Collaboration Best Practices: Global Report and Recommendations

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Executive Summary

A global research study, initiated in June, 2012 with over 700 participants, examined the value of implementing collaboration solutions in business and learning environments through a combination of technology tools and best practices. It revealed some compelling findings:

- **Levels of Collaboration Maturity**
  There are distinct levels of development that organizations exhibit as they become more competent collaborators. These levels of development form a collaboration maturity continuum based on their investment in technology tools and best practices. Value achieved from implementation of collaboration solutions increases with the level collaboration maturity.

- **The Value of Collaboration Maturity**
  More mature organizations achieve higher than expected levels of value from their investments in collaboration solutions. This value can be measured in specific outcomes, such as accelerating the rate of innovation in a commercial environment or improving student achievement in an education environment.

- **Achieving Collaboration Maturity**
  The maximum value from implementation of collaboration solutions is achieved through a balanced combination of technology tools and best practices. A well-developed implementation strategy that includes a focus on people, process, and technology is essential to success.

- **Collaboration Best Practices**
  The best practices that were tested varied by use case, but there are common areas of capability that were rated as needing improvement by participants from both business and education sectors:

  - Investment in strategy should precede technology. Acting with intent matters a great deal in achieving value.

  - An inclusive view of collaboration end users and a deep understanding of their requirements drives adoption and value

  - Providing appropriate collaboration spaces and enabling technology in informal settings is important to innovation and creativity

  - Rich technology integration, coupled with best practices is important to achieving advanced collaboration maturity and maximizing return on investment

- **Assessing Your Level of Collaboration Maturity**
  Organizations can participate in the research and receive a personalized self-assessment including improvement recommendations at smarttech.com/collaborationassessment

Introduction

Leaders of all types of organizations around the world, from school districts to multi-national corporations, are increasingly focused on effective collaboration as an opportunity to drive new value. In fact, IBM's latest global CEO study* ranked collaboration as the number one trait that CEO's seek in new employees as part of their efforts to create a more effective culture. In education, creating a 21st Century learning environment is seen by thought leaders as essential in preparing students for future success.
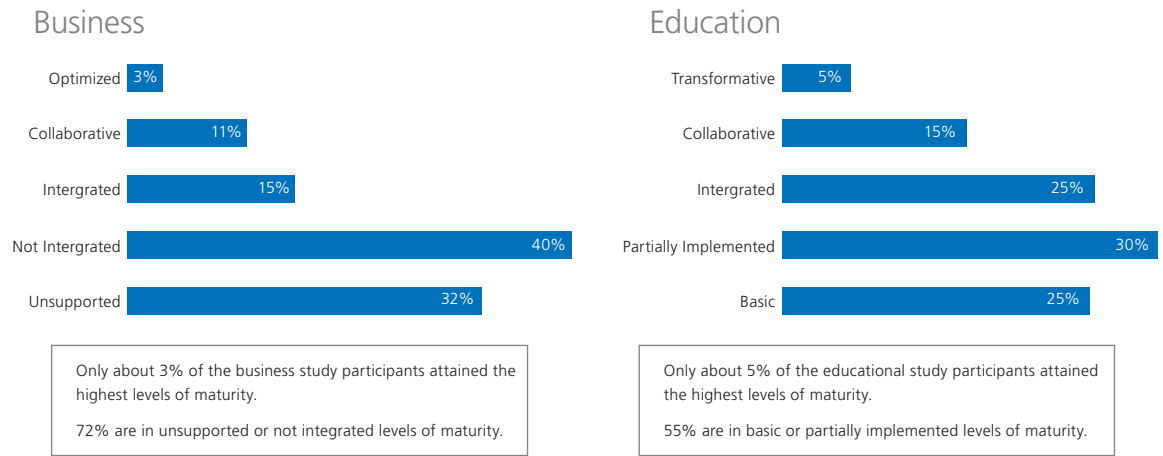
Within this context, SMART Technologies commissioned a broad global research study of collaboration solutions implementations in business and education environments. The study focused on understanding the types of investments being made in collaboration solutions – in the form of technology tools and collaboration practices – and the value received from those investments.

