COLLABORATION SOFTWARE

A BUYER'S GUIDE

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Buyer's Guide Intent

The Collaboration Buyer's Guide is intended to help those seeking to acquire all or part of a small business or enterprise collaboration solution to understand how to define their expectations, specify requirements, evaluate products and services, and work effectively with vendors.

Although this Buyer's Guide mentions adoption and deployment, it does so only in light of evaluation experiences, or preparation for those evaluation experiences. No guidance is provided about adoption or deployment.

The Buying Process: An Overview

1

Specify Requriements
• Collaboration Design
• Business Requirements
• Technical Requirements

2

Evaluation Criteria
• User Experiecne
• Capabilites
• Technology
• Support and Maintenance
• Business Model Support
• Value
• Vendor

3

Managing the Procurement Process
• Specifying requirements (see above)
• Deciding on your Tool Approach
• Evaluating solutions
• Integration analysis
• Pilots and feedback
• Negotiating with vendors

Collaboration Design

How valuable collaboration investments become relies on the individual organization and its perspective toward technology. Those organizations that acquire collaboration software in order to facilitate existing processes will not realize as much value from their collaboration technology as those who rethink existing practice in light of new capabilities.

A good collaboration design begins with determining the scope of collaboration. Some evaluation criteria suggest a purpose be the starting point, but collaboration is highly distributed and the tools, techniques and expected outcomes vary greatly among individuals, teams and functions. This means it is more important to understand the scope, for example, how many functions and the variations in expectations, than it is to hone in on particular use cases and their outcomes.

Unlike traditional transaction systems that have a very clear goal to automate a process and improve the accuracy and timeliness of information related to that process. Even if a process is complex, it can be thought of as a vertical slide of the organization, focused on managing a single action, like on-boarding an employee or approving an expense report. Transactions systems designed and implemented for one function or process cannot be reassigned or redirected to another.

By contrast, collaboration software is usually horizontal, meaning that it cuts across functions, departments and geographies. Even if a few specific functional goals initiate the search for a solution, collaboration technology is rarely so tied to a specific function that it cannot be applied to work that falls well outside its initial requirements.

Buyers need to understand these two aspect of collaboration. In call centers for instance, messaging software used to communicate between operators and engineers can help increase first-time call resolution dramatically. That same software, without modification, when deployed across the enterprise, will facilitate a wide range of other collaborative interactions that go beyond functional point communications, and in fact, will be impossible to anticipate or model at the detail level.

This means that Buyers needs to understand the scope of their potential implementations, not just point collaborations. In many cases, the acquisition of point solutions will yield licenses that permit wider distribution. If those licenses are used, they need to be deployed purposefully so that the recipients of the new capabilities understand what it is they are receiving, and how it might be of value to them. In addition, Buyers need to facilitate feedback not only to help manage issued related to intended use, but to help people

attempting to use collaboration software in ways that go beyond departmental or functional requirements.

In organizations that begin at with a horizontal perspective, it is important for them to reach as deeply into the organization as possible to understand all the types of collaborations that currently take place, and the approach to, or even types of, work people imagine they could conduct if the right tools were in place.

This effort begins with an inventory of collaborative activity that includes the following information for each activity:

Name	• A unique name that describes the collaboration.
Actors	• the people involved in thecollaboration, their roles and their organizational placement.
Organization	• the type of collaborative relationship(s) : Customer, partner, internal, supplier
Reason	• Why is the collaboration taking place: Communication, learning, coordination, decision making (business purpose).
Data	• describe the data or transaction that initiates the collaboration, or supports its outcomes.
Documents	• describe thedocuments or other content iniiated or involved.
Process and Exceptions	• list the processes involved, or related to the collaboration.
Repositories	• list the content repositories involved in the collaboration (sources and destinations)
Reach	• describe where the collaboration takes place: physical sites, other organizations, mobile/travel, work-from-home, etc.
Integration	• list the applications (MS Word, Excel, PowerPoint, etc.) and clients (Windows 8, OSX, iOS, Android, browser. etc.) involved in creating any content associated with this collaboration
Integration points	• list any line-of-business and other transaction systems involved in the collaboration (for instance, from which data is pulled)
Business Metrics	• Describe how collaboration success is determined and reported.
Current Issues	• List any technical, political, organization or process issues relatd to this collboration.

Specifying Requirements

Once an organization understands generally how it could use collaboration technology, it then needs to develop requirements that are used to determine if particular software services and products can meet the organization's needs.

