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Making collaboration tools
work at work: Navigating four
major implementation dilemmas

NICK OOSTERVINK | BART VAN DEN HOOFF

**NEW WORKING
PARADIGMS**

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DEAR READER,

Welcome to edition 52 of the Capco Institute Journal of Financial Transformation.

Transformation has been a constant theme in our industry for several decades, but the events of 2020 have accelerated change in employee working patterns, and in the very nature of the workplace itself. This Journal examines three key elements of these new working paradigms – leadership, workforce, and organization.

As we explore in this edition, a key part of any firm's transformation agenda centers around digital leadership and how to tackle the novel challenges created by changes within organizations and society. Leaders need advanced organizational skills to build teams that use digital technologies, as well as to inspire millennial workers who have grown up in a digitally transformed world. They also need deeper technology skills to lead, and a broader understanding of the ethical paradigms introduced by the challenges created through new technologies such as AI. These enhanced skillsets will help today's leaders and their teams fully realize the benefits of new working models.

The topics reviewed in this Journal offer flexibility for employees, increased agility for teams, and a combination of both for organizations. When supported by the right technology, these can create collaborative, outcome-driven environments. Through the resulting remote or hybrid models, organizations can transform their workforce and operations to boost productivity, cost effectiveness and employee engagement, while enhancing resilience and customer experiences.

As always, our contributors to this Capco Journal are distinguished, world-class thinkers. I am confident that you will find the quality of thinking in this latest edition to be a valuable source of information and strategic insight.

Thank you to all our contributors and thank you for reading.

A handwritten signature in black ink, appearing to read 'Lance Levy', with a stylized, flowing script.

Lance Levy, **Capco CEO**

MAKING COLLABORATION TOOLS WORK AT WORK: NAVIGATING FOUR MAJOR IMPLEMENTATION DILEMMAS

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ABSTRACT

Organizations introduce collaboration tools, such as Microsoft Teams and Facebook Workplace, to stimulate communication and collaboration across hierarchies and silos. However, many firms struggle to successfully get their workers to adopt these new technologies. The result is that both management and employees are frustrated, and neither of them become more collaborative. What are the reasons these collaboration initiatives do not always live up to their expectations and how can this be overcome? In this article we discuss four major dilemmas that firms need to address in order to increase the chances of their initiatives becoming a success.

First, the scope: is the goal of the project a repository of best practices, or a collaborative space for (work-related) exchange of ideas? Second, design of the tool: should it match the expectation of what management envisions, or should it match (and thereby amplify) current work practices? Third, the implementation strategy: should you go for a top-down implementation with champions and KPIs, or does it make sense to “just let go” and let users play around? And fourth, project governance: should you focus on the quantitative data, or on qualitative evaluations of end-users?

Addressing these dilemmas will enhance focus, and ultimately help address the question of how to manage the implementation and use of collaboration tools in relation to broader organizational change: do you want to “disrupt” or “augment” existing ways of working?

1. INTRODUCTION

Organizations continue to introduce collaboration tools, such as Facebook Workplace, Slack, and Microsoft Teams, to create an organization where employees communicate and collaborate across hierarchies and silos, with the help of digital technologies. Whether they are referred to as social software [Gotta et al. (2015)], content collaboration tools [Basso et al. (2018)], or digital experience platforms [Guseva et al. (2019)], most of these tools provide rich features such as collaborative co-authoring, file sharing, closed and open communities, and

private and public communications. When more sophisticated collaboration tools started to become more prominent, Gartner predicted that roughly 50 percent of businesses would use collaboration technologies by 2017 [van der Meulen and Riviera (2013)]. Harrysson et al. (2016) conducted a survey of 2,750 global executives and found that, indeed, over 50 percent of organizations are actively using tools for internal communication and collaboration. An increasing number of employees are using collaboration tools on a daily basis, and as these tools continue to be utilized they are becoming an integral part of the digital workplace [Poitevin (2018)].

Despite their widespread implementation, many firms still struggle to make collaboration tools a success. As with many tools that start as hypes, collaboration tools were first considered as “magic bullets” that would magically make people and organizational cultures more collaborative. In this article, we offer business leaders and other decision makers four clear dilemmas that need to be considered, and managed, to ensure that their collaboration initiatives can take off successfully. These dilemmas are based on our extensive practice-based research in a variety of firms, such as banks, consulting firms, healthcare organizations, and public institutions. The first author collected data during his PhD research, whereas the second author continues to collect data through ongoing research projects. In total, we collected user statistics and hundreds of hours of interviews and observations at different organizations. Note that all names of the organizations mentioned in this paper are anonymized. Our research shows that there is a gap between what leaders envision and what is actually happening in practice. A major reason for this discrepancy is the difference between what leaders think their employees need and what their employees actually want. Oftentimes, collaboration initiatives are launched in organizations where the culture and way of working are not necessarily collaborative to begin with.

