BSB 7.0

BSBTEC404

USE DIGITAL TECHNOLOGIES TO COLLABORATE IN A WORK ENVIRONMENT

Aspire Learning Resources

BSBTEC404

Use digital technologies to collaborate in a work environment

Release 1

Learner Guide

Aspire Version 1.1

Learning Resources

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BSBTEC404 Use digital technologies to collaborate in a work environment, Release 1

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Before you begin

This Learner Guide is based on the unit of competency *BSBTEC404 Use digital technologies to collaborate in a work environment*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at:
www.training.gov.au.

How to work through this Learner Guide

This Learner Guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the Learner Guide you need to read, and which Practice Tasks and Learning Checkpoints you need to complete. The features of this Learner Guide are detailed in the following table.

Feature of the Learner Guide	How you can use each feature
Learning content	Read each topic in this Learner Guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
Examples	These highlight key learning points and provide realistic examples of workplace situations.
Practice Tasks	Practice Tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
Summaries	Key learning points are provided at the end of each topic.
Learning Checkpoints	There is a Learning Checkpoint at the end of each topic. Your trainer will tell you which Learning Checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.

Foundation skills

As you complete learning using this guide, you will be developing the foundation skills relevant for this unit. Foundation skills are the language, literacy and numeracy (LLN) skills and the employability skills required for participation in modern workplaces and contemporary life.

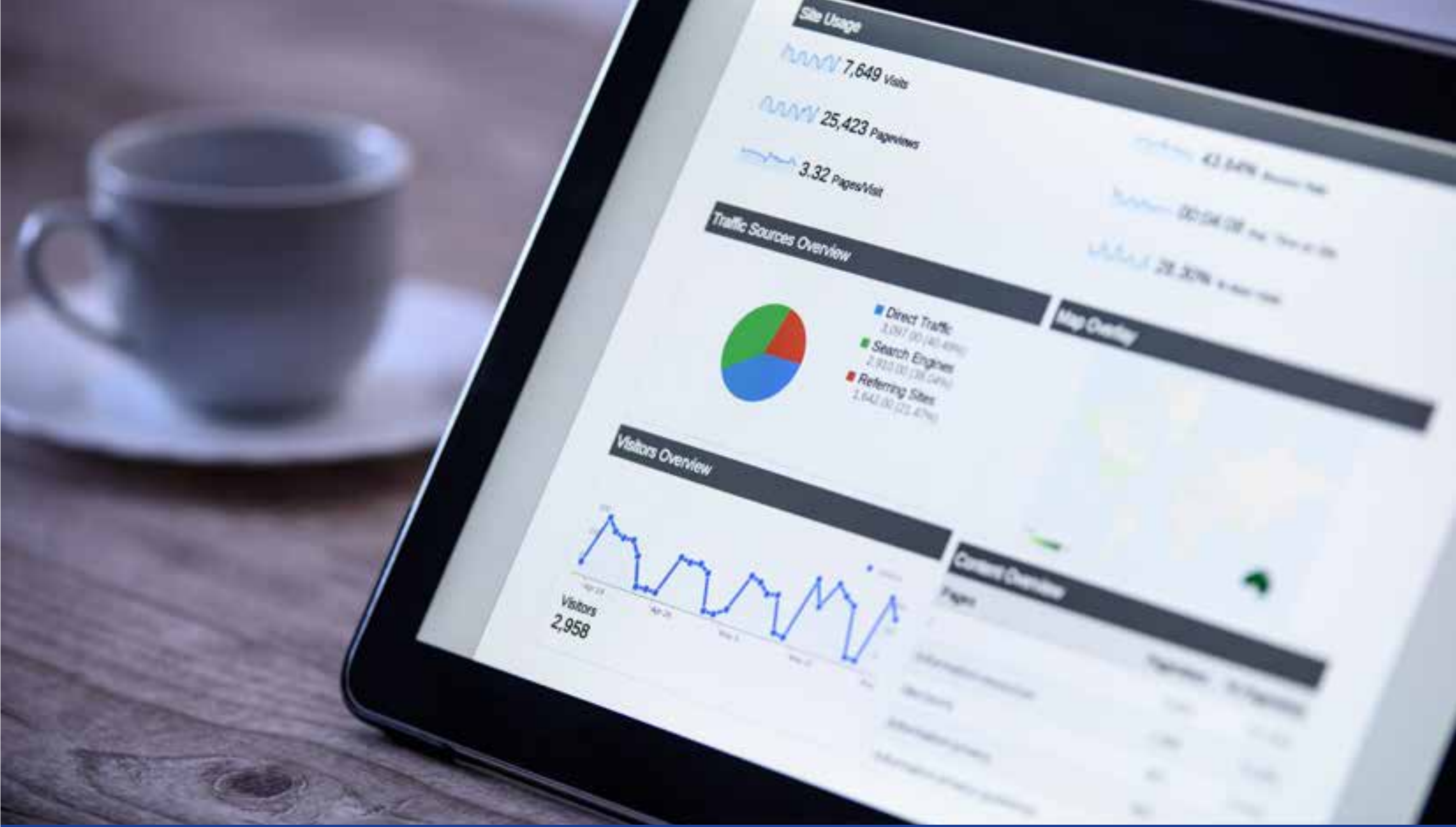
The following table provides definitions for each foundation skill.

Foundation skill area	Foundation skill description
Learning	▪ Actively reinforces workplace learning by encouraging personnel to expand their digital literacy
Reading	▪ Organises, evaluates and critiques information from a wide variety of textual material
Writing	▪ Develops material for a specific audience using clear language and workplace conventions to convey explicit information, requirements and recommendations
Oral communication	▪ Uses appropriate, detailed and clear language to address key personnel and disseminate information ▪ Uses listening and questioning skills to confirm understanding of requirements
Teamwork	▪ Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective group interaction, influencing direction and taking a leadership role on occasion
Problem solving	▪ Applies problem-solving processes when tackling an unfamiliar problem, breaking complex issues into manageable parts and identifying and evaluating several options for action

What do you already know?

Use the following table to identify what you may already know. This may assist you to work out what to focus on in your learning.

Topic	Key outcome		Rate your confidence in each section
Topic 1: Review existing digital technology use in the business	1A	Identify and assess performance of current collaborative ways of working	❑ Confident ❑ Basic understanding ❑ Not confident
	1B	Collate information	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 2: Identify opportunities to implement digital technologies for workplace collaboration	2A	Identify and assess digital technologies for collaborative working	❑ Confident ❑ Basic understanding ❑ Not confident
	2B	Prepare a business case for implementing new collaborative digital solutions	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 3: Implement digital technologies for workplace collaboration	3A	Develop and communicate a plan to introduce new collaborative technologies	❑ Confident ❑ Basic understanding ❑ Not confident
	3B	Implement digital technologies	❑ Confident ❑ Basic understanding ❑ Not confident



Topic 1 | Review existing digital technology use in the business

1A Identify and assess performance of current collaborative ways of working

1B Collate information

1A Identify and assess performance of current collaborative ways of working

Collaboration involves communicating and supporting each other by sharing skills and knowledge.

Collaboration is the process of completing work, solving problems and making decisions as a group. Working collaboratively can increase creativity and productivity and better utilise the strengths of team members.

There are three main types of collaboration:

- team collaboration – collaboration in the team to achieve team objectives
- community collaboration – building a strong team community, based on learning from each other, to increase the overall knowledge and skills level in the group
- network collaboration – collaborating with individuals and other teams, both internally and external to the organisation.
- The main opportunity for cross-collaboration occurs when there is an obvious skill deficit in one team that can be filled by another team or an external source. However, opportunities for collaboration can occur when:
- you need new ideas – a fresh perspective from another team or an external consultant can fire the imagination and help with problem-solving
- you're drowning in work – another team, external freelancers or temporary staff may be able to help make your team's workload manageable, as well as adding to your team's skill set and knowledge
- you can only solve part of the problem – you might need another skill set to complete the picture and help you achieve objectives
- there are knowledge gaps – you might not have the budget for training, but another team, employee or external expert may have the knowledge you need to help complete projects and achieve objectives
- there are conflicts between teams – issues can arise due to poor communication and conflicting priorities. Cross-collaboration and alignment of priorities may promote better communication and better results.

Identifying current collaborative ways of working

To implement new collaborative technologies, you first need to understand how teams and team members currently collaborate in the workplace.

You will need to undertake research in your organisation to accurately identify current collaborative ways of working.

The following table outlines a process for collecting and analysing information.

Researching and critically evaluating information
Understand your information objectives.
Apply appropriate research methods.
Identify information sources.
Analyse the validity of the information.
Assemble the information appropriately.
Review the material for information gaps.

Understanding your information objectives

If you are required to identify the current collaborative ways of working in your organisation, you need to understand what questions you are trying to answer. Write down your objectives to ensure you are focused on the required results. Be specific about your aims and ultimate goals, then formulate your questions.

Consider the following:

- What is the scope of my research? For example, the whole organisation or just a department?
- How are we currently working collaboratively?
- What digital technology is currently available for collaboration and how is it being used?
- Are collaborative working processes defined or do they occur organically?
- Are our current ways of working helping us to achieve our organisational objectives?
- What opportunities are there for us to increase productivity by working more collaboratively?
- Are there any barriers to working more collaboratively?

Use these questions to develop your objective, which might be something like: Identify the collaborative working processes of the sales team that contribute to the achievement of their sales targets.

Clear objectives help you decide what kind of information you need to gather and where to look for it. Start with readily available information by collating any existing material and assessing it for relevance. This information may include job descriptions, monthly reports, technology usage reports or strategy documents. Material that is unreliable, inaccurate or out of date should be discarded, unless it might be of historical interest. You can then identify information gaps and work towards finding out what it is you need to know.

Applying appropriate research methods

Researchers often use a combination of methods to collect information. The research methods depend on the objectives, the desired outcomes and the timelines involved. You may gather the information yourself, or a team or someone acting on your behalf may gather information for you.

The amount of time spent collecting information should be consistent with your objectives, as well as with the broader objectives of the organisation. You may not have time to interview every member of your organisation, but you may have time to create a questionnaire or survey that every employee can complete.

Methods of acquiring information include:

- reading reports, articles and other news items
- analysing catalogues, price lists and statistics
- interviewing, asking questions and sharing ideas
- observing and listening
- reviewing and sampling new products or services.

Identifying internal information sources

Key people in the organisation have information based on their own knowledge and experience, and can share this with you or point you towards other relevant information. Knowing who to approach for information helps you to understand work roles and responsibilities and to form relationships with others in the organisation. Be clear about the advice you need and what the person can and cannot provide; define your information objectives.

There are a number of ways of obtaining information in your organisation. Some of the main sources are shown in the following table.

Ways of obtaining information	
1	**Paper-based files** Paper-based files containing correspondence, statistical data and historical material
2	**Electronic files** Electronic files, such as emails, financial systems, technology usage reports and customer databases
3	**Online material** Online material, such as your organisation's intranet, which may contain planning and organisational documents, policies and procedures, marketing data, news items, minutes of meetings, personnel records and short reports
4	**Internal reference libraries** Internal reference libraries or collections of reference manuals, journals, magazines and catalogues
5	**Key people** Key people in the organisation who have information based on their own knowledge and experience

Collaboration between individuals

Levels of collaboration are likely to differ between individuals, teams and departments and will certainly vary from organisation to organisation.

