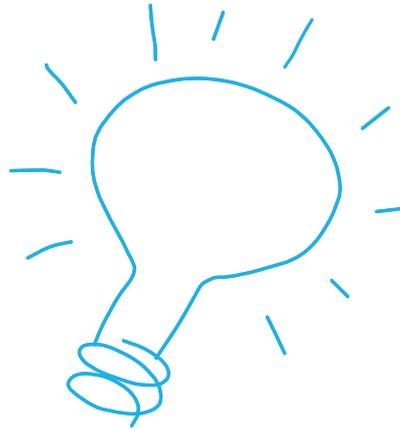


Eleven lessons on achieving broad deployment of collaboration technologies in the workplace.

A White Paper from
SMART Technologies



Based on discussions held at the SMART Collaboration Technology Forum 2011.
9–10 November 2011, SMART Executive Briefing Centre, Paris.

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Foreword



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Collaboration technologies are a tantalising prospect for today's businesses. Not only can they deliver marked improvements to existing business processes, they also hold the key to unlocking completely new ways of working. They can drive up productivity and creativity. They can save time, whether in the office, through remote working or by reducing travel time. They can cut the carbon footprint of a business. They can deliver the most effective and exciting collaboration experiences ever seen, irrespective of location, particularly as part of a complete visual collaboration solution.

However, the deployment of collaboration technologies is not necessarily straightforward. It is a multi-faceted, multi-disciplinary challenge with plenty of scope for getting it wrong, potentially resulting in misunderstood technologies installed in the wrong locations and being used for the wrong purposes – or not being used at all. In short, a costly missed opportunity.

The goal of this White Paper is to provide an insight into how best to deliver a deployment programme for collaboration technologies that works for your organisation. The eleven lessons set out here range from top-tier strategic considerations to practical, everyday steps. They are drawn from the discussions that took place over two days at SMART Technologies' inaugural Collaboration Technology Forum.

The participants in the Collaboration Technology Forum were Abbott GmbH & Co, Adidas, Biogen Idec Manufacturing, Capgemini, Centrica, Coodart, Deloitte, Deutsche Post DHL, NNIT, Solutors, Steljes, Telefónica and ourselves, SMART Technologies.

Collectively, these organisations have over one million employees around the globe and decades of experience of using collaboration technologies. One of the main aims of the Collaboration Technology Forum was to allow them to discuss their insights and practical experiences with each other. This report aims to share these findings with a wider audience.

We are passionate about visual collaboration solutions that enable, not inhibit. That are not just installed, but adopted. That are integrated and embraced within our everyday working lives. We hope that the lessons of this report will help to achieve this.

Eleven lessons

Analogue



Digital

The Challenges Facing Business

The corporate world faced a set of diverse challenges in 2011 that would test the mettle of the most adept of business leaders. The global economic downturn, the lack of growth in the major Western economies and the ongoing Eurozone financial crisis have forced businesses to cut costs, scrutinise budgets and demand new efficiencies from all parts of their operations.

Local



Global

At the same time, the globalised economic model of the 21st century demands an increasingly agile approach to the way that we do business. More and more organisations are operating across international boundaries and time zones, with suppliers, customers and colleagues scattered around the globe. The ones that succeed in this environment will find new ways to engage, communicate and collaborate on a global basis in a faster, more responsive and more effective fashion.

Viewing



Interacting

Environmental considerations are also moving up the boardroom agenda. What was once viewed as a largely discretionary activity, championed by a few companies, is now a business-critical consideration for every major organisation; expected by customers, supported by shareholders and legislated by governments.

Meeting



Collaborating

The emergence of what might generally be termed 'new ways of working' is also presenting both challenges and opportunities to business. Constant innovations in business technology, the rise of mobile working, evolving workplace cultures and employment rights that allow a more flexible approach to when and where we work, and new ideas of what constitutes 'the office', are all reshaping the traditional parameters of 'work' as a 9 to 5 fixed-location activity.

The transformation of the workplace is also being accelerated by the emergence of the 'net gen'; a generation of young people that is totally au fait with interactive, touchscreen technology and entirely comfortable using collaboration tools for education or work. The technological skillset and collaborative practices that this generation will bring to the workplace is set to have a profound effect on how businesses operate.

The Role of Collaboration Technologies and the Deployment Challenge

Collaboration technologies can be regarded as any technology product, service or solution that supports the process of collaborative working, learning or interacting, whether between colleagues in the same room or across multiple remote locations. Whilst the best-known examples are the likes of videoconferencing, audioconferencing and interactive whiteboard technology, a new concept of 'visual collaboration solutions' is now emerging. Visual collaboration solutions provide a fully integrated package that encompasses interactive displays, bespoke collaboration software, remote collaboration options, support, training and maintenance services and compatibility with every day industry-specific software.

