

CASE STUDY

Collaboration: The New New Thing and This Decade's Hottest Skill



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Some technical communication gurus would have it that the profession's history goes back as far as Leonardo da Vinci's descriptions of his inventions; some would go back even farther, perhaps to the brief technical specifications for the ark in Genesis. Be that as it may, most of us can agree that collaborative writing processes are becoming more important in technical communication and this trend has emerged fairly recently. Cross-functional teams are still a new idea in some environments. Cooperative writing—the practice of distributing chapters in a single book among multiple writers—is something many teams attempt but few do well. And now we have single sourcing staring us straight in our collective faces, upping the ante on collaboration in some teams to a point where the process of writing is more complex than even the most technical content.

The demand for collaborative writing is not likely to go away any time soon. Expert collaboration skills, that is to say human communication skills, will increase in significance for technical communicators. But just what are those collaboration skills? What can developing stronger collaboration skills do for you and your team? And how can you tell when you're collaborating—or not?

True collaboration is co-creation of a shared work product. True collaborators can create a better quality product because decisions are reached in an egalitarian manner using the best the entire team has to offer. Collaboration is fostered by a dialogic mindset (see the box on page 106) and is supported by a set of facilitative interpersonal skills. That is to say, good collaborators have many of the same skills as good mediators and facilitators.

You may have had the experience of joining a team that is supposedly collaborating,

and you sensed something didn't fit or didn't make sense when the team's methods and modes of interacting were measured against your understanding of collaboration. So it makes sense at this time to say what collaboration is not. Collaboration is not:

- ◆ Networking: people with common interests informally exchanging information
- ◆ Coordination: people with a common mission and formal relationships working independently to meet a common goal
- ◆ Cooperation: people working together toward a common goal without any clearly defined mission, structure, or planning effort
- ◆ Competition: people acting as rivals, competing simultaneously for the same set of limited resources

Perhaps you see some of your collaborative work experiences defined in the terms above.

FOUNDATIONAL UNDERSTANDINGS

Kikuyu Saying: When elephants fight, it is the grass that suffers.

Collaborators can identify and respond appropriately to their team members' communication, learning, and conflict styles.

Good collaborators know their own styles and can flex those styles appropriately for the benefit of the collaborative process.

Communication Styles

Communication style is not something many of us identify objectively. It can be very subtle, and we can perceive it primarily as “clicking” with another person—or not. Communication style may be best described by a range of continua, including

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THE DIALOGIC MINDSET

A dialogue is an exchange of information or ideas. It does not imply prejudging or advocating. Rather, it implies inquiry based on mutual respect and true curiosity. People with a dialogic mindset approach people, problems, and the world with a sense of not knowing and eagerness to explore. A dialogic mindset is characterized by a predisposition to engage in an exchange of information or ideas for the sake of the exploration.

In western cultures, the norm in verbal exchanges is an advocacy model wherein ideas are contested to prove their merits. The model's underlying principle is evaluative. The most common example of advocacy is our court system, but a similar approach is used in most environments when you must choose among potential solutions to a problem.

The dialogic mindset naturally prefers an inquiry model that focuses on exploring and understanding. Its underlying value is curiosity. There are few good examples of this model in the dominant culture, though that is likely to change over time because this model is being explored in a number of contexts including community-building and peacemaking groups, which are struggling with defining and addressing some of the most difficult problems before our society. Some readers may have experienced this approach to problem solving if they have participated in discussions with a skilled facilitator whose mission was to assure the quality of the communication process rather than advocate for any particular outcome.

- ◆ Direct versus indirect
- ◆ Boundary differences regarding private versus public information
- ◆ Boundary differences regarding the amount and type of touch
- ◆ Use of pauses during verbal exchanges
- ◆ Intensity and use of body language
- ◆ Use of physical space
- ◆ Tone of voice

Many of these style differences are cultural, but all tend to be learned in childhood. And while communication style can be elevated to the level of a conscious skill—image consultants do this for public figures all the time—modifying your individual communication style takes time and attention. For many people, their communication style is so much a part of who they are that even considering modifying their style seems like an abnegation of their essential self. However, the ability to flex your style to assure that your message is received as you intended is extremely powerful.

Learning Styles

To collaborate well over the course of a career and sometimes over the course of a project, stepping into another team member's dominant style is helpful to communicate new information effectively to that team member. The instructional design and educational psychology communities have developed an array of models to help us understand learning styles. One model includes the following styles:

- ◆ Active learners, who learn best by doing
- ◆ Sequential learners, who learn best by stepwise inquiry
- ◆ Sensing learners, who like to learn disparate facts and established methods
- ◆ Visual learners, who learn best by looking
- ◆ Reflective learners, who need time to think through or process new information

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- ◆ Intuitive learners, who prefer to learn through exploration and discovery

- ◆ Verbal learners, who need to talk through new information and understandings
- ◆ Global learners, who seem to learn by leaping to conclusions, which is typical of gifted learners

In this model, learners are evaluated as having a combination and range of styles, from most to least dominant or preferred.