Business Requirements

The business requirements for collaboration technology will vary from business-to-business, for a number of reasons including:

- Vertical-orientation of the business
- Existing collaboration tools in place
- Local and national regulatory environment
- Scope of collaboration participates (inside organization, verified partners, ad hoc collaboration)

Lesson Learned 1
When speculating about future use of collaboration technology, organizations may design a collaborative activity that can't be performed by existing software, or would require significant custom coding in order for standard software to meet the need. Those activities should be identified and put to the side during initial requirements specification because they can easily become distractions to the acquisition of a generally acceptable solution. Those more unique or complex cases should be readdressed after general deployment is successful, because only after people understand the capabilities of a tool, and are able to integrate it effectively into their work, will they be ready for new approaches that may not align with their current practice.

Each business must orient itself within this list to determine how industry and business-specific its collaboration approach will be. Vertical industries, like healthcare or energy, may need to include regulatory requirements that restrict information flow or specify information retention.

In the case where an organization must comply with a court order, the details of that order must be included in the evaluation (such as an order to retain specific records related to a product, service or employee for a set period of time).

Another key business requirement is budget. The organization should determine its budget for the following areas:

Software Acquisition or Service License Fees	Hardware Acquisition	Data and Process Migration	Architecture, design and analysis	Training	Software deployment & policy/practice updates	Maintenance

Technical requirements

Regardless of how well a collaboration solutions fits the needs of the business, its employees and its partners, it is important that it also not introduce technical complexities beyond those already associated with the deployment of a new application.

The following technical requirements should be spelled out prior to conducting an evaluation of any collaboration solution:

- Standards with which the collaboration technology must comply.
- Approach to account management, including access control.
- Desired application development environment and programming language.
- Security and encryption requirements.
- Target server environment.
- Hardware requirements (client and server).
- Type and brand of databases being used within the collaboration environment.
- The applications the collaboration platform or tools must integrate with in order to realize value.
- Target clients on which the collaboration capabilities must execute.

A note about The Cloud and technical requirements

While certain technical requirements, like those related to application integration, remain important regardless of the target server platform, the choice of using a cloud service rather than deploying on enterprise servers negates certain questions, like database compliance. If the service uses a database that differs from the enterprise standard, but that database is never managed or in any other way, becomes an interface point for other software, then the database used by the cloud service supplier should likely be removed from the requirements (though thorough evaluations may still ask about it for completeness and as a data point related to reliability, and scalability.

Evaluation Criteria

The evaluation criteria is developed from a combination of technical and business requirements, which become a lens for evaluation, and procurement examinations that determine the stability and professionalism of the supplying organization.

Category	High-Level Evaluation Question
User Experience	Does the user experience integrate well with other tools, platforms and applications so that employees, partners and others can quickly take advantage of collaboration features?
Capabilities	Does the collaboration product or service include that majority of the capabilities called out in the collaboration requirements?
Technology	Does the technology used by the collaboration product or service integrate well with existing infrastructure and applications? Does it meet security and performance criteria?
Support and Maintenance	Does the vendor provide professional services and other support mechanisms at pre-sales, deployment, adoption and business value realization phases of the project? Are the support costs and maintenance costs reasonable based on the market?
Business Model Support	Does the collaboration product or service support, or permit, the vertical use of the collaboration experience? Does the vendor or a vendor partner support the organization's specific vertical? Does the verticalization of the product reduce its effectiveness as a cross-functional, horizontal collaboration tool?
Value	Does the product or service offer a reasonable return on the investment based on internal projections for product value?
Vendor	Is the vendor financially viable, and trustworthy? How is the vendor placed according to industry analyst market positions? Is the vendor engaged in a merger or acquisition?

User Experience

The user experience needs to be divided into three evaluation areas:

Integration and familiarity.

- Does the user experience for the collaboration environment work enough like the existing business systems that end users will not need to learn another approach to interacting with the system. Also, does the system permit the free flow of information between existing systems, and easily integrate that data into its collaborative stores or processes?

Ease-of-Use.

- Regardless of the style of user interface, does the software provide sufficient ease-of-use

Deployment.

- How IT is asked to deploy software, and what end users must do to install or configure the software on their desktop is also a crucial user interface test. If the deployment experience is not passive, or at minimum intuitive, future use of the tool could suffer.

Capabilities

Capabilities is perhaps the most difficult category for which to maintain evaluation criteria because it is the most evolutionary. Enterprise social media, currently a widely desired capability, was all but non-existent just a few years ago. Capabilities are also one of the most difficult to evaluate because simulations must be used as a proxy for actual use. Even small pilots do not get to the scale and diversity of use that a produce will experience during an actual implementation.

In order to evaluate capabilities, organizations need to:

- Understand the capability categories (see below)
- Prioritize the capabilities against internal requirements to identify which capabilities are required and which are not (or which are optional)
- Test as many capabilities during the evaluation phases as deeply as they can be in the time allotted
- Seek input from existing customers about their experience with capabilities

Capabilities are divided into several categories:

Basic features that define a collaboration platform.

