

A modern approach to **BUSINESS** **COLLABORATION**

Using **visual collaboration** to develop strong partnerships and grow your business



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ROELTO 
Visualise & Accelerate

A modern approach to
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Introduction

I've worked in a great variety of roles over the past 25 years, from coaching my local rugby teams to serving as a process control engineer, manager, consultant and business leader for several global organisations. However, at every stage of my career, the common thread has been my interest in helping people work more effectively together to produce a result that's greater than anything they could achieve individually.

This has become more and more important in today's business world, where organisations are finding themselves having to work within a global market, often for the first time. Although they may be quite accomplished at getting their own teams to work together effectively, developing a successful collaboration with another business, potentially in another country, is still proving challenging for them. As a result, communication breaks down, projects are pushed over-time and over-budget, and promising business relationships turn sour.

Does this sound familiar? If your business has struggled to collaborate successfully in the past, you're far from alone. Having spent years helping people collaborate more effectively, I was keen to find a solution that would simplify the process and make successful collaboration straightforward for businesses at all levels. It took several years of research and testing, but eventually I found it in the form of the British Standards Institute BS 11000 – collaborative business relationships – and SharpCloud – a visual place to do business.

BS 11000 is the British Standard (soon to become ISO 11000) that provides a tried and tested framework for business collaboration in order to improve performance and enhance business relationships. Taking a collaborative approach will bring both tangible and intangible benefits to your business, from better cost management, resource utilisation and business innovations, to improved collaboration capability, leading to greater trust between people and organisations.

SharpCloud is a visual communication tool that allows you to collate multiple streams of data and display them in a variety of different visual formats, depending on your requirements and preferences. This way, data can be translated into a form that is both understandable and actionable at all levels of your organisation and can also be kept up to date without time being unnecessarily wasted updating multiple records.

Collaboration and visualisation are both important tools for any growing business, even when you consider them individually. However, the greatest value is achieved when the two are seamlessly integrated into what I have termed 'visual collaboration'.

It's a whole new approach to both collaboration and visualisation that can easily transform the way you think about both your partnerships and your data. That's why I wrote this guide, in order to make these principles accessible to all growing businesses.

In the pages that follow I'll not only explain how to achieve better collaboration through BS 11000 and how to effectively visualise your data using SharpCloud, but also introduce my approach to combining the two, which I refer to as The Complete Visual Collaboration Process.

This goes far deeper than simply utilising collaboration technology, such as video conferencing and telepresence. True visual collaboration incorporates people's collaboration capabilities and behaviours, business processes, technology and data, enabling you to collaborate efficiently and effectively with other people and organisations, regardless of distance and time considerations.

Some of what you're about to learn may cause you to reconsider the way you treat both your data and your business relationships, but I guarantee that once you put it into practice, you are sure to see a dramatic improvement in your efficiency, innovation capabilities, and ultimately, your bottom line.

Jason Hier

Roelto

Collaboration – partnering with other businesses to identify solutions that are greater than the sum of their parts

Successful collaboration in business is all about ensuring each and every element of a project and business relationship is working in perfect sync to bring about the desired result. Most importantly, this is about supporting people’s collaborative behaviours and competencies with the right processes and systems. As we move into a truly global economy, this has become more and more important for growing businesses. Outsourcing and partnering are becoming increasingly common across multiple industries, locations and time zones, so it’s important that you understand the key elements of successful collaboration. It’s true that there are existing tools like video conferencing to make the process easier, but these are not quick fixes – you still need to have the correct organisational behaviours, processes and systems to be able to take action and measure the outcomes. For example, during a video conference, everyone will probably be taking their own notes throughout. Someone will need to take responsibility for collating it all, so it can be agreed what was communicated and a list of appropriate actionable points created.

The principal challenge here involves making sure that everyone involved in a project and business relationship is working in a way that suits them and allows them to perform at their best, and integrating this into the ‘big picture’, so the different elements complement and support each other. If this isn’t achieved then projects will fail to meet deadlines and may go over-budget and business relationships will fail. Fortunately, the BS 11000 framework specification offers a practical, effective approach for ensuring that business collaborations deliver the desired results and that everyone involved will benefit from them, which forms the basis for my own approach to collaboration and visualisation. I often describe this as being composed of four key elements: communication, agreement, actions and outcomes.