2. HOW TO MAKE COLLABORATION TOOLS WORK AT WORK

Introducing collaboration tools in non-collaborative cultures is likely to fail; and depending on the goal of the initiative, leaders may need to try to overhaul their organizational culture in order to make digital workplaces work.

Throughout our different studies, the extent to which the technology initiative is aligned with an existing or envisioned culture seems to be decisive. In organizations where the initiative matched the existing ways of working, we noticed how people’s ways of working were augmented: they were able to do their work more easily, better, and faster. If, on the other hand, the initiative did not match the existing ways of working, we noticed that there were two potential outcomes: either the initiative failed because of the disconnect between the culture and the new collaboration tool, or the organization needed a large scale cultural change program to shift how people thought about their ways of working and collaborating. Put simply, the technology can augment or disrupt the existing culture and ways of working but it will not act as a magic bullet.

Our research shows that there are four fundamental dilemmas that leaders need to navigate in order to establish long-term performance value from their collaboration initiatives. Each of these dilemmas concerns a specific dimension of the existing or envisioned culture. In this article, we address each of these dilemmas in detail and share our recommendations to help decision makers make their collaboration initiatives a success.

2.1 Dilemma 1: Scope of initiative – repository versus collaboration

2.1.1 WHY DO WE WANT PEOPLE TO USE THE TECHNOLOGY?

The first dilemma concerns “the goal of the initiative”. Is the main goal to stimulate and facilitate interaction and collaboration across departments and specializations, or to create an online repository of best practices? The choice for either of these options has implications for how employees will perceive the initiative. Simply put, if the goal of the initiative is to stimulate collaboration, knowledge closely related to practice (e.g., solving problems) will be shared but will not necessarily be documented and codified into organizational knowledge. On the other hand, if the goal of the initiative is to create a repository, knowledge will be codified into a database of organizational knowledge (e.g., high level best practices), but this knowledge is probably going to be less relevant to employees’ daily practice.

2.1.1.1 Repository

If the goal is to create a repository of information, such as organizational news, procedures, best practices, and the like, then an important consideration is how to motivate employees to contribute to the repository. Employees will generally perceive the tool as an additional task and/or tool, and not as something that may help them in their daily work. The challenge here is to have a continuous flow of content that is relevant to the different professionals.

At a large multinational IT firm, management wanted both high levels of collaboration as well as the creation of an online repository. Although the idea of collaborating through such an open platform was not necessarily problematic for many professionals, the idea of contributing to a repository did not appeal to them. They reasoned that since they were evaluated based on billable hours they could spend at clients (doing their work there), they focused purely on those types of activities, and that writing best-practices did not contribute to that goal. An employee at the firm complained that their newly introduced collaboration tool is “a business tool, it

is not just social, it is a business tool, so we want to make sure that people realize that and find ways to integrate it into their work.”

At GovDep, a large government department in the Netherlands, the goal of implementing a collaboration tool was explicitly framed in terms of creating a “collective brain” that would give employees insight into who-knows-what and who-works-on-what. The initial idea at GovDep was both stimulating collaboration across organizational borders and establishing a repository of organizational knowledge. The collaboration tool would serve as a tool for discussions and collaboration, and whenever some information became “validated” by experts, that information could be stored on the organization’s intranet. In practice, this distinction between the two separate but related tools turned out to be difficult to maintain. Since government employees depend on validated documentation to do their work, they generally just waited until someone would validate the information, and hence refrained from using the tool for collaboration. For the organization as a whole, the platform was mainly a repository of relevant information.

A successful example comes from BuildCo, a large international construction and engineering firm with offices all over the world. In order to continuously learn from their experiences with different projects across the globe, management introduced an online platform where best practices (and other learning experiences) could be shared. Although the initiative was not successful at first, management decided to make it mandatory for project leaders to draw up case reports that would contain information about projects in terms of what went well and what did not go well in their projects. Management also made it mandatory that before starting with a new project the responsible project leader should check the platform to see if there had been similar projects before. The result is a platform where best practices are definitely shared, but where only few discussions are taking place.

2.1.1.2 Collaboration

For a collaboration tool to actually facilitate collaboration, it is most important that working together is already part of how people do their work. The tool should basically help them do parts of their work in better, easier, or faster ways. Next to a match with the existing ways of working, employees need to experience a sense of psychological safety: a feeling that it’s OK to post something or ask questions without running the risk of, for example, being labeled as uninformed.

