

A new picture develops

Not so long ago, collaboration meant sharing documents and not much more. Later, virtual workspaces were developed that included options such as instant messaging and discussion forums, task management and scheduling. Today's market is far more complex. Collaboration tools have proliferated to the point where potential customers are challenged to sort out all the options. The good news is that many of the available solutions are more flexible, less expensive and better integrated with users' day-to-day work.

"We are seeing a collage of alternatives," says Tim Neill, CEO of agencyQ (agencyq.com), which develops custom applications and websites. "In any single enterprise, a variety of approaches can be used effectively." Organizations with large collaboration platforms are incorporating additional features such as social networking, while others are turning to "collaboration lite," inexpensive, cloud-based applications that are quick to launch and easily learned. "Historically, col-

laboration has been document-centric," Neill says, "but right now many solutions are focusing on connections between people."

Creating content in house

The Legal & General Assurance Society (legalandgeneralgroup.com)

financial services industry is heavily regulated," says Andy Wooler, HR technology manager at Legal & General, "it was very important for us to be sure we were managing our training effectively."

In addition to ensuring compliance for more than 10,000 agents

own content," says Wooler, "which saves money."

A second area, the one that launched the collaboration capability of Legal & General, was the development of communities of practice using Saba Collaboration. That product provides wikis, chat and threaded discussions. "The communities of practice are integrally related to our employee's work," Wooler explains. "The community may be formed around a course the employee took, but it may also be focused on a particular job category or location."

A people issue

Having collaboration centered in the HR department is not typical, but Wooler makes a strong case for it. "Many organizations manage collaboration from the IT department, but we believe it's a people issue, not an IT issue, and that it fits well with the overall themes of learning and knowledge sharing." To get collaboration rolling, he used some viral marketing techniques that exposed potential users to the power of wikis,

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is a financial services company in the United Kingdom, with nearly 7 million customers in its life assurance, pension, investment and general insurance plans. The company's collaboration environment evolved from its use of a learning management system (LMS) from Saba Software (saba.com). "Since the

and employees through the use of the Saba Learning Suite, Legal & General also was able to expand its learning activities into several new areas. For example, Saba Publisher enabled the company to develop its own content, rather than purchasing training packages from other providers. "Now we develop 90 percent of our

Collaboration mashups

Mashups are a versatile software tool for integrating and sharing information on the fly to provide a view from multiple data sources. Presto, a mashup platform from JackBe (jackbe.com), allows rapid development and sharing of enterprise apps. "Users can take apps, put them on a mashboard, wire them together and create a dashboard-like app that is a collaborative workspace," says John Crupi, CTO of JackBe.

An example is the development of a performance dashboard for a data center. "Organizations often have a difficult time seeing everything that is going on in a data center," Crupi says, "including the network, routers, trouble tickets." Typically operational workers have to go to different systems and create a top level view in their minds. With JackBe, that information can be presented side by side in a dashboard that provides an overview. In cases where the performance of various parts of the data center may be interrelated, the mashup lets the different divisions work together more effectively.

Several years ago, JackBe added an Excel connector that takes any Excel spreadsheet and pushes it into a mashable service. "This data is live and interactive," says Crupi, "and allows workers to collaborate rather than e-mailing the spreadsheet around to multiple individuals for updating."

and the concept took hold. Employees then began asking HR to set up discussion groups.

Successful communities of practice must have a compelling purpose and be user-driven, according to Wooler. "You cannot set up a group to meet a specified number of times per year for an abstract purpose," he says. "People need a context and a motive." One group began posting documents because the files could be accessed from any location, unlike those on share drives. "Then the employees began to use it to set up meetings, post their minutes and document their action items," Wooler adds. "Rather than having the documents be static, they posted action items in a wiki and updated them as the actions were accomplished."

The point of need

Another use of wikis that developed was obtaining compliance sign-offs for training documents used by agents. "When we used e-mail, it could take a month for a dozen sign-offs to be completed," Wooler says. "Now we can put the document in a wiki, amend it if needed and have a history of who made changes as each individual reviewed it."

