure, the meeting spaces needed (if any), training and communication costs, as well as employee and consultant costs to help implement the solution.

The return includes hard dollar benefits, such as reduced travel, fewer in-person meetings, and a need for less office space. Return also includes "soft" benefits such as employee satisfaction, which leads to employee retention and therefore lower recruiting and training costs.

*Unique Consideration: Determining costs and benefits is particularly difficult when considering multiple global locations. While it is often easy to know what questions to ask the "home office" employees and what the existing meeting room environment is, additional inquiries and assessment time may be required to accurately assess this information for other locations.*

### Step 5: Determine Technology Strategy

This phase is similar to the software selection phase of other system-based projects, yet exponentially more complex since there are numerous technologies in the marketplace, often with overlapping capabilities. Further, a variety of technologies (both software and hardware) is likely to be required for a complete organizational solution. As Figure 1 illustrates, there are varied solutions for an organization to choose from and a different combination of solutions may be appropriate for different circumstances. Proper evaluation of the company's needs and constraints will inform the optimal virtual collaboration type and specific technology and delivery solution(s).



While this strategy phase implies starting from a “blank slate,” certain technologies are already utilized in an organization and the mandate is often to expand their use or take them to the next level. Alternatively, the mandate becomes a “video conferencing” strategy rather than an overall virtual collaboration strategy. In any case, it is important to determine the best mix of solutions within the constraints of the organization.

In some cases, the technology strategy will also involve hardware solutions, including bandwidth considerations, video technology, and home office technologies. Each of the components in Figure 1 could have related hardware implications that must be considered.

***Unique Consideration:** The concept of a “pilot” can be applied slightly differently for a virtual collaboration effort. While the traditional meaning of pilot may apply (i.e., rolling out to certain groups or individuals first), different types of technology pilots could be conducted. For technologies without a high infrastructure, training, or cost investment, multiple solutions may be piloted to see which will have more traction within the organization.*

*Another option is for different pieces of the overall mix to be introduced in waves. For example, less expensive technologies (generally the ones at the lower end of Figure 1) may be introduced and as employees become more accustomed to utilizing tools and reducing their in-person communications, further investments in technology could be made.*

## Step 6: Determine Meeting Room Strategy

Depending on the solutions the organization is implementing, there may be a significant office infrastructure/facilities impact. In many cases, more rooms may need to be converted to conference rooms to allow those who attend virtual meetings to have a place to participate if they are in the office.

For more advanced technologies such as telepresence, rooms need to be built to support the technology. They will need to be a certain size, shape, and have a seating configuration that best accommodates the approach. This can mean significant building costs to offices that plan to utilize the technology.

Another consideration gaining popularity is shared meeting spaces. These off-site spaces are rented by a corporation and enable participants to connect using the shared technology. For example, if one office is unable to build a video conferencing room, they may be able to use a location nearby.

It is important to clarify the strategy as it relates to cost and expected utilization to achieve the maximum return on investment. This will become progressively more difficult as usage and adoption increases over time and expands to new offices. Depending on factors such as cost and space constraints, a scalable model may be appropriate.

## Step 7: Determine Policies and Process

“If you build it, they will come” does not apply to virtual collaboration. Employees need to know about it, know how to use it, know when to use it, and see it as a benefit. To allow this to happen, it is important to have a virtual collaboration policy, or an overall mobility (or travel/meetings/virtual collaboration) policy.

Unlike most system implementations in the twenty-first century, there are more constraints to consider, such as meeting rooms. Overbooking conference rooms or having last minute

exceptions for senior executives could have a significant impact on the people in the room, and potentially others across the globe who scheduled a meeting at an agreed upon time. Rescheduling is often difficult as it may take weeks to find another time when participants and meeting rooms are available in each location.

Scheduling, prioritization, cost allocations, license approvals, recording policies, and attendee camera requirements are just some of the considerations that should be made up front in order to eliminate potential stressors to the process and to each of the individuals. There will always be unanticipated obstacles with this type of technology, but the goals should be to eliminate 95% of these before they occur. A clear, well thought out, fair, logical, and well-communicated policy will help. Fostering a culture of complying with policies may be difficult to achieve, but the most important influencer is having senior management set a positive example.

### Step 8: System Deployment

As with other system implementations, an organization will need to go through the typical SDLC methods to ensure a successful system implementation. First, a design must be built to help determine how the technologies will work technically and functionally. In some cases, the provider will lead the design effort, but in other cases, the organization must determine how best to design the systems for their unique needs. The design documentation will feed the next step, configuration.

The level of effort varies depending on which technologies are chosen, but configuration is generally a significant component. Configuration could involve setting up varying technologies to be compatible (i.e., Telepresence suites with home office cameras) or ensuring a content management system is configured to allow for simple documentation collaboration, security, and backup processes.

Testing will need to be conducted. Depending on what type of technology is being tested, there will likely need to be at least user and functional capabilities testing to ensure the system works as configured. Tests should be performed to emulate a real time environment (i.e., from people's homes or from various global locations) to ensure the most significant and useful feedback.

### Step 9: Communications

Ideally, the communications strategy starts at the beginning of this effort, ensuring buy-in from senior management, various impacted groups, multiple locations, and individual employees. At this point, communications are particularly important as people need to understand each piece of who/what/where/when/why, and how.

Organizations may use a variety of methods to distribute communications such as email, website, meetings, or training. Some organizations may even try to incorporate their collaboration tools in their communications and make them interesting, fun, informative, and educational, all within one delivery vehicle.

As part of the communications, we recommend qualified resources employees can contact to ask specific questions. There may need to be multiple resources, depending on the type of inquiry (i.e., employee issue vs. policy vs. technical).

## Step 10: Evaluation

Having the right people on the team, and having the right culture to accept these changes are key ingredients for success. However, this type of rollout may experience bumps along the way including:

- Confusion about the policy
- Technical malfunctions
- Different personalities having different communication preferences

The focus should be on evaluating the successes and continuously improving the process. Success can be measured in areas such as user satisfaction, uptime of the systems, cost savings, or utilization of meeting rooms (too high indicates not enough rooms; too low indicates not enough return on investment).

This step, with its associated impacts, requires a long-term commitment. For a successful long-term virtual collaboration strategy, the team needs to adapt to feedback, as well as to new technologies. Given that the area of virtual collaboration is evolving at such a rapid pace, even with an ideal solution, it is likely that an organization's technologies will become outdated within three years and may no longer meet the evolving needs and preferences of its employees.

## Conclusion

Any corporate-wide change is challenging, but embarking on a virtual collaboration strategy has its own unique challenges. However, by being aware of the complexities, having appropriate management support, and taking the time to think through the strategic approach, this effort can yield company-changing impacts: higher employee satisfaction, reduced costs, and greater efficiency.

## About Acquis Consulting Group

Acquis Consulting Group is a management consulting firm specializing in strategy and implementation. Based in New York City, Acquis helps ambitious organizations solve business challenges that enable sustainable growth and healthy efficiency.

Acquis Consulting Group's experience in mobility stems from its roots in corporate travel, which has grown into meetings management and virtual collaboration strategy. This coupled with Acquis's expertise in project management, systems selection and integration, cost reduction, expense management, and change management, make us uniquely qualified to assist with organizations' mobility strategies. Please contact us to discuss any questions you may have about this article or to discuss your company's specific needs or concerns.

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