A clear example comes from our study at Xhealth, a large healthcare organization that provides specialized care for clients with communication related challenges (e.g., autism,

blindness, and deafness) in the Netherlands. At Xhealth there was already a high level of interaction and collaboration between therapists before the collaboration tool was implemented. There was an active exchange of knowledge to stay on top of developments, and to discuss complex clients when necessary. Over time, the collaboration tool became one of the primary channels for these interactions. The therapists felt free to engage in conversations with their peers. They often required additional input from different fields of expertise to come up with a comprehensive treatment plan for their clients, and hence using this tool helped them connect and collaborate with the right people. Management decided not to intervene at all: they started to use the platform themselves but generally did not join discussions to avoid employees feeling that management was watching their every move.

By contrast, our study at the aforementioned IT firm revealed that even though management wanted the technology to be used for collaboration, they made it clear that they were watching what people said and did. Some of the IT professionals we interviewed explained that their contributions were escalated to higher management since their opinions were not appreciated on such an open platform. They felt as if “big brother is watching you.” The result was that instead of supporting collaborative behavior, the tool was mainly used to communicate in highly strategic ways to protect and boost their reputations. As one senior professional at the firm explained: “You have to make sure that you’re visible. So that you’re not only doing good things, but also that the right people know that. Right, if you want to qualify for a promotion for example, or for a salary increase...”

Hence, managers should ask themselves two things: (1) would the people in my organization benefit from collaborating more with each other? And, (2) to what extent are we providing them with a level of psychological safety?

2.2 Dilemma 2: Technology design – management versus user driven

2.2.1 WHAT USER EXPERIENCE SHOULD THE TECHNOLOGY PROVIDE?

The second dilemma concerns the design of the technology: what features should it have? Is the technology designed from the perspective of management (and how they want employees to work with it), or from the perspective of the employees and how they (want to) do their daily work?

The choice for either of these options has to be made upfront and has major implications in the long run for the ways in which the tool will (not) be used. If the tool contains all the

possible features that management desires, chances are that only the appointed champions will utilize the full possibilities of the tool. On the other hand, if the tool is only aligned with the current expectations of employees, chances are that the tool will not bring about a major shift in how work is done. This dilemma has to be weighed carefully, through some upfront decisions made here may leave room for changes along the way.

2.2.1.1 Alignment with management goals

In many organizations the collaboration tools that are bought and implemented are selected based on the requirements stated by higher management. In other words: executives and programmers decide how the tool is to be designed for “optimal” use by employees. Optimal relates to managerial goals. Many of our studies, however, show that this top-down design of the collaboration tools has a variety of downsides. Most prominent is the fact that since executives are relatively far away from daily practice, they have limited knowledge of what it is exactly that their employees do on a daily basis.

In one example, management decided to purchase a commercial off-the-shelf sophisticated collaboration tool, which facilitated many of the features of different applications on one platform. Beside the basics of sending private and public messages in public and private groups, the tool allowed users to collaboratively work on documents, and facilitated the integration with several external tools (e.g., Sharepoint and Dropbox). The problem with such a wide integration of features into one single tool is that most people – even seasoned technology users – get lost in the jungle of features. In such situations, users often decide to abandon the tool after some time since it costs too much time to get to know the full functionality of the tool while their existing tools work just fine. As several consultants explained to us: “And it’s a lot easier to stick something in email, than it is to create a page on the platform. It seems more effort to do it [there] than to knock up a quick email.”

Another example is GovDep, where there was a clear management vision driving the implementation: the creation of a “collective mind” for the organization. Interestingly, the choice of the platform technology was made rather independently from this vision, as the IT department was leading the initiative and decided to opt for a supplier that was the organization’s main technology partner. The vision driving the whole project was formulated by the organization’s communication department, and they were not entirely happy with this choice as they would have preferred a more “open” platform that would have less functionality, but would be easier

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Management should consider how to balance the different dilemmas: the technology can augment or disrupt the existing ways of working but will not act as a magic bullet.
 ”

to use and would allow more user-generated content. Hence, while the management vision driving the implementation would have been one of emphasizing collaboration (users sharing knowledge to provide insight into what they know and what they work on), in practice the platform was mainly used as a repository. This was partly due to the technology, which was not really facilitating open sharing and collaboration, but more so due to the organizational culture, which was very formal and hierarchical. It was uncommon for employees to share ideas that were not approved or validated and there was a general feeling that it was risky to share knowledge as this might negatively influence one’s position.