‘Communication’ means the ability to share information in such a way that it is accessible to everybody involved, so ideas are shared, options explored, conversations and further understanding is achieved. ‘Agreement’ means being able to arrive at a conclusion that is satisfactory for everybody and will lead to agreed objectives, roles and responsibilities, processes, systems and the long-term benefits for both partners before working together. ‘Actions’ means executing everything that was discussed and agreed, so they are completed efficiently and as effectively as possible to achieve the collaboration’s goal. Finally, ‘outcomes’ which is the change or impact from collaborating together, means having both a system for measuring the collaboration’s results and having a proper exit strategy in place for when it’s time to end it and move on to a new opportunity.

The key to successful business collaborations

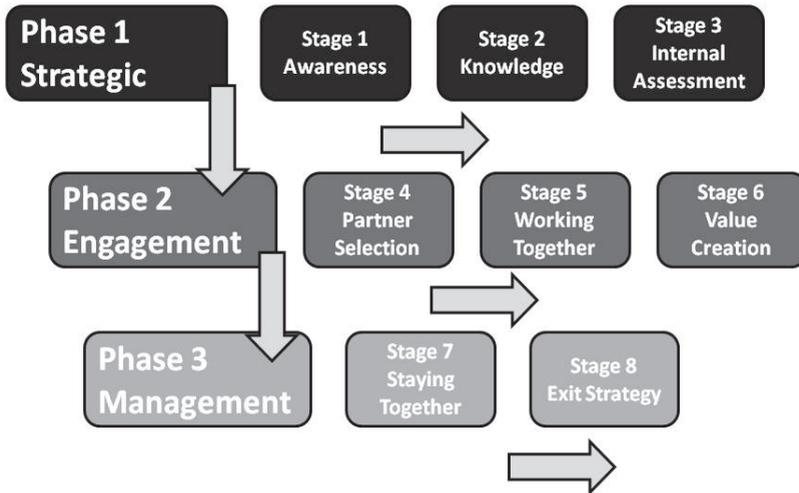
When you decide to partner with somebody, you're not doing it just because you like them. You're doing it because you believe that one partner will equal ten; that you will actually create what I call 'new value', working collaboratively to bring innovative new ideas to life.

There has to be a right time for this, as sometimes a full collaboration is unnecessary and a straightforward transaction will prove sufficient. For example, if you need to get something printed, you don't need to set-up a collaboration partnership with the printer. All you need to do is let them know what you need printing, in what format and in what volume. There's no need to make the transaction any more complicated than that.

In BS 11000, there are three phases for establishing a successful collaboration: the Strategic Phase, the Engagement Phase and the Management Phase. When combined with the successful implementation of SharpCloud, this creates a ten-step process that I call The Complete Visual Collaboration Process. You can utilise this process to gain BS 11000 certification, or to simply improve your overall business productivity.

Here is an overview of BS 11000 collaborative business relationships – a framework specification:

BS 11000 3 Phases and 8 Stages



Taking the trial and error out of business collaboration

I often meet people who are seriously interested in business collaboration but are unsure about how the BS 11000 framework specification can help, usually based on the assumption that collaboration is all about people and given that everyone is different, it's impossible to create a specification that will work for everyone. To a degree they are right, but this is a misconception. The BS 11000 specification is a framework that can be adapted and tailored to provide an easy to use and understand process. Put simply, it's a series of stepping stones to help you successfully implement a collaborative approach, not a one-size-fits-all solution. It's about making the secrets of successful collaboration accessible to all business, so all the guesswork is taken out of the process.

The three phases identified above will help you create collaborative business relationships, all of which are captured in your relationship management plan. However, this is not just a static document; I have developed a highly dynamic, visual and collaborative relationship management plan that you can share and reuse with different partners, utilising various templates to complete the eight stages as outlined. This framework can then be integrated into you and your partners' existing processes and systems, using SharpCloud as the visual collaboration platform.