In the early stages of development are pilot programs to surface content from communities to reach a broader range of employees. "We wanted to do this for a while, and we now know how to do it," Wooler explains. "The important thing is to deliver this content at the point of need, into a best practices center, for example. No one wants to look at the interface of a system—people want to see content within the context of their own work." Wooler also contemplates the expansion of collaboration to create a blended learning environment that incorporates both formal and informal learning.

The information flow as supported by the collaborative environment at Legal & General occurs independently of organizational or functional area. "People do not care whether you call it learning, performance support or knowledge management," Wooler says. "What they want are the tools and knowledge to do their jobs."

Saba introduced Saba Live in summer 2010, an enterprise business networking solution that provides social tools such as ratings and employee profiles. It is available as a standalone product or can be integrated with Saba's Web conferencing and virtual classroom (the two

components of Saba Centra). "Users don't just want to find content," says Jim Lundy, VP and general manager of collaboration at Saba. "They want good content—the best sales presentation, the most informative and recent business analysis. With Saba Live, users can search by rating as well as by topic." In addition, when teams need to be formed, Saba's profiling feature can bring together the right mix of people.

The expectations for collaboration have changed markedly over the past few years, Lundy says. "Previously, the prevailing wisdom was that whoever won the e-mail war would win collaboration," he notes. "Now, e-mail is used for notification, but not nearly as much

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for communication. Younger workers barely use it at all. Other methods are much more efficient."

Cloud-based

An organization does not have to be large to benefit from collaboration tools; in fact, small volunteer organizations need that type of support as much or more than enterprises with abundant resources. An example is Paws in the City (pawsinthecity.org), an animal rescue organization based in Dallas. Founded just after Hurricane Katrina struck, the organization got off to a busy start by rescuing and fostering the many animals that were made homeless along with humans in the aftermath of the storm.

A primary activity carried out by the group is fundraising. "We have six major events each year, and some of them overlap," says Sydney Richardson, a volunteer for Paws in the City. "We became overwhelmed by the 'Reply All' approach to communicating." A member of one of the event planning committees was familiar with StreamWork from SAP (sapstreamwork.com) and suggested the group try it. Paws in the City is

using a free, cloud-based version that allows up to five active projects. The enterprise version, also cloud-based, allows for hundreds.

Now the volunteers can log onto the organization's StreamWork site and check the status of the event, find out what needs to be done and share information. "There is a discussion section for everything from sponsors to food and where we get our rented supplies," Richardson says. "In addition, we can create links to websites where we have found good prices on items we need to buy, or other useful information." An integrated spreadsheet allows users to create lists of contacts or any other type of record, and a timeline tool helps the group keep track of target milestones.

Widgets

One of StreamWork's strengths, especially at the enterprise level, is its ability to connect to other applications. "StreamWorks can pull documents in from Documentum's eRoom or from a content management systems," says David Meyer, senior VP of on-demand, productivity and sustainability at SAP. "As a Web-native application, it is designed to connect people through widgets or other apps, and it is easy for a new user to master."

In many global manufacturing companies, large enterprises obtain supplies and components from much smaller companies, and they need to collaborate. "The solar industry is a good example," says Meyer. "Supply chains are starting to go down to the level of small manufacturer, and they need to communicate with production monitoring systems to provide a view of capacity or inventory."

A widget can bring that inventory into the StreamWorks space for quick monitoring, without the supplier having to learn or purchase another application. The owner of the inventory data can govern who has access and what data can be viewed. The small company is then able to see what supplies are needed, post messages to the team or add supporting documentation.

SAP is known as an enterprise resources planning (ERP) company, which Meyer sees as a natural base for collaboration. "ERP systems provide a lot of context," Meyer says. "These are large systems that have a lot of the information people need to collaborate and make decisions." ■

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