



CGX 2.0 Coaching Strategy

Findings from the world cafe' at the KM4Dev Rome event, 29 October 2009

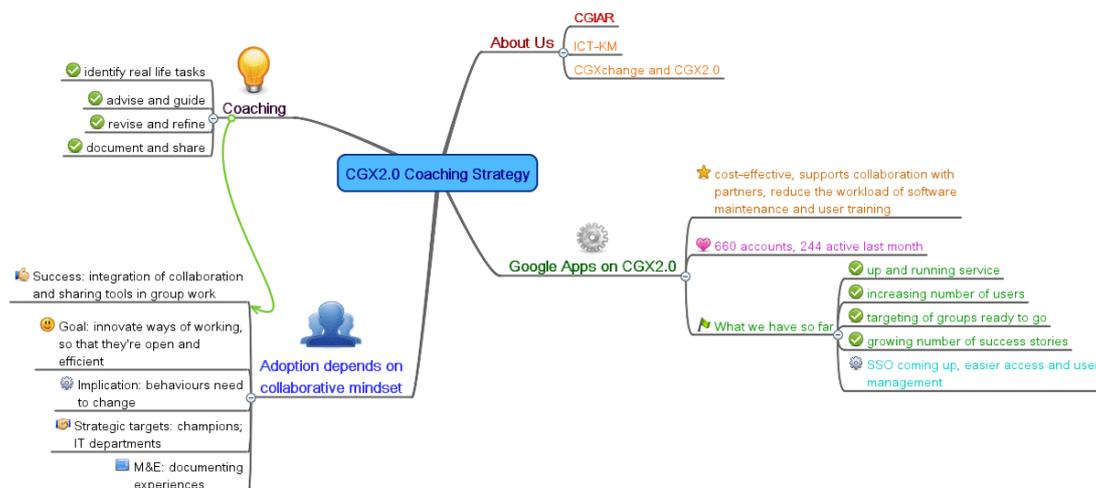
On 29 October, 2009, the CGX2.0 team (Tania Jordan, Michael Marus and Antonella Pastore) attended the event "[Knowledge Sharing: Getting Together to Do It Better](#)", at [IDLO](#) Headquarters in Rome. The event was organized by the [KM4Dev Rome group](#), under the broader umbrella of the [Share Fair](#).

The CGX2.0 session was run as a [world cafe'](#). We were seeking contributions into a strategy to support broader and more effective use of the online collaboration tools available at [CGX2.0](#). Two colleagues from Bioversity (Cristina Sette and Adriana Alercia) helped us with the hosting of the table discussions.

The session was lively and productive. Many good ideas emerged from discussing the two key questions we explored: examples of successful cases in which the use of online technologies helped get the job done well, and the ingredients of an exciting, compelling learning experience.

Here follow the introduction and problem statement; the summarized notes taken by the hosts at the five discussion tables, and our initial analysis.

Introduction and problem statement



CGXchange is one of the ICT-KM core projects which was born out of the need for collaboration between the CGIAR Centers and their partners, support for communities,

and the sharing of common information. One major product of the project right after it was started in 2005 was an Intranet/Extranet portal called CGXchange.org. The portal never really took off in terms of adoption, times were not mature for a big common home for the CG. The underlying technology was dismissed in early 2009, and following a successful case study with the Google Apps Education Edition, we decided to switch to this suite in order to offer our colleagues a full suite of online collaboration tools. In March 2009, CGX2.0 was launched based on the Google Apps and other shared tools.

The Google Apps provide an efficient and cost-effective alternative to a proprietary portal technology, cater for the need of collaboration with external partners, reduce the workload associated to software maintenance and user training, since most of this is taken care of by Google.

As of October 2009, we count 660 accounts and 244 users who have signed in at least once over the last month. This has happened basically by itself, with very little promotion on our part, besides the occasional postings on our blog and casual contacts with groups that we knew would benefit from using an online collaboration toolkit.