Visualisation – translate your data into a form that helps your people communicate easily and you make better informed business decisions

One of the biggest challenges for organisations all over the world is how to most effectively communicate with people. This is why stories are so important to businesses – they give reason; they give purpose; they give vision. They demonstrate why you do what you do. The standard way of telling stories in the business world throughout the past few years has been through PowerPoint, which is fine, but it's a very linear approach to communication and is quite limited in many ways. For example, PowerPoint presentations are great if you're delivering a well-rehearsed presentation, but when it comes to answering questions from the audience, you wouldn't have any visual aids unless you had prepared them in advance.

This problem is exacerbated by the sheer volume of data organisations work with nowadays, especially when they are working in a global market. This data comes from a variety of different forms, from technical to financial and social. As a result, pulling these disparate streams of data together in order to take a 'big picture' view of the business can prove challenging. That's why it's so important to develop an effective way of visualising your business data.

Visualisation is all about being able to communicate visually through what I call data-driven views – translating real data into a format that people can relate to in order to ensure successful collaboration. This is simply a question of helping people absorb information faster – studies show that people remember 80% of what they see and do (i.e. collaboration) as opposed to 20% of what they read and 10% of what they're told. Presenting data in a visual format therefore ensures that you, your staff and your partners are able to quickly absorb what you need in order to move the business forward, leading to greater efficiency and improved decision making at all levels.

But how do you identify a method of visualisation that will work for you, your staff and your partners? Put simply, you probably can't – human beings are simply too diverse for a 'one size fits all' solution to be appropriate, which is why I'd suggest taking a more flexible approach to visualisation...

People absorb information in different ways, but SharpCloud can help you make this work to your advantage

What's needed is a visual way of presenting knowledge, information and data that is flexible enough to accommodate the different ways people absorb information and the nature of their roles. For example, if your role was project-based, you'd probably visualise information in terms of timelines. On the other hand, if you were primarily focused on idea generation, you would get more use out of a blank board where you could put up

and refine your ideas. If you were an analyst, the ability to quickly compare data would be your top priority.

SharpCloud makes this easy, allowing you to collate multiple portfolios of data from within your organisation and present it in whatever format is most appropriate. This is not a sophisticated analytics tool that requires specialist training to use – it is designed to be as simple to use as possible, so everyone within your organisation can take advantage of its capabilities. There's no need to re-edit spreadsheets whenever you need to make an amendment for example – once your data has been updated, it will be updated everywhere, so everyone with access to your 'story' will get the updates straight away without the need to send out a company-wide email.

As a result, staff at all levels within your organisation will have instant access to the data they need to do their jobs, in the format that suits them, whenever they need it. This provides a massive boost to productivity and will lead to more productive meetings, whether they take place face to face, or online via video conferencing tools such as Skype. It's a very interactive approach to communicating data, which encourages feedback and comments, helping staff to take ownership of their roles within a project and business relationship and deliver their best possible work.

This way, collaboration can be measured in order to identify what is working and what isn't. You will see the four key elements we mentioned in the previous section – communication, agreement, actions and outcomes – displayed in a visual format, so you can make instant business decisions and improve the quality of your collaboration. You'll identify and manage risks better. You'll be able to create new values and embed them amongst your staff.

The increased level of transparency will help you build trust with your international partners and collaborate more effectively together – something that's becoming increasingly important in the global market, where people may not be in a position to meet in person. It's very inspiring when collaboration and visualisation come together in this way. Although I agree that it's often important for people to meet face to face, through the prudent application of modern technology and adopting a collaborative approach, it's quite possible to develop strong working relationships without ever even being in the same country as your strategic partners.

This is the key to the Roelto approach and the foundation of successful visual collaboration...