Social and community. Enterprise social networking, communities of practice and other community features.

Content management. Collaborative document editing, and control, including for web properties.

Process management and workflow. Define and execute workflows for content lifecycle management or decision management.

Learning and development: Tools for managing knowledge, education assets

Basic Collaboration

Basic collaboration capabilities cover the minimum set of features that an organization should seek when evaluating collaboration technology. These are horizontal tools that allow people within an organization to work together

Capability	Criteria	Drilling Deeper
Profiles	Information about people who have access to the collaboration system.	• Directory integration (Microsoft Active Directory, LDAP) • Federated directories to include non-employee partners. Includes skills and other metadata about people in the directory.
Discussion forums	Threaded discussions that capture dialog asynchronously.	
Realtime Collaboration	Provides the ability to share voice, screens and video. Includes presence and instant messaging.	Not often used internally except by PC support, it is important that this capability be examined to determine how well it works with remote and mobile employees.
Messaging and personal information management	Typically this capability covers messaging, calendaring and personal task management.	Many collaboration platforms avoid this capability given the wide deployments of messaging and PIM platforms like Microsoft Exchange, IBM Domino and Google Apps. It is important to look at how a collaboration solution integrates with these platforms if an organization is already using one of them.
Search	The ability to search across repositories, profiles, sites, tags, steams and other content containers.	Collaboration-oriented search may include hashtags, expertise and other metadata derived from collaboration content, which makes it more useful than traditional search.

Social and community

Social and community capabilities incorporate features that allow individuals to communicate in ways that mimic consumer-technology, such as posting blogs, micro-blogs, Wiki-like team sites and status updates.

Capability	Criteria	Drilling Deeper
Activity streams	A continuous flow of posts and post-related content such as URLs, links to documents, voting and awareness mechanisms	Do activity streams support metadata or just embedded hashtags within messages? Do activity streams support images, URL and internal/external links to content.
Team sites	Easy to implement sites that provide access control, repositories, postings and other features. These usually appear to be standalone and self-contained.	
Blogging and microblogging	The ability to create a blog, post micro-blog entries, subscribe to a blog/micro-blog.	Micro-blogging is difficult to distinguish from activity streams in actual practice. Whereas blogs often appear as long-form, rich-document entries, micro-blogs are usually short posts that may include links to other content, but do not include that content in a contextualized form unless a particular client is used to render the microblog post and its references.

Content management

Content management focuses on the creation, editing, assembly, control and publication of content.

Capability	Criteria	Drilling Deeper
Content repository	A data storage design that includes storage for large objects like documents, videos and audio files, along with associated metadata.	
Version Control	Automation that tracks	
Access Control	The ability to limit who can edit a document, along with the ability to lock a document from editing that is "checked-out."	
Content Assembly	A library and a scripting feature that allows for the creation of larger documents from control document components.	Proposals are often constructed from individual responses to specific questions within a request-for-proposal. Content assembly would allow tight control on individual responses while creating a framework that would pull-in necessary components to create the response document.

Process management and workflow

Process management and work can also be called "business process automation" but in a collaborative platform, process management and workflow are usually end-user developed, rather than developed through IT as part of a transaction system. A workflow for approving a loan application would be considered "business process automation," where the approval of a marketing plan, would be considered a workflow, because it requires personal decisions, qualitative analysis and feedback.

Capability	Criteria	Drilling Deeper
Define workflows	Define tasks, decision points, containers and destinations for a series of connected tasks.	Some systems use scripting, other user graphical interfaces to draw workflows.
Create exceptions to workflows	Workflows often evolve over time, or require changes based on circumstances or available resources. Workflows should include the ability to create an ad hoc, or on-the-fly, exception to a standard workflow process.	
Monitor workflows	All workflow should roll-up to higher level process monitoring so that the state of a workflow can be determined easily by those within the workflow and those awaiting its output or outcome.	

