

# VIRTUAL COLLABORATION

## -Why all the fuss?

### CURRENT SITUATION

Currently companies are struggling with the “how to” in establishing an effective companywide collaboration practice. Charles H Kepner, a best-selling author, wrote a book called “Managing Beyond the Ordinary” in 1985. In it he promoted the concept of how to collaborate using a common process but the sales of this his second attempt at publishing were dismal. Business and people were just not interested in how to collaborate with others at that time.

Move the clock forward to 2020 and we are still struggling with the same issue. Although Management supports the idea to a greater extent than before, we still have clients saying to us that they are struggling to make collaboration work within their organizations. They are not referring to virtual collaboration, which is a much more difficult objective to achieve, especially when we cannot even get a basic collaboration platform established.

For years we have had access to exciting new technology and supportive platforms such as those provided by Atlassian (ticker: TEAM) and still we are struggling. Why is that?



**OBSTACLES TO COLLABORATION**

- ❖ Practical - Need a solution
- ❖ Organizational – Management to resolve

### PRACTICAL OBSTACLES

There are several obstacles that need to be addressed to create the most conducive climate for good collaboration practices. Some of these obstacles can be classified as practical problem areas or organizational problem situations. Here are some of the practical obstacles:

- **Don't have the equipment** – A problem for video conferencing, but there are many free platforms which allow groups to collaborate effectively.
- **Time pressure for getting inputs and cannot wait** – The perpetual excuse and really stems from the overuse of certain resources and these resources go from meeting to meeting and don't even have time to do their normal assigned job.
- **"Turf" mentality** – More an organizational issue, but the practical implication is that employees are in such a rut they believe they are not allowed to talk to other functional areas' colleagues.
- **Time Zone issues** – The Subject Matter Expert (SME) for a specific function is "on the other side of the world" and we need the data now to be able to resolve a critical issue.
- **Scarcity of SMEs not being available for meetings** - Subject Matter Experts are in such high demand and are invited to every meeting and they just can't cope. It gets to the point where these individuals are overused and abused.
- **Don't know how to do it** – A possibility that the organization just does not know how to set this up and make it work.
- **Information overload** – An unfortunate practical reasons when a team is experiencing a problem they try to get as much data as possible with the unintended consequence that the "irrelevant" data confuses them.
- **Not enough information** – The other side of the coin when a team just have partial data and then they feel they cannot attempt to solve the problem.

## GREATEST BENEFIT OF COLLABORATION

"The right question is asked to the right person to get the most correct and accurate answer!"

*Matt Fourie*



## ORGANIZATIONAL OBSTACLES

- **Problem solvers not venturing beyond the obvious** – Problem solvers are happy with the idea that they have all the data required to solve their problem situation, which would be wrong and problematic in most situations.
- **Team mentality** – The production team will solve the "production" problem, because it is their problem! Realizing that when they've struggled for some time to solve a production problem, the source of the problem have at least a 90% chance of originating in another area.

- **Poor identification of problem-solving participants** – A simply a matter of being conscious of engaging the correct people when solving problems. This could be that the team does not know how to identify the correct personnel, or it might just be difficult to get the right people involved.
- **Not using a common process** – A common process should be agreed and supported by all cross-silo divisions. The result of not having a common process is that the team members want to approach the problem from different angles, and this introduces a complication that they could have done without.
- **Not adopting a system approach to problem solving** - Knowing which questions to ask and how to ask them would help the group understanding. Added to this is the practice of making all data visible and to arrange the data in a way that would make sense.

## WHAT WOULD PROMOTE A GOOD COLLABORATIVE PRACTICE?

We believe that we have many of the drivers that could help a company to affect a positive change towards more effective collaboration across an organization. There are four basic but important elements to put in place:



### ESSENTIAL COLLABORATION DRIVERS

- ❖ Technology support in terms of Platforms and Bandwidth
- ❖ Common templates with embedded structured questions
- ❖ A basic understanding and knowledge of problem-solving techniques
- ❖ The availability of professional in-house problem-solving facilitators and/or coaches

Let's briefly expand on each of these four drivers:

- ❖ **Technology Support** – Thanks to the COVID-19 pandemic we have been thrust into virtual video and audio meetings, whether we wanted them or not. There are few exceptions and we believe this is a positive opportunity, demonstrating the value and situation being presented to us to start using these same methodologies for business collaboration in real time. Features such as face-to-face virtual meetings and real time simultaneous document editing added to the use of Excel spreadsheets are all excellent collaboration tools, especially when dealing with remote teams.

