

**Report Brief:
The CIO's Role In Enterprise Collaboration:
Tapping The Groundswell**

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RESEARCH BACKGROUND AND METHODOLOGY

This report explores the best practices for using collaboration tools within the organization for strategic advantage. It examines some of the most effective tools used for collaboration and the benefits they provided, such as unifying a global employee base, enabling cross-silo collaboration among business units, and locating expertise within the organization to improve products or customer service. It features eight case studies of CIOs who have implemented a wide variety of collaboration technologies to meet their organizations' needs.

In searching out best practices, we interviewed CIOs, experts, consultants, and Forrester Leadership Boards members who shared their challenges and progress toward creating an enterprise collaboration environment.

In compiling this research, we conducted in-depth interviews with CIOs and leaders of information and knowledge management teams who have successfully implemented collaboration tools in their organizations. These interviewees include CIOs from Accenture, Goodwill Industries International, BAE Systems, Pacific Northwest National Laboratory, CHS, and EMCOR Group. In addition, we interviewed experts who study the interplay of tools and culture when it comes to collaboration, including Wanda Orlikowski, professor of informational technologies and organization studies, MIT Sloan School of Management; David Coleman, founder and managing director, Collaborative Strategies; and Reynold Lewke, North American CIO practice leader, Egon Zehnder International.

In addition to the extensive interview process, this research references other Forrester publications and secondary sources related to the topics discussed.

THE CIO'S ROLE IN ENTERPRISE COLLABORATION: OVERVIEW

The next generation of transformational technology is here, shifting power away from the IT organization to end users. Social networking tools such as Facebook, instant messaging, LinkedIn, and Wikipedia change how employees work and interact. Many employees (especially recent college grads) expect to collaborate and communicate across traditional boundaries. Companies are eager to use these tools to tap into employees' collective knowledge and gain strategic advantage.

However, CIOs wrestle with the chaotic, unstructured nature of these tools, struggling to balance the demand for open sharing with their duty to protect the enterprise. While they may have a wide range of collaboration tools, they haven't unleashed their full potential. Many CIOs would like to see these tools adopted more readily, but they lack an organizational culture that supports collaboration. CIOs must assess their current attitude, determine where the organization could benefit from these tools, and build top-down and bottom-up support for their use.

The CIOs who play a leading role in the early adoption of collaboration tools create strategic advantages for the enterprise, including:

- Fostering and strengthening employee connections across a geographically distributed workforce and increasing employee engagement.
- Encouraging information- and knowledge-sharing to innovate, reduce product cycle time, and improve customer service.
- Locating expertise within the organization to provide subject matter expertise or join a project team.
- Creating communities of practice that span traditional boundaries.
- Enhancing collaboration among internal and external project teams.

THE CIO'S ROLE IN ENTERPRISE COLLABORATION: BEST PRACTICES

Although many CIOs have a wide range of collaboration tools in their organizations, many are not using them effectively and remain at the lower end of the maturity scale regarding enterprise collaboration. CIOs who follow best practices create strategic advantage for their organizations. The best practices help them unleash the collaboration tools' full potential (see Figure 1).

Figure 1 Best Practices For Unleashing Collaboration Tools' Full Potential



BEST PRACTICE 1: ACT NOW, MEASURE LATER

Many CIOs struggle with building a strong business case or return on investment model for collaboration tools. However, those who attain the greatest competitive advantage are the ones who get a gut-sense business case and get going. Waiting until collaboration technology is “table stakes” means losing that early advantage. Like many technologies in the past with no upfront ROI (personal computers, email) collaboration tools prove their value post-adoption.

Some of the key actions that CIOs take to jump on the opportunity that collaboration tools provide include:

- **Begin small.** Seek out and pilot tools with the most forward-thinking business partner. One CIO interviewed for this research selected the most innovative business unit to pilot team site technology. Because this group relied heavily on data analytics for their success, they thought an internal team site to share that data would be very advantageous. The CIO was able to use their success as a means to get other business units (formerly very siloed) to use the team sites. Today, the team sites are one of only a few truly enterprisewide technologies in use at this organization.
- **Use low-cost or open source providers when possible if budget is a concern.** One nonprofit organization featured in this report had a small budget for an enterprise collaboration initiative. The CIO decided to use open source software out of budget concerns. In addition to getting a robust, customized product that integrates well with other technologies, the CIO benefited from the community of open source developers who helped him solve problems for free.
- **Monitor how ingrained the tool becomes in the organization.** Unlike traditional measurement of technology tools (e.g., decreased costs, improved efficiency, etc.), collaboration tools are successful only when they have full support and adoption by the users. When the tool becomes ingrained in the business process and how work gets done, it can be considered a success. One CIO interviewed for this research said that a senior executive who was skeptical of the value of collaboration tools did an impromptu show of hands for how many people felt they were critical to their work. He was amazed by how many people raised their hands and immediately realized that the tools had taken on a life of their own.