Visual Collaboration – using your data to build a more efficient organisation and create better collaborations

When collaboration and visualisation are brought together and made to work in harmony, they can easily transform both your organisation and those of your partners. Not only will you find that staff at all levels are able to take greater ownership of their roles and deliver innovative solutions for business growth, you will experience proactive collaboration through enhanced transparency, respect and trust at all levels.

It may sound implausible, but I've seen it work over and over again throughout my career, provided the right processes, training, development and tools are implemented and used effectively. Through visual collaboration, information and ideas can be freely exchanged and developed, even if you are in different countries. This interactive approach means agreements will be reached quickly, which can then be translated into clear action points for everyone to take away in order to deliver the agreed outcomes.

So how can you utilise visual collaboration?

The Complete Visual Collaboration Process – a ten-step process that integrates the eight stages of BS 11000 collaboration and the benefits of visually communicating using SharpCloud

By following these ten steps, which incorporate the eight Stages of BS 11000 and the use of SharpCloud, you will start to enjoy the benefits of Visual Collaboration.

Step 1: Preparation – Utilising Visual Collaboration

Before beginning the three phases, it's important to conduct a gap analysis of BS 11000 and your existing processes and systems to identify the opportunities and benefits a visual collaboration approach would bring. This will ensure you are well-placed to complete the next nine steps.

The Strategic Phase

Step 2: Awareness (BS 11000 Stage 1) – Understand Your Full Potential

This is all about understanding why you would want to collaborate with people and organisations. What are the benefits and risks? These need to be aligned with the values, vision and objectives of your business and will require investment, resources and sustained backing via focussed leadership.

Develop your visual collaboration policy and identify business objectives and value propositions against potential risks to create a specific business strategy.

Step 3: Knowledge (BS 11000 Stage 2) – Create Your Knowledge Base

Now you need to develop specific strategies, establish knowledge management processes and objectives, including the business case, potential organisations to partner with, and the all-important exit strategy.

Do this by visually mapping out your data, information and knowledge to develop your strategy for specific visual collaboration opportunities.

Step 4: Internal Assessment (BS 11000 Stage 3) – Play to Your Strengths

This is when you focus on your people – the ‘soft issues’. What are your current capabilities, understanding and collaborative skills within the context of the potential collaboration? How prepared are the people within your business to collaborate? Be honest here – it’s important that you utilise the resources you have as effectively as possible and don’t assign staff to roles to which they would be ill-suited. Make sure you understand what you are doing, why you are doing it and whether you are in a position to do it before you proceed any further. That’s why you need to develop a collaboration profile of your organisation with regards to its attributes (systems and processes), ability (people) and attitude (organisation).

Once that is done, you will be able to share your co-created Visual Collaboration Roadmap with both your organisation and business partners.

The Engagement Phase

Once you’re clear on these points, it’s time to move on to the engagement phase...

Step 5: Partner Selection (BS 11000 Stage 4) – Apply the 80:20 Principle

Now it’s time to begin evaluating potential partners. You may well already have an idea of the sort of people you wish to partner with, based on the collaboration profile you developed in Step 4, but to make the selection process even easier, I have developed a visual online systematic approach to this stage of the process. Start by taking the list of potential partners identified in the Strategic Phase, grade them from A to D on the three areas described previously: their attributes, their ability, and their attitude to collaboration. This is where things become more tactical, which is why I have created a selection of workshop templates using SharpCloud which allow you to create a collaboration profile for both yourself and anyone you are considering as a strategic partner.

As you do this, bear in mind the 80:20 principle – 80% of your profits will come from 20% of your efforts. With this in mind, aim to identify partners who will deliver considerable rewards, without the need for excessive effort or cost on your part. Always look to create new value, as we discussed earlier.

The principal advantage of this approach is that it makes comparing potential partners much easier, as you’ll have a clear visual representation of how their abilities and requirements compare to your own.

This way, you'll be able to quickly and easily identify which business partners will deliver the greatest benefits when adopting a visual collaboration approach.

