

How to Improve Collaboration in a Mobile Workforce

Executive Summary

Companies have increasingly turned to cloud-based storage services for saving, updating and disseminating important files, both for internal and client-facing purposes. Cloud-based storage services have made collaboration easier and faster than ever before. The proliferation of collaboration tools now available on mobile devices has made the convenience and immediacy of cloud storage available to customer-facing teams in the field, as well as to other mobile professionals.

Unfortunately, there are a number of problems inherent with most of these collaboration tools. Mobile tools may not always sync up properly. Files shared with coworkers or prospective customers may not always be up to date. Many of the solutions are technically complicated, requiring help from busy IT professionals to deploy, manage and maintain. And the unbranded displays typical of these tools look less than professional and will likely fail to impress when deployed for client-facing presentations.

This white paper details many of the problems inherent with the mobile collaboration tools deployed by many organizations. It also discusses must-have features that organizations should seek in searching for a mobile collaboration solution. Finally, this paper describes a collaboration solution that helps maximize the potential benefits of mobility while avoiding the associated problems that currently inhibit productivity.

How Does Your Organization Hang Together?

Collaboration. Working together. Teamwork. There are many different terms that can be used to describe the process of harmonizing the actions of individuals to accomplish organizational goals. But no matter the term used to describe the process of collaboration, its benefits are indisputable.

Throughout history it has been generally acknowledged that a group of individuals working together can accomplish more than the sum of the individuals working separately. In perilous times, collaboration has often been viewed as the key to survival, as Benjamin Franklin wryly noted: “We must, indeed, all hang together, or most assuredly we shall all hang separately.”

Collaboration is just as important for modern business enterprises as it was for Franklin and his compatriots. Though modern workers need not fear the hangman’s noose, failure to efficiently collaborate can result in the death of productivity — and may ultimately spell the demise of a business enterprise. At the very least, ineffective and inefficient collaboration among the workers of an enterprise provides competitors with a golden opportunity to seize a crucial marketplace advantage.

But providing a working environment in which collaboration thrives is a far more complex proposition than it once was. And technology is to blame.

Not so long ago, workers at the same office tended to be within close physical proximity. Collaboration with a coworker might have been as simple as turning to the occupant of an adjacent cubicle, or stepping across the hall to a neighboring office. But collaboration can no longer be driven by physical proximity.

Thanks to technology, coworkers that once might have worked within arm's reach of one another are now just as likely to be located on opposite sides of the planet. A recent Gallup survey, in fact, found that nearly half of all Americans now work remotely at least part of the time — and that percentage rises significantly with each passing year.¹

While a distributed workforce provides many advantages to workers and the organizations that employ them, it also presents some problems. Most notable among those problems, perhaps, is the difficulty of assuring that collaboration among geographically scattered coworkers is not negatively impacted.

But though technology has enabled the mobile workforce that threatens to diminish the benefits of collaboration, technology also provides a solution to that problem. Many technological tools have been devised to aid in collaboration among mobile workforces. With the selection of the right tool, an enterprise workforce can collaborate more effectively and efficiently than ever before, no matter their geographic spread.

However, enterprises that are searching for such a tool must evaluate candidates carefully. Enabling and enhancing collaboration among today's mobile, cloud-dependent workforce is a serious challenge. Any tool deployed for that purpose must avoid problems that are common among this class of tools while providing a range of essential features.

Following is a summary of those common problems, along with the features that should be considered must-have offerings for collaboration-enhancing tools.

Problems to Avoid in a Collaboration Solution

A solution designed to serve a mobile workforce can enable previously unobtainable efficiencies of collaboration — even among workers who might never meet face to face. But many such solutions stumble badly in the attempt to serve a mobile workforce. When that happens, the collaboration solution that is found to be deficient most frequently demonstrates problems in two key areas: usability and look-and-feel.

The most common problems with usability include the following:

- **Complicated Complexity:** All collaboration solutions are technically advanced tools. Unfortunately, many collaboration solutions also demand a high level of technical sophistication from users. The more complicated the tool is from the user's perspective, the less value it can provide to a large range of users.

¹ <https://www.nytimes.com/2017/02/15/us/remote-workers-work-from-home.html?mcubz=1>

One illustrative example is the need to use a third-party integration point when downloading content to an endpoint device, a flaw that many collaboration solutions share. This significantly complicates the use of the solution and greatly amplifies the likelihood that something will go wrong in the process of downloading content, requiring the user to seek help from the IT department.

A collaboration solution should provide technological sophistication without requiring users to be IT experts.