Whether standalone or integrated into existing communications systems, these technologies hold great promise as a way of delivering more effective collaborative experiences that increase productivity and provide tailored solutions to some of the most intractable collaboration challenges faced by organisations and business sectors.

However, we also know the process of deploying collaboration technology needs to be carefully thought through, whether installing a single interactive whiteboard in a meeting room or undertaking full deployment across a large multinational organisation.

To maximise the benefits that collaboration technologies can deliver, there are a host of issues to consider during the planning, deployment and operational phases; the organisation's corporate objectives, the level of boardroom support, the level of acceptance among the workforce, the fit with the working culture, integration with other processes and technologies, the suitability of the workspaces available, and the specific challenges faced by different user groups; all of these issues can have a significant bearing on the success of the deployment process.

Put another way, will the technology be used on a daily basis by large numbers of employees and in a way that fulfils the potential of the technology, or will it gather dust in an unused corner of a meeting room?

There is no easy answer to this question, but in order to maximise the chances of success, it is instructive to learn from those organisations that have been actively involved in the deployment of collaboration technologies. Based on their experiences and insights, these are the lessons that need to be learnt in order to meet the challenges posed by the broad deployment of collaboration technologies.



The lessons

Define exactly what broad deployment means for you and what you want to achieve.

It is essential to understand exactly what 'broad deployment' means for your business. It should be articulated in terms that are appropriate for your organisation and your needs. You should also define what a successful deployment means, including the objectives of the deployment process and the yardsticks by which successes are measured.

Be clear on the purpose of the deployment of collaboration technologies. For example, is the aim to do the same things better and more cost effectively, or is it to find new ways of doing things?

The drivers behind the need for broad deployment will differ between organisations. This could be one or several of the following, or something entirely different:

- To reduce travel time and mileage.
- To reduce real estate space.
- To deliver improved collaboration experiences within the same room.
- To deliver new/improved collaboration between remote locations.
- To solve particular challenges within an organisation's business processes.



“We needed to reduce our real estate commitments. Investing in better collaboration technologies was a means to achieve this and also a way of compensating for the reduced office space by providing improved collaboration facilities.”

“We are a very decentralised business, with design centres and factories in the USA, Germany, China and all over Asia. We need to collaborate between very distant locations where the home language is not the working language and better, more visual collaboration tools can help to avoid the inaccuracies of written notes.”

2

Find the fit between your deployment strategy and your organisational culture.

Each deployment strategy should further enhance or enable the way an organisation already works, by working with the grain of the corporate culture of the organisation. This will give the deployment strategy a greater chance of success.

Similarly, a link must be established between the collaboration tools that are being deployed and the corporate objectives, strategy and common working practices of the business. The collaboration tools – and the deployment strategy behind their deployment – should serve as an extension of the ethos of the whole organisation; not just its approach to collaboration or even its approach to communications.

Internally, the key messages in support of deployment should focus on how collaboration is enhanced, on the tangible outputs that will be delivered and on the value that the collaboration tools can add, rather than focusing on the hardware used.

The deployment strategy should also identify the ‘pain points’ within an organisation and show how collaboration technologies can specifically target and address those pain points. Furthermore, by demonstrating how collaboration solutions can be specifically applied to different business areas and job roles, people will be more likely to see the value they add and buy into it. This will help the deployment process to gain traction.

For example:

- Reviewing CAD/CAM drawings and diagrams within engineering departments
- Securing sign-off on documentation within finance teams
- Saving hours of typing up meeting notes for team administrators

The biggest selling point for most collaboration technologies, particularly interactive whiteboards, is **functionality** and this needs to be conveyed to colleagues during the deployment process in a way that is practically applied to the meaningful issues that they each face. In this way, targeted collaboration solutions can be offered for different parts of the business, drawing on the expertise of the technology provider in each.



“The best route to achieving broad deployment is through a succession of cumulative targeted deployments. That’s the way we will go about it. We won’t sell it as ‘this will help you in your meeting room.’ It will be done in a targeted fashion that explains ‘we know that your specific problems are tasks x, y and z and we will offer you solutions a, b and c.’”

3

Design and implement a deployment strategy that covers each stage of deployment.

An organic, piecemeal deployment process for collaboration technologies within an organisation is possible, but is more typically led by a conscious, strategic decision. In this situation, it is imperative that the deployment process is underpinned by a deployment strategy that covers all stages of the process, covering conception, design, proof of concept, rollout, ongoing assessment and the post-project legacy.

