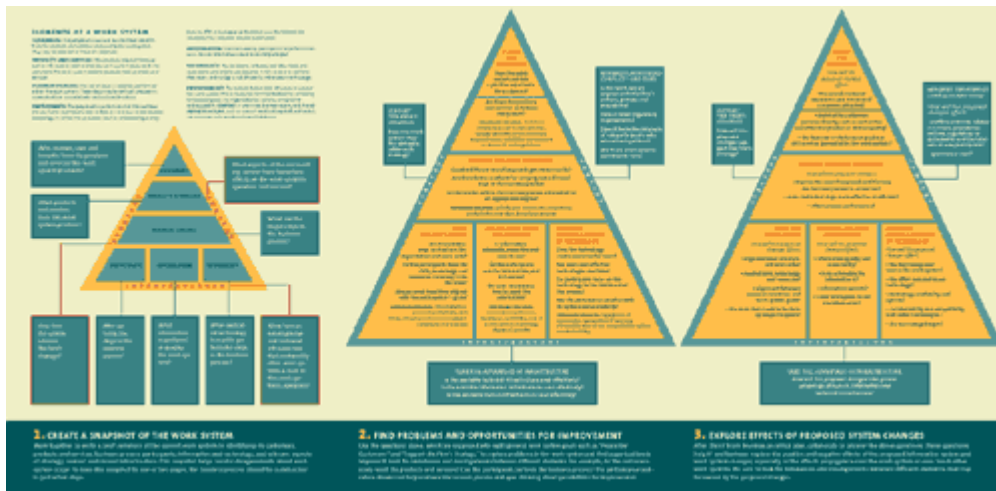


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## Navigating the Collaboration Triangle

By Steven Alter



The Collaboration Triangle whiteboard is available as an Adobe Acrobat PDF document optimized for [screen viewing](#) or [printing](#).

Getting IT and end-users to collaborate effectively has never been easy. Often, IT people focus on the technology rather than how the technology can help users perform their work. Users may then become overwhelmed by technical details and grow unwilling or unable to express their business needs clearly. The result: unrealistic expectations, poor communication and frustration, all of which lead to failed projects, poorly re-engineered business processes and ineffectual information systems.

Successful collaboration requires an approach that is user-centric rather than techno-centric. The best way to achieve this is for the two sides to hold a structured dialogue that focuses on how users do their work—be it hiring people, producing products, selling to customers or generating financial statements. By emphasizing the work system rather than just the information system, IT people can collaborate more effectively with their business counterparts, and users can better organize and clarify their concerns. The result is a mutual understanding of the planned changes and the creation of an information system that truly meets the needs of the business.

This whiteboard provides three critical checkpoints IT and business professionals can walk through together when creating or re-engineering a work system. CIOs in smaller companies can apply it when directly supervising projects; those in larger companies can give it to project managers and sponsors for use by their staffs.

The triangle-shaped framework identifies the core elements of a work system: customers, products and services, business process, participants, information and technology. Surrounding these elements is the work system's environment—the firm's business strategy, the IT infrastructure the work system shares with other work systems, and the organizational, competitive and cultural context

in which the business operates. These three environmental elements provide resources and influence decision-making regarding the other six elements.

The team of IT and business professionals creating or re-engineering a system should use this whiteboard at the early stages of its development. Begin by creating a concise snapshot of the work system the information system will support (Checkpoint 1); then identify its problems and opportunities, clarifying which of these the project will and will not address (Checkpoint 2). After the IT team creates the initial plan for a new IT system, the team arrives at Checkpoint 3. The IT and business teams must now agree on the likely effects the proposed information system will have on the work system's operation and success. At each checkpoint, the triangle remains the same, but the questions differ. The IT and business members of the team should methodically consider the questions that go with each element and try to agree on the answers. An inability to agree is an important early warning that issues need to be resolved before investing additional time and effort in the project.

The framework does not guarantee the quality of the code or the completeness of the requirements, nor does it provide a full cost-benefit analysis of the new system. But it does increase the likelihood of genuine communication, realistic system requirements and reasonable expectations. Moreover, it improves the likelihood that the project will produce an information system that users will want to use, and from which the business can gain an effective and efficient work system without creating unexpected, unpleasant side effects along the way.

### **Three Critical Checkpoints**

#### **1. Create a Snapshot of the Work System**

Work together to write a brief summary of the current work system by identifying its customers, products and services, business process, participants, information and technology, and relevant aspects of strategy, context and shared infrastructure. This snapshot helps resolve disagreements about work system scope. To keep this snapshot to one or two pages, the business process should be summarized in just a few steps.

#### **2. Find Problems and Opportunities for Improvement**

Use the questions above, which are organized into eight general work system goals such as "Please the Customers" and "Support the Firm's Strategy," to explore problems in the work system and find opportunities to improve it. Look for imbalances and misalignments between different elements: For example, do the customers really want the products and services? Can the participants perform the business process? The performance indicators shown can help evaluate the current process and spur thinking about possibilities for improvement.

