



Project-Aligned Collaboration

Many companies are using collaboration in their quest to become more efficient and 'leaner'. Business demands that people collaborate within companies (intra-company) and across company boundaries (inter-company) with suppliers, customers, etc. Collaboration happens where there are two or more people that want to reach the same target and need work together to exchange information and complete tasks to achieve the goal. This paper introduces Project-Aligned Collaboration and reviews its benefits.

Forms of Collaboration

Collaboration can take many forms including conversations, meetings and/or sharing information or documents via email. It requires a process of communication and follow-through by team members, and accountability by each individual to deliver her knowledge to the team and process.

Collaboration also involves internal and external resources. Looking at intra-company collaboration, it is safe to assume that these people can use the same tools as they are within the same environment. However, even then many teams typically use the *traditional and familiar collaboration tools - telephone, whiteboard and email.*

Looking at the inter-company collaboration, an additional obstacle arises due to each company's IT systems. They often are not compatible from one company to the other or company policies prevent users from other companies to get access to IT resources for security reasons. The users fall back to traditional collaboration tools such as the telephone, whiteboard and email.



Current Collaboration Tools

With the introduction of the Internet, web-based collaboration solutions became available to support collaboration. Typically they come in two forms: 1) 'Meeting-based' tools providing team members secured access to conduct virtual meetings or 'web-conferencing' to share documents, discuss issues or status; or 2) 'Document- or deliverable-centric' tools, allowing participants to share documents and deliverables between each other.

However, task lists, issues management and project milestones are not typically incorporated in these solutions. The team is still left to manage the overall processes and repository of information, again relying on key users to manage documents, and the use of email for communication of progress, status and issues. Therefore one of the key challenges with many of the existing collaboration software solutions is that they often do not support the management and communication of some critical information for any user to successfully collaborate such as:

- What is the current status of the work that has to be done?
- What are the steps that need to be executed to get the document or deliverable as a result?

Lastly, one of the major disadvantages of all these collaboration tools – specifically for new members we have to collaborate with, is that the new member doesn't have access to any historical information. Telephone calls that happened in the past are not accessible for a new member of the team; whiteboards got erased a long time ago; and emails are still available but have to be sent again (which in reality rarely happens). Web-conferencing minutes or issues information is often not available and dependent on the team to track, manage and to communicate to the new member. Document-centric



collaboration portals allow the new participant to gain access to historical data and documents but require the new member to search on his/her own.

These types of collaboration processes require good project management skills on the part of the team leader and also good execution skills on the part of the team. The intent is always to deliver but often there are too many obstacles to overcome that prevent efficient forms of collaboration from taking place. The top reasons for failure of most collaborative efforts are:

- Lack of assigning clear objectives and milestones
- Communication breakdown – not knowing the status of progress or issues pending
- Not following up with issues in a timely manner

Project-Aligned Collaboration

The focal point of collaboration is to jointly accomplish a goal. It involves a team that wants to work together to complete key activities or milestones, produce deliverables in a timely manner, and resolve issues as they execute their plan. This type of collaboration can be referred to as Project-Aligned Collaboration. It is based around the reality that people not only want to exchange documents and deliverables but also need to know WHO does WHAT at any given time. In addition to the WHO does WHAT information, participants also need to know about the current status of tasks. Progress can be better understood if all members could see the key tasks that have to be executed to finish the project (e.g. produce the document/deliverable/etc.).

Project-Aligned Collaboration concentrates on providing users with a solution to focus the collaboration processes around goals and objectives, projects and



milestones, and tasks that have to be successfully executed to achieve a successful delivery of any project and initiative on time, on budget and within project limitations. It facilitates good project management and execution processes by ensuring the team defines their goals and objectives. Commitments are defined and owned by an individual to ensure accountability, and progress updates are always visible providing for focused reviews on potential issues. The open environment promotes clear communication.

Project-Aligned solutions support processes and act as information repositories for teams to manage and track their objectives, projects, milestones, tasks, discussions and documents easily. While participants will prefer various collaboration tools to support their processes, it is important to recognize key elements that will be critical to the success of the collaboration processes. Virtual or face-to-face meetings will continue to happen. Conversations will certainly be required. However, it is critical to incorporate processes and a supporting solution to have the team on the same page on the goals, objectives, milestones, timeline, progress and issues.

The following benefits can be found when using Project-Aligned Collaboration:

- Focus collaboration and help team members to follow through on the objectives, milestones and deliverables in the timeframe desired.
- Allow participants to exchange information on the work that has to be done and has already been done, providing a clear view of the steps, and their status, that need to be executed to successfully finish the project/initiative and produce the deliverable/document.
- Give different stakeholders a view on the status of a project or a portfolio of projects allowing participants to add milestones and tasks, and update their status themselves. This way a Project-Aligned Collaboration solution



can also be used as an efficient vehicle to provide visibility into the status of a project or initiative across different stakeholders (suppliers, customers, and partners).

- Support learning processes and repository for future team members by capturing processes and information in a web-based repository reducing the ramp-up time of new participants.
- Incorporate critical project management and execution processes with ease to ensure collaboration succeeds.

There are several out-of-the-box solutions available that address specific areas of Project-Aligned Collaboration. Some of these are project management solutions, document management solutions, Email, web-meeting software, etc. Combining these essential solutions by having a unifying user interface that retrieves the information from the different data repositories and provides visibility into the tasks and resources allows maximizing the benefits from those solutions.

About gekima Solutions LLC

gekima Solutions LLC specializes in delivering solutions for the optimization and automation of administrative business processes, including solutions to allow customers to benefit from Project-Aligned Collaboration. bizTE is gekima's solution to automating the timesheet and expense management processes of organizations, both large and small. bizTE's easy to use web based interface ensures reduced training time letting customers instantly reap the benefits of automated timesheet and expense management.