Such a strategy must account for all factors that can impact on the project's chances of success. These factors include real estate, premises & facilities management, IT, people, working culture, financial considerations, return on investment, adoption rates, change management issues, technical support, vendor relationships, future-proofing and future applications for the collaboration tools in question.



"We ordered a lot of video conferencing boxes from different manufacturers. These were in located in the corners of rooms, without a directory of contacts or any technical support, so no one used them. It was a bad experience all round, with no one thinking about the end-to-end log, no centralised directories and no support service."

A thorough 'proof of concept' stage is important before wider deployment of the technology is triggered. This stage must be suitably robust in order to serve as a valid test of the technology, with sufficient time permitted for a meaningful trial period.



"We needed to test that the technology worked within the business. We trialled it in a number of different test areas, departments and buildings. We made a considerable investment in testing the proof of concept, as we needed to make sure that people would try it out, tell us what they thought, accept the technology and make use of it. Our broad deployment was triggered when the trial proved to be a success."

Consideration should also be given to which internal department is charged with managing the deployment of collaboration technology and the associated budget. There is anecdotal evidence that broad deployment is more successful when led by operational departments rather than finance departments.



"We saw a sea change for the better when the facilities management team, which managed the deployment of our collaboration technologies, switched from reporting into the finance team to reporting into the operations team. There was a much better effort to work together with us, the deployment project team."

The post-project legacy also needs to be properly planned and managed. When the deployment project has been concluded, it is essential that responsibility for the ongoing management of the organisation's collaboration tools is handed over to another party in a smooth, timely and co-ordinated fashion, along with a clear rationale for the choice of department or team to which that responsibility has been passed and a brief on how that responsibility is to be discharged.

4

Top-down or bottom-up deployment? Find the best fit for your organisation.

A common question is whether the deployment of collaboration technologies should be a 'top-down' (management-led) or a 'bottom-up' (workforce-led) process. There is no definitive answer to this, as the working culture and structure of the organisation will dictate the relative influence of a top-down or bottom-up initiative. The imperative is to pursue the approach that is a more natural fit with your organisation.

However, it is undisputed that two essential components of all successful deployment programmes are both **leadership** from the above and **acceptance** from below.

Leadership for the broad deployment of collaboration technologies from senior management is important as this group controls budgets and takes major decisions on procurement, IT investment and operational processes. Put simply, C-level decisionmakers can drive it forward if they like it, or put the brakes on the process if they don't, and there are many anecdotal examples of where CEOs have been responsible for identifying and instigating technology investment decisions. It is also commonly argued that changes in working culture need to be led from the front.

By the same token, acceptance of new collaboration technologies by the wider workforce is critical if it is to be not only purchased, but also properly adopted and commonly used. The 'pull' effect of word-of-mouth recommendations is a more powerful force than the 'push' effect of a management missive, leading to a more organic, peer-to-peer driven adoption process.

Moreover, if collaboration technologies are to be a long-term success, people must recognise the benefits themselves and voluntarily choose to use them. This is why it is essential that the workforce is involved in 'proof of concept' designs and testing. Not only does it draw upon their practical understanding of the job to be done, it also gives them greater ownership in the process and the outcome.



"As well as helping to test our new collaboration technologies, our people were also voting for the chairs they wanted, the desks they wanted and the layout of the building they wanted in our new offices."

A related issue is whether or not an organisation should consider issuing 'rules' that govern the use of new collaboration technologies. Again, this will depend on normal working practices and the degree of centralised control or individual autonomy practiced by each organisation. However, it has been suggested that whilst certain rules may be appropriate when establishing new working practices (e.g. when a collaboration workspace can be booked for use), 'recommendations' or 'guidelines' may be more appropriate in many cases (e.g. expected meeting room etiquette).

5

Reconcile the impact of your collaboration technologies with your working practices.

Do not assume that the deployment of new collaboration technologies will inevitably support other new ways of working that are being introduced to your organisation.

It is true that collaboration technologies have a big role to play in facilitating changes to the ways that we work, whether it is a more flexible approach to working hours, a rise in remote working, the convergence of home and work devices, or the need to engage across borders and time zones with colleagues, customers and suppliers.

However, conflicts can arise. Risks are posed to an appropriate work-life balance if new collaboration tools mean that we can all be reached irrespective of whether we're in the office, on the move or at home. 24/7 connectivity on remote business devices can imply constant availability, whilst the rise of flexi-time actually narrows the window of opportunity for collaboration, as well as making it harder to connect with colleagues and customers during core working hours. The growing integration of home and work resources (e.g. shared telephone numbers and laptops) is a subset of this.