2.2.1.2 Alignment with workers’ expectations

We encountered a few organizations where the tools were actually not designed upfront along managerial expectations but were fairly basic and allowed to be used in ways that were “appropriate” from the perspective of employees. These collaboration tools, such as Yammer and Facebook Workplace, generally do not differ that much from existing platforms that many employees already have significant experience with. In such situations, we noticed that employees were much more eager to get some hands-on experience with the tool to find out what it could mean for their work. They already know how it works in their private lives, so how could this tool contribute to their work?

The clearest example of a collaboration tool that was aligned with the workers’ ideals was the use of Yammer at Xhealth. The tool allowed users to post messages, create open and private groups, connect with peers, and share files, among others. Yammer was initially picked up by a few employees who wanted to stay in touch across geographical boundaries. Over time, however, they started to use the tool to share new developments, research, conferences, and the likes. Since in their work the therapists depend on staying up to date about new developments, the tool incrementally became the go-to

source for new knowledge and information. We also noticed that because more people were visiting the platform, they started to experiment with different ways of using the tool in their daily work. At first, the tool was used for basic tasks, such as setting up meetings and sharing minutes. Over time, however, the tool became an integral part of the way of working at Xhealth: whenever they faced difficult clients, therapists used the tool to consult each other. Yammer became aligned with professionals' ideals of how they should use the technology. Management largely stayed away and merely supported their employees to use the technology as they deemed appropriate. According to one of the therapists, "If I didn't visit Yammer, then I never would have known about that conference, or never about this book, or would have missed this training module, or missed this e-learning course. It gives me so much! It's not just one thing. And that's why I keep using it."

2.3 Dilemma 3: Implementation strategy – leading versus letting go

2.3.1 IN WHAT WAYS ARE YOU STIMULATING OR SUPPORTING EMPLOYEE USAGE?

The third dilemma concerns how the technology is implemented and managed. A popular approach is to implement the technology from the top-down by rolling out the tool, together with a mix of guidelines and instructions. A second, and less conventional approach is stimulating and supporting bottom-up interest for the technology. In this manner, employees get to find ways to integrate the tool in their work, but at the same time management has less control over how the technology is taken up throughout the organization.

2.3.1.1 Top-down introduction

The most often deployed strategy to introduce new technologies in organizations is an orchestrated top-down approach. While such an approach has had many positive outcomes for technologies, such as the introduction of new ERP systems, in the context of collaboration tools our research has repeatedly shown that such a top-down approach either discourages usage altogether or stimulates strategic behavior. Employees seem to use the tool but a closer look at their actual behavior reveals that many, if not most, of the activities on the platform are ceremonial.

One very clear example comes from our study at ATA Consultancy. Management aimed to increase knowledge sharing among employees, and between management and employees. To stimulate adoption of the collaboration tool, management developed an implementation strategy that

encompassed promotional activities (e.g., workshops) and also appointed a wide range of champions: consultants who were supposed to stimulate usage of the tool among their colleagues. This approach did succeed in the beginning: initially, the consultants used to socialize with each other and after a while even used it to find other consultants in their field of expertise. Not too long after that, the use of the tool dwindled. The users thought the platform had too little added value: they established their network and the rest of the content on the platform did not help them in their work. The problem in this case is that the idea of the platform did not align with the work of the consultants, so while it "worked" in the beginning, after those first months consultants abandoned the tool. According to one of the consultants at the firm, "if I were to post my question on the platform, I doubt whether I would get a reaction [...] because I don't see other colleagues..."

2.3.1.2 Bottom-up initiative

Although the top-down approach is most often used, we found a few cases where collaboration tools were introduced through bottom-up initiatives (e.g., by a department or by a team). Although management has less control over the exact implementation trajectory in those cases, our research shows that such an approach potentially stimulates employee adoption in the long run. Since employees have the opportunity to experiment with the technology, to find ways in which it fits in their work, the tool slowly but surely becomes part of their daily routines. At first, employees need some time to get acquainted with the tool, but as more colleagues join the experimentation phase, usage slowly, but surely, evolves into activities related to daily practice.

The best example of such a situation comes from our two-year study at Xhealth. The tool – Yammer – first surfaced in early 2011, when a group of social workers wanted to use the tool to collectively oppose a new policy from management. Soon after that, others started to join the tool. Management was not even aware of Yammer at that time, but the employees were very interested in finding new ways to keep each other up to date about their community and field of work. Although in the first few years the tool was mainly used as an outlet for a small group of users, the group of lurkers (i.e., users who join a community and follow/read its content but never contribute themselves) started to grow. Given that there was no push from the management to use tool in a certain way, the growing group of lurkers felt free to slowly experiment with using the tool in new ways. After some time experimenting with using the tool to schedule meetings, organize meetups, and keep each other up to date about new developments, the tool became used as a gateway for asking questions about complex clients

the therapists faced in their daily work. Management did not prescribe anything, and merely supported the initiative by integrating Yammer into the organization's standard intranet website. As a result, over time, the tool became "part of working at Xhealth."

