

## ACCELERATING COLLABORATION WITH SOCIAL TOOLS

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*As more and more corporate ethnographic work is crossing international borders, we are increasingly collaborating with teams that are spread across the globe. As a result, we need tools that enable us to work across boundaries. Since early 2004, the authors have been collaborating on a research project developed by an American company seeking to develop solutions specific to the Indian market. One of us, an Indian sociologist, led a team of ethnographers in India, while the other, an American anthropologist, managed research and analysis for concept development in the US. While all of the US-based team members spent time in the field in India during the project, integrating the teams into the same “brainspace” was a challenge. This paper describes how we used social tools to enable each set of team members to understand the work being done on the other side of the world.*

### INTRODUCTION

An emerging issue for Ethnographic Praxis in Industry is the fact that corporations are becoming more and more international. Working with, and developing products for, other countries means we are increasingly working across international boundaries, and creating teams in different locations and time zones. When the basis of the work is ethnographic, and collaboration is the key to innovation, finding ways to communicate with and create a coherent team is crucial. This paper describes our experiences using social tools to communicate and collaborate during a long-term ethnographic research project in India sponsored by an American corporation.

Kerr (2004) has noted that distance collaboration stimulates both innovation and productivity. Recent work on distance collaboration has focused on education, or non co-located teams within a single company (Mark, et. al. 2003; Nootboom and Gilsing 2004; Blomquist, et. al 2005; Nurmi and Marttiin 2003), but there has not been much attention paid to industry related ethnographic work. Likewise, while blogs and other social tools are becoming more common in the workplace (Porcaro 2004, Cass, et. al. 2005, Gahrn 2004), they are only recently becoming a core of data collection for ethnographic projects, as seen in the research of March and Fleuriot in this volume.

While blogs have been around for about 10 years, they have taken off in popularity in the last few years. Walker (2003) defines them as “a frequently updated website consisting of dated entries arranged in reverse chronological order so the most recent post appears first. Typically, weblogs are

published by individuals and their style is personal and informal. ... Once at a weblog, readers can read on in various orders: chronologically, thematically, by following links between entries or by searching for keywords.”

With their basic programming interface, Wikis have been used as social tools well before blogs. Wikipedia, currently the best known example defines them as “web applications that allows users to add content, as on an Internet forum, but also allows anyone to edit the content.” Other social tools include presence and communication tools such as instant messaging (IM) and Voice over Internet Protocol (VoIP). Features built into all of these tools that work for sociability in collaboration are that they are light, they are used in real-time, they allow publishing and co-creation of documents, and they can be archived.

While Martin Wattenberg suggests that blogs and wikis play opposite roles because one is individual focused and one is group focused (Delio 2005), our experience on this project shows that the different social tools in fact play complementary roles.

## PROJECT BACKGROUND

The project was based in the Advanced Concepts and Technology (AC&T) group of Pitney Bowes, the Research and Development arm of a global mail and document services company. The company was interested in expanding into emerging markets, and in particular, creating products that would specifically meet the needs of, and provide value to those markets. In order to do this, AC&T deployed a Concept Studio team to begin an engagement in India. The Concept Studio is a group of anthropologists, engineers, designers and MBA's who work on customer centered innovation teams. Typical engagements begin with a business unit sponsor, who sets a broad strategic question for a project. Until this engagement began, all of our projects had been United States based. This engagement was not only situated halfway around the world, but had a very broad strategic question, basically asking how Pitney Bowes could create value in postal and financial institutions in rural and urban India.

The Concept Studio method of working is an iterative process based in extensive customer observation, brainstorming, and concept prototyping. We wanted to maintain this process for a project in India as well. However, even though one team member had previous field experience in India, and it was intended that all team members would spend some time in India, we knew from the beginning that we wanted the majority of the fieldwork to be conducted by researchers in India — people on the ground who were closer to the culture and able to understand and gain insight that Americans would not. At the same time, it was crucial that Pitney Bowes team members all spent time in India, both to see and understand the country, and because outsiders can see things and gain insight that insiders do not.

In order to conduct the research, Pitney Bowes hired Explore Research and Consultancy, based in Mumbai. Explore is a firm specializing in qualitative and ethnographic research and consultancy across product categories and regions in India.

At the beginning of the project, we met in person, and did field work together, to ensure the consultants understood how Concept Studio worked and what the expectations were from the research. We also established protocols for sending weekly written reports and pictures, and had a

weekly hour long conference call. In between, there were occasional emails and an intermittent phone call.

## CHANGES IN COMMUNICATION MEDIATED BY SOCIAL TOOLS

We established the project blog after the project had been running for a year (Figure 1). The delay was primarily due to security concerns. The blog was password protected and each of the team members had access to a site. It did not replace other forms of communication, but enhanced them. We still used e-mails but not for much, and FTP for the numerous pictures. While the blog did not replace these media, it did displace them. Because we could use the blog for quick information about site visits and questions, we were able to use our weekly phone calls more productively to discuss site visit learnings in more detail, ideas, and future directions, rather than asking clarifying questions. The blog enabled our weekly discussions to be about higher level research issues such as what are we learning, what do we need to know, what are we doing with what we are learning, and planning.

The more frequent blog communication enabled us to reach the same wavelength faster. Current thinking could be posted, so we had a way to keep track of ideas and thoughts. The researchers in India answered questions quickly and it was easy to ask for more clarification. All this got recorded as comments at a specific blogpost, allowing for easier archiving and searchability. One of the most useful aspects of the blog was for the researchers to post quick highlights of site visits immediately, so the United States team knew what they saw in the field and could guide further work, well before full reports were written.