Learning and development

Capability	Criteria	Drilling Deeper
Knowledge repository	A collaborative repository specifically designed to house lessons learned, practice information, process models and other knowledge-oriented content. Unlike general collaboration content, a knowledge repository is usually curated and content that is no longer relevant is excised rather than simply remaining or expiring at a certain time.	Most collaborative repositories can be configured to manage knowledge-oriented content, but the practices associated with them, as well as some metadata, such as knowledge category, related work, affected roles, related content and other items would be specific to knowledge content.
Tagging	Content can be tagged with metadata for categories and other identifiers like learning style or content type.	Tags help refine content categories across all collaborative content. Tags act as supplemental information in relationship to curated knowledge-oriented content where specific metadata is used to describe the content.
Courses and curriculum	The ability to store courses and other related curriculum within the collaborative environment as a "collection" of course material.	Many organizations are choosing to acquire learning management systems (LMS) in addition to collaboration platforms. It is important to note that LMS systems often include collaboration features that duplicate collaboration platform features (such as discussion forums). Organizations should choose their collaboration solution prior to their LMS solution in order to rationalize their collaboration features across all learning and collaboration activities.
Surveys	Basic surveys to provide feedback about events, classes, ideas, etc.	Some platforms now offer isolated collaboration modules that go beyond surveys with capabilities like prioritization, categorization, etc. Although these are not traditional surveys their intent is to provide feedback, and therefore will fall into this category.

Operational Features

Operational features provide data and information about the performance of the collaboration environment. This includes, but is not limited to, analytics about server performance, error and exception reports, capability use reports, etc.

Capability	Criteria	Drilling Deeper
Analytics	■ System performance ■ Virtual machine performance ■ Storage use ■ Network performance ■ Active content and sites ■ Search results ■ Social network analysis and expertise discovery	Some analytics, like system performance, will be global and universal, delivered to IT managers. Other analytics, like social network analytics may be used more by individuals than by management.
Reporting	■ Content changes ■ User privilege changes ■ Content and site aging & abandonment	Traditional paper reporting is a dying commodity. This "reporting" will likely come in the form of online reports delivered through web-pages.

Lesson Learned 2

Beware of trial periods and other free offers. In a systematic evaluation, all contenders should be evaluated against the same criteria. That usually excludes all but the most rudimentary of pilots projects to test the claims of the vendor. Free trail periods are intended to get a group of people so connected to the new software that they cannot extricate themselves after the trial period. As companies with trial periods to respond to the procurement process and not to go around the back of procurement to engage end users directly.

Technology

Although technology evolves as rapidly or more rapidly than capabilities, it is easier to evaluate because IT typically creates an enterprise architecture that defines the basic technology components, security requirements and platforms upon which applications are built and where they execute.

When evaluating collaboration technology, the following items should be considered:

Technology Evaluation Area	Criteria
Enterprise architecture	■ General alignment with the enterprise architecture
Standards	■ Support for supported/required standards
Interoperability	■ Open APIs
Database	■ Alignment with the enterprise standard database(s) as deployed to support other systems.
Clients	■ Runs on specified enterprise clients
Language and development	■ Written in, or accessible by, the language and development environment used for enterprise software development.

It is important to note the phrase "generally align" above, because the enterprise architecture, as a living document itself, may be modified to incorporate new elements derived from the collaboration platform should a good business case exist for doing so.
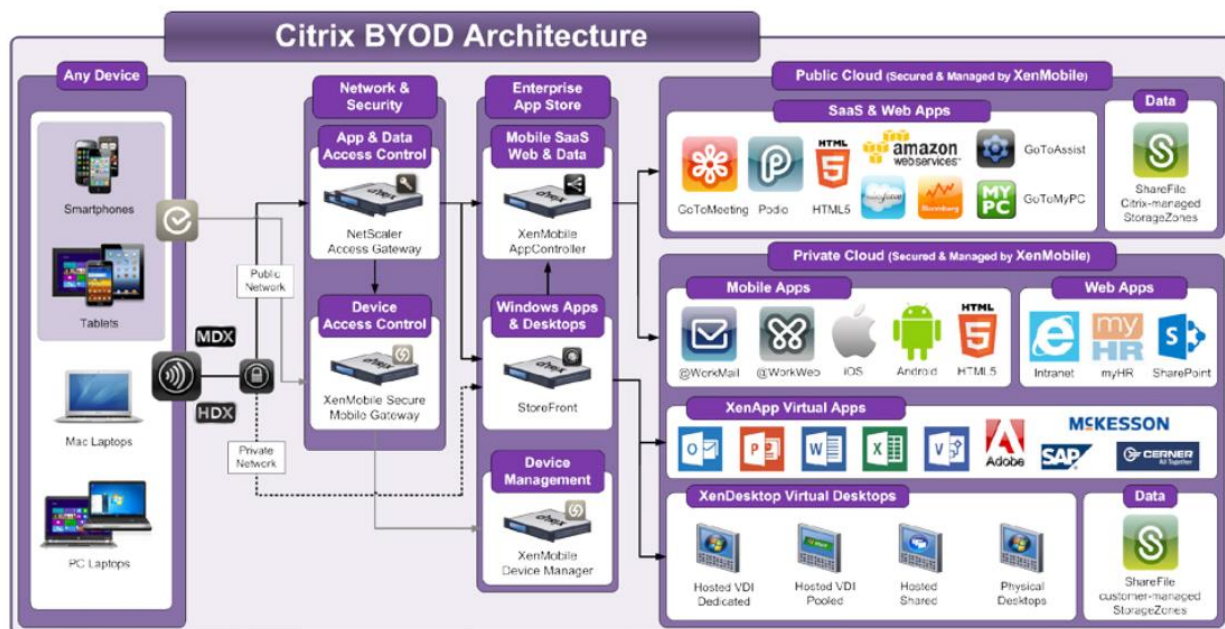
Example: Citrix BYOD architecture