- **Data Doubts:** We live in a data-driven world. Within all organizations, data is now acquired, stored, modified and disseminated with greater speed than at any time in history. This complicates the process of collaboration — not only for associates within an organization, but also for those responsible for creating and fostering inter-organizational collaboration.

Sales reps, for example, are routinely charged with representing an organization through presentations. By their very nature, presentations are data driven. But all too often, sales reps rely on devices (such as iPads) and collaboration solutions that provide little confidence that the organizational data they are sharing is accurate and up to date.

- **Search Shortcomings:** Organizational dependence on data highlights another common shortcoming: the difficulty of finding the right data at the right time. At its core, after all, collaboration revolves around the sharing of data.

But data that cannot be found cannot be shared. With many collaboration solutions, the provided search features often result in long, frustrating and sometimes fruitless searches — particularly when key data identifiers, such as file names, are forgotten or misplaced.

- **Storage Struggles:** As noted above, organizations are accumulating data at unprecedented rates and volumes. All of that data must be stored, and organizations utilize many resources in providing for the storage of data. For most organizations, the cloud has become a key repository for the storage of data. Typically, a menagerie of storage apps is used to shuttle data to and from the cloud.

This leads to a stored clutter of files and file types on the cloud that users must negotiate in finding the data that is relevant to their needs. Many collaboration solutions do little to aid users in navigating that cloud clutter, and some solutions may even contribute to the confusion.

- **Interface Imperfections:** Solutions designed to aid and facilitate collaboration among mobile workers should be intuitive by design, and provide an easy-to-use interface on all devices. Unfortunately, it is common for mobile collaboration

tools to provide poor user experiences. One example is the difficulty of navigating many tools due to the small buttons designed into the interface — a simple flaw that can be mightily frustrating for users.

There are also a couple of common problems with the look-and-feel of many collaboration solutions that impact their effectiveness and frustrate users.

One such look-and-feel problem is linked to the cloud storage problems referenced above. When users reference or download information from the organization's cloud storage system, they are often required to painstakingly conduct a random search through folders to find the files they need. This type of search often involves a frustrating exploratory expedition through a bewildering display of identical manila folder file icons, click after click after click, until the target data is finally found.

It's a tedious, time-consuming, and for many users, infuriating process. The frustration levels that result are often sent soaring even higher for mobile app users as a result of the small-button problem noted above.

Another common look-and-feel problem results from the lack of customization options inherent with many collaboration solutions. It is commonplace, for example, for collaboration applications to provide no means of displaying organizational logos or symbols that serve to brand the app, and provide a look that's customized specifically to the organization's users.

While it may seem a small thing, the ability to customize a solution's look can enhance its appeal to internal users, and convey an enhanced sense of professionalism to external parties — during presentations, for example.

Features to Seek in a Collaboration Solution

Choosing the right collaboration solution certainly involves avoiding the problems and pitfalls listed above. But it also requires assuring that the selected solution will provide certain must-have features. These provide the key capabilities and usability necessary to foster collaboration in a mobile workforce.

The must-have features for collaboration solutions include the following:

- **Ease of Use:** Team members should be able to easily and conveniently load and toggle between content on their device without having to switch from one app to another. The solution should also be customizable, enabling companies to brand the application interface, marketing collateral and other customer-facing output.

Ease of use should be enhanced with sophisticated search features. A full-text search engine should provide users with the ability to search file text as well as file names, and search capabilities should encompass integrated PDF files.

The solution should also provide users the flexibility to organize files on the application in any way they choose. This capability is particularly useful for onboarding new employees/team members. All onboarding materials can be centralized in one location, enabling new team members to read documents, watch videos, fill out forms, sign contracts, etc., from one location, online or offline.

- **Offline Capability:** Maintaining connectivity can sometimes be an issue, particularly for associates that travel frequently in the performance of their jobs. A collaboration solution should continue to provide full functionality — including the ability to generate crucial business documents — even when connectivity is temporarily lost. And the solution should automatically update in real time once connectivity is restored.

Offline capability is particularly crucial for certain industry verticals. For companies in the pharmaceutical or financial industries, for example, offline capability addresses major document compliance issues associated with regulatory requirements and government mandates. The offline capabilities of a collaboration solution can help ensure uninterrupted compliance with mandated requirements and can help to avoid punitive enforcement actions.

- **IT Independent:** Many collaboration solutions require the assistance of IT personnel, both in the installation of the solution and with ongoing management. Ironically, relying on IT stifles the very collaboration capabilities that the solution is intended to enhance. Workers, after all, are not collaborating one with another when they are waiting for IT to perform a task. Therefore, it's imperative that a collaboration solution be designed such that it enables users to install and manage the solution without requiring the expertise of IT personnel — a capability that's likely to be appreciated by IT personnel every bit as much as any users of the application!