#### **3. Explore Effects of Proposed System Changes**

After the IT team develops an initial plan, collaborate to answer the above questions. These questions help IT and business explore the positive and negative effects of the proposed information system and work system changes, especially as the effects propagate across the work system or even touch other work systems. Be sure to look for imbalances and misalignments between different elements that may be caused by the proposed changes.

The Collaboration Triangle: A Tool for Improving IT-Business Communication  
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## ELEMENTS OF A WORK SYSTEM

**CUSTOMERS:** The people who use and receive direct benefits from the products and services produced by the work system. They may be external or internal customers.

**PRODUCTS AND SERVICES:** The products (physical items as well as information) and services the work system produces for its customers. The work system exists to produce these products and services.

**BUSINESS PROCESS:** The set of steps or activities performed within the work system. These steps may be defined precisely in some situations and relatively unstructured in others.

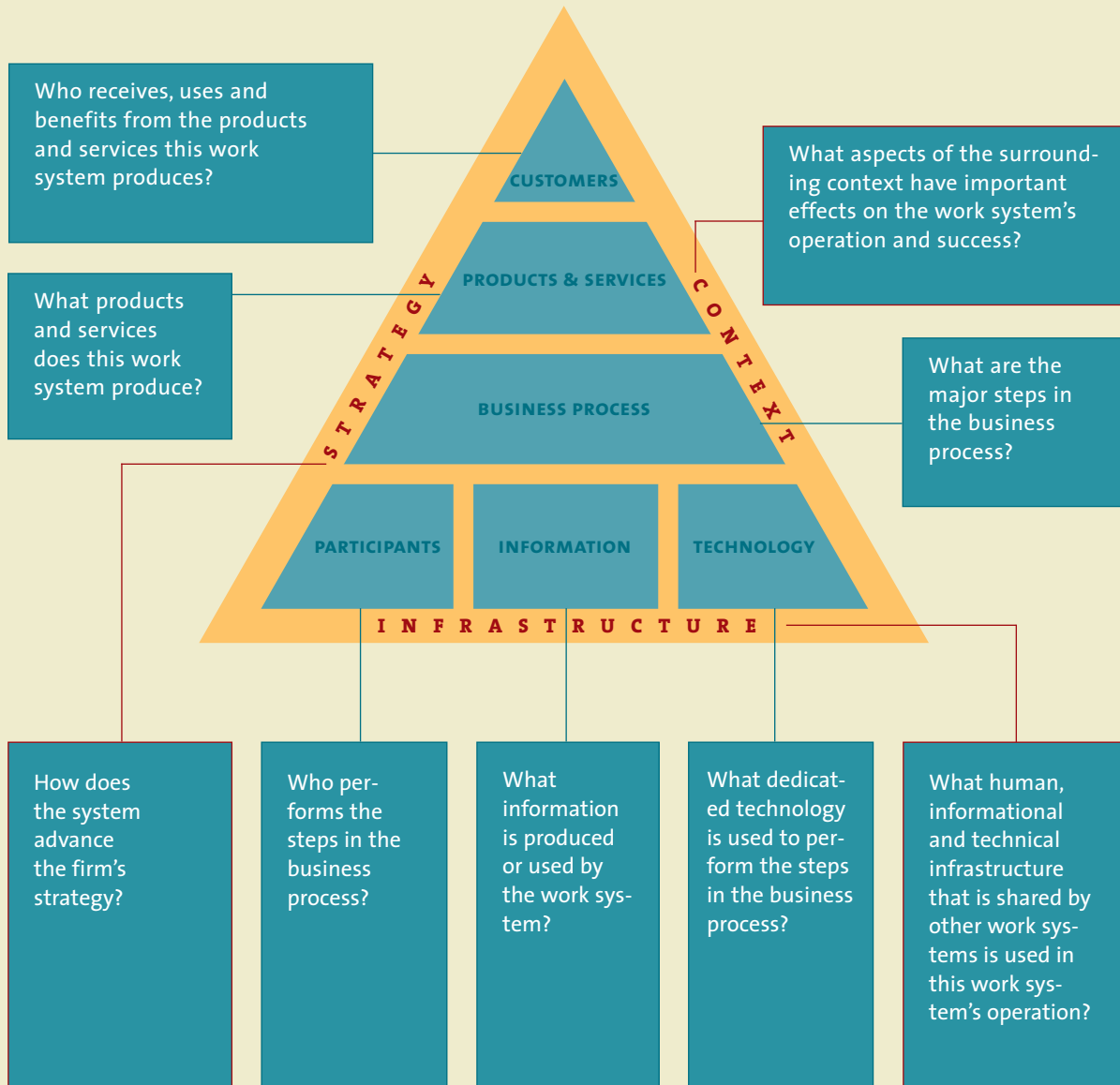
**PARTICIPANTS:** The people who perform work in the business process. Some participants require little or no access to information technology. In self-service processes (such as withdrawing money

from an ATM or buying an airline ticket over the Internet, for example), the customers are also participants.