Support and Maintenance

Support

For many smaller organizations, vendor support is critical for basic deployment. For larger firms support for activities like data integration, mobile support and cross-organization collaboration become important.

When evaluating support consider the following:

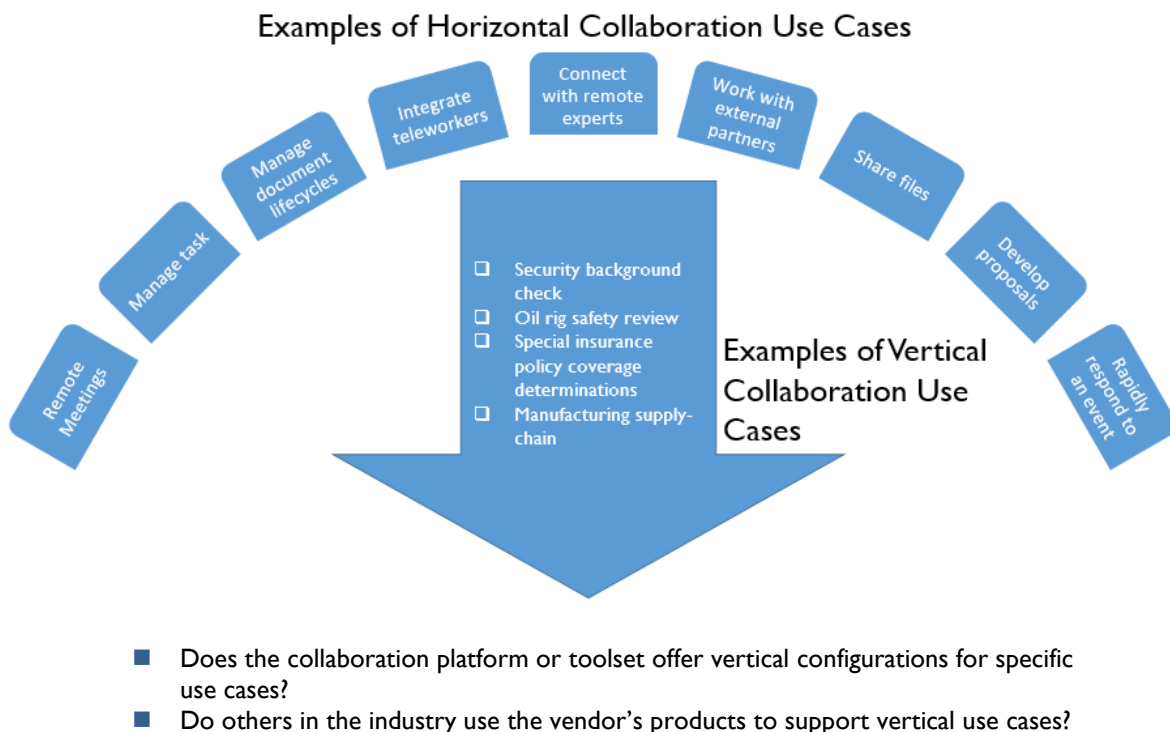| Support Evaluation Area	Criteria
Online product support	■ Forums ■ Downloads
Training	■ On-site, at vendor or other location-based training ■ Self-paced, online training ■ Certification programs. ■ Third-party books or other training materials.
Data and Process Migration	■ Services from vendor or third-party assist in the migration of collaboration content and defined processes from existing platforms to the new platform.
Source Code	■ Available as Open Source ■ Available in Escrow
User Manual and Online Help	■ Available on website ■ Available in print ■ Available contextually within product
Peer Support	■ Vendor sponsored peer support forum ■ Third-party/independent peer support forum ■ Sponsored tweetchats or other realtime interaction opportunities
Just-in-Time Training	■ Recorded webinars ■ Videos ■ Animated "how-tos" ■ Software wizards ■ Telephone, chat or realtime collaboration support
Professional Services	■ Internally ■ Third-party
Conferences (virtually or physically)	■ Annual conferences ■ Regional conferences

Maintenance

Maintenance examines two important long-term questions when it comes to a collaboration platform, frequency and quality of updates, and the cost of updating. Consider the following maintenance questions when evaluating a collaboration vendor:

Maintenance Evaluation Area	Criteria
Releases	■ Frequency ■ Reliability of new releases (do existing customers migrate quickly to new releases or wait for incremental maintenance releases?)
Response	■ Time-to-fix for known errors. ■ Visible log of known bugs available to customers ■ Are all known errors addressed.