BEST PRACTICE 2 AND 3: BUILD SUPPORT; FOSTER A CULTURE OF EXPERIMENTATION






Unlike traditional technology implementations, enterprise collaboration tools require both top-down support and end user adoption to realize their potential. By definition, collaboration tools require participation by employees. CIOs must build groundswell support for these technologies. They must also get top-down support to secure funding for initiatives and link the tools to strategic goals. Marketing the successful use of the tools throughout the organization is a strategy for building support for its use. One CIO interviewed for this research built top-level support for collaboration and also a three-pronged approach to creating bottom-up support for their collaboration efforts:

1. **Public relations and communications.** Personnel from the organizational development team visited offices to talk to employees about working collaboratively in a virtual environment. They promoted the use of collaboration tools in the company newspaper. The Knowledge Management & Collaboration team collects stories about groups that found cost savings or discovered capabilities through collaboration that helped them win business and publishes these stories as monthly news articles.
2. **On-the-ground advocacy.** Engineering managers visited smaller offices to promote the collaboration efforts. They insisted that engineering managers leading geographically dispersed teams visit all team locations periodically to ensure that the smaller sites were fully integrated.
3. **Comprehensive training program.** The Organizational Development group created classroom and online training. The trainers targeted the top two levels of program management to teach project team leaders how to host virtual meetings, be inclusive of remote team members, gain trust among virtual team members, and create opportunities to socialize (even online).

BEST PRACTICE 4: OVERSUPPORT AND UNDERGOVERN

CIOs often feel that a proliferation of collaboration tools can seem chaotic and even threatening to organizational security. The attitude of the CIO toward enterprise collaboration can influence the successful adoption of these tools. CIOs must assess the consequences of their current attitude and determine the best method for supporting and governing the use of these tools (see Figure 2).

