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Step by Step Guide to Collaboration Analytics

The goal of this quick overview is to provide you with a basis to make an informed decision about whether to engage in a collaboration analytics project. You will get an overview of what is typically involved as well as some guidance.

Step 1: Set-up

- *Involve stakeholders and define strategic goals*: Collaboration analytics doesn`t work well in a vacuum. It should be intimately linked with a core strategic objective, such as a business transformation, growth initiative, business model innovation, post-merger integration or similar. Early on, you should involve stakeholders such as relevant P&L leaders from the business units, as well as senior representatives from HR, IT, and workers council representatives. You need to align with these stakeholders for a clear strategic goal what processes and decisions should be informed by the results of the collaboration analytics.
- *Define sample*: Based on the strategic goals, you should next define who is going to be covered by the analysis. Often, this sample is based on function, region, hierarchy and / or some combination thereof. In other settings, it might make sense to define the sample in a more detailed manner, for example when looking to understand how a given process moves through organizational fault lines (organizational process mining).
- *Tune questions:* For the vast majority of cases it makes sense to collect collaboration data based on digital footprints (email, MS Teams, Slack, …) and simply enrich these data with a pulse survey. For some contexts such as employees who mostly don`t interact digitally, you can also approximate collaboration data through a survey. The topics of the questions of the pulse survey should be aligned with the strategic goal of the project. Typically, we think about:
    - *Outcomes* we seek to improve: Innovative performance, proficiency with new tools, organizational identification after a merger, mindsets & values which are focal to a transformation, and so on. For each of these goals, we need a way to assess them. The goal is to have a success criterion which we can use to identify collaboration signatures of success.
    - *Initiatives* we are already employing to achieve our goals: Here we focus on participation in trainings, leadership development, offsites, and other initiatives we are employing. The goal is to be able to quantify the impact of these initiatives on collaboration signatures and outcomes, so we can re-align investments.
- *Compliance:* Depending on the regulatory framework in which you operate in, you might need to ensure compliance. For example, using a data processing agreement and creating a legitimate interest assessment ensures compliance with GDPR rules.

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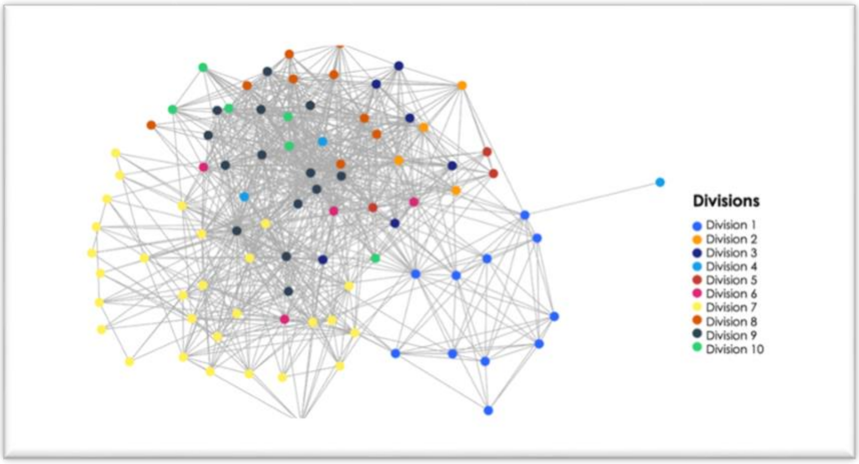
Step 2: Analyze

- *Communicate:* You should communicate clearly and proactively with employees in the sample (i) what the goal of the project is, (ii) which data are going to be analyzed, (iii) how you are going to ensure that data will only be processed anonymously and (iv) a single point of contact where they can reach out with concerns and questions. Depending on the digital maturity of the interaction, having a live event where you explain this and answer questions might make sense. Be sure to highlight that the data are never going to be used for performance reviews or algorithmic decision making.
- *Leverage HR data*: In order to keep the pulse surveys as lean as possible, export the basic demographic data and reporting lines from your HR data.
- *Export data*:
  - Collecting data should match how collaboration actually gets done in your organization. If you rely on email, export headers from exchange servers; if Microsoft Teams, the audit logs will capture these interactions. In most installations you can also export Slack data for analysis.
  - Platform usage can change quickly, so leaders need to work with where people are, but you can at least to chart and assess basic interaction on any popular platform.
- *Conduct pulse survey*
  - Generate a survey from your strategic questions and send them out.
  - Make sure to have some way to link the responses with the collaboration data, for example embedding a pseudonymized alphanumerical token in each survey version.

Step 3: Act

- *Generate visuals and look for patterns*
  - A basic overview of the collaboration structure can be generated with a variety of freely available and well-documented software tools. At first approximation, we recommend zooming into team levels and slicing the data by function, region and hierarchy:



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- Further, you can dive deeper and look for the signatures explained in the analytics chapter.
- Dig into the data so you measure more than mere interaction. Are the messages asymmetric -- from a single sender to several recipients, or symmetric, one to one? The latter indicates collaboration. What about speed of reply? A late or no response suggests mere interaction.

- *Compute statistics and identify relationships:* After the visual inspection, it is time to compute some statistics. Typical first measures we are interested in are density, cohesion (how tightly nit is a group) and centrality (how important is an individual in a group). Again, these will be computed for you in most software packages. Try and quantify relationships between these patterns and the initiatives and outcomes you measured in the pulse survey.
- *Act*: Now it is time to use this data to inform decisions.
  - Prioritize by identifying which initiatives had a good impact on collaboration signatures and outcomes in relation to their investment.
  - Optimize by leveraging patterns you have identified such as opening up internal silos, disrupting bottlenecks and leveraging internal influencers.
  - Nudge by building strategic collaboration interfaces to pockets of excellence.
  - Feedback for employees by providing each individual a short report of his personal collaboration network.

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