Business Model Support

Collaboration is always horizontal at its roots, offering freeform approaches that allow people to identify a topic or activity and to collectively work on it. But there are cases where specific vertical requirements exist, it is desirable to have those vertical activities modeled in the enterprise collaboration platform whenever possible, rather than procuring separate, specialized software to serve the vertical need.

Examples of Horizontal Collaboration Use Cases

Remote Meetings · Manage task · Manage document lifecycles · Integrate teleworkers · Connect with remote experts · Work with external partners · Share files · Develop proposals · Rapidly respond to an event

❑ Security background check
❑ Oil rig safety review
❑ Special insurance policy coverage determinations
❑ Manufacturing supply-chain

Examples of Vertical Collaboration Use Cases

■ Does the collaboration platform or toolset offer vertical configurations for specific use cases?
■ Do others in the industry use the vendor's products to support vertical use cases?

Value

To paraphrase the Margaret Wolfe Hungerford adage, value "is in the eye of the beholder." No external entity can determine the value of a collaboration investment because collaboration is a complex, multi-product, cross-functional, multi-disciplinary tool. Organizations will discover that it is impossible to trace all value-creation activities associated with collaboration. Buyer's must therefore concentrate the determination of value from specific use cases that can be modeled, knowing that other activity will fall outside of the model.

This approach creates risk, as it tends to concentrate on production-oriented value creation rather than that arising from serendipitous activities and events. Buyer's need to understand what they are measuring and what they are not. Those who concentrate on a few, high-value returns may well miss other activity that will contribute value over time. Serendipitous collaborative activity, in particular, may return value over much longer periods of time than measured in the typical ROI calculation.

Vendor

The vendor is the source of the software or service, and must be evaluated not only for financial stability, but as a business partner.

Maintenance Evaluation Area	Criteria
Financial	■ Viability – Debt, stock performance, layoffs. ■ Target of acquisition or merger. ■ Driver of acquisition or merger.
Market Position	■ Position according to industry analyst evaluations and other secondary research.
Legal	■ State and resolution of any class action lawsuits. ■ State and resolution of any employee or partner lawsuits.
Industry reputation	■ Positive online/customer reputation. ■ Solid thought leadership content and follow-on actions.
Transparency	■ Roadmap (at least to existing customers). ■ Financials (especially if private).

Managing the Procurement Process

Once an organization understands its requirements and has its evaluation criteria selected, it then needs to engage in a formal procurement process. It is important to note, that some see the development of evaluation criteria as part of the procurement process, this Buyer's Guide suggests that organizations complete evaluation criteria development prior to engaging vendors in order to create a more unbiased set of criteria.

Specifying Requirements (see *Specifying Requirements* above)

Develop a set of requirements that reflect what the organizations sees as its needs, independent of what technology is available or affordable. This will set the baseline criteria for evaluation. The evaluation process will identify and disposition those capabilities that are unavailable or prohibitively expensive.

Deciding on a Tool Approach

Specifications should not answer the question about the acquisition profile. Specifications should state what a collaboration environment needs to deliver, but not how it is acquired, or from whom. In the purchasing process, organizations need to decide which types of solution providers to include in the evaluation. The choices are:

Single Vendor.	*All the technology is delivered from a single vendor.*
Point Solutions.	*Individual requirements will be seen a separate from each other, and vendors compete for capabilities without regard to a great, more holistic view of the requirements.*
Best of Breed.	*A total solution is desired, but it may consist of capabilities delivered by a number of vendors. Unlike*

INDUSTRY ANALYSIS

Evaluating solutions

Use the evaluation criteria developed above to create a set of spreadsheets with the criteria down the far left column, the weight of the capability next to it, and then places for vendors and vendor scores.

A typical spreadsheet for evaluation would look like this:

Evaluation Area/Capability	Weight of Capability	Vendor 1	Vendor Score 1	Vendor 2	Vendor Score 2	Vendor 3	Vendor Score 3
Profiles	0.2	2	0.4	2	0.4	2	0.4
Discussion forums	0.05	1	0.05	2	0.1	2	0.1
Realtime Collaboration	0.25	2	0.5	2	0.5	2	0.5
Messaging and personal information management	0.25	3	0.75	1	0.25	2	0.5
Search	0.25	2	0.5	2	0.5	2	0.5
Total	1		2.2		1.75		2

Example Only

Each section of evaluation criteria will receive a weight, and each weight will be multiplied by the vendor score, creating a relative score across all vendors under evaluation. In the example above, for the basic collaboration criteria, vendor 1 wins with a score of 2.2.

