Environment

• Rapid proliferation and maturation of collaboration tools – sync and async
• Users becoming more comfortable and familiar, and facile with the tools
• Increasing focus on and demand for tools to support collaboration, both intra- and inter-organizational
  • De-perimiterization
• Security and privacy concerns increasing
Environment

- Project-based teams coming together and disbanding as needed
  - What artifacts are left behind for others?
  - How are the results of their work, and lessons learned along the way, available to others?
- Virtual Organizations (VOs)
  - Generally project-based
  - Often separated by geography, affiliation, time zone
  - Usually uses significant computing resources beyond collaboration
Environment

- Increasing demands/opportunities for collaboration
  - Within the organization
  - Between organizations – with vendors, customers, partners…
- Reinventing the wheel: lost opportunities for serendipity and leveraging organizational knowledge assets
Challenges

• Staff **VERY** busy…
• Staff reluctant to embrace new systems without clear motivation/incentives and drivers
• More consumers than providers in early stages of collaboration tool implementations
• Usability obstacles
Challenges

• Collaboration tools springing up ad hoc (esp. wikis and blogs)
  • Policy compliance
  • Management issues
  • PR

• Knowledge and collaboration silos
  • Disconnected systems
  • Fragmentation
  • Friction
Challenges: Inter-organizational

- Virtual Organizations forming
  - How to support them effectively?
- Collaboration silos
- Complex/overlapping regulatory environments (SOX, HIPAA, GLB, international, etc.)
- Jurisdictional issues
- IPR
- Security concerns
Challenges: Inter-organizational

• External (and some internal) systems requires users to utilize separate usernames and passwords
  • Post-It proliferation & insecure passwords for low security applications
  • Users end up reusing passwords across multiple systems
  • Multi-factor authentication
• Privacy concerns
Key Elements for Successful Collaboration

- Ramped/phased rollouts
  - Start with low-hanging fruit, evaluate, then iterate, iterate, iterate…

- Continual assessment
  - Well defined and utilized feedback loops

- Creating and nurturing a collaborative mindset
  - Coupling with the organizational culture

- Incenting participation
Key Elements for Successful Collaboration

• **Reduce friction** hindering collaboration
• **Build Community**
  • Recruit champions to work with their peers
  • Foster communication channels in multiple directions
  • Listen…
  • Set achievable goals and milestones – short- / mid- / long-term
  • Build review and assessment into the system
  • Calibrate expectations
Collaboration and KM

• Harvesting lessons learned and other useful artifacts
  • Context: how does this fit into the project or task at hand? What other areas might it also be relevant in?
  • Provenance: what is the history of documents or other artifacts?
  • Reputation: who contributed to a particular document or artifact, and what level(s) of credibility can be attributed to it as a result?
Collaboration and KM

• Metadata
  • Attachment/assignment/management
  • Taxonomy
• Search and retrieval
Opportunities

- How to utilize Web 2.0 applications for business goals?
- Automate and externalize access control - authentication and authorization
- Allow access based upon identity, roles, and attributes
- Take advantage the strengths of both synchronous and asynchronous communication tools
- **Leverage organizational knowledge assets**
Collaborative Management Platform (CMP)

- Federated Identity
- Role-based Access Control (RBAC)
- Extensible & customizable platform upon which to base a variety of collaborative applications as needed
- Manageable and secure access control mechanisms
- Resource holders NEVER lose control over their resources
  - Always maintain ultimate access controls
  - Attribute-based access decisions
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