

Achieve Agility and Resilience by Operationalizing Collaboration

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Improving Business through Better Collaboration

Improving Collaboration along Five Dimensions

Our research on strategies for long-term business success shows that the majority of companies faced steadily increasing business risk and disruption over the last five years¹. The data shows that companies responded by growing their resilience through focus on innovation, agility, and digital transformation. To accomplish this, they have had to empower their people to get the most from everyone, working together, through effective collaboration.

Collaboration is natural in small organizations like startups, but it requires more intentionality as companies grow and teams get separated by departmental boundaries, dispersed geographies, and remote work environments. Collaboration must then be fostered and enabled. Leaders must evolve beyond ad-hoc brainstorming sessions by adopting a collaborative culture and more systematic processes and tools. These allow organizations of all sizes, even startups, to target the right things, get the right people involved, and center their collaboration around common information, enabling their people to do more.

How can individuals be more effective and efficient through improved collaboration? How can companies get the most out of their people, processes, projects, and portfolios? We'll explore how improved collaboration, both structured and unstructured, helps companies grow, scale their business, and become more resilient to achieve long-term, sustainable business success. We'll also share how to improve collaboration in five dimensions: people, process, project, portfolio, and technology.

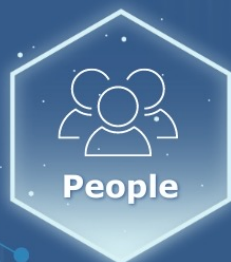
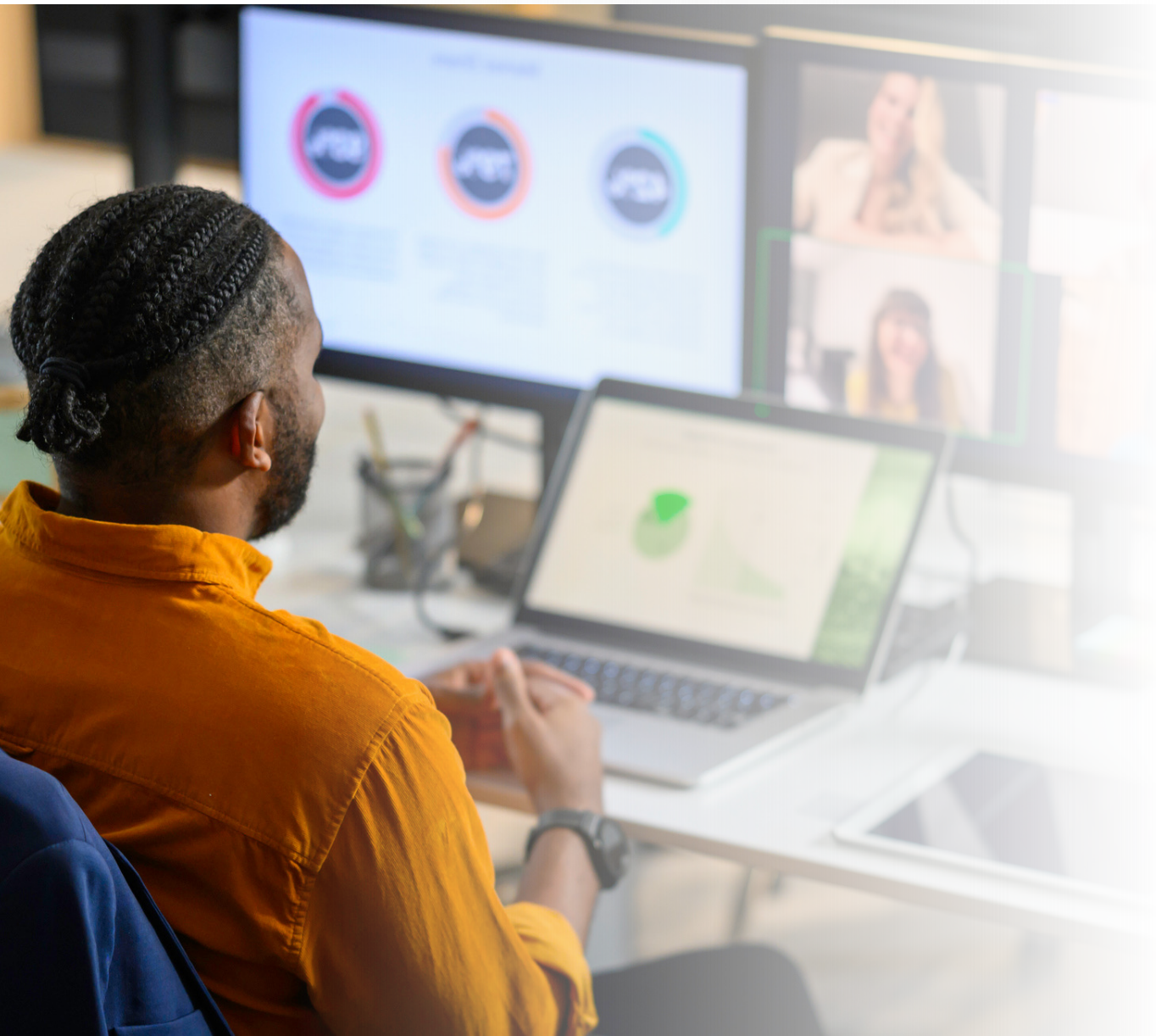


