

Promoting a Culture of Collaboration:

An Overview of Attitudes, Strategies, Behaviors, Tools, and Future Needs for Collaboration Success

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At most professional services firms, success hinges on the ability of teams to work well together — complementing each other’s strengths and filling in gaps wherever they occur. While entire libraries are filled with books exploring the subject of managing effective teams, most managers lack the time to even begin a review of all the literature.

A quicker path to success, based on our experience, is to recognize that effective teams can benefit from a thoughtful combination of adopting the right attitudes, strategies, behaviors and tools, while keeping the future in mind. In this paper, we provide a high level view of five of the most essential ways to promote a culture of collaboration.

ATTITUDE: Working Together as a Team

Few things can make a manager at a professional services firm more excited than seeing his or her team excited. Such enthusiasm is not something one can easily create — but a key first step is getting the group of

individuals to move from thinking of themselves as mere co-workers to teammates.

Consider the popular deconstruction of the word **TEAM: Together Everyone Accomplishes More**. By looking more closely at each part of the phrase, we can uncover some fundamental strategies to improve staff cohesion, help team members begin to work together more effectively, and feel a sense of enthusiasm for their role on the team.

Together: One of the most important things you can do to get your staff working together as a team is to get everyone working on the same system. Often, individual departments are working on their own specialty software, a reality that has the tendency to create independent groups or communities — the antithesis of a team atmosphere.

However, for some firms, it is not feasible to migrate all employees to a single, shared platform or system. In such cases, a better approach may be to look at new

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tools for collaborating and sharing data, such as setting up a [Kona](#) space or DropBox folder for projects.

For professional services firms that are seeking to leverage a fully integrated system, a better solution may be [Deltek Vision](#), the leading ERP software designed for project-based firms in the professional services industry. Our firm has had significant experience implementing this application in real-world environments, and our website has many resources that go into the benefits of Deltek Vision in more depth.

Everyone: To be successful as an organization, and as a team, you need buy-in on everyone's part. Your firm can invest in the world's best software and top-of-the-line infrastructure; yet none of it will mean anything if your staff does not embrace the technology — and the sometimes profound changes in roles, processes and outcomes that may come with it. For this reason, every effort you lead should have a champion, a 'team captain' for the project. Ideally, this person also acts as a motivator, resource and taskmaster. Without a champion, your effort is sure to lack in overall direction and effectiveness.

Accomplishes: An important aspect of being a member of a team is being able to know that one is doing one's part. To accomplish this, team members need goals, and ways to track them. By [developing a set of core](#)

[growth strategies and metrics](#), your firm will be able to position itself to consistently surpass the competition. Additionally, you cannot underestimate the value of the sense of accomplishment a team gains from attaining small 'wins' along the way to the main goal.

More: To keep a team's members enthusiastic, one must be willing to challenge them. By expecting not only production, but also a level of professional growth out of each team member, you create a positive environment of development.

Paving the way to growth and higher profitability begins by encouraging the right attitude — and transforming co-workers into teammates — and these are some of the core attitudes toward which to strive.

STRATEGIES: Improving Team Project Collaboration

Beyond encouraging enthusiasm among team members, another essential focus must be improving project collaboration. Here are some specific strategies to employ in order to create a more collaborative environment:

- 1. Focus on Goals:** The most effective project collaboration tends to be aimed at a specific goal or goals. So a natural place to start the process is with a discussion of the pain points/problems for a given project that the team is trying to address. Starting in this way

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ensures that team members share a specific understanding of what success will look like, and also makes it easier to take periodic measurements of the team's progress and compare it against the established goals.

2. **Create small, diverse, nimble teams:** The best way to encourage collaboration on a team is to keep groups small and diverse. For inspiration, consider that one of history's most prolific inventors, [Thomas Edison](#), liked to organize his people into teams of 8 or less that included a variety of disciplines (his light bulb team, for example, included chemists, mathematicians, and glassblowers). Fortunately, collaboration tools on the market make it easier than ever to include team members not only from different parts of an organization, but from different parts of the world.
3. **Build trust:** To improve project collaboration, it's crucial for team members to trust and respect one other. In a similar vein, they must be sure that management is supporting them, providing the time needed for collaboration, and giving credit where it's due. If you're assembling a team with members who are working together for the first time, consider team-building exercises that allow the members to get to better know each other and their

work/communication styles — building cohesion and trust in the process.