Figure1. Screen shot of project blog.

New entries could be posted and edited by the author, and anyone could add comments on entries easily at the blog site. We found that the blog quickly became a method which allowed us to communicate with more immediacy and informality, as it was easy to post and comment. While email also can provide immediacy and informality, we posted items to the blog that we wouldn't have emailed. The blog is a "place" and conceptually different than email. This not only provided a location to store all the information together, it enabled conversation in a different way than email. Unlike email, the blog holds different strands of conversation in one, easily viewable place. We were also more likely to use it to post small comments and immediate thought that we wanted to share and keep, but that we might not have emailed because they weren't necessarily worthy of the interruption created by email.

Since communication between team members became less formal and more spontaneous and intuitive, it was also at times more chaotic and hence, creative. It is not like writing a report or spending time thinking through points to discuss at a conference call, conscious that every minute costs a lot—with these tools, we could move our expressions from "what we did" to a much more intuitive and spontaneous "what we feel" and "what we think."

Moreover, it allowed us to experience the wonder in creativity arising from the chaos that only a decentralized, self-organizing system can embody. Taxonomies were emergent rather than pre-structured or closed; points and counterpoints leading to synthesis, seeding ideas and seeing them take shape.

Our categories emerged as a result of the research and our interactions through which our archiving was created. This archive was used as a training ground for new team members, and allowed part-time participants to get up to speed in their own way. The categorization was embedded in the navigation, and included ideas, notes, project phase, sites, and status.

In addition to the blog, we used Skype, a VoIP tool, for immediate real time communications, and a wiki on which this paper has been written. Using Skype worked well, though it can also have time lag and duplex problems. Skype also allows chat, and since Dina spent a great deal of time online, we were often able to IM, despite the large time difference. We knew whether she was online or not through the presence indicators on the main window. Sometimes she would get a brief note: "Dina, u available for a 2 minute call?"

The beauty really was in the spontaneous chats and calls we often had in-between the conference calls. It's too expensive to just pick up the phone and call someone in India for a small clarification, and usually not warranted. Also, due to the time differences between India and the United States, there is hesitation in just picking up the phone and calling someone at say 11 pm at night. With Skype, we didn't worry about intruding into each others' spaces at odd hours, and we didn't need to wait to get clarifications.

As we have developed this paper, we have discussed other tools out there that could be used for projects such as ours. The two most immediate are tagging and photosharing. Tagging allows users to create and share their own taxonomies (Golder and Huberman 2005), and in a team project can allow team members to place structure and meaning on a mass of ethnographic data. Adding tags to pictures shared in the blog or on a linked photosharing space can remove the need to download, sort, categorize and manually archive them.

## WEAKNESSES OF SOCIAL TOOLS FOR COLLABORATION

As with any collaboration tool, the blog does have its strengths and weaknesses. A blog is typically used as a means for the blog owner to post his or her own daily thoughts in a forum that encourages others to comment. The blog we used had some associated drawbacks such as lack of threading and not being readily print-friendly, and it was not initially set up well for archiving. We hired Stuart Henshall to redesign the blog and add some functionality that made it more usable such as a “recent posts” section, and an enhanced printing capability.

Unfortunately a blog alone, or any social tool alone-for that matter any of the commercial knowledge management or collaboration tools, does not do everything. Blogs work well as exchange spaces, while IM creates a conversation space. Wikis allow users to edit and negotiate content. Most of the existing knowledge management tools are best suited for archiving, which social tools do not do as well. Our ideal tool would be one where we bring all these features together into the same workspace, so we could go to one place to exchange, converse, build, brainstorm, collaborate, and archive.

## IMPLICATIONS: MOBILITY, BOUNDARIES, AND “BEING THERE”

As we mentioned at the beginning, we considered it fundamental that all United States based team members spend some time in India. The use of social tools does not change how important that is, as best expressed by Darryl Rathbun, one of the Pitney Bowes team members. Although Darryl was on the project from the beginning, he did not visit India for a year. He reflected, “Before I went to India, I had a good mental picture of what India was like. Conversations with the people were not different-- they went the way I expected them to go. The things that I found different were not related to the research itself, it was more the day to day life. It was what's it like to be on a road in India, what's it like to have so many people around you...I never had a mental picture of a truck driving alongside an overstuffed wagon pulled by oxen,” (personal communication, September 6, 2005). While these things aren't directly related to the research, they are important for gaining a full sense of the culture and environment.

While nothing can replace the experience of being there physically, these tools can engage some senses that bring the distant space closer. Dina spent some time doing research in a village without electricity and telephones, but there was connectivity with cell phones. Through her mobile, she could upload pictures to the blog, and speak to people anywhere in the world on Skype. On our next round of fieldwork, we plan to take this further with webcams or video integrated with VoIP, allowing team members in the United States to see India in the moment, allowing all team members to be present in the field, guiding, probing, absorbing, and learning.

As we work further and further apart, presence and mobility become more important. Social tools enable this as well as speed and efficiency. The tools we used changed the nature of our collaboration. There was more spontaneity and immediacy in our interactions leading to better information and communication flows. The tools also allowed a more natural, real-life and emergent adaptation to chaotic conditions, which in turn allowed flexibility and facilitated a process of creativity that we might have lost otherwise.

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