**INFORMATION:** The data used by participants to perform their work. Not all information needs to be computerized.

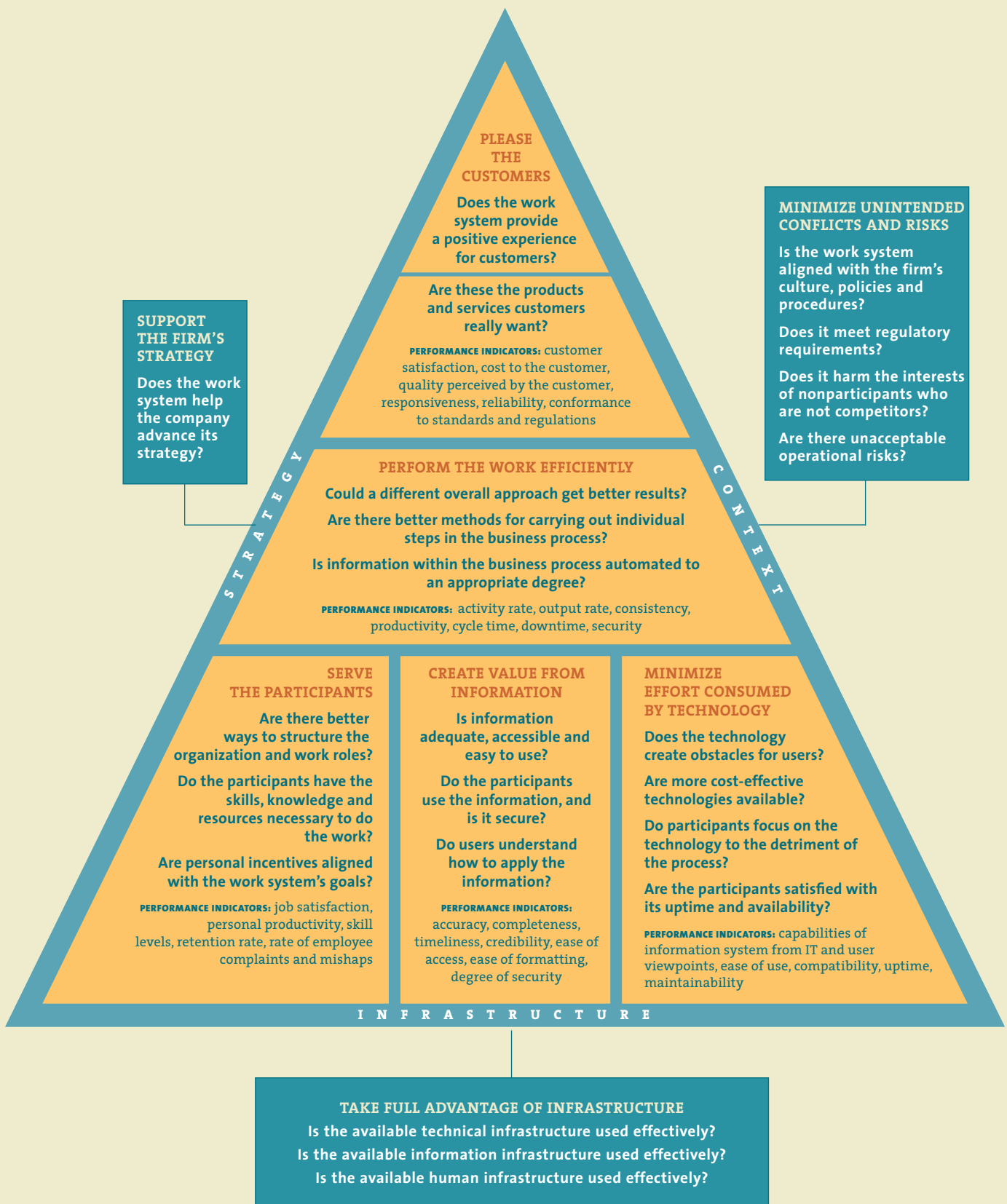
**TECHNOLOGY:** The hardware, software, and other tools and equipment used only by participants in this system to perform their work. Technology is not limited to information technology.

**ENVIRONMENT:** The outside factors that influence or support the work system. This includes the firm's **STRATEGY** for achieving its business goals; the organizational, cultural, competitive and regulatory **CONTEXT** in which the business exists; and shared **INFRASTRUCTURE**, such as support and training staff, and technical resources such as networks and databases.



