

UNDERSTANDING PROJECT COLLABORATION

How to Improve Collaboration in Any Environment



PART 2 OF OUR SERIES
Best Practices for Effective
Project Management



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CHAPTER 1

The Buzzword Defined

What Collaboration *Really* Means

Collaboration might be one of the most overused buzzwords in the business world. A Google search for the phrase “what is collaboration?” reveals 178,000,000 results.

You may have noticed the word “collaboration” is often used interchangeably with “communication” or “teamwork” or is taken to simply mean the latest social software tools. In fact, it is used so often, it is difficult to define and can imply various meanings to different people. What do you think of when you hear the word “collaboration?” The Oxford Dictionary defines it like this:

***n.* col·lab·o·ra·tion**

The action of working with someone to produce or create something.

Sounds simple, right? It might be, if the definition weren't so vague. The truth is, some companies are using collaboration in their business practices to achieve great success when it comes to project management.

And that's what we want to talk about in this white paper—how project teams can collaborate in the best way possible, specific to their unique environment and circumstances, to bring a project to successful completion.

73% of organizations plan on increasing collaboration, considering it vital to project success.

FD | FORBES REPORT



Collaboration isn't One-Size-Fits-All

In reality, collaboration means different things to different organizations and people. For example, teams will collaborate onsite in a client location very differently than those working in an office building.

Organizations conducting client meetings mostly in person will use different collaboration software and strategies than those serving remote clients. Multinational corporations will benefit from a different set of tools than sole proprietors working with contractors and outsourced vendors.

The key point here is that collaboration is not a one-size-fits-all approach, because all business environments are different.

Time for some practical examples:

- A large organization with thousands of employees and many internal departments may struggle with managing projects because of the sheer volume of email and the tendency for fragmented, mismanaged communications. This kind of organization might benefit from tools that increase the efficiency and usability of email, such as Software-as-a-Service (SaaS) products or Gmail, which allows users to group email threads into categories, “star” (and thereby flagging) important messages and view messages grouped with relevant responses.
- A remote or virtual project team needs collaboration tools that allow for an easy way to share files (using Dropbox or Google Drive) and stay connected (using chat clients) throughout the project.
- Consultants, entrepreneurs, sole proprietors or small organizations that outsource individual services will benefit greatly from SaaS products (such as Mavenlink) to bring client, vendor and contractor communications to a centralized location.



The Goal of Collaboration

While collaborative strategies may indeed look different for each organization, the end goal—improving your business processes—should be the same no matter what your business or industry.

Collaboration does not exist in a silo, and is not in itself an end—it is a means to an end. Collaboration is a living thing; it is most effective when it is applied to a business process, a meeting, a conversation, and other forms of transactional communication.

Implementing collaboration tools and strategies can impact virtually everything across an organization, but companies will see the most gains when these are tied into their existing business processes.

Say, for example, a project team decides to use chat software, such as Atlassian HipChat. The goal cannot just be “to improve interpersonal communication” between members. You should have a specific goal as it relates to how the project management process is affected by such a tool.

Without a shared context, interpersonal conflict on virtual teams rises. And when far-flung team members use the same tools and processes, the incidence of conflict goes down.

HARVARD BUSINESS REVIEW



Did the project run more smoothly? Did this tool make it easier for team members to share ideas and information? Did it result in less phone calls and emails? Regardless of your organizational structure, the right collaboration tools can change how people communicate within a business process and make that process run more efficiently.

In this white paper, we hope to help you determine which tools and applications are right for your unique environment and workplace culture.

CLOSING THE GAP

According to a recent study, 92% of CEOs understand that effective communications is critical to project success.

Despite this, there often lies a disconnect between executives developing strategy and the project managers actually executing it. Businesses must do everything they can to communicate strategy more effectively and overcome this disconnect.



CHAPTER 2

Get Chatty with Coworkers

How (and When) Chat Software Improves Collaboration

What is Chat Software and Who Should Use it?

Email is pretty standard for nearly every business, but it can be problematic and even downright frustrating. Today, business professionals send or receive an average of 120 emails a day, which works out to be one email every four minutes!

(Radicati Group)

Considering the sheer volume of emails, it becomes difficult to read and respond to messages in a timely manner. Project managers often run into problems when it comes to avoiding spam, tracking conversations, filtering messages and the inevitable email “black hole” (an email is swallowed by the inbox, never to be seen again).

Chat software is a communication platform (similar to instant messaging) that allows users to share ideas and files in real time, either in a group or one-to-one chat. It’s a great supplemental tool for businesses struggling to use email effectively.