We are now in the process of implementing single sign-on, which is the possibility for CGIAR staff (about 8000 in total) to sign in the Google Apps with the username and password they use to log onto the local network, email and other corporate systems. This is an important step toward easier access and management: CGIAR staff won't need to remember yet another username and password. Overall, we expect the SSO solution to lower the threshold of access and eventually adoption.

What we have so far is an up and running service, at a much lower cost, an increasing number of users (that can potentially increase when we have single sign on), targeting of specific groups that have either experience with online collaboration or some sort of sensitivity to working in a more efficient way (let's call them the early adopters), a growing number of success stories, particularly with Sites/wikis.

What's next? As soon as SSO is up and running, we plan to start a number of activities to foster adoption of more efficient ways of working and sharing with partners. Someone may call it a communications strategy, and certainly there are communications elements in this. Others may call it training, but this doesn't capture the spirit of it completely.

Encouraging the adoption of online collaboration and knowledge sharing tools depends very much on a collaborative mindset that we observe to be there in the CGIAR, but this is neither consistent nor institutionalised. What we consider success in our case, is the integration of collaboration and sharing tools in the way groups, teams and communities work. What we're aiming at is innovating ways of working so that they are more open and efficient.

For this to happen, behaviours need to change.

We're working with and for groups that are ready or almost ready to change their way of working. We want to create first of all success stories, although we certainly learn from failures, as we did already, document these experiences, and use these primarily as indicators of performance. We are already seeing the early signs of successful adoption.

We are also aware that we need to work closely with the IT departments in the Centres: they are the frontline in receiving requests, advising on tools and supporting them. We have been working to obtain the consensus of the IT Managers on the implementation of single sign on. There is a working group with a number of IT Managers to define technical support procedures and the key requirements for the conservation in institutional repositories of the information created in the Google Apps. We plan to 'delegate' part of the strategy to IT staff in centres.

Going back to the intended end users, because it's about mindset, behaviour and skills, we like to speak about coaching, instead of just communications, marketing or training, although components of these three are in there. Coaching is a concept that encompasses instruction on skills but also guidance on strategy.

In this design phase, we think that the coaching strategy should follow four key implementation steps:

- start from what colleagues need to do to achieve their goals, i.e. real life tasks
- advise and guide them in new ways to achieve the same goals using shared and collaborative tools
- correct, revise and refine the tactics
- document and share widely the information, materials, experiences that we accumulate (we've started this already through our blog and the public part of cgxchange.org)

What we were seeking at the KS event was the participants' contribution to the CGX2.0 coaching strategy, and in particular on two key questions:

- 1) Based on your experience, what were the cases/stories/situations in which the use of online technology helped you get the job done well?
- 2) What makes learning new technologies and ways of working compelling and exciting?

Notes from the cafe' discussions

Question 1) Based on your experience, what were the cases/stories/situations in which the use of online technology helped you get the job done well?

- Collaborative writing was the most cited example, in particular:
 - Online writing of documents in groups, instead of mailing word documents around, required demonstrations to colleagues and an active role of the 'owner' of the document who would facilitate, remind, instruct, keep the time schedule. E.g Google Docs
 - Contribution to a joint publication through a wiki, from 10 people, which needed facilitation and reminders. The specific case had some active participants and some who never showed up to contribute, so the promoters are still enquiring about the meaning of silence/lack of participation.
 - Online project documentation within a closed group of team members. Documentation is visible on the Intranet as it gets created.
 - Keeping track of documents, gathering information from multiple sources, ensuring a group is on the same page and works transparently
- Project management: two cases were reported. One was based on Basecamp, combined with collaborative writing of documents in groups of 6-7 people. The other based on a system, Assembla, which combines a timeline, a wiki and a ticket system.
- Online discussions during a global forum on food security, which of course required a moderator, a time frame, advertising the topic and identifying the experts.
- Problem solving: a wiki used as a reporting and tracking mechanism for issue analysis and solution.
- Online surveys, the most cited tool was SurveyMonkey
- Voice communication tools, like Skype, are widespread and people can get in touch with each other very quickly. However, some organizations still have strict policies which prevent staff from using skype at work. In last year's Palestine Emergency, once WFP was on the ground to respond to the emergency, Skype

was the only method of communication for several days. It allowed collaboration on documents and communications to news services.