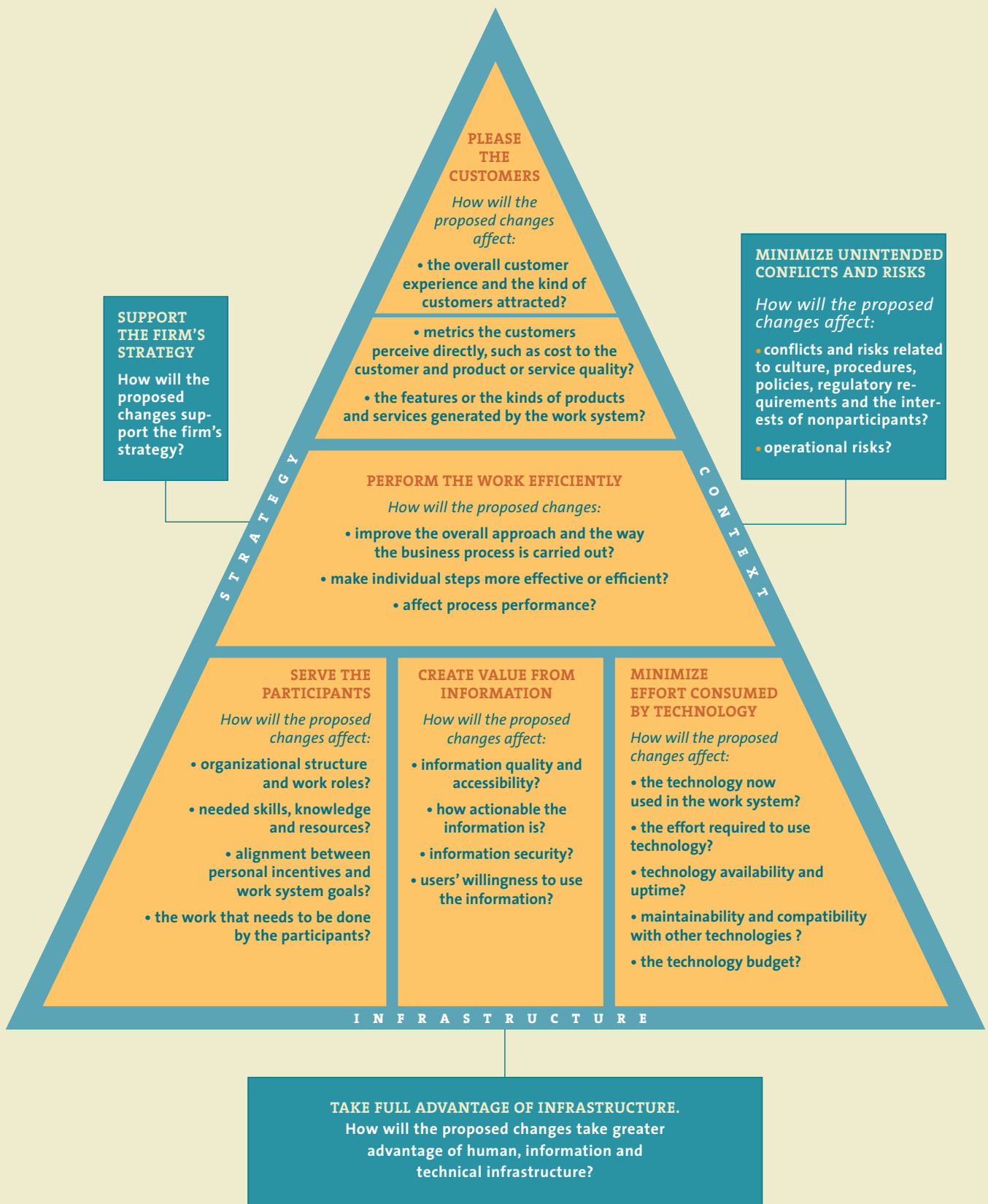
## 1. CREATE A SNAPSHOT OF THE WORK SYSTEM

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## 2. FIND PROBLEMS AND OPPORTUNITIES FOR IMPROVEMENT

Use the questions above, which are organized into eight general work system goals such as “Please the Customers” and “Support the Firm’s Strategy,” to explore problems in the work system and find opportunities to improve it. Look for imbalances and misalignments between different elements: For example, do the customers really want the products and services? Can the participants perform the business process? The performance indicators shown can help evaluate the current process and spur thinking about possibilities for improvement.



### 3. EXPLORE EFFECTS OF PROPOSED SYSTEM CHANGES

After the IT team develops an initial plan, collaborate to answer the above questions. These questions help IT and business explore the positive and negative effects of the proposed information system and work system changes, especially as the effects propagate across the work system or even touch other work systems. Be sure to look for imbalances and misalignments between different elements that may be caused by the proposed changes.