*Source: IBM C-Suite Studies (2012) Leading Through Connections; Insights from the Global Chief Executive Officer Study. Retrieved from http://www-935.ibm.com/services/us/en/c-suite/ceostudy2012/
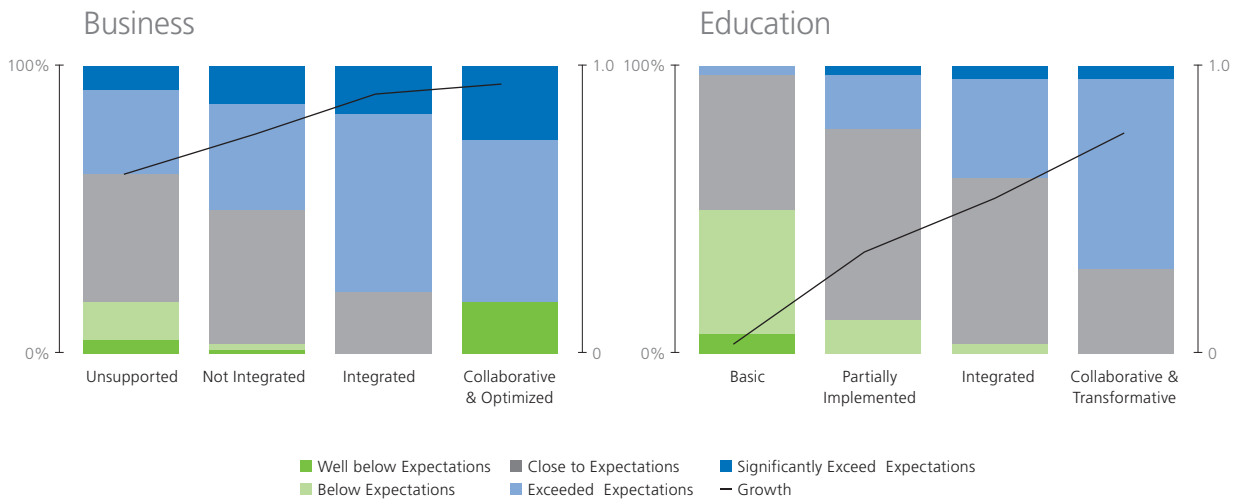
Levels of Collaboration Maturity

In both education and business environments, the research uncovered a five-stage maturity continuum related to the effective implementation of collaborative technology and associated best practices. Each study participant was placed into one of these continuums.

Overall Maturity Levels

Business

Optimized	3%
Collaborative	11%
Intergrated	15%
Not Intergrated	40%
Unsupported	32%

> Only about 3% of the business study participants attained the highest levels of maturity.
>
> 72% are in unsupported or not integrated levels of maturity.

Education

Transformative	5%
Collaborative	15%
Intergrated	25%
Partially Implemented	30%
Basic	25%

> Only about 5% of the educational study participants attained the highest levels of maturity.
>
> 55% are in basic or partially implemented levels of maturity.

Though the phases of the maturity models are defined mildly differently there is one striking commonality in the results. That is, the more mature organizations received greater than expected value overall compared to their other technology investments.

Value vs. Expectations

Business — Education

Legend: Well below Expectations, Close to Expectations, Significantly Exceed Expectations, Below Expectations, Exceeded Expectations, Growth

> For business, value exceeded expectations for 82% of participants in the highest levels of maturity, compared to 37% of participants in the lowest maturity level.

> For education, value exceeded expectations for 70% of participants in the highest levels of maturity, compared to 3% of participants in the lowest maturity level.

The Value of Collaboration Maturity

The research indicates that many organizations across the education and business sectors have achieved remarkable results from effective implementation of the right collaboration tools. The data shows that organizations with higher levels of collaboration maturity get better results – both in value and in specific outcomes.

The top outcomes, defined as those that improve the most across the maturity continuum, are listed below. For example: High performing business participants reported a positive impact to their rate of innovation 3.1x times more frequently than low maturity participants. High maturity education participants reported a tangible gain in student achievement 2.4x more frequently than low maturity participants.

