

Collaboration and Communication – Is More Better? –

By Clive Longbottom, Service Director, Quocirca Ltd

In the good old days, if you wanted to communicate with someone, you met up with them and talked, or you sent round someone with a piece of paper, and that someone stayed there while the communicant responded in writing and brought the message to you. A clever guy realised that this piece of paper could be delivered on a more wholesale basis, and that the delivery and return could be charged for, so creating the postal service. Then some bloke decided that using paper was a bit slow and wasteful and that messages could be misunderstood, so off he went and invented the telegraph as a means of getting messages through more quickly. Taking things one better, we then had the arrival of the telephone and then the fax. Then the computer came along, and we got email, then instant messaging, then web conferencing. Oh – and just in case we were not quite connected enough, along comes RIM with the Blackberry – the relatively new drug for the affluent young executive (or older one trying to look younger). Now, we have hybrid systems giving us easy voice conferencing from our mobile phones, our PDAs, our laptops when we are sitting in the airport lounge – the list is endless.

And all of this was meant to make our lives easier.

As with a lot of technology, the “next best thing” rarely gets rid of the “last best thing”. In 1981, the IBM PC was going to get rid of the mainframe – IBM sold more mainframe processing power in 2005 than it had sold all together previously. Email was going to rid the office of paper (remember the paperless office?). HP’s profits are dominated by sales of toner and inks for its printer range. The Internet would rid of us client/server technology, which had already rid us of green screen terminals – strange that we still see complete mixes of all of these technologies out there.

The postal services of the world are not going broke – there’s still a lot of paper being sent around as communications. The telephone is still the mainstay of a lot of people’s lives – whether it be wired or wireless. Email volumes

continue to grow, as do text message volumes. Voice over IP (VoIP) usage from various sources (standard handsets, computers, PDAs) is growing, voice and web conferencing is becoming common – and yet we still enjoy the social side of having a meeting and seeing a person in the flesh.

The big problem with all of this is that we are in an increasingly governed world. For example, most financial institutions now have to be able to demonstrate a complete audit trail of communications with their clients, to safeguard themselves against claims of mis-selling. Each new communication and collaboration method introduces yet another channel of communication – and yet another link to what until now has been a very weak chain.

Now, let’s say that the company involved has filings of all paper communications between the advisor and the customer, of all telephone calls, of all emails and face-to-face meetings. Great – that should cover it. Ah, but then the customer suddenly cries foul and it gets to court and the customer says “I remember an IM session where the advisor told me that Product A would give 300% per annum returns, guaranteed”. With no demonstration of how you control IM, you can’t prove that it didn’t happen – and the powers that be are far more likely to side with the customer than the company these days.

What can you do? Today’s technologies can help to ensure that as many events as possible are captured and that the above scenario is harder to prove. However, it all has to start with a set of policies, detailing how the individual must deal with prospects and customers. Draw up proper guidelines/policies as to what tools can/should be used in what circumstances. Ensure that ad-hoc tools such as consumer-based IM clients can’t be used within your company – use commercial versions only which allow recording of sessions in context to the customer. Ensure that content filters are applied to email and file transfer systems that allow information into and outside of the company. Integrate systems wherever possible – ensure that telephony systems tie in with customer relationship

management (CRM) solutions so that calls can easily be logged (and even recorded) against the customer. Scan in any paper records and file them against the customer. Keep mobile phone records and match them against customer records. Ensure that field personnel complete meeting and telephony contact records either directly during the contact with the customer, or directly afterwards, and get the customer to sign off the record as a true representation of the meeting. Turn on recording for web and audio conferences and file them correctly for ease of recovery.

True, it is not possible to record the nuances and the every word and happening of all direct interactions, such as face to face meetings, but our view is that by capturing as much as you can, by demonstrating that your whole value chain, from central systems, through intermediaries to the prospect/customer, is logged as much as can possibly be expected, it will be far harder for a customer chancing his or her lot to present a legal case as to how any "off record" remarks could have been made.

It's a nasty world out there – to ensure that you are covered, you need to look at the multitude of different communication and collaboration tools that are used by your customers and employees – and make sure that you have them all covered....

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The insight and experience that comes from working as an industry analyst as well as a practitioner allows the Quocirca team to contribute significantly to IT Vendors, Service Providers and Corporate clients. To this end, it provides a range of consulting and advisory services. Details of these, along with some of Quocirca's latest analysis, may be obtained by visiting <http://www.quocirca.com>

Quocirca's primary research involves the surveying of many thousands of technical and business end users each quarter, analyzing their perceptions of the possible impact of emerging, evolving and maturing technologies on their businesses.