Step 6: Working Together (BS 11000 Stage 5) – Utilise Your Assets

Establishing the correct platform on which to jointly create a collaborative relationship is critical and comes back to the four key components of collaboration: communication; agreement; action and outcome. Being able to leverage best practices and jointly share people, information and processes involves a degree of integration, so I will introduce you to a simple way of reusing your existing systems and processes and conduct competency reviews to ensure you select the best team to establish a successful start to your collaborative relationship.

Step 7: Value Creation (BS 11000 Stage 6) – Become More Innovative

It's important to define what 'value' means in order to identify processes to support continual improvement and innovation. This helps you to proactively engage with your partnering teams and create new value beyond your original objectives.

Jointly create ideas that can be applied to create more value and mutual benefits for everyone involved.

The Management Phase

Once you have identified your perfect strategic partner, established a joint way of working and creating value, it's time to ensure your working relationship is a successful one. Don't take this for granted.

Step 8: Staying Together (BS 11000 Stage 7) – Sustain High Levels of Teamwork

Experience has shown that once the initial 'honeymoon' period of any business partnership is over, maintaining continual improvement and value creation becomes difficult. This stage outlines how you need to be willing to maintain the dynamics of your relationship for as long as you need to. It's true that all business relationships have a limited shelf-life, but this shouldn't be used as a justification for neglecting your strategic partnerships once they are in place. The BS 11000 approach takes this into account and provides a systematic process for maintaining business relationships, helping you to maintain high levels of teamwork and continually deliver business value.

Step 9: Exit Strategy (BS 11000 Stage 8) – Ensure Future Business Continuity

The exit strategy is perhaps the most neglected aspect of business collaboration. In order to maintain business continuity and avoid letting your customers and clients down, you should always plan how you will exit a relationship and leave yourselves the option of working together again at some stage in the future. Never burn your bridges!

Step 10: Systemisation – Managing Your Visual Collaboration

Finally, establish a business intelligence dashboard to manage your visual collaboration projects and business relationships, both now and in the future.

By integrating BS 11000 collaboration and SharpCloud visualisation this creates several unique benefits for you...

A scalable, versatile approach to collaboration

The beauty of BS 11000 is that it simplifies the process of establishing a successful collaboration. You can start off with just a few people involved and a fairly straightforward set of processes, then gradually make your collaboration more sophisticated as more people get involved and you build rapport with your strategic partners. It's amazing how quickly this sort of visual collaboration brings people together, even if they were initially wary or even hostile towards each other. I've seen it many times when I've worked with international teams.

Furthermore, you may well find that building this level of trust and efficiency with your partners gives you the courage to challenge your current mode of operation and business processes in order to make them serve you better. When you're working collaboratively, people are far less likely to be offended when you challenge the status quo.

Much the same goes for your social, corporate and regulatory responsibilities. Collaboration can often highlight aspects of these areas that you could be paying closer attention to, as being seen as an ethical, responsible corporation is extremely important nowadays, and many companies will be reluctant to collaborate with partners who aren't giving this their fullest attention. This applies to all industries, but fortunately, BS 11000 is versatile and scalable enough to be tailored to any company's specific requirements and responsibilities.

Making the complex simple

One of the biggest challenges faced by businesses nowadays is the need to translate complex information into a simpler form that can be easily shared and understood by the right people at the right time. This might include product and technology road maps, project and innovation portfolios, workshops, business strategies, sales and marketing plans... all of which might need to be shared with people in different locations and organisations.

Many organisations have no problem with this when they're operating on their own local business network. Even if there are multiple networks involved, they are still part of the same organisation, and so problems rarely arise. However, things become more complicated when more than one organisation is collaborating together. Given that everyone involved will be operating on their own network, how do you ensure information is accessible to everyone?

The answer is simple: a cloud-based system like SharpCloud that keeps your data completely secure, but still accessible to everyone within and outside your company who

needs access to it through visual links to other resources, content and systems. There's no need to download any extra software for your computers – once your security profile has been set up (which takes less than a minute to do), all you need to access your information is an internet connection. It really is as simple as that!