To identify current collaborative ways of working, start at the individual level and explore how individuals collaborate to complete work tasks and achieve objectives.

Consider the job descriptions of individuals in a team and the alignment of tasks, roles and responsibilities. Do individuals undertaking similar roles work collaboratively on tasks, and if so, what aspects of the task do they work collaboratively on? For example, customer service representatives might work independently to fulfil their own job requirements, then discuss issues they have been experiencing and collaborate to identify solutions.

Working collaboratively may be part of a job description or a process employed by the team, or it may have occurred organically where two or more individuals have decided to work together on an aspect of a task.

Ensure you ask questions about how the collaborative process works. These may include:

- Does it involve meetings, calls or emails?
- How are digital tools used to aid collaboration?
- What have been the benefits of working collaboratively?
- What is the outcome of the collaborative work?

Collaboration between teams

All individuals, teams and departments contribute to the achievement of organisational objectives; however, they rarely do this in isolation.

Collaboration between teams and/or departments may be essential to completing your team's objectives. You are likely to find yourself relying on information from other teams in order to complete tasks. For example, the sales team may need current information from the warehouse team about stock levels and shipping times. The teams will need to collaborate to understand each other's requirements and to communicate the required information.

Communication is likely to be a key element of collaboration between teams, but the level of communication is likely to vary from team to team depending on the nature of the teams and their tasks.

When identifying opportunities for collaboration between teams, look for:

- communication touchpoints between teams
- overlap in tasks and roles
- handovers of information or projects between teams
- interactions with shared services such as finance, IT, customer service or HR
- frequency of collaboration
- tools used for collaboration
- outcomes of the collaboration.

Example

Working collaboratively

Every Monday morning, Katrina holds a sales meeting. It is attended by her sales team as well as representatives from the marketing, product, customer service and finance departments. The sales team discuss their sales calls from the previous week and share positive and negative feedback from the customers.

Katrina leads a collaborative discussion with the attendees to decide how to resolve issues with a product and what actions each of the attendees need to take. Communication between the attendees will be important while the problem is being resolved, as each party must report when their action is completed. The communication loop is closed when the sales consultant has spoken with the customer and provided updated feedback.

This collaborative approach to resolving customer issues ensures that all departments are invested in achieving the best result for the customer and that there is transparency about issues and accountability.

Organisational policies and procedures

Organisational policies and procedures may have a role in promoting collaboration and these should be considered and consulted when identifying collaborative work processes.

Organisational policies and procedures cover a wide range of subjects, such as employment conditions, work health and safety, technical processes, communication procedures, performance reviews and security arrangements. These policies and procedures will have been developed collaboratively to ensure they are relevant to the requirements of all employees.

Policies and procedures are important because they outline the legislative and regulatory requirements that a business must follow. They also provide you with a clear set of expectations on how you should work and behave. Each department must refer to these documents to ensure consistency across the organisation. Policies are essential in the area of human resources, as they provide staff with clear guidelines. Staff can refer to their organisation's policies and procedural documents if they need to question their work conditions or if they are having issues or conflict with other employees.

Structure of a policy
▪ Title of the policy ▪ Purpose of the policy – a statement on what the policy aims to achieve ▪ Scope of the policy – what the policy covers and what it applies to ▪ Definitions – some key terminology used in the policy document that may need explanation ▪ Policy statement – a general description of the policy ▪ Procedures – how the policy should be applied ▪ Related policies and procedures – a list of policies and procedures addressing related issues, and any other relevant documents

The following table provides examples of common workplace policies you may come across.

Policy	Details
Work health and safety	Responsibilities and norms around health and safety in the workplace, such as what personal protective equipment (PPE) you may be required to wear when you work
Anti-discrimination and equal employment opportunity	Norms and responsibilities that ensure all employees are treated respectfully, equally and fairly no matter their age, gender, ethnicity, physical ability, religious belief, etc.
Performance management	Details how you will be given feedback, how your work will be evaluated and the consequences of poor performance, as well as potential reward for high performance outcomes
Dress code	How you are expected to dress at work, e.g. business attire Monday to Thursday and casual Fridays
Quality management	Outlines quality standards of the organisation and the level of quality you are expected to implement in your work
Communication guidelines	How to communicate with others internal and external to the organisation, including how to write and structure emails and how to represent the company on social media
Standard operating procedures	How to perform a particular task or function – includes step-by-step procedures and quality standards with measurement of performance

Other policies that may affect your job role include:

- use of company property, such as IT equipment or vehicles
- leave applications
- marketing guidelines, such as format and style guides for promotional information.

Analysing the validity of the information

Once you have completed the collection of information on collaborative ways of working, you need to consider its validity and relevance to your research objective.

There are a number of elements you should consider to determine whether information is valid, as shown in the following table.

Source	Check where the information came from, who created it and whether the source is reliable and widely accepted in the industry. Always check and verify information sources, particularly when dealing with material on the internet. Before using or reproducing any material, you must check whether there are any copyright restrictions and follow any legal procedures for reproducing material.
Currency	Be wary of relying on information that may be out of date. Check that the information you use matches the time period of any work being undertaken or examined.
Relevance	Check that the information relates directly to your research goals.
Presentation	Look at how the information is presented. If it has a lot of errors or is poorly organised, you need to be careful about relying on its content.
Authenticity	Make judgments about whether the information is accurate and authentic. Has it been prepared by someone with a biased viewpoint on the subject? Is it promotional material? Can the claims be substantiated? You may want to check with others who are more experienced in the subject as to whether the material you have obtained is credible.
Acceptability	Some organisations have policies regarding what information is acceptable or unacceptable. Always follow your organisation's policies and procedures when collecting and using information for work purposes.

Reviewing the material for information gaps

You need to review your material for information gaps to ensure you have collected enough information to answer your research objective. You may need to seek information from a different source to obtain a more balanced viewpoint. You might discover that you need to gather further facts or ask for clarification from someone whose opinion you trust.

The way you assemble information can highlight information gaps. For example, if you are collecting information on how one team works collaboratively, you should seek information from all team members and also talk to those outside the team who may have insight about how the team works.

Practise thinking critically about any information you receive and how it can be assembled in the most useful way. Your aim should be to effectively evaluate the material, extract the key facts, make sound decisions and keep organised records that enable you to verify your decision and refer back if the need arises.

Assessing performance against organisational objectives

You need to assess whether the current collaborative ways of working are helping each team or department to achieve the performance targets set out in organisational strategies and objectives.

Your organisation is likely to have a commercial strategy and objectives that are set out in an operational plan. A commercial strategy outlines how an organisation will achieve its commercial objectives. It is likely to be dependent on staff, products, IT and so on, to describe how the objectives will be achieved. The strategy is likely to consist of an overarching objective broken down into smaller, more specific goals and be accompanied by an action plan.

For example, the organisation BizOps has the following objective: BizOps will consolidate its position in the market as a lead retailer of sustainable, high-quality products. It will expand its reach and presence across Australia and into parts of Asia.

To achieve this objective, BizOps has created a commercial strategy to focus on finance, market position and its people.

- Financial stability:
  - increase revenue by 15 per cent (compared to the previous 12 months) by the end of the financial year
  - maintain annual profit levels of 15 per cent of revenue for all products and services, calculated at the end of each financial year
  - reinvest 75 per cent of profit back into the business at the end of each financial year.
- Market position:
  - maintain the number one rating in the annual national industry customer service awards
  - launch new high-quality exclusive consumer products to meet customer demand ahead of competitors, in budget and by the agreed deadlines
  - increase reach across Australia and into Asia with enhanced online presence and expansion of home shopping TV channels in Australia and parts of Asia.
- Right people:
  - provide induction training at the commencement of employment to train new employees to be knowledgeable, helpful and enthusiastic

- provide the physical, human and time resources to support an annual professional development program for all BizOps employees
- ensure BizOps has the capacity and capability across all its operations to accommodate the aggressive marketing strategy over the coming year.

Team objectives will be derived from that strategy and so will individual performance objectives, so that ideally each person and each team contributes to the achievement of organisational objectives.

Key performance indicators (KPIs)

KPIs for digital technologies and collaboration should be focused on improvements to operations and financial impact.

Key performance indicators (KPIs) are typically used for individuals and teams to describe tasks or duties that need to be carried out, the frequency or time frame and the expected standard. Traditionally, KPIs have been seen as poor indicators of the effectiveness of digital technologies, as they were better suited to measuring long-term impact that identified annual or quarterly improvements. However, in today's world of agile organisations, KPIs need to reflect these new digital operating capabilities.

As such, KPIs for digital technologies and collaboration should be focused on improvements to operations:

- How well and to what extent is the organisation using digital technologies?
- What quality of work is being produced by these technologies?
- Have these technologies improved productivity?
- How well is the technology performing?
- KPIs for digital technologies and collaboration should also focus on financial impact:
- How has productivity increased?
- How has revenue increased?

KPIs may also be accompanied by actions that describe how these tasks will be carried out. These actions will detail the processes involved in using digital technologies. For example, the IT team has a KPI to measure team initiatives, looking at the number of new ways the team has developed to solve current challenges. This will indicate the team's level of engagement with digital technology as well as their readiness to overcome unexpected problems in a digital environment. The actions described might specify use of particular tools or functions and may involve a range of software applications.

In order to assess performance of the current collaborative ways of working against organisational strategies and objectives, you will need to review and analyse individual, team and organisational level performance review data. To obtain this, you may need to work with the HR team who may have compiled summaries at team level to show where objectives have been achieved or missed. Individual performance information is likely to be confidential and you may only be given limited access to performance data. Team or organisational data is likely to be more readily available for analysis.

Example

How is commercial strategy relevant to digital technologies?

Commercial strategy typically outlines a plan for stability or growth and to protect or gain market share. Most industries are too competitive for organisations to afford to stand still. When considering the actions that are required to achieve commercial objectives, you need to consider how collaboration and collaborative tools can assist in achieving efficiencies and delivering results.

For example, BizOps wants consistent induction training and professional development for all its staff but they are located across Australia and in Asia. The management at BizOps understand that the current collaborative ways of working won't be sufficient to achieve their objectives. So, in order to deliver their commercial strategy, they define an action: to invest in video conferencing tools and equipment to facilitate communication between all retail, online and telesales centres, and reduce travel time and costs.

You can identify the need for collaborative digital technologies during the development of the commercial strategy, as BizOps have done, or you can assess the organisational strategies and objectives and determine if the current ways of working can deliver the desired results.

Deciding on your assessment criteria

Deciding on assessment performance should be a collaborative effort as it may significantly impact the collaboration activities of all teams and/or departments.

As you are assisting relevant personnel to review existing digital technology use in the business, it is important that you meet with them to agree on the criteria you will use to assess performance. It may be as simple as whether KPIs have been met, but there may be other factors you need to assess, such as absenteeism, attitudes, organisational culture and behaviours. These all contribute to an organisation's performance.

Many objectives are likely to be related to increasing productivity or sales and decreasing costs and time scales. If these objectives are not met, then there is likely to have been, or will need to be, analysis undertaken to determine why the objectives were not met. It will be helpful to consider how current ways of working may have contributed towards the failure to meet the objective. For example, if the customer service team did not meet their customer satisfaction target, you need to consider why this has happened. It may be due to poor communication, delays in resolving customer queries, or product quality issues. Discussing this result with the customer service manager will help to identify issues that may be related to the way the team works, as well as providing potential solutions that may feed into your objective.