A downside of a bottom-up implementation strategy emerged in our case study at a multinational electronics corporation, Electroco. Electroco employs over 110,000 employees in more than 100 countries and introduced their collaboration tool with the aim of connecting employees around the globe. The general implementation strategy was to be hands-off: the tool was launched and made available to employees with very little in terms of predefined structure or instructions on how to use it. Users were stimulated to connect with like-minded colleagues and start their own communities to discuss relevant issues. What was considered "relevant" here was initially defined very broadly as basically anything that the users themselves deemed relevant to discuss. This led to large-scale adoption: after just over a year, almost 40,000 employees were signed up on the platform. Actual use of the platform, however, turned out to be very fragmented. After two years, "thousands" of communities had emerged, and about 40 percent of those communities were "private", i.e., they were not open to users other than those who were invited to join. Many of these communities were overlapping in terms of the subjects that were discussed, but the owners were generally not willing to merge their communities with similar ones as they maintained that there were significant differences. The fact that over 40 percent of the communities were "private" exacerbated the problem that there was little to no exchange between communities. Hence, at Electroco, a bottom-up approach facilitated large-scale adoption, but in terms of actual use it led to fragmentation and a lack of organizational knowledge sharing.

2.3.1.3 Balancing act

An interesting case that balances between a full top-down versus bottom-up approach is the case of a large national bank. Although the collaboration tool was initially introduced from the top-down, employees were not overly "forced" to use the tool, and rather anyone who showed some interest was highly supported. If people wanted to create private or public groups, they were supported by a team of community managers who helped get everything up and running. These community managers not only supported users in this, but also actively coordinated the process. For instance, they questioned whether a new group was really necessary if similar groups already existed, and actively approached groups with a low level of activity to ask how this could be improved. In this

case, the initiative was not necessarily a large scale success because of several cultural factors (e.g., given the high level of confidentiality, employees remained extremely reluctant to share files on the platform), but the case does illustrate that there can be a good cooperation/interaction between top-down and bottom-up elements.

2.4 Dilemma 4: Project success – numbers versus knowledge

2.4.1 WHEN DO WE SEE THE INITIATIVE AS SUCCESSFUL?

The final dilemma managers should consider when implementing, managing, and evaluating their collaboration tool initiatives, is whether they want to measure the success of the initiative through quantitative statistics, such as usage numbers, active members, and number of posts, or through qualitative measures, such as whether the tool helps people make more informed decisions, expands people's networks, or helps people stay up to date about new developments in their field of work.

2.4.1.1 Numbers

Though not surprising given our current-day focus on data-driven decision making, most organizations evaluate the success of their collaboration tool initiatives by looking at usage numbers. Numerous studies, however, have found that such numbers can be deceiving: when usage numbers are high, does this mean that people really help each other, or are people posting stuff simply to satisfy managerial expectations? On the other hand, when numbers are low, does this imply that nobody uses the platform, or that most people are lurking and learning from a select number of frequent users (e.g., experts)?

At ATA Consultancy, a multinational accounting and consulting firm, success was very much measured in terms of numbers: the knowledge managers who were responsible for the gateways were frequently checking their dashboards to see the numbers of users that registered, activated their account, posted something, etc. After a phase of initial enthusiasm, in which people were willing to explore the possibilities of the tool, the numbers stalled and started going down. An important reason for this was the lack of relevance of the content – the paradoxical feeling that there was "too much" information on the gateway, but at the same time "too little." As management was not focusing on the issue of relevance, but on the numbers at the level of the entire organization, they overlooked the fact that in some communities there actually was a lot of activity and enthusiasm because employees with a shared interest (e.g., e-auditing tools) had found a common ground and were

very actively integrating the tool into their daily work. Instead of capitalizing on such successful groups, and trying to learn from them, management focused on the overall numbers. Given that from a holistic perspective the numbers were going down, they declared the gateway a failure and replaced it with a different tool that was more “open”, less prestructured, and allowed for more user-generated content. Coupled with this, management adapted their idea of “success”, focusing less on critical mass in quantitative terms and more on the actual contribution of what happened on the platform to users’ work. As one interviewee explained: “It’s all way too broad – 80 percent of what’s on the Gateway has nothing to do with my work, but with all of ATA. I never found anything useful there.”