- ❖ **Common Templates with embedded structured questions** – Today it is possible to get a specific problem-solving method(s) vetted by a company. If it is a “thinking approach process” it could involve templates and pre-determined structured questions embedded into a template. This is particularly true in situations using a tool such as an Excel spreadsheet. This would make for a realistic situation enabling more people to participate meaningfully and actively.
- ❖ **Common Problem-Solving techniques** – There are many good problem-solving approaches if these are socialized in the company and everyone knows how to use them. All problem-solving approaches are not equal but using something is better than nothing. This situation would give you the opportunity for remote inputs, because the information source who is expected to contribute would know what is expected and respond accordingly.
- ❖ **Professional Problem-Solving Facilitator/Coach** – In today’s business environment it is a prerequisite that you have a facilitator/coach to be able to lead a diverse cross-functional team through the problem-solving process quickly and effectively. The same facilitator/coach could confidentially assist a senior manager or senior team with sensitive problem situations. We believe that the in-house facilitator/coach will prove their value repeatedly, especially when it comes to virtual collaboration.

#### UNIQUE ABILITIES OF A COACH/FACILITATOR

1. To prepare an individual or team for a successful problem-solving session
2. To coach an individual or team on the use of an all-inclusive process
3. To provides an objective overview of the process and ensure balanced inputs and only verified information is used
4. To work with any cross-functional team at any level in the organization through a problem-solving approach



#### CLIENT CASE STUDY - IN EXCELLENT COLLABORATION

A Global KEPNERandFOURIE® client struggled with a two-year old problem to find a way to standardize Private Banking facilities across international time zones, among diverse cultures and with distinct requirements.



With the use of a common solution finding process we used a video conference platform to get all the locations to confirm their objective in creating a standardized “look & feel” for their prestigious Private Banking facilities. We helped them to identify the specific groups of stakeholders and who would provide the inputs we would need to make an informative quality decision. We then got all of them to have their own meeting with one of our facilitators to discuss and agree on the requirements for such a facility. These were collated and all the similar requirements were categorized into a few key requirements. Representatives from all four groups were asked to attend a virtual session to iron out all the “outlier” requirements.

After these sessions, the lead facilitator was in a position to crystallize all the key requirements with the blessing of all four teams. It took two virtual sessions of one hour each to get the teams to buy-in to six key requirements, with the understanding they would all support a solution that satisfied all six requirements. In the end the organization agreed that they would allow one unique requirement per region over and above the six agreed key requirements.

The rest was easy, because using the Excel spreadsheets for inputs and virtual team meetings to discuss differences, the problem-solving teams managed to arrive at a solution they were all happy with. The whole exercise took two months to complete, which is a fraction of the two years already spent.

## HOW THE KEPNERandFOURIE® METHODOLOGIES HELP

The KEPNERandFOURIE methodologies can be applied to all kinds of collaboration and are useful for asynchronous, synchronous and computer mediated types of working protocols.

**TYPES OF VIRTUAL COLLABORATION**

- COMPUTER-MEDIATED**: Represented by a laptop icon.
- ASYNCHRONOUS COLLABORATION**: Represented by two people icons with arrows pointing in opposite directions, indicating interaction at different times.
- SYNCHRONOUS COLLABORATION**: Represented by two people icons with arrows pointing towards each other, indicating interaction at the same time.

**COMPUTER MEDIATED**  
Working together by using technology-facilitated means, such as texts, emails, etc.

**ASYNCHRONOUS**  
Means that something is happening between two people or two teams, but not at the same time

**SYNCHRONOUS**  
Team or teams meeting at the same time virtual or face-to-face



Most collaborations are about addressing and finding solutions to problem situations. Using the KEPNERandFOURIE® (KandF) common structure of problem solving and solution finding templates to supply an ideal working platform. The KandF methodologies provide all the following tools and techniques to leverage more effective and successful collaboration:

- Structured and embedded questions ensuring you are dealing only with relevant data.
- Easy to master online templates and questions that ensure a large target population may be addressed within a short period of time. These templates and questions are particularly helpful in virtual asynchronous situations.
- A process-based methodology which makes it easy for a facilitator to lead the meeting with any virtual team and is of major assistance during virtual or face-to-face meetings
- Advanced training for facilitators/coaches to aid problem-solving teams to identify stakeholders and reliable information sources. This ensures the team is working with the right people to get the right answers
- Use of a common language and a problem-solving methodology which reduces speculation on the type of approach
- Precise techniques to drive specificity which ensures only accurate and relevant data is employed.

## SUMMARY

Maybe it is time to change the way we work? Looking at all the new possibilities it seems that the old ways of collaborating were slow, biased and sometimes even conflict ridden. Maybe it is time to be done with that and move on.

We might not change all the above immediately and there are no guarantees. We believe if we use templates and embedded questions, we will have formulated an easier way to collaborate with the appropriate stakeholders and information sources. This would give us a much better chance of arriving at more workable solutions and a greater number of successful implementations.

Adopting this approach would save time, money and effort and improve our productivity and having the confidence to rely on other teams to produce results. It seems that if we could combine these factors in a synergistic way that we would have a compelling case in support of virtual collaboration.