Asking questions to assess performance

When monitoring performance using metrics, you need to identify instances of underperformance and focus on any roadblocks, or barriers, that may have caused failure. You will need to analyse what stopped individual strategies or tactics from being properly enacted. There might have been an unexpected external factor, such as a spike in interest rates, or there may have been an internal problem, such as a lack of training and support for implementation in a particular department.

You need to be asking:

- What is happening?
- Why or why not?
- What is getting in the way?
- Who needs help?
- Who needs recognition?
- What can we learn from the success or failure?

Relevance of data to research question

Remain focused on your research question when evaluating data – not all of the information you collect will be directly relevant.

The questions you ask when assessing performance data are likely to produce a range of answers and only some will be related to your research question.

Remember to keep your research question in focus – you want to determine whether existing ways of working and digital technology are sufficient to achieve organisational objectives.

You may need to sort and classify your research data into categories, which could include:

- communication issues
- operational/process-related issues
- knowledge/skills issues
- financial issues
- external issues.

By sorting the data, you will be better able to assess which issues relate to current ways of working and which are associated with other factors such as external factors or budget constraints. It is important not to discard the other data you have collected as it may be relevant to ways of working, but do not allow yourself to be distracted by it. For example, it might be easy to blame all issues on budget constraints and not investigate further. However, if processes were to become more efficient, it may be possible to achieve objectives despite the budget constraints.

Example

Barriers to achieving objectives

Keith is a sales consultant for a soft furnishing and window-dressing company. He visits clients in his sales territory to advise on interior design solutions and offer quotes on curtains, furniture upholstery, and other soft furnishings. Keith has a laptop, phone and company car and spends most of his time out of the office visiting clients. Keith is struggling to meet his sales targets as he is limited to how many clients he can see in a day. He feels that with better tools, such as an iPad and video conferencing and communication software, he might be able to communicate with more customers without having to travel to their homes.

Keith's manager is reluctant to invest in these tools as there is a limited budget. Also, the company promotes its personal, face-to-face service. Keith explains that some customers have even requested that he send photos of fabric patterns for them to consider at their leisure. Keith talks to the other sales consultants who express similar views. He puts forward a proposal for his sales manager to consider. The proposal outlines the potential time savings per customer transaction and the increased rate of customer contact as a result.

Practice Task 1

Question 1

Which of the following are collaborative ways of working? Tick all that apply.

- ◯ Collaboration in the team to achieve team objectives
- ◯ Working independently to fulfil your job tasks and responsibilities
- ◯ Learning from each other to increase the overall knowledge and skill levels in the group
- ◯ Reporting to your manager about your weekly achievements
- ◯ Using video conferencing to work with individuals outside the team, both internal and external to the organisation

Question 2

Answer True or False to the following statements about collaboration.

Communication – as well as a willingness to share ideas and recognise the contributions of others – is key to successful collaboration.	» True	» False
When monitoring performance using KPIs, only refer to examples of excellence and achievement in order to determine what works and apply these strategies to meeting other objectives.	» True	» False
Successful collaboration can be measured by whether it produced efficiencies in regard to time and money, and if skill sets and knowledge were utilised favourably to create the end result.	» True	» False
In order to assess performance of the current collaborative ways of working against organisational strategies and objectives, you need to analyse individual employee performance review data.	» True	» False
Team objectives will be derived from a commercial strategy and so will individual performance objectives, so that ideally each person and each team contributes to the achievement of organisational objectives.	» True	» False
KPIs involving digital technologies are not directly connected to the organisation's commercial strategy.	» True	» False

Question 3

Which of the following organisational policies and procedures may impact collaboration in the workplace? Tick all that apply.

- ◯ Hazard reporting
- ◯ Motor vehicle use
- ◯ Work health and safety
- ◯ Anti-discrimination and equal employment opportunity
- ◯ Performance management

1B Collate information

After identifying and assessing the information you have gathered, you need to collate it in such a way that it is meaningful for your audience.

Discuss with relevant personnel how they want the information to be collated and presented to them. It is likely that they will expect the information to be collated into a report, so you need to be aware of organisational requirements when it comes to producing reports.

Organisational procedures and requirements

Your organisation may have specific procedures regarding its electronic and paper-based documents.

There may be a procedures manual that tells you what computer software is used, how to use it and what to do if you have any problems. For example, you may be required to:

- document your work with a file name, author and path in the footer of each document
- use specific templates for the type of document you are producing
- employ and conform to house style in regard to font, headings, page numbering or contents.

Other organisational requirements may include:

- protocols for external and internal communications, including requirements for inclusive and non-discriminatory language
- considering copyright; for example, how to acknowledge any material you have copied in a document, whether you need to seek copyright permission and how you would do so.

Reports

Reports are usually very formal documents that need to be submitted when performing important work tasks such as investigations, analysis, evaluations and recommendations.

Most organisations have a standard structure for their reports with headings that you must address and styles you must use. For example, some organisations require reports to use a complex hierarchical numbering system. Take note of the format required by your organisation. Many reports incorporate visual devices to make them more readable. These devices include the use of headings, lists and keywords. Important information or text may be repeated in break-out boxes for emphasis.

A report should include:

- a title page
- a table of contents – this should reveal a logical flow of information
- a list of tables or graphs if necessary
- a summary of key points (sometimes called an executive summary)
- an introduction
- the main text
- a conclusion
- a list of recommendations, where appropriate
- references and acknowledgments, if necessary
- appendices, if appropriate.

Assembling the information appropriately

After obtaining the required information, you may need to convert it into a form more suitable to your needs.

You can categorise and file the material, cull it down to a few key documents, highlight relevant sections, make separate notes, draw up some charts or prepare a report. The method you choose depends on the nature of the research and your information objectives; that is, what you or your audience needs to know from the information.

The following table provides some examples of how to assemble information.

Example 1
If you are gathering information regarding the KPIs of your organisation's workforce, you might look at the performance plans of your employees. However, presenting a report that simply consists of these documents bound together will not satisfy your information objective. You need to extract the relevant information – the KPIs of your employees – and assemble this information in a way that you (and others) can use.

Example 2
If you want to explain which digital tools are used in collaborative working, you could assemble the information in a table, with digital tools listed across the top columns and collaborative working listed in the left-hand rows. Put an X in the tools column where that tool is used for a type of collaborative working. It will present a clear visual picture that will be easier to digest than a written explanation.

Reviewing gathered information

As you write the document, take the time to review the quality and structure of its content.

Check that it is accurate by asking someone else to verify what you have written. Also check that the information is up-to-date and relevant.

Delete irrelevant material and look for gaps. Is the material comprehensive? Is any of the material unclear? Would a table or chart help to make the information clearer? These are the sorts of questions you may ask as you read through your document.

Use this checklist to verify that you have checked the information in your document:

- The information is current.
- The information is relevant.
- The information is accurate.
- The information is clear.
- All appropriate resources have been consulted.
- Resources were reliable and unbiased.
- Graphics have been included where appropriate.
- Formatting has been kept to a minimum but used effectively.

Confidentiality, timing and distribution

Be aware of confidentiality or privacy issues for both staff and external customers when reviewing or handling information.

Some information needs to be viewed as commercially or politically sensitive. The ability to treat certain matters with discretion is one of the traits of a successful manager. You may be entrusted with confidential or highly sensitive information. Ensure you know who the report should be sent to, when it is expected and in what format they expect to receive it – for example, hard copy, email, or a link to a file.

The following table provides more information about confidentiality and distribution of information.

Privacy standards
Refer to your workplace policies and procedures if you are unsure about how to handle particular information, or ask your supervisor. You must comply with all Commonwealth, state or territory privacy legislation that governs the use of personal and client information.
Releasing information
You need to make judgments about when to release certain information, taking into account its possible impact on employee morale and productivity, and the potential for leaks to the external marketplace. Timing may also have implications for how you decide to distribute the information.
Open communication
Some managers decide not to share information and ideas with their colleagues; or information may be released on a need-to-know basis. Once considered a shrewd approach, keeping information secret is not consistent with current management thinking, which supports open communication, transparency, accountability and staff development.
Disseminating information
The way you disseminate information depends on the type of information. For example, a change of government policy that does not affect staff members individually may simply require a memo, notice or announcement at a staff meeting. Alternatively, you may need to organise an information or training session to inform team members of a new health and safety requirement.

Example

Delivering a report

Dakai has just finished a report on attitudes towards an open plan office, requested by his manager. Dakai spent time interviewing staff, collating data and preparing the report. He attaches it to an email and sends it to his manager. His manager asks for a meeting, and Dakai attends happily, expecting praise for his efforts. However, he is dismayed to see his manager's copy covered in red pen annotations.

'I can see you've put a lot of effort into this report, Dakai,' his manager tells him. 'However, I just can't understand what the outcome of your research is. Why didn't you follow the report template? That may have helped you better structure your report and provide some recommendations.'

Dakai explains that he wasn't aware that there was a report template and that he hadn't been given any guidance as to how to present his research. His manager acknowledges that this may have been the case, but points out that Dakai has seen other research reports, including a recent one on organisational culture. He could have asked for guidance or just confirmed what the expectations were. Dakai nods silently, his disappointment clear.

'I think we've both made assumptions about this task, so we're both to blame,' his manager concedes. 'So, why don't you find the report template from the template folder, look at the organisational culture report again and try to structure your report the same way. If you have any questions, please ask.'

Dakai agrees readily, keen for a second chance to get the report right.

Practice Task 2

Question 1

Explain why a report is the best way to collate research information.

Question 2

Answer True or False to the following statements about collating information.

Including tables, graphs or diagrams in reports caters for the visual learner and allows patterns and trends to be noted at a glance, which will complement the main points of a report.	» True	» False
If research is collated into an organisational template, people will quickly understand what they are looking at which will help them better interpret the information.	» True	» False
All internal reports are to be provided to your manager and disseminated to individual team members.	» True	» False
Be aware of confidentiality or privacy issues for both staff and external customers when reviewing or handling information.	» True	» False
To collate information, you will need to produce a report that consists of the team's performance plans and reviews bound together.	» True	» False

Summary

- Collaboration is the process of completing work, solving problems and making decisions as a group.
- To identify the current collaborative ways of working in your organisation, you need to understand what questions you are trying to answer.
- Collaborative working may be part of a job description or a process employed by the team, or it may have occurred organically where two or more individuals have decided to work together on an aspect of a task.
- Collaboration between teams and/or departments may be essential to completing your team's objectives.
- Organisational policies and procedures may have a role in promoting collaborative working and these should be considered and consulted when identifying collaborative work processes.
- In order to assess performance of the current ways of working against organisational strategies and objectives, you will need to review and analyse individual, team and organisational level performance review data.
- Agree on the criteria you will use to assess performance.
- Discuss with relevant personnel how they want the information to be collated and presented to them.
- Identify and follow organisational requirements when collating information into a report.
- Be aware of confidentiality or privacy issues for both staff and external customers when reviewing or handling information.

Learning Checkpoint 1

Review existing digital technology use in the business

Part A

1. Draw a line to match each policy and procedure with how it applies to digital technology in the workplace.

» Work health and safety	» All employees, contractors, suppliers and customers should be treated equally and with dignity, free from harassment, bullying, intimidation or discrimination.
» Use of social media	» Workstations should be set up to create the ideal work position: elbows above the desk, shoulders relaxed, wrists in line with forearms, feet on the ground or footrest, eyes looking at the top third of the screen and hips, knees and ankles at 90 degrees whilst seated.
» Anti-discrimination and equal opportunity	» Be aware that what you say is permanent. Be honest about who you are and clarify that your opinions are your own. Be respectful and humble in all your communications and use good judgement when sharing public information.