In short, there is a risk that broad deployment could be undermined by a failure to review the implications for other changes to working methods, as well as the deployment of other workplace technologies. This requires an intelligent approach to assessing the impact of your collaboration technologies at the proof of concept stage, so that all variables are pulling in the same, positive direction.



"80% of our colleagues are still logged on in the evening, often up to 11.00pm at night and beyond. We're trying to break that habit."

6

Plan and manage your workspaces and real estate to support the deployment process.

The broad deployment of collaboration technologies cannot be achieved without reference to the workplace within which the deployment will take place. The modelling of the physical space can have a critical impact, not just on the effectiveness of the technologies when used, but also the success of the deployment process itself.

If deployment takes place within a new build project, there is far more scope to deliver bespoke collaboration spaces. The opportunities are more restricted if you are working within the built form of an existing office, but it is still perfectly possible to remodel rooms and spaces so that they are better suited for collaboration sessions. This could require improvements to the acoustics or lighting levels in the room.

At the very least, all deployment planning must take account of the constraints and opportunities presented by existing real estate provision and facilities management arrangements. The costs involved in reconfiguring office space to create new meeting areas capable of hosting collaboration technologies should also be factored in.

Visibility is also a key component of the broad deployment process. In order to encourage usage and acceptance in an organisation, it is very helpful for colleagues to be able to physically see the collaboration technologies being used, whether it is through glass walled meeting rooms or other communal spaces.

Organisations are also looking beyond the traditional meeting room and also placing new collaboration technologies such as interactive whiteboards in open, communal spaces with a high footfall, such as hallways, open plan floors and cafeterias.



“With a desk in our location costing between £6,500 and £7,500 a year to run, we needed to tackle our real estate costs. It’s also about sustainability, delivering a better work-life balance, reducing travel and working smarter.”

7

You need internal champions.

Every organisation hoping to deliver the broad deployment of collaboration technologies needs its internal champions who will promote, encourage, teach and evangelise on behalf of the technologies. Their role combines that of cheerleader for the technologies, trainer in how it can be used and mentor for those colleagues that may be nervous about taking their first leap with collaboration technologies.

Internal champions need to have a genuine commitment to the role and a strong understanding of the technologies and its capabilities, in terms of what they can deliver for the organisation and individual colleagues. It is also helpful if the internal champions are influencers within their organisations. For example, Personal Assistants are very well placed to benefit from new collaboration technologies themselves and also to encourage their managers to adopt the technologies.



“We trialed interactive whiteboards in two separate offices. In one office, the board was located in a highly visible space where everyone could see it. Supported by two real evangelists for the technology, it snowballed and became very popular. In the other office, the board was located out of sight in a small room, with no one to promote it and it was never turned on. You must have a champion for it.”

8

A great user experience is essential.

The single most effective way for new collaboration technologies to be adopted by employees is for those employees to have a great user experience, every time.

Even if the need for the technology is well established among employees and the products are cutting-edge, an unsatisfactory experience on the part of the participants will undermine enthusiasm and damage the prospects of securing broad deployment.

The room quality, including the lighting and acoustics, are important. In some cases where the physical space is sub-standard, organisations are looking towards more creative options in order to improve the user experience:



“We changed our rooms, reconfigured spaces and introduced new tools to give us more flexibility, including lots of desk-to-desk video conferencing. We also looked at the acoustics, which can really affect the user experience, and introduced two other solutions; Vpod, which is video conferencing in a box, and Orangebox acoustic pods, which are good for dead space.”

The procedural aspects to booking collaboration sessions are also worth considering. An efficient one-stop-shop for bookings can make a notable difference, rather than people having to make separate bookings for a room, for the equipment and for a telephone line, as well as remembering several passwords and PIN numbers.

Users are also looking for intuitive, simple-to-use functions within the collaboration technologies, so that they can turn up, press a button and get started in seconds.

9

Provide employees with training, refresher sessions and learning aids.

If new collaboration technologies are to be deployed across an organisation, it is imperative that the employees have the skills and the confidence to use them. Initial training, regular refresher sessions and other learning aids are essential in ensuring that people are willing and able to fully utilise the tools that are at their disposal. New employees should also have a training session as part of their induction process.

Following initial training, regular refresher sessions will help people to retain and develop their skills, as well as ensuring that new arrivals are getting the same basic training. Technology providers and vendors should support this process and be encouraged to return after three months, six months or as appropriate to offer refresher training, beginner sessions and to demonstrate new and advanced functions.

