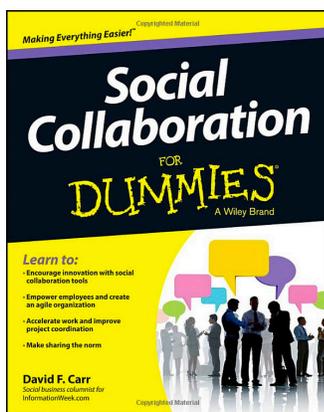




Making Social Collaboration Productive

By **David F. Carr**, author of *Social Collaboration for Dummies* and Redbooth Chief Evangelist



When my book *Social Collaboration for Dummies* came out in late 2013, it included the observation that “one of the most active frontiers in social collaboration is finding better ways to organize tasks and projects through the network.”

At the time, I was an editor at *InformationWeek* who covered the business use of social networking and all the ways that social tools like blogs, wikis, and comment streams were being adapted for use within the enterprise. When I was researching and writing the book, I knew the chapter on project and task management was an important one to include. If I were writing the book again today, I would have much more to say about using the network to organize work.

One reason is a change in employment: today, I am Chief Evangelist for Redbooth, which offers a platform for team workspaces and real-time collaboration. But another reason is more personal: I am collaborating much more intensively than ever before in my working life.

The difference is that now I’m part of an agile organization where all work is tracked and planned online — with frequent course corrections as needed. Before, I was writing about innovative online work styles, but many of my editors and other collaborators couldn’t shake free of email and conference call habits (even though our parent company had its own internal social network). Now I’m using social collaboration more than email — and HD video meetings more than the phone.



I'm proud to stand behind the research that I did for the Dummies book. At the same time, there is a lot I have learned since its publication in late 2013. Here are the points I most want to emphasize today:

- **Work requires multiple modes of collaboration.**

Asynchronous and real-time communications each have their virtues. The asynchronous exchange of messages, as with email or posting and replying to messages in a shared workspace, is more practical when those messages don't require instant attention. That is often the best way of getting a message through to people who are offline or in different time zones when we reach out to them. On the other hand, with an online presence indicator that lets you see a collaborator is available, you can speed things by switching to real-time modes like chat and video conferencing. That pays off in faster decisions and troubleshooting.

- **Platforms should flex to include what works.** Avoid forcing team members to abandon tools they already use productively if it is not absolutely necessary. Your core collaboration platform should provide a rich set of services, but also let you plug in other cloud and enterprise tools. In other words, an integrated file sharing tool is great, and offering it alongside integrations with Box, Dropbox, Google Drive and others is better.

- **Focusing on work solves most adoption problems.**

Enterprise social software is supposed to be intuitive. Yet even when enterprises deploy products that closely mimic consumer social networks, adoption of those social collaboration tools is often disappointing. Too often, employees are provided access to online collaboration without any clear business purpose. In other words, they are left to figure out on their own how it might fit into their work. On the other hand, when your boss assigns you work through the collaboration platform and expects you to provide updates on your progress the same way, suddenly online collaboration is not optional — it's an integral part of doing business.



- Structure makes a difference.** Most platforms will let you create online spaces for specific projects or business units. However, if all you're doing is segmenting discussion and document sharing, you're missing a key element. Tracking specific work items is more effective if tasks are treated as a distinct type of social object. Being able to comment on tasks is a good start, but you also want to be able to assign them to someone, set a deadline, and ultimately mark them done.

You might suspect that this list lines up nicely with Redbooth's capabilities, and you'd be right.



Redbooth: An Integrated Collaboration Hub



Redbooth offers an communication and collaboration hub with online workspace at the center, designed to keep the focus on team productivity. You can have free-form conversations in Redbooth, just as you can in other social environments more focused on online community building. We use them all the time to welcome new employees to the organization and recognize people for a job well done. The social dimension, including basic things like seeing profile pictures of the people you're interacting with, helps humanize the workplace.

Besides, the most productive work often starts with brainstorming about products, projects, and priorities. Once we identify specific work to be done, conversations can be converted into assignments — making clear who will be responsible for getting the work done or and when. That way, we can preserve the message threads and file attachments from the conversion, carrying them forward to the task.

In much the same way that we can flow from conversation to task, we can smoothly escalate from back-and-forth messaging to real-time chat and video conferencing. That lets you clarify issues, make decisions, and keep things moving.

Customers frequently report productivity improvements of 30-50% or more — and fewer things falling through the cracks.

There are other potential benefits from social collaboration, such as improving document management, knowledge management, and employee engagement. Still, you can make a better business case for social collaboration when it is directly linked to a productive business purpose.