The following workplace environments can benefit from chat software:

- Organizations with employees distributed amongst different locations
- Remote workers or those who are constantly working away from a centralized location
- Vendors or contractors working with multiple clients
- Small teams or departments within larger organizations



How Chat Tools Help Collaboration

Organizations with team members spread across different locations or offices need to find ways for everyone to connect in the same space, or “room,” as many chat tools call them. Within these different chat rooms, teams can communicate as a group or individually and employ automatic notifications to help everyone in the room stay on task.

Chat software is generally easy to use and implement, with minimal setup and little training required. These tools allow users to instantly communicate, no matter where they are. This means a project team can share updates and feedback, send files and even screen-share, helping keep everyone on the same page. It can significantly improve team efficiency and productivity.

As chat tools become more and more sophisticated, they help improve the way teams collaborate by offering some or all of the following benefits:

Private and Group Chat

Users can communicate with a project team (or an entire department) by setting up a group chat room. Some chat tools allow you to mention someone within a message using the @ symbol (similar to Twitter). One-on-one chat rooms are great for sending a message specific to an individual that doesn't apply to the group.

EMAIL FOR THE 21ST CENTURY

Email certainly has its place in the workplace, but in many cases its functionality can stand to be improved.

Tools like **ActiveInbox** for Gmail, which allows users to turn emails into tasks, ensure nothing is swallowed in your inbox. With this tool, you can also add action labels to each task, assign due dates with reminders, and attach notes to individual emails.



Chat Specific to Tasks

Some chat software tools, such as **ChatWork**, allow you to convert your conversations into action items through assigning tasks. You can set due dates for each task and notify team members when a task has been completed.

Conversation Tracking

Your chat history is saved, always accessible and sorted by conversation, so you can go back and review who said what without having to weed through hundreds of emails.

Mobile Accessibility and Push Notifications

Most major chat tools have mobile apps that allow users to get messages on their mobile devices so they can stay connected wherever they are. Push notifications alert you of private messages or if someone mentions you in a group chat.

File and Screen Sharing

Some clients, such as **HipChat**, feature drag-and-drop file sharing, video chat and real-time screen sharing, allowing project teams fast, efficient collaboration and feedback.

When team members stay connected, they can work more efficiently (reduce those voicemails!) and keep the project moving forward.

5 WAYS TO MINIMIZE DISTRACTIONS DURING CHAT

1. Keep one-on-one conversations limited to private rooms and out of group chat rooms.
2. It's okay to sign off if you really need to focus on a project or need some quiet time without any distractions.
3. Limit live notifications to rooms in which they are necessary.
4. Only notify users who truly need to see your message.
5. Make sure the right people are in the right chat rooms so messages are always relevant.



CHAPTER 3

Meeting of the Minds

Making Your Voice Heard

Whether you are strategizing with your team on a new assignment, hosting a roundtable discussion or delivering a project to a client, there is immeasurable value in meeting face-to-face, versus audio alone.

Considering that **55% of your message is conveyed through nonverbal elements** (like gestures, facial expressions and posture), face-to-face communication is best for collaborating on strategies and concepts, which require information-rich nonverbal cues and in-depth understanding. (Nonverbal Group)

Who Should Use Video Conferencing?

When in-person meetings aren't practical, due to time, travel costs or other constraints, web conferencing software can be an extremely valuable tool for collaborating internally and externally. These tools not only give you and your team a "face-to-face," interpersonal connection, many of them have file sharing, screen sharing and interactive white board capabilities.

The beauty of video conferencing software is its ability to slash travel expenses, span the distance and connect users as if they truly were meeting personally, making it an ideal solution for the following environments:

- Companies or sole proprietors serving remote clients and prospects
- Remote workers, especially those living in different time zones than their coworkers
- Geographically distributed organizations or those with multiple branches



Using Video Conferencing to Improve Interpersonal Connections

Now let's move on to discuss how these tools work, and what they offer in terms of the user experience:

Staff Training and Development

Businesses that need to provide training to off-site employees in multiple locations can host a web conference, which can include videos and slides.

Conference Meetings (Group or One-to-One)

Quick, check-in meetings, team brainstorming sessions and agency-wide conferences can all take place on a user's laptop, or even on a mobile device.

A full-featured, customizable tool like Adobe Connect can join you with up to 99 other people in a video conference. For smaller or on-the-fly meetings, Skype and Google+ Hangouts are incredibly easy to use and best of all – they're free.

Desktop/Screen Sharing

"Are you seeing what I'm seeing?" Video conferencing tools have recently upped the collaboration factor by allowing users to view one another's desktops, a great feature for project teams who can't physically meet but still need close interaction.

File Sharing

One very handy feature of many web conferencing tools is the ability to share (and comment on) files. This saves the time of sending a file to a team member, waiting for comments, revising, sending it again...you get the picture. It can all be done in one meeting.

Face-to-face contact is synergistic, pleasurable and efficient. A five-minute video meeting can accomplish more than 20 emails.