2. Which of the following are key features of an organisational commercial strategy relevant to digital technologies? Tick all that apply.

- ◯ Code of conduct
- ◯ Key performance indicators
- ◯ Team objectives
- ◯ Professional development opportunities
- ◯ Individual performance objectives

Part B

Case study

Read the case study and then answer the questions that follow.

Christine is frustrated. She heads the product department and is very proud of the products her team creates. They are always delivered on time, on budget and are of the highest quality. Her team works across different work sites and communicates daily using Slack (which offers direct and group messaging). For team discussions, they meet face-to-face using web conferencing tools. However, the products are not meeting sales targets and she cannot understand why. Christine complains to the Managing Director that the sales and marketing manager and his teams are ineffective. The MD is not so quick to agree and asks his HR Manager to investigate how the product and sales teams are working and collaborating, and if there's an internal factor contributing to the low sales.

The HR Manager discovers that the sales and marketing teams do not have access to Slack. This means they only receive information about what the product department have been working on from emails Christine sends to update them. Also, the sales and marketing teams have never met the entire product team, as they do not participate in any web conferences that Christine holds. Therefore, they feel disconnected from the product team and do not see them as 'real' employees, based on their remote status.

1. Explain how you would identify current collaborative ways of working in the product, sales and marketing teams.

2. The organisation is not meeting its sales targets. Suggest current ways of working that could be contributing to its underperformance.

3. Describe how you would collate and present your findings in writing to the Managing Director.

Topic 2 | Identify opportunities to implement digital technologies for workplace collaboration

2A Identify and assess digital technologies for collaborative working

2B Prepare a business case for implementing new collaborative digital solutions

2A Identify and assess digital technologies for collaborative working

Collaborative technology refers to tools and systems designed to better facilitate group work, both in-office and remotely.

The internet is the most accessible external source of information on available collaborative technologies. A simple search will bring up thousands of hits that will be time consuming to explore. Before you commence your research, it is important to narrow down what you are looking for and consider the type of collaborative technology that may be helpful to your organisation.

Types of collaborative technologies

There are four main types of technology commonly used to enable effective team communication and enhance collaborative working methods. These are:

- communication technology
- conferencing technology
- coordination technology
- creative technology.

Each of these categories provides team members with tools to better communicate and work with others, leading to more effective group work and ultimately more successful individual and organisational outcomes.

Communication technology

Communication technologies are any software or applications that allow for communication via messages, chat groups, forums, etc. They tend to be unstructured and do not require scheduling. Back and forth messaging can be immediate or delayed, dependent on the availability of the recipient.

Examples of communication technology include:

- email
- instant messaging apps
- team, department or org-wide chat forums
- digital voicemail applications
- Voice-over-Internet Protocol (VoIP) calls.

Conferencing technology

Conferencing technologies allow two or more individuals to communicate with each other in real time, using internet-based or cloud-based platforms. They also allow that same group of people to view a unified screen. It is the screensharing capability of conferencing technologies that differentiates it from communication technology.

Types of conferencing tools for the workplace are:

- video conferencing with shared screen capabilities
- document-sharing software
- shared digital whiteboards, where users can add, review and edit information or data at the same time
- shared applications, where users can access certain apps in real time to check information.

Coordination technology

It is important to coordinate teams and taskwork functions in order to work collaboratively to achieve individual and organisational objectives.

Coordination technologies are designed to integrate both teamwork and taskwork functions, allowing individuals and groups to connect as well as coordinate work tasks and activities, making workflow management simpler and more efficient.

Some examples of current coordination tools include:

- e-calendars
- employee time trackers or scheduling systems
- project-management systems, on-premise or Software as a Service (SaaS), web or cloud-hosted
- enterprise resource planning software
- internal employee as well as client portals.

Creative technology

Cloud-based networks help reduce barriers to cooperation and collaboration in the workplace.

Creative technologies allow team members to create and work simultaneously on documents and projects. This reduces issues of version control and does away with having to wait for a team member to finish their section of a report before your own part can be added.

Some examples of creative collaboration tools include:

- cloud-based document software
- cloud-based networks.

Features of collaborative technologies

Identify the features and benefits as well as the downsides of each technology to ensure you understand how it could be used in your organisation.

Once you have identified the type of collaborative technology you want to research, you can start to focus on looking for collaborative technologies that may help your organisation achieve its objectives. You'll find there are numerous applications available for each technology type, so it will be helpful to construct a table that will help you capture the features and benefits of each application. An example is provided below.

	Features	Benefits	Disadvantages	Price	Other
Application A					
Application B					

If you were to enter an internet search for 'compare video conferencing solutions', you will receive a list of web pages that will compare video conferencing applications. This can be a useful starting point in your research, but keep the following in mind:

- some websites may be sponsored to promote certain software
- visit at least five different web pages to compare their findings
- consider whether the source of the information is credible
- technology changes all the time, so do not visit web pages that haven't been updated within the last 12 months, or you may miss out on new technology or be considering obsolete technology.

Consider the following web page: aspirelr.link/pcmag-video-conferencing-software

This is a reputable online magazine that reviews software and hardware. This article explains video conferencing in detail and the benefits it can offer organisations. It reviews the pros and cons of the applications and classifies how they might best serve an organisation. It doesn't necessarily cover every available video conferencing product, so you will need to consult additional sources to build your knowledge of the available video conferencing tools.

By reviewing these web pages, you will begin to understand the common features of video conferencing technologies and you may start to build an awareness of which of those features would be useful to you.

Software as a Service (SaaS)

Prior to 2010, most software was sold as a package which you downloaded or installed from a disk. You would purchase the software for a one-time fee and you would own it. Now, software is most often offered as a service, which means it is purchased on a subscription basis, normally with free updates during your subscription period. It will usually be offered on a variety of devices including PCs, phones and tablets. When researching collaborative technologies, it is important to understand if the technology is SaaS and what the annual subscription price will be.

Example

Commonly used collaborative tools

Most organisations utilise Microsoft Office as their main software for creating documents, presentations and spreadsheets. The latest iteration of Microsoft Office is called Microsoft 365, which offers the Microsoft Office software suite as a subscription. It also offers cloud-based Saas products for business environments, such as hosted Exchange Server, Skype for Business Server, and SharePoint, among others. It is quite likely that your organisation already uses Microsoft Office and may have moved to the cloud-based server. However, you may not be aware of a range of applications outside of Outlook and Word that can allow for more collaborative working. Some of the collaborative tools featured in the current version of Microsoft 365 include:

- Teams – used for chat, online meetings, calls and video conferencing as well as functioning as a task management tool
- Yammer – a social networking service which works through group-based messenger
- SharePoint – allows you to work on a single document/presentation at the same time as others.

As these tools may already be freely available to your organisation, it may be worth considering whether they meet your needs. One strong advantage may be their ability to integrate seamlessly with your current work product.

Seeking assistance from specialist advisors

When considering new collaborative technologies, it could be helpful to obtain specialist advice.

It is quite likely that you may not have the specialist IT skills required when it comes to considering the IT requirements of the collaborative technologies you are considering. If your organisation has an IT department or consultant, it will be beneficial to discuss with them the collaborative technologies you are considering.

Your IT department or consultant may be able to:

- recommend products to you based on their experience
- make you aware of products the organisation already has access to that you may be able to utilise
- define requirements that you will need to consider
- explain terminology that will assist you in your research.

The following table shows some of the requirements you may need to consider in conjunction with your IT department or consultant.

Purpose and nature	• What functional areas will the system include? • Who will be using the system? • What type of security arrangements will be needed? • How will WHS policies affect the system?
Users	• Are users casual, internal and/or external? • How many people will be involved in inputs and outputs?
Staff requirements	• What procedures do staff need to follow? • How are the procedures communicated to staff? • Do staff need to be trained to use the system? • Who will monitor staff involvement?
Storage size	• What are the storage requirements for the technology?
Coverage	• Will the technology cater for both office-based and remote staff? • Is the technology dependent on access to a wifi or mobile phone network?
Access speeds/types	• What restrictions and classifications might there be?
Type of system	• Is the system web-based, server- or file-based or a combination? • Will systems integrate? • What peripherals or consumables need to be considered? • What is the cost for the system to operate efficiently?
Compliance requirements	• What legislative benchmarks, industry standards, WHS reporting and governance requirements must be complied with? • In what ways?

Legislative considerations	• What are the legalities of purchasing and/or licensing usage of the system? • Can the system be used across multiple sites and multiple users? • If data is stored on a cloud server, what laws govern the data ownership? • What laws govern the privacy protection for the use and distribution of personal data? • What are the legal requirements for data retention?
Procurement requirements	• Are there procurement policies and procedures that govern purchasing decisions? • How is value for money evaluated on a purchase decision?
Policies/ procedures	• Does the procedural manual need to be updated? • How effective is it in helping staff use the system? • Do guidelines cover quality assurance issues, security, privacy, back-up procedures, legal requirements, licence registrations? • What risks does the system pose to the organisation; for example, the impact of failure of the system?

Other experts

Depending on the technology solution you are considering, you may be able to access expert advice from the software vendor. Most software companies have sales consultants that are able to provide advice and help you determine the best product to meet your needs. You should be aware that it is in their best interests to sell you their product.

However, you should be able to obtain all the technical information you need about their product as they will be the most reliable source.

Example

Seeking expert advice

Jeremy started a role as a designer at a small organisation that offered online training. Jeremy had some previous experience working with Moodle learning management systems (LMS) and his manager asked him to lead upgrading their Moodle LMS.

Jeremy firstly met with the IT manager, who admitted he had no experience with Moodle, but helped develop a list of questions he should ask when looking for a provider to upgrade and host their Moodle platform. Jeremy also asked current and former colleagues for recommendations. Then he contacted several companies to ask their advice on what was required to upgrade and host their Moodle LMS and to provide quotes. Jeremy then collated all the information and returned to his IT manager to consult. Together, they reviewed the information and chose a preferred supplier, which Jeremy sent to his manager for approval to engage.

Assessing existing collaborative work against collaborative technologies

Use the information you collated on current collaborative work and current tools to assess whether other collaborative tools could be more effective.

One way of presenting the information you collated in Topic 1 was to assemble the information in a table. To do this, list the organisation's existing digital tools across the top columns and the collaborative ways of working in the left-hand rows. This table will be helpful in assessing existing collaborative work against available and existing digital technologies. You will be able to clearly see what tools are currently used for existing collaborative work.

You will need to develop criteria to help you assess whether the collaborative work could be improved with the implementation of new technologies. The criteria may be dependent on the objectives you want to achieve, the integration with existing systems or other factors. Examples of criteria could include:

- Can it reduce errors?
- Can it improve communication?
- How easy is it to use?
- What processes will need to be altered?
- Is it accessible for all?
- Are there any privacy or other legislative concerns?

It may be helpful to group your criteria into themes such as IT requirements, HR requirements, Team requirements, and so on. You may need to assess several different collaborative tools to ensure you find the best application to meet your needs.