Figure 2 CIOs Must Assess The Consequences Of Their Current Attitude

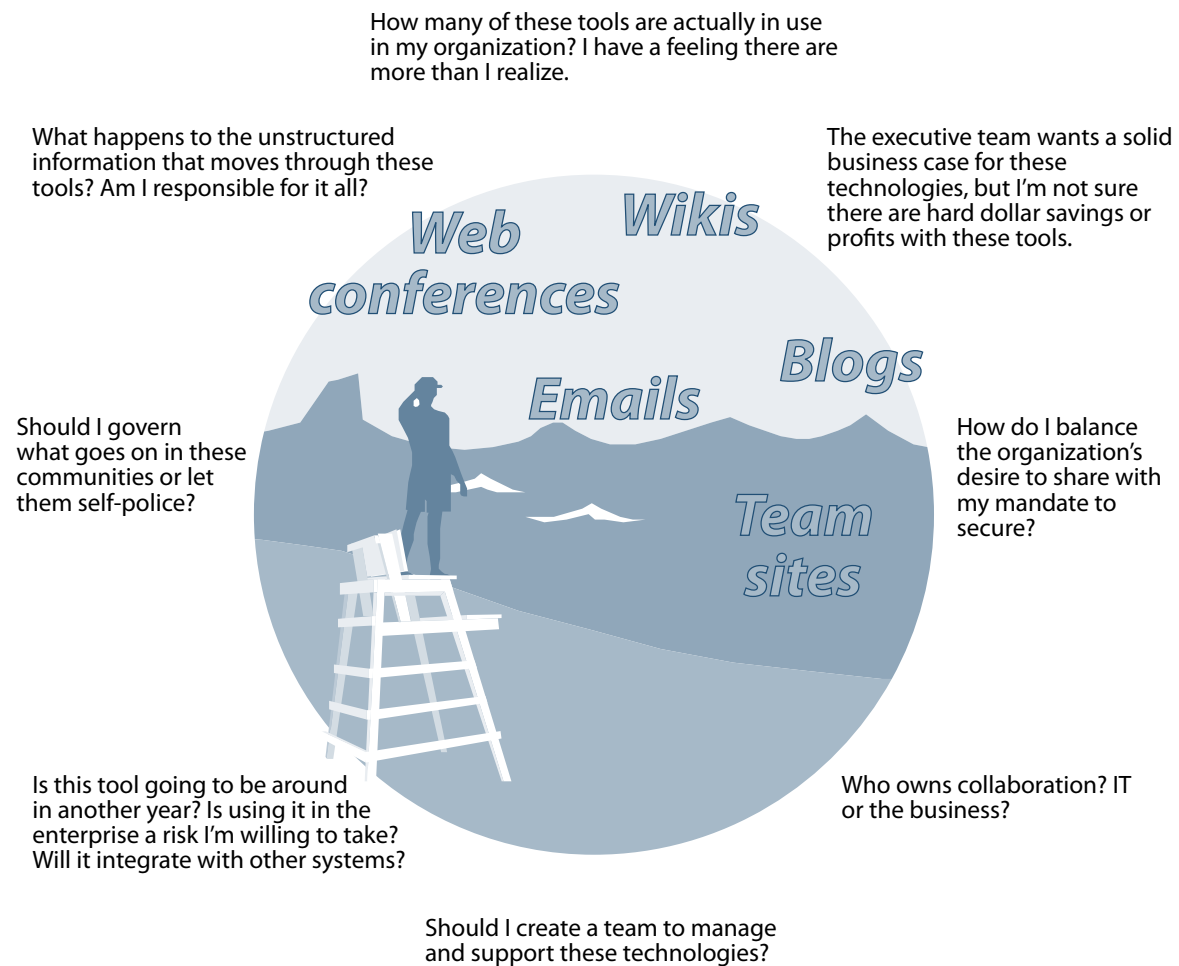
CIO	Attitude	Consequences
<p>Lifeguard</p> 	<p>Policing collaborative activity, waiting for something to go wrong to blow the whistle.</p>	<p>Stifles innovation within the organization because of overcautious attitude; prevents employees from feeling empowered to experiment or collaborate freely</p>
<p>Sunbather</p> 	<p>Enjoying a state of blissful unawareness . . . until the tide comes in unexpectedly.</p>	<p>Gets burned because employees bypass the CIO to use collaboration tools, often putting the organization at risk</p>
<p>Wader</p> 	<p>Getting her feet wet but making slow progress.</p>	<p>Plays it safe and slow, but doesn't gain as much competitive advantage because others will plunge in headfirst</p>
<p>Water-skier</p> 	<p>Letting the business pull her along and happy to follow in the wake.</p>	<p>Relies on others for direction and risks being taken in the wrong direction or through uncharted, unsafe waters; unable to tell when to stop or where to turn because the driver is so far ahead</p>
<p>Surfer</p> 	<p>Riding the crest of the wave, leading the enterprise.</p>	<p>Risks being reckless and cavalier, leading the organization into a situation that's out of control, possibly even setting the company up for a complete wipeout</p>

BEST PRACTICE 5: FIND THE BALANCE BETWEEN SHARE AND SECURE

Collaboration tools can cause CIOs to feel conflicted about their duty to protect the organization while also supporting the organization's desire to share information freely. They struggle with the unstructured nature of these tools, trying to find the balance between sharing and securing (see Figure 3). They can follow some simple actions to ease the burden of that responsibility. Those actions include:

- Apply the necessary security measures to keep information safe and prevent network harm, but don't restrict tool usage unnecessarily.
- Educate employees about the types of information and files that are safe for sharing.
- Use administrative permissions to delegate power to the users in a secure way.

Figure 3 CIOs Wrestle With The Chaotic, Unstructured Nature Of These Tools



MORE INFORMATION

The “The CIO’s Role In Enterprise Collaboration: Tapping The Groundswell” research is exclusively available to members of the Forrester Leadership Boards CIO Group. Forrester IT Leadership Boards bring together top IT analysts with leading CIOs and IT executives to exchange ideas and experience within a peer knowledge community. Members also leverage dedicated Forrester Leadership Board advisors, saving valuable time getting answers to tough business and technology questions from analysts and peers. The mission of Forrester Leadership Boards is to make each member successful in his or her role.

As part of the Forrester Leadership Boards program, Forrester provides exclusive member-directed research to identify best practices across a wide array of IT leadership issues and member-directed peer networking events.

For more information on this report or future research, or to learn more about the CIO Group, please contact Anton Hios, vice president, The CIO Group, at ahios@forrester.com or +1 203.221.2854.

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