Table of Contents



	PAGE
People-centric Collaboration	4
Process-centric Collaboration	5
Project-centric Collaboration	6
Portfolio-centric Collaboration	7
Enabling Technology	8
It's Time to Operationalize Collaboration	10
Acknowledgments	11

People-centric Collaboration



Get People Working Together

Let's look at operationalizing collaboration from a people perspective to maximize their collective insights, innovation, and knowledge. As companies grow, it's essential to move beyond more naturally occurring ad-hoc collaboration common to smaller teams and organizations. Larger teams and companies must be more intentional to create a virtual environment that encourages people to share their unique ideas, perspectives, and expertise. Even smaller companies typically have significant room for improvement.

Beyond simply submitting ideas, contributors have to be able to expand on ideas and provide feedback in a social, community setting. They have to create an environment where ideas can mature, grow, and spawn new idea threads. Community-centered collaboration helps empower individuals to effectively contribute based on their unique skills, training, and experience. It allows the company to leverage the tacit knowledge in their employees' heads in addition to structured documentation.

A Case in Point

Let's look at a scenario where people work together and combine their expertise to resolve a customer complaint about a product damaged in delivery. In this case, the problem – and the solution – may lie across a variety of company domains, including product engineering, packaging design, distribution, the supply chain, and customer service. Bringing a cross-functional team together to brainstorm and problem-solve in a virtual workspace with a virtual whiteboard allows employees to contribute to a more holistic solution. They can work toward a common goal instead of placing blame across departments. In this way, the company leverages its know-how to develop an optimal solution and simultaneously capture the interaction to increase company knowledge.

Process-centric Collaboration

Create Repeatable Collaboration

Next, let's look at operationalizing collaboration from a process perspective. There is no value in recreating the wheel for every collaboration effort. Companies should coordinate work and workflows to move from ad-hoc to repeatable, managed approaches. By focusing efforts around tasks and workflows, teams can leverage best practices and continuously improve the way they work together on specific scenarios. Leveraging workflows to manage collaborative processes helps people stay on task and track progress.

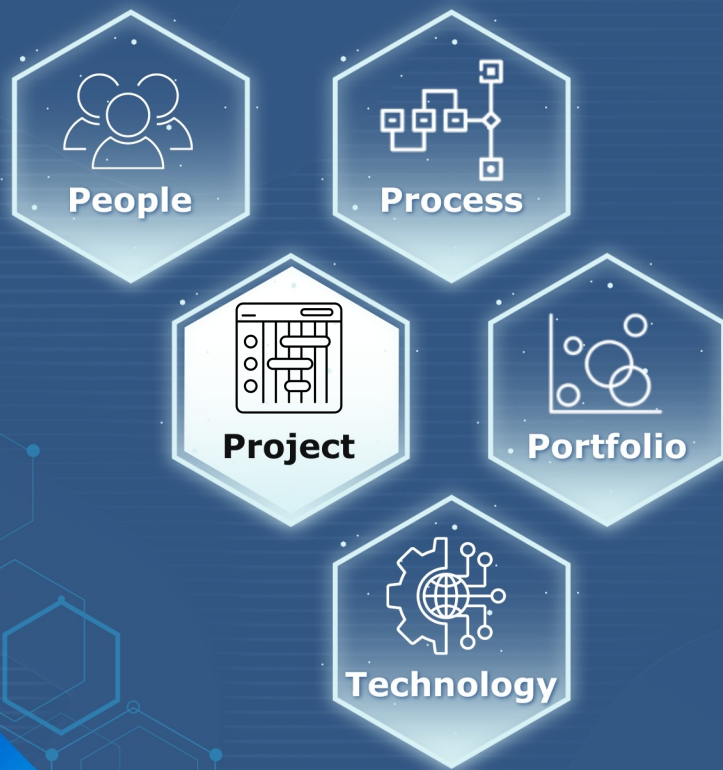
These workflows should also be associated with their context, the underlying data people need to play their roles. Associating the process with the appropriate information improves efficiency because team members can efficiently work in a common environment on the same data. Then, they can add their own information to extend knowledge. It also helps create traceability and develop a digital thread of information related to the process.