ERIC YUAN, CEO OF ZOOM



CHAPTER 4

Put the *Work* in Teamwork

Collaborating with Online Project Management Software

Getting all team members on the same page is critical to the success of any project. Allocating the right resources, organizing the workflow, managing tasks, and keeping track of files and expenses help keep a project moving forward.

A Competitive Advantage to SaaS

The worldwide market for Software-as-a-Service (SaaS) products is expected to hit **\$45.6 billion by 2017**. (Gartner Forecast: Public Cloud Services, Worldwide 2011–2017)

Why is the growth of SaaS exploding? According to a **survey by IBM**, businesses cited reducing total cost of ownership of their software applications as the top reason for utilizing SaaS.

But the study also revealed that nearly half of the companies they surveyed are using SaaS products because of their promise to deliver something more than just cost savings: an undeniable competitive advantage through better decision making, increased market agility and improved collaboration.



Who Should Use Project Management Software?

A primary benefit for project managers to use project management software is its ability to improve collaboration in a variety of working environments, and often very quickly. Here's a look at several types of businesses that can benefit:

Small- and medium-sized businesses with limited staff/and or resources

Project management software can offer lower risk and less upfront cost and resources. Small- and medium-sized companies also have the benefit of quick and easy deployment because they typically don't require developers or IT staff to get the product up and running.

Creative agencies, marketing firms and professional services

Project management software like Mavenlink offers time tracking, budget management, file sharing, resource management and other capabilities, which are essential for these types of organizations that manage many projects and multiple clients.

Businesses seeing rapid growth or adding clients/employees at a fast pace

Businesses growing quickly can use project management software like Mavenlink to meet changing demand. The software is easy to configure on multiple machines and businesses can add or remove users as needed.

3 THINGS TO CONSIDER BEFORE DEPLOYING SAAS PRODUCTS:

1. In what ways can improved collaboration (internally and externally) help your organization achieve better results?
2. Which business processes could run smoother and more efficiently?
3. Which project teams or departments could use SaaS tools to make better, more informed decisions?



Improve Your Project Collaboration

Project management software offers project teams many additional benefits, including:

Task Management

Software applications like Mavenlink offer project managers a way to assign tasks to team members and track the status of those tasks. Users can link conversations and attach files to individual tasks, allowing for task-specific communication.

61% of businesses leading the pack in terms of cloud deployment said that SaaS products offer them increased collaboration, both internally and externally.

(IBM CENTER FOR APPLIED INSIGHTS)

Organized Workflow

Projects run more smoothly when project teams can focus their communications on outcomes and deliverables in addition to task-oriented conversations. Mavenlink allows users to organize the project workflow using tools like Gantt charts to see when a project begins and ends, in addition to all of the deliverables in-between.

Resource Management

Project managers need a way to maximize one of a company's greatest assets — its people. Resource management help you determine who's doing what and how much time team members are spending on each task. You can allocate hours to each task or to individual team members.

Activity Feeds

Activity Feeds allow project teams to track and monitor important activities and conversations through a series of short updates. Real-time notifications and an easy-to-follow stream of information helps all team members understand where they are within the project and move it toward completion.



CHAPTER 5

Before You Jump In

Other Critical Considerations

As we mentioned at the start of this white paper, every organization has its own unique environment and culture, and not every collaboration tool is right for every business. Taking time to consider these important issues before deciding on a collaboration tool will help ensure that your organization is utilizing these tools in the most effective way possible.

Security

As more and more project teams take advantage of collaboration tools, it becomes increasingly important to implement best practices and standards for securely sharing sensitive information like customer data, financial records and intellectual property. Companies and departments who use cloud-based applications and other file-sharing tools should consider how sensitive data would be handled.

File Sharing

Project managers and teams who bring these tools into their organization must be aware of existing compliance, governance and security requirements. Files in storage and transfer should be protected with encryption, and users should be authenticated before gaining access.

Data Recovery and Backup

It's a good idea to check if your vendor has a multilevel backup strategy so your files are always secure. The vendor should also have disaster recovery procedures in place in case of an emergency.



Cost

It's important to be aware of the features of your software or application, so that you understand if your organization will actually use what you are paying for. Considering who will be using the application and what it will be used for will help you avoid paying for additional “bells and whistles” that you really don't need. Here are some additional cost considerations:

Remember Auxiliary Costs

Before diving in, identify any additional costs associated with implementing and maintaining the application, such as staff training, upgrade costs, etc.

Purchase Scalable Solutions

Choosing scalable tools helps to ensure you only pay for features you use, with the option to add on features or eliminate them as needed.

“Try Before You Buy” Programs

Some applications offer users a free trial period to determine if it is the right fit for their needs.

Project managers who keep these considerations in mind will be able to make a smart, informed decision when choosing a collaboration tool – leading to better business productivity and profitability.