4. **Choose appropriate tools:** We live and work in the age of the app — and that's good news for organizations that are seeking to improve project collaboration. There are many software tools that empower collaboration — not only widely-known ones such as DropBox that facilitate file sharing, but also other, lower cost (and even free) tools for screen sharing, real-time chats and IMs, scheduling and more. [Click here to read about our five most highly recommended collaboration tools.](#)
5. **Appreciate different approaches to technology:** Ultimately, it makes sense to have your team members all using the specific collaboration tool or tools that you select, for ease of management and cost effectiveness, if nothing else. That being said, it's helpful to keep in mind that not everyone may be ready to adapt to the new technology at the same time. Be realistic, and build a process and schedule that allows time for bringing every member up to speed on the new technology.
6. **Allow sufficient time for success:** Evolving to a more collaborative environment is not a simple or quick process. Rather, it requires changes in not only how group members

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BEHAVIORS: Top 4 Best Practices in Team Communication

1. **Responsibility for success rests with the communicator, not the receiver.** *Before you start communicating with a co-worker or teammate, pause for a moment. If you're having trouble keeping up with your train of thought, how can you expect someone else to follow it? To ensure success, you must develop a coherent, easily understood message.*
2. **Cut out the noise.** *Communication "noise" refers to various factors that affect the listener's interpretation — ranging from psychological (stereotypes, biases), to physical (actual noises that interfere with hearing), to semantic (mumbling, jargon, etc.). For best results, identify any potential noise before or during a conversation, and address it immediately!*
3. **Haste makes waste.** *We may spend hours forming our thoughts on a subject, and then expect listeners to react on the spot with the same level of thoughtfulness. Be fair, and create an environment that fosters thinking, collaboration, and open ideas. Anything less could lead team members to worry more about why you are asking a question, than what you are asking.*
4. **Listen, listen, listen!** *One of the biggest communication mistakes is lack of listening — on the part of both the sender and receiver. If you're busy forming an opinion about what is being said, rather than actually listening to it, you're missing the message. One modest tip for better listening: If you're using a computer or device while having a conversation, don't track a specialized set of KPIs, but also make them constantly available to employees.*

work individually and together, but also in the level of trust that the individuals have in each other and in management.

Try to manage expectations in such a way that you maintain enthusiasm for the new possibilities that the process will enable, with the realistic understanding that success will not come overnight.

7. **Effectively capture information and ideas:** Last but not least, make sure you have a system to capture and store the group's collective work, as well as individual members' contributions. Unlike using simple email for communication among team members, the leading collaboration tools create central repositories where communication and documents can be archived for later referral — a very useful capability to have throughout a project, but especially when a key team member leaves.

For the most part, the strategies underlying collaboration are not too different from other tried-and-true business practices. By carefully establishing and guiding your project teams, equipping them with the most effective collaboration tools, and managing expectations appropriately, your organization can be on its way to far more innovative and responsive products and services.

TOOLS: Driving Social Collaboration Throughout the Organization

It can sometimes be difficult for a professional services firm to get its employees to interact and collaborate with each other effectively. Fortunately, social collaboration tools can improve the effectiveness of not only your individual employees themselves, but also the separate functions within the firm and the organization as a whole. Here are some of the ways these innovative tools can add value throughout the organization.

Executives:

From the CEO or partner's perspective, social collaboration tools have the potential to improve productivity at every level within the organization:

- Empower individual employees to share information and collaborate on projects more efficiently and keep their managers and colleagues up-to-date in real time.
- Allow functional units to collaborate more effectively, because managers have better insight into the status of all ongoing projects. Managers also have a central location for all project communication that doesn't disappear when an employee leaves.
- Enable team leaders of a firm's various functions to collaborate and communicate more effectively with one other and the CEO.

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For many CEOs, another major benefit is differentiation from the competition. Collaboration tools such as [Kona](#) make it far easier to include clients as team members throughout the process. Compared to other firms that simply use emails and phone calls to keep clients informed, a firm using these tools can enable more integrated and up-to-date communication with clients, and at the same time, create a more enjoyable customer experience.

Project Managers:

On each project, project managers can get better visibility into milestones and issues, improving project efficiency as well as the client's experience:

- Improve team members' communication and accountability, while reducing time wasted in status meetings.
- Strengthen the project manager's relationship with the client, and also differentiate the firm.
- Bring new staff up-to-speed more rapidly, shortening the time required before they can contribute.
- Create a centralized record of working issues, tagged and easily searchable.

Marketing/Business Development:

Professionals in a marketing/BD function, like executives, stand to benefit in the long term from the differentiation that can result from effectively managed social collaboration tools:

- Improve communication and accountability in proposal planning, development, and review, including go/no-go decisions.
- Streamline event planning and tradeshow preparation.
- Provide unified view of specific tasks across multiple BD proposal efforts happening simultaneously.
- Enable greater consistency and knowledge transfer across multiple groups working on proposals and other repeatable processes.