A Case in Point

Let's take an example of bidding for a new program or contract. Capturing new business requires input and tradeoffs between legal, financial, pricing, strategy, compliance, technical, and other perspectives. Allowing participants to track progress centrally by creating a collaborative process that leverages common data streamlines their work. Enabling them to make new information visible across roles in real-time so they don't have to wait for another department to finalize their input before providing feedback or adding their own perspective saves time. By leveraging a standard workflow, or at least starting from a common template, the team can ensure they cover all aspects and take advantage of automation, such as routing logic to improve the efficiency of input, reviews, and signoffs.



Project-centric Collaboration



Organize Activities and Actions

Let's examine operationalizing collaboration at a broader level to improve project performance. Larger initiatives require greater coordination but bigger team sizes can hamper collaboration. It's essential to ensure project basics, including tasks, schedules, staffing, and budgets, are in place and people are working against a single plan. But to get the most from everyone, companies have to move beyond spreadsheets and disconnected project planning tools. Instead, they need a shared project environment so the entire team can access shared, measurable, and highly visible objectives that create a sense of team mission.

A collaborative project approach gives teams central visibility to track and manage tasks, progress, KPIs, and risks so everyone has visibility to the broader initiative, not just their individual activities. Connecting project management with underlying people, processes, and data makes project management integral and not standalone. This is important for traditional project management approaches but even more critical for increasingly common agile project approaches.

A Case in Point

Let's consider a company planning and executing a decarbonization initiative. People need to know their roles and tasks and should be able to raise issues so they can be addressed quickly, for example by using lean techniques like Kanban. Taking an integrated approach associates data and tools so the team can work together in real time, such as using data science tools to gather supplier data, product information, and additional details to calculate, optimize, and report on carbon content. An integrated approach also allows dashboarding, for example connecting sustainability goals with actions, giving the team more ownership of – and pride in – the results of their work.

Portfolio-centric Collaboration

Develop Profitable Portfolios

Stepping up to an even broader perspective, let's discuss how operationalizing collaboration helps improve the ability to turn innovation portfolios into profits. Defining a winning portfolio is inherently a data-driven activity and companies have to move beyond disconnected tools and spreadsheets. Instead, they must be able access internal and external content from enterprise systems, the cloud, managed content, broader data repositories, and data lakes in real time to optimize decisions through simulation and what-if scenarios to act on facts instead of opinions.

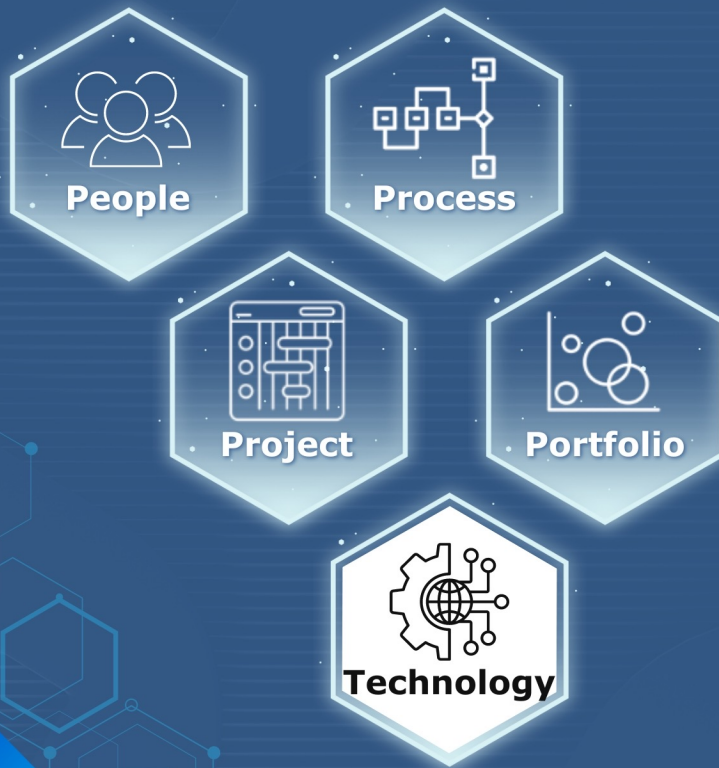
Optimizing portfolios, however, requires effective collaboration. Portfolio management and new product development are inherently team-oriented activities, requiring input and analysis from across the organization. Team members must be able to share internal knowledge and prior experience to analyze and validate opportunities. They have to be able to work together across departmental boundaries to test assumptions, find issues early, and make difficult tradeoffs required to optimize the innovation strategy. Doing this in a collaborative environment allows them to trace decisions so they can leverage prior analysis as market or technical considerations change over time.