Top Business Outcomes

- Accelerated rate of innovation (3.1x)
- Faster and more informed decision making (2.3x)
- Meeting productivity (length, participant satisfaction) (2.2x)
- Enhanced customer experience (2.0x)
- Increased individual productivity (1.8x)
- Reduced environmental impact (1.7x)
- Improved information quality (1.6x)
- Reduced travel costs (1.6x)

Top Education Outcomes

- Student engagement as measured by decrease in abstenteeism (3.2x)
- Ability to test and implement new teaching models (e.g. Flipped Classroom, etc.) (2.5x)
- Tangible gain in student achievement (2.4x)
- Decrease in discipline referrals (2.4x)
- Retaining and recruiting quality teachers (2.1x)
- Improved teacher effectiveness (1.5x)
- Improved student experience (1.3x)
- Increased teacher efficiency (1.3x)
- Ability to provide differentiated instruction (1.3x)

Achieving Collaboration Maturity

The study indicates that leading organizations succeed in deriving value from their implementation of collaboration solutions by having a clear strategy that accounts for investments in knowledge, people, technology, and process. This holistic, integrated approach has been affectively put into action by the leading organizations in education and business. It is clear that investment in technology tools alone is not sufficient to achieve the value associated with high levels of collaboration maturity.

Based on the research, the optimum mix of collaboration practices (people and process) and technology is relatively balanced for organizations at moderate levels of maturity. At low levels of maturity, the data shows that organizations should focus more on building the technology infrastructure and physical spaces necessary to drive adoption. At high levels of maturity, the focus should be on refining collaboration practices.

Collaboration Best Practices

As previously mentioned, two use cases were tested in the study: business collaboration within commercial enterprises and collaborative learning within school environments.

While the best practices that were tested varied by use case, there are some common areas of capability that (a) relate strongly to value and (b) were indicated as being areas of relatively low performance and high impact:

Investment in strategy should precede technology. Acting with intent matters a great deal in terms of achieving value and high levels of collaboration maturity.

In both use cases a strong relationship was identified between achieving value and the implementation of various strategy and planning activities. Both studies identified low performance / high impact practices in this area.

- Collaborative learning participants rated their approach to planning practices as low performance and high impact. Specifically, they indicated that many learning environments, outside of the traditional classroom were not planned (~30% with low planning levels overall). They also indicated that their implementation practices frequently did not include all of the necessary technological and process considerations (~40% of the time).

- Business collaboration participants rated strategy development as a low performance/ high impact area, suggesting a need for greater focus. Based on the responses from the business study, a fair number of collaboration environments (~40%) appear to be implemented without significant planning.

An inclusive view of collaboration end users and a deep understanding of their requirements drives adoption and value.

Within the study, this relates to the areas of needs analysis and requirements planning. Both were indicated as areas for improvement.

- Collaborative learning participants rated their approach to identifying user needs as low performance and high impact. Approximately 30% of the education participants in the study indicated that they did not effectively map needs to implementation priorities.

- Business collaboration participants identified their handling of some user groups (remote users in particular) as being deficient.

Providing appropriate informal collaboration spaces and enabling technology is important to innovation and creativity.

The research found that practices focused on informal collaboration and collaboration spaces are an area of low performance and high impact, relative to the other practices studied. Improved performance on practices related to informal collaboration and collaboration spaces have a direct relationship to measureable outcomes.

Traditionally collaboration has occurred in a meeting room or in a classroom. More and more collaboration occurs where ideation and/or learning occurs in real-time. Informal collaboration is frequently how big ideas are formed. Supporting informal collaboration involves technology for rapid capture of ideas without constraints and settings where ad hoc collaboration can occur.

Participants in both use cases studied indicated that they needed to improve in the areas of informal collaboration and in providing spaces for informal collaboration.

- Collaborative learning participants identified informal collaboration (generally ad hoc and outside the classroom) as a low performance/high impact practice. Higher Education participants indicated that their performance was significantly higher than K-12 participants, but it remained a low performance/high impact practice for them.

- Business collaboration participants identified several practices that related to collaboration spaces (formal, structured and informal) as low performance/high impact.

Rich technology integration, coupled with best practices is important to achieving advanced levels of collaboration maturity and the associated outcomes.

This refers to the collaboration practices that require rich integration across various parts of the solution. More specifically, there is a common user interface, movement of information between components, ease of making them work together, easy to set up, install, use together, etc. The concept includes "making it easy" to use the technology together, but extends to making the technology powerful to use together. Both business and education participants indicated improvement could be made here, and a noted a strong relationship between these practices and achieving high value.

- In education environments, advanced results are achieved through advanced learning models, flexible learning and the use of integrated whole class devices and personal devices. Collaborative learning participants in the study identified flexible learning as being a low performance, high impact practice.