Information Technology:

IT departments can use these tools to address a range of technical needs and, at the same time, change the culture to one that is more collaborative:

- Enhance internal and external collaboration while protecting network information.
- Save costs over traditional collaboration solutions such as SharePoint (not to mention, increase user adoption).
- Improve management of complex IT projects and save time by enabling peer support.
- Allow the CIO and other leaders to be more aware and experience the "pulse" of individual projects and issues.

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Human Resources:

For the HR function, these tools can help in ways that are both strategic and logistical:

- Streamline and expedite recruiting and on-boarding processes.
- Use two-way internal communication about tasks events and topics to create a more collaborative environment and improve employee engagement.
- Allow HR employees to be more productive in planning and implementing internal events and initiatives.

Accounting:

For the accounting function, social collaboration tools bring new efficiencies to a variety of ongoing processes:

- Streamline month-end close processes for accounting professionals by eliminating the need to dig through email chains or contact multiple individuals for answers, and by generating repeatable steps to capture and organize financial information.
- Improve contract management by creating templates with specific steps and forms to guide each project.

Create a private but accessible space for accounting staff to capture progress and follow-up on A/R issues, assign individual responsibilities and maintain a centralized log of progress toward resolution.

FUTURE: Keeping up with Business Communication Needs

Business communication continues to change each generation. The quantity and speed of information has exploded and firms are seeking new ways to handle the pressure of information overload. Are business collaboration tools the answer? We predict that these 5 reasons demonstrate why collaboration tools are the way of the future.

1. **Reduce Dependency on Email** | Imagine a world of no email. It sounds crazy, right? However, if you had a designated space that colleagues, sub-consultants, vendors, and clients used to collaborate about specific initiatives, projects, or marketing efforts, wouldn't it be nice to capture all of those thoughts in an organized fashion in one area? When you think about some of the biggest challenges with email and the fact that colleagues are not always down the hall anymore, it makes sense that businesses are looking beyond email. Here are some things that can be improved through business collaboration tools where email consistently fails:
 - Eliminate forgotten or missed requests
 - Categorizing comments, notes, files, tasks, and requests
 - Capturing ideas, competitive intelligence, or ways to improve your business that are easily searchable

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2. Personal Meets Business

| The line of business and personal continues to blur. When was the last time you worked 9-5? People are working at all times of the night and answering questions while watching their favorite TV show. Business colleagues and clients are now connected to us on Facebook and personal activities and responsibilities need to be accomplished sometimes during the work day. Social collaboration and business collaboration tend to have the same needs: to share files, ideas, assignments, calendar of events, etc. Wouldn't it be nice to organize both business and personal in one tool? Collaboration tools like [Kona](#) are making this possible.

3. Make Life Easier | Employees

are looking at ways to balance their work and personal life, as well as, have more flexibility with their schedule. Not all tasks need to be done during work hours or even at their desk. Virtualization is becoming more common, requested, and needed in corporate America. Disasters or state emergencies have made that even more apparent. Additionally, they allow people to access information and other individuals anywhere and anytime with the comfort that the information is readily available in the cloud.

4. Instant Access | Business collaboration is not just for internal communication, but is also being requested by clients. Clients are looking for a better way to communicate and a better client experience. No more excuses of lost emails. Clients can instantly ping you with a question and you can immediately respond with an answer through the use of collaboration tools. What client wouldn't like to immediately IM or video chat with their consultant to resolve issues? Setting expectations of this instant access is important. Alternatively, you could set a schedule that you are available for client questions at a particular time each day and quickly answer those pending questions in one collaboration tool.

5. Integration | Collaboration tools are becoming more and more integrated with other business tools. Not only are they now integrated with our ERP, [CRM](#) and Outlook, but collaboration tools integrate with other sharing tools like Dropbox, Box, Google docs, Skype, and the list goes on. The ease of use and social familiarity increases the likelihood of usability. Integration makes it even easier for users to access data in one place through connectors.

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The Collaborative Edge

As mentioned in the introduction of this document, we have barely scratched the surface of the countless ideas that can contribute to more effective communication and collaboration among team members. Ultimately, each organization must find the combination of strategies, processes and behaviors necessary to achieve the results they seek. Business collaboration tools are all about working more effectively as a team.

In a sense, a firm's most important asset could also be a liability: if staff members cannot or will not collaborate effectively, the firm is not optimizing its capabilities. The attitudes, strategies, behaviors and tools outlined in this document have the potential to improve collaborative capabilities at every level and in every area of your organization, bringing about measurable improvements. At the same time, they can help you create a better client experience and differentiate your firm from others — critical factors in attracting and retaining clients and employees.

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