- Online meetings via videoconference saves time and resources on travelling, but was reported to be formal and cold.
- Social bookmarking for collecting and sharing links
- Messaging services (e.g. twitter, yammer) have been used/tried out and issues related to content of sharing came up, as personal vs work related sharing. Those sharing work related issues found the tool useful and helpful.
- Google docs was mentioned several times as an easy way to share documents. A concern raised is about security/accountability, as some organizations are reluctant to have google in charge of backup
- Meeting planners: Doodle
- Webinars/Webconferencing: GoToMeeting/DimDim
- Using Dgroups, FAO was able to put together an on-line Collaboration Course between dispersed colleagues. The tool is easy to use and allowed FAO to cut travel expenses for the project drastically, and also helped in avoiding to send mail attachments.
- drop.io is used by WFP Logistics to gather pictures from contributors around the world to be used in the Logistics Web sites. Centrally-located editors can pick and choose items for the Web sites from pictures contributed via drop.io.

Key ingredients of successful cases:

- moderation, facilitation, ownership, someone to keep the pace;
- social element is key: people prefer to work with others and feel/see their presence, which means also the combination of face-to-face opportunities
- in online courses, participants need to feel confident right from the start, invest time in helping them becoming familiar with the tools. There was a case cited where they started the online course with a game that asked the participants to say 2 lies and 1 truth about themselves, and then the other participants had to discover which one was the truth. After this start-up, people felt confident and keen to start the virtual learning process.
- Document success stories for others to see with clear examples - show what users can achieve with the tools and make them understand why they should use this tool instead of others.

Question 2) what makes learning new tools and ways of working exciting and compelling?

- Targeting of the content: make sure the information is targeted to the role of the person you are addressing with the instructional material
- Usability: basically, the 'don't make me think' factor, also called intuitive, user-friendly
- Usefulness: the content has to be very relevant to a number of practical applications
- Time-bound: it is important to anticipate how long the learning experience is going to take and how much time you will save so it can be compelling
- Playground/Hands-on: testing and playing with tools, foolproof recovery from any action undertaken
- Recognition of effort, visibility can stimulate learning
- Shock treatment: going through a shock experience that exposes the participants to something very new and untried for them can trigger the learning/adoption experience
- Focus on tasks that can be carried out, show the relevance to what people need to do
- The 'human' or 'personal' dimension to give the idea all adopters are contributing and the sense of ownership.
- Don't forget the importance of 'face-to-face' whenever possible

- To teach is to show: demonstrating the capacity of Web tools can be a key factor in overcoming doubts of their use. Show a smarter way of doing work.
- There needs to be balance: timing depends on maturity and readiness.
- Give feedback: this gives a comfort-level when the communication goes both ways. Not only engage others, but respond to reactions.
- If it is fun, then it can be exciting and compelling: Web tools that are not just another "loop to jump through".

Take-home points

- Some groups/organizations are unable to promote in-house collaboration as a principle. With the introduction of a new tool, it is expected that people will collaborate/share/work together more effectively. If the organization does not have the culture and the right incentive for stimulating staff to share, a tool may work at the beginning, while it is new, but will not be a sustainable measure.
- Adopting a technology/tool is related to personal preferences, how professionals feel more comfortable. What works for one may not work for another. Having a pool of tools and a set of different activities/materials to choose from may be a good strategy when working with diverse groups. Some may prefer discovering new tools by themselves, others prefer to be introduced and guided first before they feel comfortable enough to venture by themselves.
- Champions: get champions and nothing better for promotion than the 'word of mouth' - seeing in action without forcing is the best strategy...there is also the challenge to get management to champion the initiatives.
- Learning new tools and ways of working doesn't mean much by itself. Tools and ways of working must relate to what people need to do at the end of the day, be task-oriented. A coaching approach should not focus on how to operate tools, but on the overall process and task set they are supposed to support.