2.4.1.2 Knowledge

In fact, ATA’s management moved from a purely quantitative determination of success to a more qualitative one. Such an approach requires a more in-depth understanding of what is actually happening: how are people using the platform and what are some of the consequences for their regular work? Although this approach requires more effort, our research seems to indicate that a qualitative understanding of how the tool is used in practice has major benefits compared to just looking at quantitative indicators. A qualitative approach moves beyond the statistics and explores how the use of the collaboration tool actually benefits professionals in their daily work and in the long run. The result of this approach is that managers are better able to support communities and users in getting the most out of the tool. Having said that, a possible pitfall of this approach is that a platform is declared a success on the basis of a few (and possibly very prominent) small groups of users claiming to derive value from it – whereas most of their colleagues do not even use it.

Both at Xhealth and at the national bank, those involved with managing or supporting the tool were interested in what people were actually experiencing when using the platform. At Xhealth, both management and several core contributors felt that almost nobody seemed to use Yammer at some point in time. However, instead of canceling the project they let it exist without much additional support. Over time, some of these core contributors started to notice that people would approach them offline (e.g., in the hallway or during meetings) to tell them their appreciation of the content spread by the core contributors. The content that was produced continuously by those core contributors actually resulted in a certain critical mass of relevant content. At some point in time, these contributors posted so much relevant content on a continuous

basis that other users felt an increasing fear of missing out: they felt that they had to visit Yammer to stay up to date. From a quantitative perspective, the statistics did not change much, since most users still remained lurkers. From a qualitative perspective, however, Yammer became increasingly essential for therapists to stay knowledgeable. According to a therapist: “So if you’re not active on Yammer, or you’re not following posts, then you miss out on that information. And that does not benefit your professionalism!”

At the national bank, the collaboration tool was introduced from the top down, but management provided a lot of freedom for employees to use the technology as they deemed fit. They appointed a community manager who did not necessarily check whether people were using the tool in “the right way” but was rather concerned with helping people get started and continue their use. If the community manager noticed that some communities were silent, they would talk with those people to find out what happened. Sometimes the answer was simple: a project was finished. In other cases, the community manager could share tips and tricks with the community-starters to get their community going on a continued basis.

3. SO HOW TO CONTINUE WITH COLLABORATION INITIATIVES?

To summarize, our research projects at several different large organizations draw attention to the following four dilemmas:

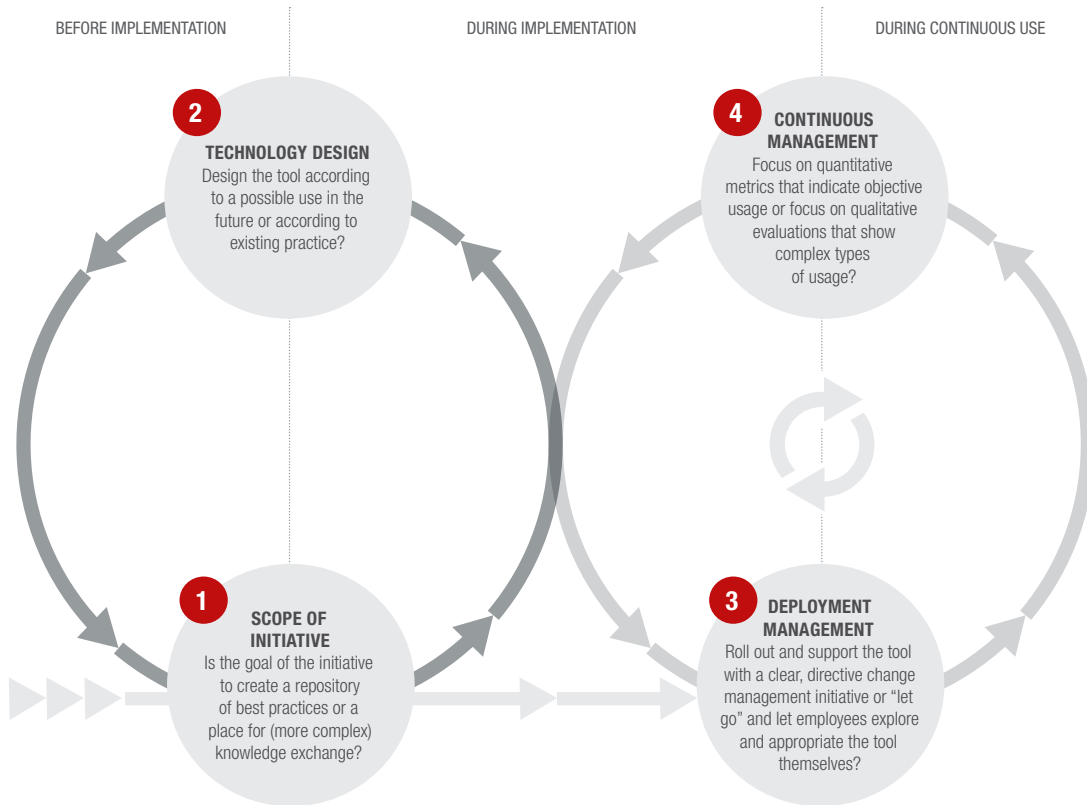
1. **Scope of the initiative:** repository versus collaboration
2. **Technology design:** work versus management-driven
3. **Implementation strategy:** leading versus letting go
4. **Managing continuity:** numbers versus knowledge