Ideally, you should carry out your assessment by using a table which will allow you compare all the tools you are considering for one collaborative activity. List all your criteria as headings in the top row and list each technology in the left-hand column (as shown in the following table). You may want to use a rating system to make it easy to digest and then write some overall notes to support your ratings.

The following table shows an example of a rating system you might use to compare tools.

Collaborative work: Team task management				
	Ease of use	Compatibility with current systems	Ability to collaborate in real time	Ease of access
Excel (currently used)	4/5	5/5	3/5	5/5
Google sheets				
Monday.com				

Example

Assessing collaborative working tools

Lucia manages the production team at her organisation. All projects are entered into a spreadsheet, tasks are allocated and target dates are set. Each team member is supposed to update the spreadsheet when they complete their task, but this is not done consistently. Lucia holds a production meeting at the start of each week to check on the progress of each team member and their tasks. She updates the spreadsheet during the meeting. Lucia then informs the senior management team that the spreadsheet is updated, and sends them the link and a summary of any issues. As part of a new IT strategy, Lucia's manager encourages her to look at new solutions for task management and scheduling and Lucia is amazed to find the number of tools available. She identifies the criteria she will use to determine an effective solution:

- cost
- ease of use
- ability to integrate with existing systems
- provides real-time information that can be updated by simultaneous users
- has a reporting function
- sends reminders to complete or update tasks to users
- automatically assigns task to specified team member on completion of previous task
- can measure time taken to complete projects and compare final timeline to original timeline
- estimates time saved.

Lucia involves her team in the assessment of various tools and collectively they decide on a new collaborative tool to replace their spreadsheet. Lucia uses the criteria to prepare a business case for her manager to seek approval to implement the new tool.

Identifying opportunities for digital technology in collaborative work

Your assessment of current ways of working and available digital technologies may have identified opportunities for more or improved collaborative work.

Your assessment of the performance of current ways of working against organisational objectives is likely to have found several areas that need to be improved. As you identified the range of collaborative technologies available, it is likely that you found synergies between the functions they offered and the performance deficiencies you need addressed. These synergies may provide opportunities to either improve the current ways of collaborative working or allow for new ways for teams and individuals to work collaboratively.

It is easy to get excited by some of the collaborative technologies and want to implement them all. However, it is important to consider the need the technology would fulfil – those needs must be prioritised. Start by revisiting your assessment of the performance of the current collaborative ways of working and listing all the areas where the objectives were not being met. Then consider the importance of these to the organisational strategy and prioritise these accordingly.

For example, you might have the following at the top of your list: sales targets not being met because sales team are not able to see enough customers. Now consider what collaborative technologies you have identified that might be able to assist with that problem. There may be more than one solution:

- using video conferencing instead of face-to-face visits to decrease travel time and allow for more customer contact
- sharing product knowledge via a team chat platform with the customer service team, so they have the product knowledge to create strong leads for the sales team.

List all the solutions you can think of for each of the needs you have identified. Then look for overlap between the solutions. If one solution is similar across your list of needs, that could suggest it should be prioritised as it may help solve more than one issue.

However, there may be a range of criteria you need to consider when prioritising your opportunities. You should consult with teams, managers and senior management to understand their needs and what is important to the organisational strategy.

Practice Task 3

Question 1

Answer True or False to the following statements about available digital technologies.

There are four main types of technology: communication; conferencing; coordination and creative.	» True	» False
Identify the features and benefits as well as the downsides of each technology to ensure you understand how it could be used in your organisation.	» True	» False
SaaS is not suitable for organisations working with a tight technology budget.	» True	» False
The internet is a valuable source of information about current digital technologies available for purchase or subscription.	» True	» False
Cloud-based document software cannot be used for collaboration as uploaded documents cannot be edited by other users.	» True	» False

Question 2

Which of the following people could you seek assistance from to implement digital technology for workplace collaboration? Tick all that apply.

- ◯ IT Manager
- ◯ Software provider
- ◯ User community
- ◯ CEO
- ◯ HR Manager

Question 3

Which of the following criteria would you use to determine the suitability of existing digital technology to the collaborative work completed in the workplace? Tick all that apply.

- ◯ Ease of use
- ◯ Ability to integrate with existing systems
- ◯ Allows any users to invite new members
- ◯ Provides real-time information that can be updated by simultaneous users
- ◯ Has a reporting function

Question 4

Draw a line to match each digital technology to the collaborative work opportunity it affords employees.

» Conferencing technology	» Allows team members to create and work simultaneously on documents and projects. This reduces issues of version control and does away with having to wait for a team member to finish their section of a report before your own part can be added.
» Communication technology	» Allows individuals and groups to connect as well as coordinate work tasks and activities, making workflow management simpler and more efficient.
» Creative technology	» Allows for information to be passed on via messages, chat groups, forums etc. Messaging can be immediate or delayed, dependent on the availability of the recipient.
» Coordination technology	» Allows two or more individuals to communicate with each other in real time, using internet-based or cloud-based platforms, and allows that same group of people to view a unified screen.

2B Prepare a business case for implementing new collaborative digital solutions

In many organisations, it is likely that a business case will be required to seek approval to implement a new digital solution.

Every organisation will have its own process and procedures for implementing change, and this is likely to include a formal approval process. The reasons for a formal approval process include:

- ensuring organisational data will be secure
- transparency about ways of working
- considering impact on current processes and procedures
- evaluating the risks
- understanding the cost–benefits.

A formal approval process usually requires a written business case. A business case provides justification for undertaking a project, explaining the issue that needs addressing, and proposing a solution, along with an evaluation of the benefits, cost, and risks of the project.

How to write a business case

A business case is a formal document. Your organisation may have a business case template or examples of previous templates, so check with your manager how the business case should be presented.

The content and detail of the business case may depend on the size of the investment required and the potential impact on the organisation. With your manager, decide on the headings and the amount of detail required in your business case. All the work you have carried out prior to this step will be useful for populating the business case, but you may need to source additional information to provide the detail required.

The typical requirements of a business case are:

- executive summary
- background information
- project definition
- business requirements
- presenting and evaluating different options
- presenting your preferred option
- strategic alignment
- benefits
- risks
- project implementation plan
- financial analysis
- resources required
- authorisations
- appendices.

The following table provides further information on the sections of a typical business case.

Executive summary	▪ An executive summary is an overview of the business case. ▪ Ideally, it should be less than a page long and summarise the problem, the research carried out, the findings and the recommendations of the business case. It is usually best to write the business case last.
Background information	▪ Background information should be provided to help all stakeholders understand the context of your project. For example, not all stakeholders will be aware of the details of how a team works and why. ▪ Background information might include information on current collaborative working and the tools that are used.
Project definition	▪ Define your project and include information about the business problems it will solve. ▪ Try to capture the essence of your project in one sentence and then provide the critical details that support your project definition. ▪ An example of a project definition statement is: By switching to an online project management tool, our team will have better visibility and control over their workload; reducing the need for lengthy project update meetings and providing better monitoring of project delays and issues.
Business requirements	▪ Identify the business requirements related to this project and how your project will meet them. These could like to strategic objectives such as increasing output and efficiency as well as budget, preferred suppliers, fit with current systems etc. ▪ Refer to the research you have undertaken, including discussions with specialist advisors to identify any business requirements you identified and how they will be addressed in this process.
Presenting and evaluating different options	▪ The purpose of this section is to explain the different options you have researched and how you evaluated these options. ▪ The detail required in this section will be dependent on the scale of your project, so check with your stakeholders as to how much information they require. ▪ You can draw on your previous work here to demonstrate how you identified available digital technologies, the criteria you used to assess them and how you identified opportunities and priorities for collaborative work.
Presenting your preferred option	▪ Describe your preferred option, why you have chosen it and how it meets business requirements. ▪ You may want to list the features and benefits of the tool, and the results of any trials you have conducted with the tool.

Strategic alignment	▪ You will need to explain how your project actively contributes to your organisation's strategies and objectives. ▪ Refer to the work you carried out earlier which assessed performance of current ways of working against organisational strategies and objectives and the information you collated. This will provide you with the evidence to demonstrate how your project aligns with your organisation's objectives.
Benefits	▪ Outline the benefits to the organisation in terms of cost savings, efficiencies, better metrics and transparency etc. ▪ Detail each benefit and describe how the organisation will be advantaged by it. ▪ This section is important in influencing stakeholders to approve your project. If the benefits are clear, then the decision to approve is much easier.
Risks	▪ You need to outline the risks of implementing a new digital solution, including the likelihood that these risks might eventuate. Risks that should be considered include: – security – privacy – outages – loss of data – unsuccessful implementation. ▪ Check with your manager how risks should be assessed and rated, and the detail required here. You may need to include contingency plans especially in the event of loss of data or outages.
Project implementation plan	▪ Provide an implementation plan that includes who needs to be involved, what resources are required and a timeline. ▪ A visual plan in terms of a Gantt chart or even a table will be helpful.
Financial analysis	▪ A financial analysis should demonstrate that the project is affordable, that there is sufficient budget available to fund it, and that it will deliver financial value in the short and long term. ▪ The size of your project will determine the detail of your financial analysis, so check with your manager as to what is expected. ▪ A simple cost–benefit analysis may only be required if the scope is small. For example: It will cost $50 per month for a subscription to an online project management tool. It is estimated to save each team member one hour a month. This is a salary saving of $250 so the cost–benefit of this investment is worth $200 in staff time each month.

Resources required	▪ You need to describe all resources, including physical assets, intellectual resources, human resources and financial resources that your project will need for implementation. ▪ Ensure you include sufficient detail, for example: The IT manager estimates approximately five hours of his time will be required to implement the tool.
Authorisations	▪ The authorisations section details who needs to sign off on what and at what stage. ▪ Check if this is relevant to your project.
Appendices	▪ The appendices include important information that doesn't belong within your business case, such as more detailed research on the options you have presented, data, case studies etc. ▪ Only include these if they are relevant and you think they will be required by stakeholders to inform their decision.

Presenting your business case

The approval process of business cases will vary across organisations. You may be required to complete your written business case and submit it to be considered prior to a management meeting. You may then need to attend the meeting and briefly present your business case and answer any questions. You may be given approval to proceed at the meeting or you may be informed after the meeting. Discuss the process with your manager so you have a clear idea what is expected of you, and make sure you know how to prepare your business case properly to give it the best chance of succeeding.

Example

Seeking approval

Joel works for a small company and manages a team of three. He has always used a spreadsheet to manage projects and has found this to be sufficient. However, the company has become busier and Joel is now managing freelancers and finding it quite time consuming to keep the spreadsheet updated. He researches solutions and finds an online project management tool which is free for less than 10 users.

Joel discusses this with his manager who agrees it is a good option, but she asks him to put together a simple one-page document that describes what the issue is and how the new option will solve it. She tells Joel he will be invited to the senior management team meeting to explain his proposal and answer any questions. She suggests Joel consider any risks with using the tool, that he outlines a contingency plan in case of outages and that he should be prepared to discuss these at the meeting. Joel prepares his proposal, researches risks and contingencies and attends the meeting. After a short discussion, Joel is given permission to implement the new solution.

Practice Task 4

Question 1

Which of the following would be found in a business case to implement a new digital solution? Tick all that apply.