Improving your people's innovation capability

As we've touched on several times throughout this guide, one of the main benefits of effective collaboration is that it dramatically increases your team's innovation capability – their ability to think outside the box and deliver cutting-edge solutions and concepts that really grow your business. This is all about tutoring your team members to improve their skillsets, improving you and your partners' collaboration capability and helping your leaders and managers make better informed decisions.

This is especially important in companies where projects are likely to last for several years, during which there may be a number of significant changes within their industries. If your business works in this way, it's important that you are able to keep abreast of changes in your industry and act on them quickly in order to ensure projects are completed as expected and that the end result will justify the time and money invested.

Many organisations struggle to keep their information up to date in this way, as they have to not only edit multiple spreadsheets and PowerPoint presentations every time there is a shift in their industry, but also make sure said changes have been properly communicated to everyone within their organisation, and also to their strategic partners. This is incredibly time-consuming, and makes it far too easy for something to get missed, meaning that people will be working with outdated information without even realising.

Fortunately, you can save time and money by integrating your different portfolios of business data, allowing your company to remain agile and aware of industry trends and developments. One of the major advantages of SharpCloud is that it can create multiple presentations of the same data, so one can be tailored for your organisation's scientists, another for its managers, another for its sales teams, even ones for partners in other countries, which eliminates problems caused by language barriers. This saves a considerable amount of time and allows decisions to be made much faster, which can prove invaluable when deadlines are tight.

Measure your outcomes to create a culture of constant improvement

Finally, SharpCloud simplifies one of the most important aspects of any project – measuring the outcomes. Through a dedicated 'outcomes' panel, you'll always be able to see what's working and what isn't, which means you can constantly refine and improve your processes. This way, you and your partners will be able to stay ahead of changes in the marketplace, ensuring that you are well-placed to adapt to them and continue to grow.

And that's when you'll really start to stand out from the competition!

Conclusion

I hope this guide has proved interesting and informative and that you are now keen to start exploring visual collaboration within your own organisation and potential business partners. In closing, let me remind you to be patient and methodical as you put everything we've discussed into practice and refer back to this guide if you ever need a little extra guidance.

If you do so, you'll soon find that visual collaboration will open up a wonderful variety of doors for your business, from increased profits and efficiency to new opportunities for innovation.

I wish you the very best of luck and look forward to hearing your success story!

About Roelto

Roelto is committed to helping businesses everywhere achieve their full potential through successful visual collaboration. Through the proper implementation of both BS 11000 and SharpCloud, we will ensure that your visual collaborations are successful and long-lasting and that you are in a position to make the most of your business data.

Our approach is flexible and collaborative, based on the specific needs and goals of your business. With years of experience in business collaboration and data visualisation, we have seen over and over again that ‘off the shelf’ solutions are never enough to deliver a truly outstanding result. The tools we will provide you with are designed to help you focus on your goals and move closer towards them, improving your efficiency, productivity and profitability along the way.

Just visit our website to find out more about how we can help you transform *your* business...

“A genuine pleasure to work with Jason over the past 12 months. Jason is a first class communicator and that rare breed of person that successfully combines a wide ranging strategic viewpoint with a meticulous attention to detail. We would position Roelto as key partners in the integration and enhancement of our global communication platform within the Industrial team at Enterprise Ireland.”

John Hunt, Senior Market Advisor
Enterprise Ireland

www.roelto.com

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In today's global market, it's more important than ever that growing businesses are able to create successful business collaborations and utilise their data in a way that results in significant business growth. Unfortunately, with the market rapidly changing year by year and an increasing volume of business data now coming from multiple sources, this has become a serious challenge for business owners.

Until now...

In this special guide, Jason Hier of Roelto introduces a new approach to visual collaboration in business – one based on transparency, good communication and effective use of business data. Some of the topics covered include...

- Why business collaboration is essential in today's global market
- Why visualising your data is the key to making effective use of it
- The key elements for successful collaborations
- Bringing you and your strategic partners together

This advice is all drawn directly from Jason's 25 years of experience helping leading organisations collaborate more effectively. You won't find any jargon or any short-term solutions – just clear, practical advice on how to make successful collaboration and data visualisation a key part of your business life.

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