The different dilemmas show that it is obviously not just the technology that determines whether digital workplaces work. It depends, to a large extent on the perception and actual usage in practice of the people who will work with the tool. This is the reason that the four dilemmas also emerge at different moments in time when considering the process going from idea to implementation to continuous management. We suggest management consider the four dilemmas at different moments in the process, as presented in Figure 1.

3.1 Dilemmas emerge in phases

Figure 1 indicates three major phases: before, during, and after implementation (i.e., during continuous use). They are depicted as two major feedback loops, since the choices made to tackle the individual dilemmas, also affect some of the other dilemmas.

Figure 1: Process flow of collaboration tool initiative rollout



3.1.1 PHASE 1: BEFORE IMPLEMENTATION

Perhaps the most clear-cut phase is the “before implementation phase”, in which management needs to think about the why and how of the collaboration tool initiative. Dilemmas 1 and 2 are most relevant. The scope of the initiative (dilemma 1) and the technology design (dilemma 2) will need to happen before long-term deployment. Notice that a little adjustment can take place during the initial phase of implementation (pilot phases, for example). However, once the tool is in place, it becomes more complex to roll out large updates. Not only because of tool complexity but because employees incrementally develop routines that include the tool in their daily work that can be significantly damaged if the tool is suddenly changed significantly. Think about the troubles of upgrading all staff from Windows 7 to Windows 10.

3.1.2 PHASE 2: DURING IMPLEMENTATION

All four dilemmas are applicable during the initial implementation. Based on preliminary input received during deployment management (dilemma 3) and continuous management (dilemma 4), management can decide to alter

the scope and even the technological choices. Especially since new features can continuously be added virtually, the implementation phase can serve as important phase to alter the initiative based on experiences in practice.

3.1.3 PHASE 3: DURING CONTINUOUS USE

Dilemmas 3 and 4 are most relevant during phase 3, in which the collaboration initiative needs to be kept going, either actively or passively. At first it should be considered whether or not to engage in a top-down implementation, or to have a less strict approach where employees are free to use the tool or not (dilemma 3). This approach can be adjusted based on data and insights collected during continuous management. Should you give clearer instructions (typically in hierarchical organizations) or back off and let your professionals experiment (typically in organizations with flat hierarchies) (dilemma 4)?

3.2 What does this look like in practice?

Consider a hypothetical example, purely for informative reasons: a case where management of a traditional financial firm wants to collect best practices in a repository tool. Based

on their scoping, they decide to go for a commercial off-the-shelf document management system (DMS), which turns out to also include strong co-authoring and community features. Based on the tool, management decides to reconsider their scope slightly to also include collaboration. They think: “Who knows, it may spark innovation and break down silos”.

During the highly controlled pilot roll out, they notice that people do not seem to use the community and co-authoring feature since it does not integrate with their existing cloud-based document storage tool (e.g., OneDrive, Dropbox, G-Drive). This is a core element of the daily work of many of their professionals, so no integration presents a major hurdle for adoption. Management goes back to the software vendor, who quickly builds the integration. The integration is rolled out to the pilot group and most employees seem to quickly adopt the feature and start to use the community and co-authoring features.

Management decides it is a success and the tool becomes available for all employees through a large top-down introduction program, where champions of all departments are trained at length and now have the mission to stimulate their co-workers to also adopt the tool. Management wants to see increasing usage numbers, more communities, more documents, the works. After several months, the numbers seem to be promising. In practice however, people do not seem to be overly enthusiastic. Many of them, when asked, explain that they played around a bit and uploaded some documents, but started to halt that behavior as it did not really benefit them in any way, colleagues did not seem to notice what they uploaded, and their direct management did not seem to care in evaluation sessions. The general attitude seemed to be: “It doesn’t help me do my work better, faster, or easier, so why bother?”