- ◯ Identification of business requirements related to the project and how your project will meet them
- ◯ Explanation of the different options you have researched and how you evaluated these options
- ◯ Outline of the risks of implementing a new digital solution, including the likelihood that these risks might eventuate
- ◯ Feedback forms collected from software providers and user groups to demonstrate the usability of the digital technology
- ◯ Outline of the benefits to the organisation in terms of cost savings, efficiencies, better metrics and transparency

Question 2

Which of the following need to be applied when developing a business case? Tick all that apply.

- ◯ Add slogans or taglines
- ◯ Use of organisational templates
- ◯ Language and workplace conventions appropriate to intended audience
- ◯ Include a description of your target audience
- ◯ Correct spelling and punctuation

Question 3

Identify one risk raised by implementing conferencing technology and how you would address this risk.

Summary

- Collaborative technology refers to tools and systems designed to better facilitate group work, both in-office and remote work.
- There are four main types of collaborative technology: communication, conferencing, coordination and creative.
- The internet is the most accessible external source of information on available collaborative technologies.
- If your organisation has an IT department or IT consultant, it will be beneficial to discuss the collaborative technologies you are researching and the requirements you will need to consider as part of your selection process.
- You will need to develop criteria to help you assess whether the collaborative work could be improved with the implementation of new technologies.
- Ideally, you should carry out your assessment by using a table which will allow you compare all the tools you are considering for one collaborative activity.
- As you identified the range of collaborative technologies available, it is likely that you found synergies between the functions they offered and the performance deficiencies you need addressed.
- There may be a range of criteria you need to consider when prioritising your opportunities. You should consult with teams, managers and senior management to understand their needs and what is important to the organisational strategy.
- A business case provides justification for undertaking a project, explaining the issue that needs addressing and proposing a solution, along with an evaluation of the benefits, cost, and risks of the project.

Learning Checkpoint 2

Identify opportunities to implement digital technologies for workplace collaboration

Part A

1. What information could a specialist advisor provide you regarding digital technologies? Tick all that apply.

   - ◯ How effectively your team will use the new product
   - ◯ Make you aware of products the organisation already has access to that you may be able to utilise
   - ◯ Define requirements that you will need to consider
   - ◯ Identify suitable products currently on the market
   - ◯ Explain the amount of time saved in task performance by implementing the new product

2. Draw a line to match each project definition to the business problem it will solve.

» Employees' travel allowance for national team meetings needs to be reduced.	» By implementing this digital technology and utilising it for bi-monthly team meetings, we will reduce our travel costs by 30% while still maintaining our collaborative working processes.
» Customers are experiencing long telephone wait times.	» By implementing this digital technology, we will be able to offer live web chat to address queries, solve issues or refer problems to a representative for follow up.
» Team members have been struggling with document quality control as remote employees are emailing documents using old templates.	» By implementing this digital technology, we will be able to create and work simultaneously on documents and projects, reducing issues of version control and reducing time wasted on editing, downloading, saving and filing documents.

Part B

Case study

Read the case study and then answer the questions that follow.

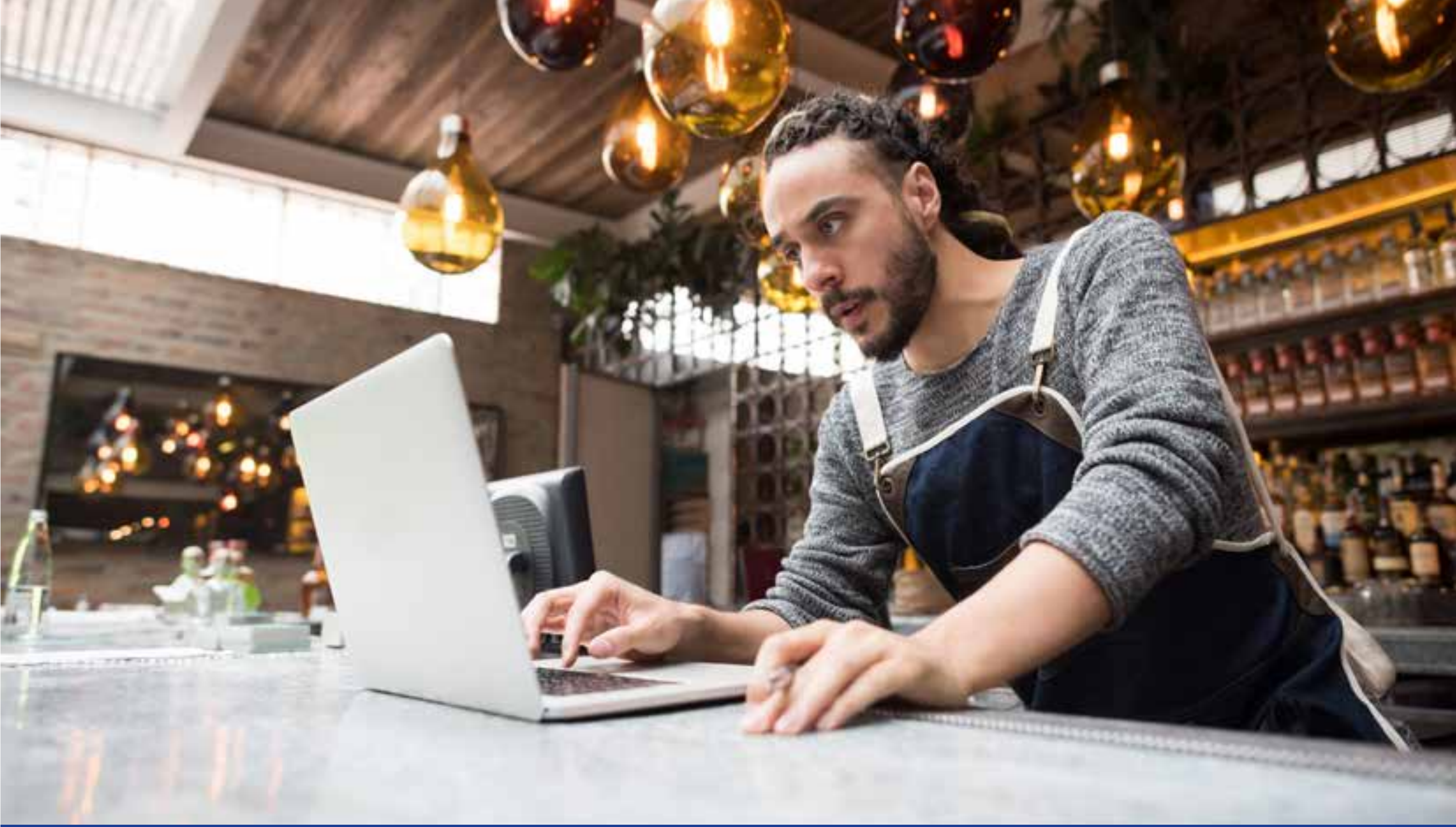
Juan is a national sales manager with a team of 10 sales consultants, located across every state and territory in Australia. Once a month, all the team members come to the head office in Sydney for product training and meetings. Juan also has weekly calls with each team member. Juan has been asked to cut his team's travel budget and he needs to find alternative options to maintain collaborative ways of working.

1. What type of collaborative technology should Juan consider?

2. Provide three examples of collaborative technology Juan could consider.

3. Describe how collaborative technology would allow Juan and his team to continue with their current collaborative work.

4. What other opportunities could the collaborative technology provide and how would you prioritise them?



Topic 3 | Implement digital technologies for workplace collaboration

3A Develop and communicate a plan to introduce new collaborative technologies

3B Implement digital technologies

3A Develop and communicate a plan to introduce new collaborative technologies

After your business case is approved you will need to develop and communicate a plan to introduce the new collaborative digital technologies.

Developing a plan for implementation is critical to the success of the project. An implementation plan identifies both your short-term and long-term goals and objectives, lists the project tasks to be completed, defines roles and responsibilities, outlines the budget and necessary human and physical resources required, and lists any assumptions. It can help you reduce disruption, anticipate problems or issues and develop a timely response. An implementation plan also helps you identify resource requirements and outcomes that you need to monitor.

Consider the range of variables you might encounter when implementing new collaborative digital technologies in your organisation.

Variables that might be encountered
▪ Staff may lose confidence or focus. ▪ Performance may be interrupted or hindered. ▪ Conflict may develop between colleagues, functional groups or organisational levels.

Establishing your strategy for the implementation plan

Consider factors such as business goals and objectives when developing your strategy for an implementation plan.

You will need to develop a clear strategy for your implementation. An implementation strategy defines how to action the objectives outlined in the implementation plan by stating how you will implement each aspect, from funding and resources to processes and training. The technology cannot simply be installed and staff left to use it or it is bound to fail. The following table outlines some factors to consider when developing your implementation plan.

Assess your business goals and objectives	Be clear about the goals and objectives of your organisation so you can ensure your implementation plan aligns with them. ▪ Identify the goals and objectives that are relevant to the new technology. ▪ Outline how the new technology will assist staff in achieving these goals and objectives. ▪ Keep the goals and objectives in focus when developing your implementation strategy.

Establish the context	**Establish the context in which the implementation will occur.** ▪ Is the organisation large, small, new or established, and organised with deep reporting lines or in a flat structure? The size and depth of the organisation will contribute to the challenges of training, implementation speed and need for delegation or authority. ▪ Assess the time lines needed to ensure that the time allocated is reasonable in order to limit downtime but allow for training. ▪ Identify the training needed and whether people need time off for training.
Learning model	**Create a learning model that suits the context.** ▪ For staff members who are less averse to change, training and adoption of the system may involve group meetings and trials. Feedback sessions may be scheduled for critical evaluation and assessment of the system changes. • In change-averse situations, formal training sessions may be required and allowances for counselling and professional development sessions made. • Communication during change processes must ensure that information about the change and its consequences is presented in such a way that people with different systems of understanding can access this information. • Individual reflection, inquiry and encouragement to share ideas are recommended.
Success factors	**Establish critical success factors.** ▪ Critical success factors include performance metrics, schedule completion times and positive staff feedback. ▪ Planning an implementation strategy with no measurement of success is not recommended. ▪ Organisational and project objectives should have a strong influence over your planning decisions.
Procedural tools	**Use procedural tools.** • Select from a range of tools to facilitate the implementation and monitor progress. These include a project plan, Gantt charts, workflow diagrams, deployment charts, cause and effect diagrams and any other tools used or required in your workplace.
Appropriate strategy	**Choose the most appropriate strategy.** ▪ Choose the approach that best suits your organisation based on the context, the organisational learning culture and the critical success factors that align with your organisation's objectives.

Approaches to implementation

Your strategies should be centred on both staff needs and organisational objectives or project goals. A single strategic approach must include both of these aspects to cover any likely contingencies or resistance to change.

You can apply one or more of the following approaches to deal directly with staff needs. Staff skills may vary and new systems may create opportunities for changes in work group structure. Staff members should be invited to make suggestions that affect their work environment. This may also be an organisational necessity. Even if it is not, every effort should be made to include staff in the consultation processes.

To maintain or boost the confidence of staff members when implementing change:

- involve the use of influential members within work groups to act as 'change agents' to support the project
- ensure clear and precise direction from all levels of management
- have open communication with change facilitators
- offer formal feedback and testing opportunities.

Organisational objectives

You will need to assess the business goals and objectives to ensure that your implementation strategy and plan will ensure the identified outcomes are achieved. The following table details some factors to be considered in your implementation strategy to ensure your implementation supports business goals and objectives.