Social and Collaboration: Two Different Things

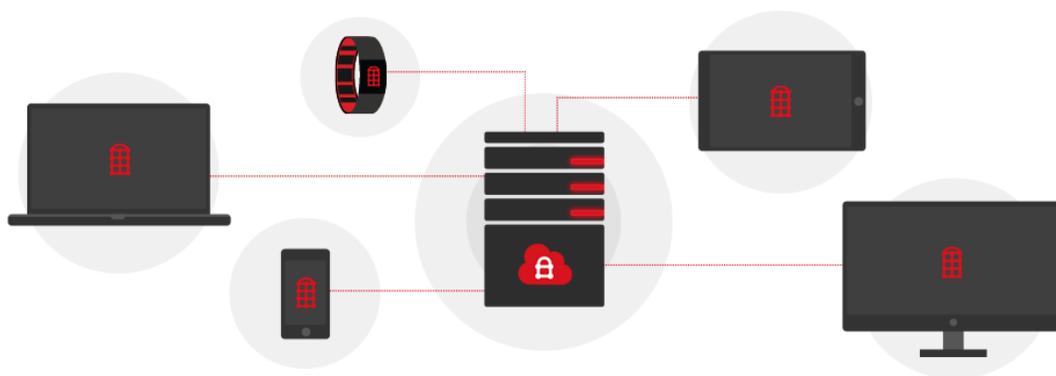
One way social collaboration tools for managing tasks and projects are different from the rest is they tend to be a little less “social.” For example, even though they incorporate social network user conventions like profile photos and comment



streams, they tend not to feature elaborate user profiles. Vendors I studied sometimes objected to me using the word “social” at all in connection with their products, which they emphasized were all business. They focused much more on the collaboration part than the social part of what I was calling “social collaboration.”

When I was researching the Dummies book, analyst Tony Byrne of the Real Story Group corrected me on the distinction between social networking and collaboration, which he thought I was using too loosely and interchangeably. According to his definition, the two modes of interaction are distinct, although they may be complementary.

Social networking is the process of making connections and facilitating introductions that allow old high school friends to find each other on Facebook. In the enterprise, the equivalent might be employees in two different research and development groups discovering that they are working on the same problem. If they then start to work together, that would be the beginning of a collaboration.



Collaboration, by definition, revolves around getting work done. The online workspace for a collaboration might revolve around a project, or an ongoing business process where people work together regularly. These tend to be smaller, more tight-knit groups. We can have a group discussion or brainstorming session involving thousands of people, but to work productively we want to pull together a team of people we trust.



An online workspace lets everyone responsible for a given project or business process see who is responsible for doing what and when. At the same time, an interactive project plan should be more than a group checklist. With associated team discussions, you can yell for help, give a shout out for a job well done, or juggle assignments as necessary to stay on track.

Theory Meets Practice

Some new collaboration environments are more “social” than others but all of them are chasing the same idea of frictionless interaction. We want workflow to flow more naturally and more productively. However, management gurus have been known to oversell the transformative promise of “social business.” Social is not a magic word that solves business problems. You still need to think about issues like adoption and training.

What, you don't think social software should require training? True, adoption is accelerated by familiarity with social networking websites, at least for those employees who use them in their personal lives. However, you can't assume all of them are social networking wizards — they may not understand techniques like the use of hashtags, for example.

In any case, work is different from play, and social collaboration in business is different from social messaging on Facebook. People need to learn to be productive in an online workspace for business. Little details like misunderstanding whether a social post is private, or can be seen by a workgroup, or is visible to the whole company can cause immense confusion and embarrassment. One organization I studied went to the trouble of creating an infographic for internal distribution just to make those content sharing rules as clear as possible.

While researching *Social Collaboration for Dummies*, I interviewed champions of the technology in many organizations, seeking common success factors. Regardless of what social collaboration



platform you choose, you should have a vision for how you want to integrate it into the work of your organization and a strategy for making it take root.

In my first weeks on the job after joining Redbooth, I heard from our customer success team that implementations benefit immensely from a leader who decides to put the software to work on practical projects. That ensures use of the tool is not optional but central to the way work will be done.

During my research for the book, I heard a similar theme repeatedly as advice for how to get started. That is, even if you call your first project a “pilot project,” make sure it’s something real that proves the value of the collaboration platform and paves the way for expanded use. Organizations that merely dabble with online collaboration — or make it available to the organization without guidance on how it should be used — well, they face longer odds.

In other words, you can sabotage yourself by being too tentative. For team members to see the practical value of social collaboration, you must apply it to real, practical work that needs to get done.

Building on Success

Once you have a pocket of successful, purposeful collaboration, build on that success.

Some social business experts I respect disagree with an incremental approach. This school of thought that says what you really want is a company-wide implementation from the very beginning, or at least very quickly. If your goal is an all-encompassing enterprise social network that provides access to all employees and all networked content, sure that makes sense. I don’t necessarily disagree.

I just don’t see many organizations willing to take the plunge on that scale — at least, not at first.



Besides, for many organizations social collaboration is part of a strategy for being more agile — not just in terms of Agile software development but also enterprise agility. They want tighter communication and collaboration to make the organization as a whole more able to adapt to setbacks and surprises. That requires a spirit of experimentation, where plans and assumptions are continually tested against reality and refined as necessary. A “big bang” collaboration software implementation is the antithesis of Agile, which emphasises incremental refinements and continual adjustments to a project plan. When you take things a step at a time, you have the opportunity to test what works and continue to improve upon it.

What I like about working for Redbooth is that our workspace focus lets us build our presence one team at a time. If we get to company-wide implementation, wonderful! Believe me, we love that. But we can be successful one team at a time by making those teams successful.

THE FORMULA IS:

First, achieve success.

Second, share your success stories.

Third, achieve more success.

Network. Collaborate. Repeat. 