Weighting: many organizations will likely already have a procurement practice in place for weighting evaluation areas and capabilities. If not, a simple approach involves ensuring that the total of all criteria (excluding those with a weight of zero, which is equal to "not applicable") should add up to 1.00. If each section is scored to add up to 1.00, then the need to parse small fractions can be eliminated. The grand total for all evaluation criteria then will equal the number of evaluation sections. If you choose to use sections, Microsoft Excel workbooks provide an easy way to manage individual sections and later aggregate the scores.

Scoring Vendors: As with weighting, organizations may already have procurement practices in place. If not, consider a simple 0-3 scoring system:

0 — Vendor or product does not include or support the evaluation area/criteria.

1 — Vendor or product supports the area/criteria in a rudimentary way.

2 — Vendor or product supports the evaluation area/criteria in a acceptable way.

3 — Vendor or product suppor the evaluation area/criteria as "best in bread" or in some other way that identifies them in this area as being superior to all other vendors or products.

Integration analysis

Although integration analysis is technically part of the overall evaluation criteria, it should be a scheduled separately because it will require information technology support that may include the creation of a test lab or other testing approach that will determine if, and how well, the collaboration tools integrate with existing software and solutions.

Each organization will decide which enterprise systems and applications require integration, but a typical list will include:

- Client software: Microsoft Office on Microsoft Windows and Apple OSX.
- Client software on Apple iOS and on Android.
- Enterprise Resource Planning
- Sales/Customer Relationship Management
- Finance
- Human resources

Pilots and feedback

In some cases, organizations will want to pilot collaboration software within a function, or across the organization with small cross-functional teams. These teams should be prepared for the pilot so that they are part of the evaluation, and not mimicking the sometimes negative adoption behavior so often found during deployment and adoption of enterprise collaboration.

To prepare teams, organizations should:

- Model the collaboration activities of the teams
- Provide the teams with all of the evaluation criteria and specifications so they are testing the features the organization as a whole has determined to be important, not the ones that they choose to use (during the modeling process teams should map specific features to existing or updated collaboration activities in order to best match the evaluation criteria).
- Do not provide pilot teams with any existing information about the evaluation scores so as to keep them, and their evaluations, unbiased.
- Include access to training and support, as well as manage constraints, like access control processes, in order to be as inclusive as possible.
- Deploy software to the pilot team's clients.
- Instruct the pilot teams to actively take notes about their experiences (it is often an added bonus to incorporate some of the feedback into the pilot software deployment in order to increase the stress test of the system and provide for an additional use case).
- Let the pilot team work for the specified time.

After the pilot, organizations should:

- Ask the teams to fill out the evaluation spreadsheets independently of the evaluation/procurement team.
- Provide qualitative feedback to the evaluation team, including missing criteria or other requirements that may have become evident during actual use of a product, tool or service.
- Identify which practices, policies and procedures would need to be updated against each product (this can help determine actual deployment costs).
- Obtain feedback about the deployment approach and refine plans accordingly.

Negotiating with vendors

Once all of the business and technical information has been gathered, it is time to negotiate with vendors. In reality, the negotiations start at the time of first contact, because the vendor is seeking to understand seriousness of the search and available budget, while the customer is seeking to understand the people, the business practices and the forthrightness of the vendors.

Once formal negotiations begin, procurement and the Buyer should be prepare the following strategies.

Strategy	Overview
Determine the timing the of the acquisition negotiations	Many vendors offer much more pliable pricing at the end of a quarter or fiscal year when they are trying to generate revenue numbers to meet objectives (or surpass them). Try to determine the compensation model for the sales person if possible.
Be willing to walk away	If the first choice doesn't come in on budget, be willing to go with the second choice. This may bring the first vendor around. Don't just bluff.
Be Collaborative	Although you want as much information as you can, and to be as strategic in your timing as possible, win-win negotiations prove the best approach for long-term positive relationships.
Manage the process	Don't let the vendor manage the negotiations. Create a plan, set deadlines and manage communications. Be clear with the team who, how and when communications will take place. Avoid side deals and off-line chats during negotiations.
Bring in outside expertise	Analyst firms, contract lawyers, industry trade groups and others can help provide benchmarking data and advice. If you already pay for some of these services, use them. If you get stuck, reach out and hire the best experts you can find.
Negotiate a comprehensive deal	Don't just look at software licenses or service fees. Make sure the outline for the contract includes professional services, training and other elements necessary to make the acquisition turn into a successful deployment. Work everything from payment terms to the maintenance agreement and what happens when you need more licenses (how much is each incremental license?). In SaaS agreements make sure that use-based contracts are clear and expect few discounts given that future use isn't guaranteed in usage-based agreements.
Include hedges for the future (Risk Management)	Include items like software escrow (for non-open source vendors), IP considerations, M&A coverage, downtime allowances and rebates, disaster recovery. Also think about back-out clauses in case the software does not live up to expectations (for licenses that aren't paid based on each use).