Based on this input, management decides to change the way of framing how the tool should or could support its employees. It starts to emphasize the benefits of using learnings from your colleagues, it highlights successes that showed how much time is saved when using the tool versus working in their legacy environments, and also focuses on the experimental side of the tool. These, and more actions, help to incrementally shift the culture within the organization. People became interested again and slowly but surely started to integrate it into their daily routines.

The whole process might take at least a year, probably several. And, even though this is a simplification, it highlights how the four dilemmas emerge continuously during different parts of

the roll out of a new collaborative tool. The implementation of the collaboration tool, making it available to all employees, is really just the starting point, as the ways in which the culture, attitudes, routines, and expectations of employees continuously shift and alter the extent to which they want to (or can) integrate the new technology in their daily work.

4. HOW TO CONTINUE

Since the roll out and continuously managing the collaboration tool provides plenty of uncertainty, we outline two approaches that may provide decision makers with clear handles on how to approach these types of initiatives.

4.1 Augmenting the existing culture and ways of working

If the goal of the initiative is to augment how people do their existing jobs, we strongly suggest that the technology should align with existing procedures, ways of working, and overall culture.

If this is the case, our research repeatedly shows that the technology is adopted relatively easily since most professionals just want to do their jobs the right way. Furthermore, if they see that they can do their work better by using the new technology, it takes very little to convince them of the benefits of using the new technology. The therapists at Xhealth were already working in an environment where collaboration, sharing and challenging ideas, and asking for help or input was the norm. Hence, the introduction of Yammer basically helped them share and collaborate with their colleagues more easily. At Xhealth, the collaboration tool helped to augment the existing culture and ways of working.

In an organization where collaboration is virtually absent, where people have to work with confidential documents, and employees have little incentive for collaborating, introducing a collaboration technology will not help. Our studies show that people might use the technology briefly and/or ceremonially, but over time they will start to get back to their original ways of working. Some consultants explained that they felt conflicted: their boss pays them to work, not to play around on such a platform. The result may be that the technology will only cost money, will not improve anyone’s ways of working, and may even damage the organization because of people’s growing frustrations.

Managers should consider how to balance each of the different dilemmas in ways that are most appropriate for their organizations and need to have a thorough understanding of the culture.

4.2 Disrupting the existing culture and ways of working

On the other hand, if the goal of the initiative is to disrupt how people do their work, we suggest that the collaboration tool becomes part of a larger cultural change program. Introducing a new technology rarely results in major changes in how people work, and more often results in frustration if the goal is indeed to change existing ways of working.

An example here is GovDep. In this organization, implementing the collaboration tool was seen as a crucial part, or even a driver, of a larger program of culture change: creating a “collective mind”. The main aim of this program was to make employees more aware of the importance of the collective knowledge of the organization, and to motivate people to be more proactive in sharing what they knew, and what they were working on. The organization was traditionally not very open to knowledge sharing, and the culture change was deemed necessary to create a “collective mind” for the organization, with increased awareness of what colleagues were working on, and what their relevant knowledge was. In implementing this culture change, often too much emphasis was placed on the collaboration platform, which was counterproductive. As the whole idea of working on the platform ran counter to the existing organizational culture of confidentiality, formality, and individualism, many employees found it problematic to integrate this into their way of working. Apart from that, (as mentioned above) the collaboration tool was seen as complex to use, insufficiently user friendly, and not really facilitating open exchange. All this frustrated the creation of a “collective mind”, as people often did not see the practical use of using the platform.

This example illustrates that fundamentally changing an organization’s culture takes time and effort, and will require a dedicated team to develop an appropriate strategy for the organization and its workers. A collaboration tool can definitely play a role in facilitating this change but should not be the primary driver of the change. Tools should be introduced at a later stage, after people have had some time to internalize the fundamental principles of the new culture and integrate collaboration initiatives in their existing ways of working. Introducing the tool at a later stage, as an enabler of an already familiar culture change program, will avoid the tool being perceived as a new trigger that may confuse, distract, and even frustrate people. It will show employees that the change initiative is rolled out incrementally and the tool is just one part of the shift.

5. CONCLUSION

As organizations are moving towards digital workplaces, we will see many more organizations working with collaboration tools as the standard way of working. However, before a collaborative culture is common everywhere, we suggest managers carefully consider whether their organization is ready for collaboration technologies. If you think your firm or department is ready, then have a close look at the four dilemmas, as we believe they will be crucial for the long-term success of your initiative.

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