

# Collaboration and Lessons Learned

Steve Olshansky

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# Environment

- Rapid proliferation and maturation of collaboration tools – sync and async
- Users becoming more comfortable and familiar, and facile with the tools
- Increasing focus on and demand for tools to support collaboration, both intra- and inter-organizational
  - De-perimeterization
- Security and privacy concerns increasing

# Environment

- Project-based teams coming together and disbanding as needed
  - What artifacts are left behind for others?
  - How are the results of their work, and lessons learned along the way, available to others?
- Virtual Organizations (VOs)
  - Generally project-based
  - Often separated by geography, affiliation, time zone
  - Usually uses significant computing resources beyond collaboration

# Environment

- Increasing demands/opportunities for collaboration
  - Within the organization
  - Between organizations – with vendors, customers, partners...
- Reinventing the wheel: lost opportunities for serendipity and leveraging organizational knowledge assets

# Challenges

- Staff **VERY** busy...
- Staff reluctant to embrace new systems without clear motivation/incentives and drivers
- More consumers than providers in early stages of collaboration tool implementations
- Usability obstacles

# Challenges

- Collaboration tools springing up ad hoc (esp. wikis and blogs)
  - Policy compliance
  - Management issues
  - PR
- Knowledge and collaboration silos
  - Disconnected systems
  - Fragmentation
  - Friction

# Challenges: Inter-organizational

- Virtual Organizations forming
  - How to support them effectively?
- Collaboration silos
- Complex/overlapping regulatory environments (SOX, HIPAA, GLB, international, etc.)
- Jurisdictional issues
- IPR
- Security concerns

# Challenges: Inter-organizational

- External (and some internal) systems requires users to utilize separate usernames and passwords
  - Post-It proliferation & insecure passwords for low security applications
  - Users end up reusing passwords across multiple systems
  - Multi-factor authentication
- Privacy concerns



# Key Elements for Successful Collaboration

- Ramped/phased rollouts
  - Start with low-hanging fruit, evaluate, then iterate, iterate, iterate...
- Continual assessment
  - Well defined and utilized feedback loops
- Creating and nurturing a collaborative mindset
  - Coupling with the organizational culture
- Incenting participation

# Key Elements for Successful Collaboration

- **Reduce friction** hindering collaboration
- Build Community
  - Recruit champions to work with their peers
  - Foster communication channels in multiple directions
  - Listen...
  - Set achievable goals and milestones – short- / mid- / long-term
  - Build review and assessment into the system
  - Calibrate expectations

# Collaboration and KM

- Harvesting lessons learned and other useful artifacts
  - Context: how does this fit into the project or task at hand? What other areas might it also be relevant in?
  - Provenance: what is the history of documents or other artifacts?
  - Reputation: who contributed to a particular document or artifact, and what level(s) of credibility can be attributed to it as a result?

# Collaboration and KM

- Metadata
  - Attachment/assignment/management
  - Taxonomy
- Search and retrieval

# Opportunities

- How to utilize Web 2.0 applications for business goals?
- Automate and externalize access control - authentication and authorization
- Allow access based upon identity, roles, and attributes
- Take advantage the strengths of both synchronous and asynchronous communication tools
- **Leverage organizational knowledge assets**

# Collaborative Management Platform (CMP)

- Federated Identity
- Role-based Access Control (RBAC)
- Extensible & customizable platform upon which to base a variety of collaborative applications as needed
- Manageable and secure access control mechanisms
- Resource holders NEVER lose control over their resources
  - Always maintain ultimate access controls
  - Attribute-based access decisions

Steve Olshansky  
steveo@luminagroup.com

<http://www.luminagroup.com/collaboration/>