A Case in Point

Let's look at an example of setting the product innovation roadmap. Companies need to optimize their R&D investments to drive market share and profitability. Analysts need to be able to rapidly gather market data, insights, and analysis through data analytics and incorporate internal data like customer experience, sales, complaints, and requests. They need to be able to bring perspectives from across the enterprise to identify risks and validate plans to optimize the portfolio and gain executive buy-in before communicating and executing the portfolio strategy. Beyond the data, they must incorporate the organization's collective experience through collaborative decision-making on centralized data.



Enabling Technology



Adopt a Collaborative Platform

The fifth dimension supports the first four. Companies need the right digital infrastructure to operationalize collaboration across people, process, project, and portfolio perspectives. As the examples show, moving from ad-hoc and unstructured collaboration demands new ways of working. These methods require new technology, such as virtual workspaces for people, processes, projects, and portfolios that connect data, decisions, and workflows with the people who have the right information and ability to take action.

Traditional, ad-hoc tools are insufficient to support innovation, agility, and resilience. Today's status quo, including spreadsheets, presentations, emails, texts, online meetings, and phone calls, are all disconnected forms of collaboration. These result in people acting on partial information and not getting the benefits of company-wide experience and knowledge. Informal, disconnected tools don't support even very small companies well, and certainly won't allow them to scale collaboration as they grow.

Enabling Technology

What to Look For

It's critical to adopt the right collaboration platform. Standalone collaboration tools that provide communication and threaded discussions are valuable but don't create a single source of truth. Further, they don't provide the tools needed to make and execute optimal decisions without having to open yet another set of applications. On the other hand, the right collaboration platform can create more harmonized collaboration and communication by capturing all activity and information in a central location, integrating it, and putting it in the context of data, tasks, projects, and decisions.

It's essential to adopt socially-oriented collaboration, for example through cloud-based wikis, discussions, and communities to encourage broad participation. However, the solution should also provide integrated status, processes, and contextual data.

It should offer the right analytic, simulation, and visual communication tools to gather the right information, frame the decision, provide direction, and allow people to collaborate and communicate an optimal plan.

Go Beyond Generic Tools

Beyond generalized collaboration tools, it's prudent to explore collaboration platforms that to provide tools to get the job done in addition to enhancing communication. Companies should look for a platform that adds direct value to their business, such as functionality to support product development or engineering work. The ideal collaboration environment provides a common area for collaboration, decision-making, and traceability. That platform, however, should also incorporate modeling, digital twins, simulation, and analytics surrounding common data to support the task at hand from people, process, project, and portfolio perspectives to drive future innovation and continuous improvement.



It's Time to Operationalize Collaboration

Improve Resilience

Today's companies must improve resilience to drive long-term business success. To succeed, they must enhance innovation, agility, and digital transformation to overcome disruption, grow, and scale. Doing this requires allowing individuals to work together effectively and efficiently so they can each contribute their unique value and perspective. Leaders must get the most out of their teams by allowing them to easily contribute their knowledge and insights to achieve company goals.

Adopt a Platform

Operationalizing collaboration helps companies move beyond ad-hoc collaboration to achieve these objectives. It's time for companies to invest in the right technology to improve collaboration in five dimensions:

- People
- Process
- Project
- Portfolio
- Technology

It's Time to Act on Collaboration

Collaboration is more than a buzzword, it's a means of competition that drives countless business benefits ranging from individual productivity to enterprise-level profitability. Companies that optimize how they collaborate are better poised for profitable growth as they compete in today's environment characterized by increased business risk from disruption and increased opportunity from digital transformation. It's time to focus on collaboration as an operational discipline that can be enabled and continuously improved over time.



Acknowledgments



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About the Author

Jim Brown founded Tech-Clarity in 2002 and has over 30 years of experience in the manufacturing and software industries. Jim is an experienced researcher, author, and speaker and enjoys engaging with people with a passion to improve business performance through digital enterprise strategies and supporting software technology.

Jim is actively researching the impact of digital transformation and technology convergence in the manufacturing industries.



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References

- 1) Jim Brown, *Executive Strategies for Sustaining Long-Term Business Success*, 2023, Tech-Clarity.

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