A collaboration solution that does not require installation or management by IT personnel offers many obvious advantages. Among the most important of these advantages, perhaps, is the convenience of permitting a single team within an organization to purchase a collaboration solution and evaluate whether it fulfills their needs. Since the team can install and manage the solution without IT support, exploring the benefits of a collaboration solution can be a simplified process conducted at the team's convenience. There's no need to generate paper trails for involving IT, and no need to adjust the team's schedule to IT's availability.

A collaboration solution that offers true IT independence must, of necessity, provide certain ancillary features that support the safe and efficient management of the solution without the help of IT.

For example, an IT-independent collaboration solution should be capable of piggybacking off of the existing security protections and protocols that have already been put in place. The solution should be capable of adopting existing organizational security protections without requiring any external integration — which, of course, would likely involve IT.

Avoiding dependence on IT also requires that the solution take advantage of an organization's existing cloud storage investment. Common cloud storage solutions include Box.com, OneDrive, Salesforce and Google Drive. The selected collaboration solution should be capable of leveraging the organization's cloud storage solution(s) without requiring any additional backend work (typically requiring IT) and without requiring the use of third-party tools.

Finally, an IT-independent collaboration solution should support an undemanding setup process. A team should be able to download the solution, integrate it with existing resources, and put the solution to work almost immediately. The initial setup of the solution should be no more involved than simply adding a file to the organization's existing cloud storage solution(s). The collaboration solution should automatically incorporate changes in real time.

- **Analytics:** Enhancing collaboration requires more than simply providing a platform for interaction. It also requires helping team members to learn what works and what doesn't. Analytics provides those insights. The best collaboration solutions provide embedded analytics capabilities that deliver those insights easily and instantaneously.

Whether team members are interacting with each other or with clients and prospective clients, the solution-provided analytics can serve as a feedback loop of sorts, enabling the constant enhancement of procedures, processes and presentations that can provide the organization with a competitive edge.

- **Expanded Functionalities:** While a collaboration solution that provides all the above features will be a capable tool, the best solutions provide a range of ancillary features to further boost the solution's functionality and usability. These added features might be thought of as elevating a collaboration solution to a truly elite status — both in comparison to competing solutions and in terms of the comprehensive capabilities provided to users.

The following are among the most important of these additional features:

- The ability to send and sign contracts
- The ability to log interactions and activities in the organization's chosen CRM
- Customization support from the solution's vendor, including support for custom forms, theme designs, added functionality features, and more
- A dynamic presentation mode that supports all formats of documentation

- PDF annotation capability
- Secure single sign-on support

The Best Collaboration Solution for All Industry Verticals

Sependa Crescendo facilitates collaboration among the mobile workforces that have become predominate in today's business climate. Crescendo avoids the shortcomings that commonly plague many collaboration solutions and provides the full range of desired features as described in this paper. Accordingly, Crescendo serves as far more than a simple tool for sharing cloud-stored documents. Crescendo, in fact, might be considered the **single most efficient and effective tool** for enhancing collaboration between mobile professionals.

And Crescendo's flexibility makes it equally effective for all industry verticals. Consider the following use case examples for two industry verticals that rely heavily on the currency of information in customer-facing presentations:

- **Crescendo in Pharma:** Pharmaceutical marketers routinely use literature that promotes existing drugs or provides details about drugs under development. This literature changes quite frequently. Quite often, as a result of company policy changes or updates to state or federal law, certain language changes are required on short notice. Blocks of text may have to be added, removed or modified. Any such change can impact hundreds of documents, presentations and other customer-facing collateral.

The problems that result can certainly impact the effectiveness of presentations. But when pharmaceutical companies share or distribute documents that are no longer current, legal ramifications can also result. Crescendo helps by assuring that documents are always kept up to date.

- **Crescendo in Retail:** Retail organizations typically support multiple branches in many locations, often encompassing a broad geographic range. Typically, not every item offered for sale by a retail organization is available at every store location. As a result, customers may be required to go online to view items that are not physically on display at their location. It's a clunky, inelegant solution.

Crescendo can provide a superior alternative when used as a branded company catalog. In-store customers can be handed an iPad and use Crescendo to "walk" through the catalog. It's a relatively inexpensive, customer-friendly solution that delivers up-to-date information about an organization's product offerings.

As workforces become ever more mobile and distributed, a solution that is designed to facilitate collaboration in a mobile environment will be a crucial component for success in any business enterprise. To learn more about how Crescendo can facilitate collaboration within your organization, [contact Sependa](#) today.