Maintenance or shift in organisational culture

Where significant changes are required, you may have to change the organisation's culture or a team's culture in order to be able to successfully implement the change. This is generally identified in the consultation process. Cultural change is a major topic of business research as it needs to be done carefully and with consideration for all staff.

Ensuring the technology functions correctly

Testing and evaluation should be considered in the strategic planning stage to ensure the technology functions the way you intended. If a new technology is being installed or implemented, you may need to observe how the it functions over a period of time, oversee trials and organise for feedback to be collected and analysed.

Information flow to relevant stakeholders

The strategy must include a communication plan to ensure the flow of information between stakeholders and throughout the organisation.

Modification of processes and ways of working

Modification of processes to ensure more efficient and/or effective ways of working is the end objective and therefore the main focus of the strategy. As it is an organisational goal, careful attention to the integration of staff needs is essential. This will reduce the risk of individual resistance to the change.

Stages of implementation

It can be helpful to provide staff with the opportunity to be involved in implementation, and this should be identified at the planning stage. Typical elements of implementation and a sample of the opportunities for participation are presented in the following table.

Elements of implementation	Opportunity for participation		
	Senior staff	Mid-level staff	Line workers
Procurement	Approve budget and resource requirements	Make decisions regarding suppliers/ developers	Facilitate procurement and liaise with suppliers
Communication	Set communication lines and milestones	Direct communications and monitor usage	Gather and provide feedback; participate in meetings
Quality assurance	Define organisational quality standards	Control and monitor quality assurance measures	Contribute to quality assurance; conduct user testing
Integration	Set timelines and scope of integration	Oversee implementation in functional areas; provide training to line workers	Participate in the integration process and installation of new technologies
Testing and review	Monitor outcomes in accordance with set objectives	Arrange and conduct testing and trials; collect feedback from line workers	Participate in evaluation

Communicating a plan to relevant stakeholders

During the process of reviewing collaborative ways of working and identifying the availability of digital technologies, you most likely will have been communicating with staff about the need to implement new technologies to improve collaborative working and performance outcomes. Regular communication keeps staff engaged and reduces resistance to change.

However, the decision to implement a new technology may still be met with resistance and it is important to have a communication strategy that explains the implementation plan, the role of staff members and the resulting benefits staff members should experience.

Communication strategies

Your organisation's structure, culture and existing policies and procedures will influence the method of communication you choose. Each of the following methods of communicating the system's procedures has its benefits and limitations.

Email messages	Email communications can be deleted, missed, dismissed or forwarded very easily. Using email as a method for communicating system procedures is quick, but less reliable than other methods. Consider keeping email messages short, concise and regular. If system users expect the email and know that it won't take too long to read and understand, then they are more likely to take action. Always use a back-up method such as hard-copy printouts.
Meetings/ presentations	Meetings are commonly used to keep specific groups of staff up-to-date with progress, procedures and system uses. Regular meetings also serve as an excellent forum for feedback and the consolidation of work group knowledge. You might arrange a specific meeting to make a presentation to inform staff of the changes and place the system in its business context.
Intranet/web posts	Placing information on the organisation's intranet is a very successful method of communicating system procedures as the information can be accessed at any time, from any location and by those who need to know. Additionally, the information stays on the site and can be traced historically for the purposes of individual learning. Lastly, web posts can allow for feedback by users. This knowledge base is often very useful to system developers and managers.
Printed or digital instructions and manuals	Digital and printed manuals provide a good reference for training and ongoing user knowledge development. It is recommended that a full standard operating procedure relating to each process be created as a part of the integration. These manuals may be kept electronically.

Communicating with influence

Consider communication strategies you might use to influence and persuade your audience.

Whether it be a sales pitch, a new strategy or just an idea, we are constantly trying to influence others to adopt or agree with our perspective. Yet everyone reacts differently to information and ideas. Each person's responses are filtered through their own culture, life experiences, knowledge, personal beliefs and values.

An audience brings with them expectations, knowledge and attitudes about the occasion, the topic and the speaker. Factors that may influence how your audience responds include:

- age
- sex
- culture
- religion
- ethnicity
- sexual orientation
- occupation
- education.

You may need to use various strategies to encourage the acceptance of the new technology. Here are some ways that you may influence your audience to accept your ideas and information.

Contextualise your presentation

Contextualise your content to the audience's needs and expectations. This means preparing your presentation so that your audience can relate to it, using points of reference they are likely to understand. Providing a context will help your audience connect with your message and keep them engaged.

Use case studies, stories or real-life examples to bring the audience into your space and incorporate them into your presentation.

Appeal to self-interest

Appealing to the needs and expectations of your audience members is a powerful way of gaining their acceptance, provided your idea does fulfil what you are offering.

Explain how members of the audience can individually benefit from your solution compared to the current situation.

Motivating factors you can use include power, pride, self-respect, recognition, security and reward. For example, a new work process could be sold on its greater efficiency, leading to reduced workload for employees.

Involve the audience

In a one-way conversation, the speaker can dominate the narrative without really acknowledging or interacting with the audience. In a two-way conversation, the speaker directly connects with their listeners.

A two-way conversation is a dialogue where the presenter speaks and listens to the audience, responding to their reactions and questions.

To gain the respect of your audience and encourage them to accept your idea, involve them in your presentation. For example:

plan a question and answer time

give audience members a role in the presentation

organise activities so that audience members can contribute to implementing your idea.

For people to welcome and be entirely committed to the successful implementation of your idea, they need to listen and fully comprehend the implications of the situation.

Prepare to listen to objections

There is usually a person or group who may oppose or challenge your idea. Do not try to suppress objections. If you do not give people the opportunity to explain their objections you can create the impression that you are covering up flaws in your idea and deny yourself the opportunity to clarify the information. Do not argue with audience members or try to embarrass them in front of others. Your earlier research and analysis should have prepared you to anticipate and overcome most objections.

Present your idea effectively

The key to a successful presentation depends on the way you explain and deliver your ideas and solutions.

Make your content easy to understand, show that it has been well thought out and that it is the best solution available under the circumstances.

Be prepared to vary your presentation to accommodate for individual needs, particularly those of people who are required to take action or provide resources for implementing your idea.

Show enthusiasm and passion for your idea – the audience can tell if you are unsure or uncertain about any aspects.

Consider linguistic style

Everything you say must be said in a certain way – using the right tone, speed and volume.

Linguistic style refers to a person's speaking pattern, which is unique to them. It is made up of culturally learned signals that are used to communicate and understand meaning. A person's style might include:

the pace, number and length of pauses

word choice

the use of humour, stories and questions.

Your own linguistic style and the style of your audience members influences how they respond to your ideas.

Be prepared to negotiate

One way of encouraging acceptance of your idea is to make concessions on certain points. This is particularly important when people expect negotiation.

To prepare, identify the aspects of your proposal that are not essential to achieve your objective. You can trade these for others that are essential to the success of your idea.

Providing motivation

It is important to motivate people to participate in the process to ensure success.

During implementation, even a good plan can sometimes miss the mark. Some staff may feel excluded, sidelined by others or disinterested in the process. It is important to maintain the motivation of staff to willingly participate in the process at the level designed during the planning process. You must always include everyone in the implementation process to ensure its success.

Here are some key approaches to assist in motivating staff.

Clear direction	**Provide clear direction** People are more likely to feel confident and included when clear instructions are given. Make sure staff understand the reasons for the implementation and know what their responsibilities are.
Involvement	**Involve staff in the implementation** By including staff in the implementation planning and execution, you are demonstrating that you value their contribution and they will take greater ownership of their role.

Vision	**Provide a strong vision** It is important to have continual reference at all levels to the end objectives of the process and the benefits it will provide to individual staff members and the organisation. Benefits might include improved skill levels, added responsibilities, improved work practices, work satisfaction and efficiencies.
Encouragement	**Give encouragement and recognition** Verbal encouragement and recognition serve as powerful motivators. Know how and when to correct the mental direction of the individual when they begin to wander off track. Supervisors and senior managers must ensure their staff receive rewards for input into the process.

Example

Communicating implementation plans

Alcott and Sons is a family company that manufactures hardwood furniture for distribution around Australia. In 1999, the company changed hands when its founder passed the business to his granddaughter, Rachael. The 30yearold had worked in the business since she was 15 and had spent time in every level of the organisation. Rachael had a rapport with truck drivers, accounts clerks, salespeople and craftspeople and was respected as the chosen successor to the Alcott family business. In 2003, Rachael Alcott decided to upgrade the company's computer systems and the administrative system they'd been using for more than 12 years. Rachael chose the face-to-face approach to inform all locally based staff of the upcoming change, and used video conferencing to include interstate representatives and distributors in the meeting. This method of communication raised the perceived importance of the change, allowed for group discussion and won the support of most of those who attended.

Practice Task 5

Question 1

Why is it important to assess your organisation's business goals and objectives when developing an implementation strategy for the adoption of new digital technology? Tick all that apply.

- ◯ To identify the goals and objectives that are relevant to the new technology
- ◯ To outline how the new technology will assist staff in achieving these goals and objectives
- ◯ To assess the time lines needed to ensure that the time allocated is reasonable in order to limit downtime but allow for training
- ◯ Identify the training needed and whether people need time off for training
- ◯ To keep the goals and objectives in focus when developing the implementation strategy

Question 2

List five factors you need to consider when developing an implementation strategy.

Question 3

Draw a line to match each level of staff with their communication responsibilities during the implementation of a new digital technology for collaboration.

» Senior staff	» Direct individual and team communications and monitor usage of communication including feedback and engagement
» Mid-level staff	» Gather and provide feedback on implementation; actively participate in meetings and training
» Line workers	» Set communication lines and milestones

Question 4

Which of the following communication techniques can you use to encourage team members to accept new digital technology in the workplace? Tick all that apply.

- ◯ Present information verbally, at the same pace, and do not stray from your notes as this will ensure any information you convey is accurate.
- ◯ Use case studies, stories or real-life examples to bring the audience into your space and incorporate them into your presentation.
- ◯ Do not make any concessions – stay true to your position as employees respond to strength of character.
- ◯ Listen attentively and give people the opportunity to explain their objections.
- ◯ Make your content easy to understand, show that it has been well thought out and that it is the best solution available under the circumstances.

3B Implement digital technologies

The implementation of digital technologies should be carried out according to organisational requirements, policies and procedures.

Before beginning implementation, you should share your implementation plan with all stakeholders and ensure it reflects organisational requirements, policies and procedures. These may include:

- IT policies
- data protection policies
- procurement procedures
- training and development processes.

You also need to consider how the implementation of a new digital technology may affect job descriptions, workflow process documents, meeting procedures etc. These will need to be updated in consultation with relevant stakeholders as part of the implementation process.

Implementation methods

Implementation is often based around the methodologies of project management, so it may be useful to adopt some of those techniques.

Implementation can be conducted:

- via a trial period in which a section of the organisation participates
- by phasing in the new system a section at a time until the whole organisation is connected
- by changing to the new system while still using the old system for a set period (this might be used if major difficulties in the new system would have a negative impact on the organisation and severely disrupt work, but this option may be costly and prove unwieldy)
- by direct cutover, in which the new system begins operation throughout the organisation on a set day.