Next Steps

After this extensive process collaboration software Buyer's should be in the position to acquire their software and feel like they have negotiated a good deal for capabilities that will make their organizations more effective and productive.

Pilot projects hint at what deployment and adoption may look like, but a handful of employees testing software over a limited time doesn't include the variety of issues that will arise during a full enterprise deployment.

IT, business units and other stakeholders should begin planning and executing the following activities during the evaluation process:

- Design technical integration.
- Develop a training plan.
- Determine collaboration security profiles and implementation approaches.
- Specify and separately negotiate hardware needs (dependent on acquisition of the collaboration solution).
- Plan for enterprise application integration.
- Prepare clients for deployment.
- Develop employee and partner communication plans in order to set deployment and adoption expectations.
- Determine how collaboration use will be reflected in individual performance goals and objectives.
- Design and test mobile deployment scenarios.
- Update policies, procedures and practices for initial roll-out. Part of expectation setting should be the gathering of on-going feedback in order to enhance practice with collaboration, not just include it as an adjunct to existing practices.
- Plan and document any content or system governance policies and practices.

The final activity may not occur during planning, but will arise during deployment: the identification and recruitment of "collaboration champions." In order for collaboration to scale, IT will need people distributed throughout the organizations who can take the vision forward and apply it to real world business situations effectively.

Managing Internal Expectations

One of the most important aspects of buying collaboration software comes at deployment. It is impossible that all constituencies, let alone all individuals, to have input on specifications or participate in the evaluation. Those making the selection of the software therefore have to communicate effectively how they saw the tools being used, and what benefit they expected to be derived. In light of full disclosure and transparency, they should also state that uses for the software are likely to arise that were not anticipated by those making the selection. Ideally in this case, the software selected was evaluated for its ability to adapt to new situations, which can then be communicated as well. It should be emphasized that for collaboration software that although certain uses and benefits are expected, those should not be seen as constraints on the use of the tools in other circumstances. That position creates an atmosphere of experimentation and learning that can magnify the benefits and returns on the investment over any anticipated during the evaluation process.

To set expectations, collaboration Buyers need to offer broad use cases that can inspire more specific collaboration to take place — and they must do so in a way that emphasizes any transitional intent, such as a move away from e-mail for document collaboration, in those communications. Here is a list of use cases that present broad, non-specific areas where collaboration can be applied:

- Engage effectively in a meeting while working remotely
- Negotiate and manage task activities and deadlines
- Document practices and lessons learned
- Manage documents through a lifecycle
- Successfully integrate teleworkers into day-to-day work activities
- Connect with remote experts
- Work with external partners (problem resolution, contract negotiations, brainstorming and design, etc.)
- Share files
- Develop a proposal
- Rapidly respond to an event (natural disaster, public relations issue, etc.)

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About the Author

Daniel W. Rasmus, the author of *Listening to the Future*, is a strategist and industry analyst who helps clients put their future in context. Rasmus uses scenarios to analyze trends in society, technology, economics, the environment, and politics in order to discover implications used to develop and refine products, services and experiences. His latest book, *Management by Design,* proposes an innovative new methodology for the design workplace experiences. Rasmus' thoughts about the future of work have appeared recently in *Chief Learning Officer Magazine*, *Talent Management* and *KMWorld*. Rasmus is an internationally recognized speaker. He has addressed audiences at CeBIT, KMWorld, The Front End of Innovation, The National Association of Workforce Boards, ProjectWorld, The CIO Association of Canada and Future Trends. He writes regularly for *Fast Company, iPhone Life* and *PopMatters*. Rasmus is the former Visiting Liberal Arts Fellow at Bellevue College in Bellevue, WA where he continues to teach strategy and social media.

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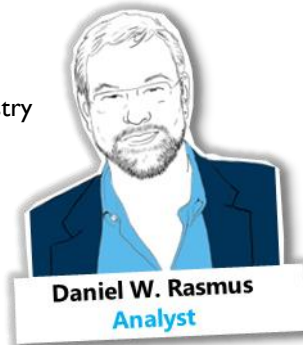
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