- Business collaboration participants indicated that there were two practices related to rich integration that specifically needed improvement: ease of set-up and the ability to easily implement or use the results of your collaboration activities. As defined in the study, both of these can only be achieved with high levels of integration.

Conclusions

Collaboration skills are critical at every stage of the journey from the classroom to the workplace.

Businesses need employees with highly developed collaboration skills to leverage the connective and interdependent nature of today's business environment. Educators need to prepare their students for this environment while leveraging the many benefits associated with collaborative learning.

Both business and education organizations have achieved varying levels of maturity in implementing collaboration solutions, with opportunity for significant improvement in many areas. This research study uncovered those areas as well as what they can learn from each other. The most significant areas for improvement include strategy development, planning, broad user requirements, informal collaboration support and richly integrated solutions.

Applying this to your organization

Although the study indicated several improvement areas that could be appropriate for any organization, meaningful improvement is only achieved within the context of each specific situation. One cannot make broad generalizations about the specific actions required to attain higher levels of collaboration maturity.

For a personalized report and action plan that will compare your organization to the research database please visit smarttech.com/collaborationassessment.

Alternatively consider reviewing the action plans that are available based on maturity levels in the following white papers:
smarttech.com/business-collaboration.pdf
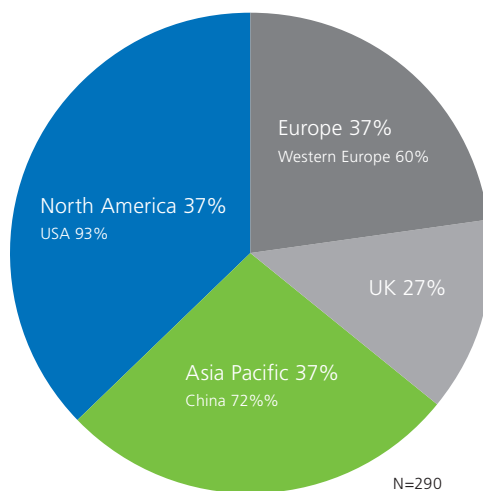smarttech.com/education-collaboration.pdf

Research Methodology and Demographics

SMART Technologies commissioned a research study in order to get a better understanding of the value derived from the investment in collaboration technology. The qualitative research included the development of questions about best practices through many in-depth interviews, site visits and group discussions. Early indications showed that collaboration is no longer just a powerful way of driving to high quality results, but a critical success factor for organizations. As part of the qualitative research, the definition of "value" was also explored. This was immediately translated into important measurable outcomes such as reduced costs, improved quality, reduced risk, increased business agility and improved student outcomes just to name a few.
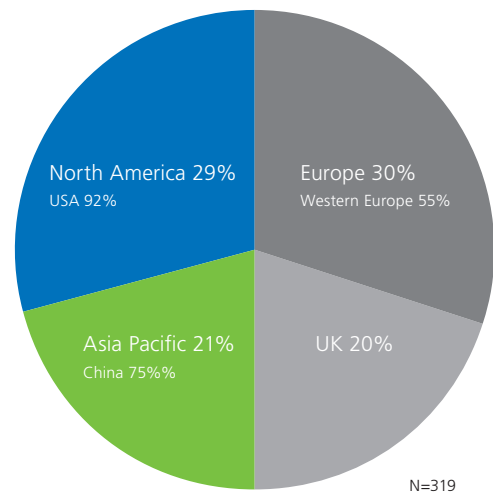
The quantitative study regarding collaboration technology best practices and measureable outcomes involved collecting input from more than 700 participants from around the world, which included a broad base of industries and functions including educational administrators and business leaders.

Study Participation by Region

Business

Europe 37%
Western Europe 60%

North America 37%
USA 93%

UK 27%

Asia Pacific 37%
China 72%%

N=290

Education

North America 29%
USA 92%

Europe 30%
Western Europe 55%

Asia Pacific 21%
China 75%%

UK 20%

N=319

Next Steps & Further Research

To help educational, business and public sector organizations leverage this innovative research, several forthcoming white papers will provide a detailed look at collaboration solutions best practices and technology adoption. The intent is to provide further direction on how schools, businesses and public sector organizations globally are achieving measureable outcomes from their collaboration solutions. In addition, as part of this initiative, we invite you to self-assess your organization. Visit smarttech.com/collaborationassessment.