As implementation is often based around the methodologies of project management, you could utilise some of the following tools and techniques during the implementation phase:

Work breakdown schedules	A list of tasks required to complete the project – each item is assigned a start/finish time, required resources, responsibility and preceding tasks (if applicable)
PERT chart	The Program Evaluation and Review Technique (PERT) uses a flow chart style of diagram to highlight the relationship between tasks
Gantt chart	Lists tasks on a project time line and graphically displays interdependencies such as start–finish, start–start and finish–start relationships
Critical path method	Establishes the flow of tasks from start to finish along the most favourable (or critical) time line

Elements of the implementation process

There are common procedures involved in the implementation process that you may find helpful to utilise.

The introduction of each element of the implementation process will vary depending on the project. Often these stages will overlap for the entire project. The following process is typical of most implementation plans.

Implementation process
Procurement: Purchase the necessary resources on time and in accordance with the plan objectives.
Communication: Create a communication plan outlining chains of authority, methods of communication used during the implementation and a communication schedule.
Quality assurance: Apply methods and standards of quality assurance. This may include software version control, the relevant Australian Standards for quality control, testing and trialling processes, and data and record storage.
Integration: Begin the new system. All users move to the new processes. This may be a gradual, stepped or waterfall (instantaneous) approach.
Testing and review: The review process should be carried out over a period of time after the implementation.

Steps of the process

The steps involved in the implementation will vary according to the scope of the project. The following is an example of the steps used in the implementation of a new IT system.

Steps of the implementation process
Prepare the infrastructure, including hardware, software, communications and facilities.
Coordinate with the key stakeholders.
Notify the organisation/s responsible for the supply and/or implementation of the system and schedule individual project tasks.
Implement training for initial users and use their feedback to modify training for all users.
Install the new system on the testing servers/desktops, etc.
Ensure all machines 'talk' to one another and storage/retrieval methods work effectively during the data conversion test.
Perform final verification against organisational and developer benchmarks.
Implement the new processes and procedures.
Roll out the training and access for all users.
Monitor and report on the system.
Make modifications as necessary and ensure organisational impact is minimised.

Example

Implementing digital technologies

Kendra's organisation wanted to encourage more cross-collaboration between their staff. In a large organisation, staff did not have many opportunities to mix and share ideas so they decided to introduce Yammer into the workplace. Yammer is like Facebook for the workplace, and is accessible only to staff.

The concept was announced via an email and information appeared on noticeboards and on the staff intranet. The organisation employed numerous 'champions' throughout the business to run training webinars and promote the use of Yammer to share information and ideas. The technology launched at the start of a week with a message from the CEO. The champions visited teams throughout the first week to encourage engagement and answer questions.

Some staff were worried about privacy issues and these concerns were addressed. Champions encouraged collaboration through competitions and rewarding those who engaged with Yammer by posting questions or issues that affected employees. It took some time for Yammer to become a useful tool to the organisation but management were pleased to see more shared ideas, issues and solutions raised and staff contributing their expertise and knowledge to help others.

Organising training and coaching

Training and support are important when implementing a new technology. Provision for training is usually included within the planning budget. Even for small projects, there will need to be some level of training and support for users. Selecting the appropriate type of training and support to meet user needs and organisational limitations is important.

Training may be organised in conjunction with managers and HR personnel and could become part of a learning and development plan for the relevant stakeholders.

Options for training

Training can set the baseline for organisational knowledge and skills. Selecting the right training approach for individual users can be logistically difficult in large organisations. Typically, a face-to-face approach is undertaken, but budgetary and geographic limitations often impede this approach. Some typical training options include: coach, mentor and buddy systems; online tutorials; and on-the-job trainers.

The following table presents some information about coach, mentor and buddy systems.

Coaching

Coaching usually consists of a system expert spending time with users in a workplace to provide knowledge and experience on the system. Coaching is a highly effective method of delivery as focus and attention are given to the learner. This method allows for the passing of both explicit and tacit knowledge. The main limitation of coaching is the cost of providing this one-on-one training. It may not suit the organisation's requirements.

Mentoring

Mentoring can provide guidance with respect to the overall objectives of the system, rather than focusing on the specific steps or procedures to follow. An experienced practitioner providing their expertise, guidance and support can help the user overcome small issues and focus on the big picture instead.

Buddy systems

Buddy systems allocate peers or colleagues to assist in the training needs of the user. This is an effective approach where a gap between learning styles of employees leads to some learning faster than others. Pairing the faster learners with those who learn at a different pace can achieve positive results.

Online tutorials

Online tutorials and forums are available for many digital technologies. Some can be accessed directly from the technology provider, while others are created by users and hosted on YouTube. There are many advantages and some limitations of using online training delivery.

Advantages of online training
• They can be created once and delivered countless times. • They can be accessed from any internet-ready computer. • They deliver a consistent message. • They can be relatively inexpensive.
Limitations of online training
• There is a lack of tacit knowledge transfer (experience-based knowledge). • Users are unable to solicit discussion (except in a very limited capacity). • They do not provide a good setting for experiential learning.

On-the-job trainers

Examine whether outsourcing training, including employing on-the-job trainers, is an appropriate option.

On-the-job trainers may include outsourced software trainers, internal subject matter experts or registered training company facilitators. The aim is to provide the knowledge and skills required to effectively use the administrative system. Training can also be provided to support end-users. Influencing factors include cost, time and available resources.

Support options

Various means of support, such as online learning or training manuals, can be helpful to round out available training options.

Knowing the specific knowledge and skills that need to be disseminated and the training options available provides an organisation with the ability to plan more effective support services. If the organisation knows that a certain level of training has already been provided, support services only need to cover the common issues, specific needs of function groups or individuals and contingency issues.

The following table outlines some support services.

Guidelines	Updated policy guidelines and procedural manuals to provide a ready reference to new procedures
PD opportunities	Professional development opportunities, including 'communities of practice' in which people share information and help each other; irregular events; and personal research and study opportunities
Skills assessment	Annual or biannual skills assessments of users, to assist in identifying knowledge gaps for future training development
Training handbooks	Training handbooks for use within functional areas or by a central training provider (internal or external). Training handbooks provide a resource for the delivery of system training that is repeatable and reliable. Handbooks must be updated as the technology is updated and this can be tedious and time consuming.
Online learning	Online learning is a very useful tool for isolated users who prefer face-to-face style instruction. A well-created video training tool can provide consistent, reliable and effective instruction over time. Limitations include cost of production (this must be weighed against the size of the training need) and redundancy (video training tools can become superseded quite quickly).

Example

The importance of structured and consistent training

Prior to the implementation of video conferencing tools and processes, Donna provided training and practice with all of her team, except for Barbara who was away on leave. When Barbara returned from leave, she told Donna she was really busy catching up on emails and asked for some more time before she had her training. As a result, the training was forgotten and Barbara missed her first video conference meeting with a client, as she wasn't certain how to use the software.

Barbara contacted Donna to explain what happened and that she had forgotten the call would be via video conferencing rather than phone. Donna was frustrated, but felt partly responsible as she was accountable for providing training for all of her team. She had left part of the implementation checklist incomplete and did not set a reminder to follow up on this. Donna organised training for Barbara, contacted all her team to get feedback on their experiences and arranged for a practice video call with them all to ensure the technology was operating smoothly.

Practice Task 6

Question 1

Which of the following organisational policies and procedures relate to implementing a new technology for collaboration? Tick all that apply.

- ○ Staff leave policies
- ○ Meeting procedures
- ○ IT policies
- ○ Conflict of interest policies
- ○ Training procedures
- ○ Procurement procedures

Question 2

Order the following steps used to implement digital technologies for collaboration into the workplace.

- ◯ Implement training for initial users and use their feedback to modify training for all users.
- ◯ Coordinate with the key stakeholders as to roll out and training requirements.
- ◯ Monitor and report on the system.
- ◯ Make modifications as necessary and ensure organisational impact is minimised.
- ◯ Roll out the training and access for all users.
- ◯ Implement the new processes and procedures.
- ◯ Prepare the infrastructure, including hardware, software, communications and facilities.
- ◯ Install the new system on the testing servers/desktops, etc.

Question 3

Answer True or False to the following statements about training and coaching in digital technologies.

You need to select the most appropriate type of training and support to meet user needs and organisational limitations.	» True	» False
Buddy systems will only work if all users are competent and experienced in digital technologies.	» True	» False
Training handbooks are a cost-effective form of training as they remain current and informative throughout the life cycle of the new system.	» True	» False
Some typical training options include: coach, mentor and buddy systems; online tutorials; and on-the-job training.	» True	» False
Outsourced software trainers, internal subject matter experts or registered training company facilitators are able to provide users with the knowledge and skills required to effectively use the new system, including administration and end-user training.	» True	» False

Summary

- An implementation plan identifies both your short-term and long-term goals and objectives, lists the project tasks to be completed, defines roles and responsibilities, outlines the budget and necessary human and physical resources required, and lists any assumptions.
- An implementation strategy defines how to action the objectives outlined in the implementation plan by stating how you will implement each aspect, from funding and resources to processes and training.
- Be clear about the goals and objectives of your organisation so you can ensure your implementation plan aligns with them.
- Clear communication is essential as it must convince staff of the benefits of implementing the new technology.
- You may need to use various communication strategies to encourage the acceptance of the new technology.
- Before beginning implementation, you should share your implementation plan with all stakeholders and ensure it reflects organisational requirements, policies and procedures.
- You also need to consider how the implementation of a new digital technology may affect job descriptions, workflow process documents, meeting procedures etc.
- The introduction of each element of the implementation process will vary depending on the project. Often these stages will overlap for the entire project.
- Selecting the appropriate type of training and support to meet user needs and organisational limitations is important.
- Training may be organised in conjunction with managers and HR personnel and could become part of a learning and development plan for the relevant stakeholders.
- Training options can include coaching, mentoring, buddy systems, online tutorials and on-the-job trainers.

Learning Checkpoint 3

Implement digital technologies for workplace collaboration

Part A

1. Draw a line to match each step of the implementation process with its description.

» Procurement	» The review process should be carried out over a period of time after the implementation.
» Communication	» Apply quality control methods and standards – for example, software version control, the relevant Australian Standards for quality control, testing and trialling processes, and data and record storage.
» Quality and assurance	» Begin the new system. All users move to the new processes. This may be a gradual, stepped or waterfall (instantaneous) approach.
» Integration	» Create a plan outlining the chains of authority, methods of communication used during the implementation and a communication schedule.
» Testing and review	» Purchase the necessary resources on time and in accordance with the plan objectives.

Consider the following two scenarios:

- The implementation of video conferencing technology which supplements current communication channels within an organisation
- The implementation of a new learning management system (LMS) which will overhaul and replace the existing model

2. Discuss two differences you expect to find in the implementation strategies used in each scenario.

Part B

Read the case study and then answer the questions that follow.

Case study

Juan is the national sales manager with a team of 10 sales consultants located across every state and territory in Australia. Once a month, all the team members come to the head office in Sydney for product training and meetings. Juan also has weekly calls with each team member. Juan has been asked to cut his team's travel budget and he needs to find alternative options to maintain collaborative working.

Juan has decided to use video conferencing technology to replace his weekly calls with team members, as well as the monthly team meeting. This will not only save on travel costs but also on loss of productivity brought on by the hours team members spent travelling and driving to and from the airport.

1. Describe three business goals and objectives Juan hopes to meet with the adoption of new conferencing technology.

2. Create a list of **eight** or more action items that Juan would need to include in his implementation plan. Consider communication needs of sales team and other relevant stakeholders.

3. Describe the ideal training method that Juan should use to train his sales team in the use of the new video conferencing software. Explain your response.