In delivering training and encouraging acceptance of the technology, it is vital that technology providers and vendors have an understanding of the particular business processes and the ‘pain points’ within each organisation, so that training can be applied to their specific needs and demonstrate how collaboration technologies add real value; perhaps through real life case studies, such as supporting a pitch process for a marketing agency or reviewing blueprint documents for an engineering firm.

Training sessions should not always be formal, diarised events. They can also take the form of informal, drop-in sessions or surgeries held in communal spaces, such as the cafeteria or open plan floors.

The internal champions for an organisation's collaboration technologies have an important role in supporting their colleagues as they learn how to use new tools. They should feel empowered to step in at any time to help their colleagues, both with their practical skills and in building up their confidence.

The 'depth' of use should be monitored. Whilst your collaboration tools may be in use, what proportion of their features is actually being deployed? For example, if an interactive whiteboard is only being used as an electronic note pad, then further effort will be required to encourage the full capabilities of the device to be exploited.

The educative process should also be supported by appropriate printed collateral. It may be helpful to have a comprehensive instruction manual or training guide available, although this is unlikely to be an appropriate point of reference for most users. Instead, organisations are well advised to develop simple, bite-sized learning aids, such as a onepage cheat sheet, a short in-room user pack, a credit card sized user guide or a small desktop tool that provides basic instructions and contact details for further help.

The more user-friendly and visually engaging the aids are, the more useful they will be to employees on a day-to-day basis. Other options include the use of games and competitions to encourage people to try out their new collaboration technologies. Online resources, such as short training videos on YouTube, can also be used to better demonstrate the capabilities of the technologies and how they can be used.



"We have three levels of documents to help our employee to use their SMART Boards; a card with a telephone number to call if they don't know how to use the SMART Board, a chart with simple instructions that we produced, and a detailed manual."

10

Work closely with your collaboration technology provider.

Your technology providers and vendors are vital partners in the process of delivering a successful deployment of collaboration solutions. They need to work with you in helping to identify the collaboration goals within your organisation, designing the appropriate deployment strategy, helping you to overcome the obstacles that may arise and working with your senior management team and your employees to help them to understand, accept and adopt the technology.

To maximise their value, technology providers and vendors should not simply act as a supplier of technology products; they have a vital consultancy role to perform in helping organisations to achieve their deployment objectives.

It is also important that an organisation invests the time in helping its technology providers and vendors to properly understand its business and its collaboration goals. They need to know the functions that you want, the applications that you need and the pain points that you want to overcome. This dialogue and this relationship are vital in order to deliver a successful deployment and a great user experience.

Technology providers and vendors should also be able to assist with delivering training and producing learning aids that are tailored to the organisation and its employees.

With an eye on the future, organisations should make sure that they ask questions of the technology provider about future-proofing its collaboration products, ensuring that forthcoming software and hardware upgrades can be added and that its products aren't about to become obsolete. They should also give feedback on what functions, tools and applications they would like to see next. In short, they should be prepared to be demanding and to ask tough questions of their technology providers and vendors.

11

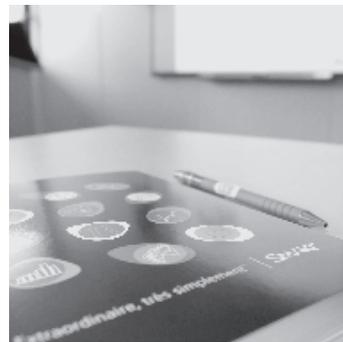
Plan for future uses, future tools and future technology trends.

In order to ensure the long-term success of a broad deployment strategy, organisations must always be planning for the future and thinking about what they would like their collaboration technologies to be able to achieve tomorrow.

As well as addressing issues of future-proofing their products with their technology providers and vendors, organisations also need to be mindful of other technology trends, anticipated future uses for their collaboration solutions and the increasing integration of collaboration technologies with other common workplace tools, as standalone solutions become less viable.

Such integration is likely to be application-led in the future, as organisations demand to use not only common workplace applications within their collaboration tools, such as Microsoft Office, but also specific applications for their industry and job function, such as AutoCAD or Adobe Illustrator. The extent to which an organisation's collaboration technology is flexible enough to be customised to its current and future needs is therefore an important one.

Organisations also need to be alert to the increasing blurring of the lines between personal devices and work devices. According to a recent Microsoft/YouGov survey, 45% of businesses allow employees to use their own computer equipment for work purposes. With an increasing number of people using personal devices for work functions, more organisations are accepting this trend and working to facilitate it by tackling issues of integration and security. It is vital that organisations are aware of such trends, which can be fast moving but with significant long-term consequences for the collaboration solutions that are being deployed.



Get in touch

If you'd like any more information about SMART Technologies or this White Paper, we'd love to hear from you.

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