The Learning Style Inventory and Interpretation self-scoring workbook developed by David Kolb (McBer & Company 1985) encourages participants to focus on pairing themselves with learners who are diagonally opposed to their own style. This strategy stretches the individual's learning style comfort zone and helps each become a more expert learner. There's wisdom in this strategy for would-be expert collaborators.

Conflict Styles

As with learning styles, there are a number of conflict styles available. One basic set that seems to work well for conflict managers includes the following styles:

- ◆ Competing, in which a win/lose paradigm is operative
- ◆ Accommodating, which dictates letting the other person win to end the confrontation
- ◆ Avoiding, in which the conflict is not acknowledged
- ◆ Compromising, in which you exchange concessions to end a crisis
- ◆ Collaborating, in which you engage in a dialogue to develop greater understanding and a long-lasting resolution

Identifying your own and your team members' dominant conflict styles can help minimize needless escalation of a conflict. Some styles work better under some circumstances. Identifying conflict styles also helps the two (or more) of you identify what kind of conflict style may be best applied in the current situation.

THE MECHANICS OF COLLABORATION

In addition to knowing and working with people with a wide variety of communication,

learning, and conflict styles, other thinking and interpersonal skills help collaborators be more effective on teams. Those skills include

- ◆ Self-reflection
- ◆ Listening
- ◆ Trust building
- ◆ Identifying and evaluating assumptions
- ◆ Distinguishing issues, interests, and positions when problem solving or negotiating
- ◆ Emotional awareness
- ◆ Processing multiple perspectives
- ◆ Managing defensiveness
- ◆ Applying inquiry and advocacy appropriately
- ◆ Decision-making mechanics
- ◆ Online communication proficiency

Self-reflection is the ability to step out of your experience and view your actions, attitudes, and conclusions objectively. Some writers in the field of conflict resolution call this ability seeing the third story.

To be self-reflective, excellent listening skills are imperative. Excellent listening skills include using many of the same skills taught to usability engi-

neers for field research based on a contextual inquiry model: ask broad, open-ended questions based on true curiosity; be quiet and listen non-judgmentally; follow up for clarification as appropriate to the inquiry process. Active listening, which has been popular for decades and is characterized by validating, rephrasing, and echoing the speaker's perceived meaning, does not work well in some contexts. Some people associate this method with psychotherapy, which implies a doctor/patient or power differential relationship. Some of these people take exception to active listening because of the association it holds for them.

Strong listening skills make the trust building process far easier. Keys to trust building are a perceived history of

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- ◆ Integrity
- ◆ Reliability
- ◆ Responsiveness
- ◆ Empathy

There is no substitute in the trust-building process for these four cornerstones. Though establishing all of these qualities may seem to take time, there are techniques to establish them more quickly. Sharing credentials and references at the outset of a project is one of these techniques.

Trust can easily be broken by the kind of flare-ups among team members that come from making assumptions about others and their behavior. These assumptions often tend to be negative and impugn the motives of the other person. And all too often, we do not check out these assumptions. Lack of self-reflection, which implies self-awareness, is often at the bottom of these assumptions. You must first be aware that you are making an assumption before you know to check out the assumption's validity. Peter Senge provides an elegant description of how assumptions are made and what their positive value is in human interaction. His Ladder of Inference is described in detail in *The Fifth Discipline Fieldbook* (Currency/Doubleday 1994) and may be summarized as follows:

“Managing your own assumption-making process or resolving conflicts that arise when you have not done so requires a great deal of creative thinking.”

- ◆ We observe data and have experiences.
- ◆ We select data from what we observe.
- ◆ We add meanings, both cultural and personal.
- ◆ We make assumptions based on those meanings.
- ◆ We draw conclusions based on our assumptions.
- ◆ We adopt beliefs based on our conclusions.
- ◆ We take actions based on our beliefs.

Obviously in our fast-paced, data-rich world, we need assumptions. Assumptions help us make vital decisions quickly. These assumptions are particularly helpful in life and death situations where our fight-or-flight response protects us appropriately. The trouble occurs because we frequently forget that today, given a somewhat more civil society and more security in general, we typically have the latitude to check out our assumptions. We also forget that negative assumptions about our colleagues, companions, and collaborators are generally proven wrong once all the data is in.

Given that the assumption-making process is pretty much hardwired in our brains, we find ourselves in unnecessary conflicts because of miscommunication. In fact, miscommunication is one of the most common causes of

COLLABORATIVE TECHNOLOGIES REQUIRE SKILLED COLLABORATORS

Over a year ago, the Software Association of Oregon staged a special networked online conferencing presentation. Consultants of every stripe were present. Upper managers from the largest and smallest high-tech firms in the area bellied up to the hot hors d'oeuvres, and everyone settled in to receive the wisdom of the online conferencing gurus. And here it was. While the sound faded in and out and the audience tried to figure out which screen to focus on when, one theme predominated: No, the technology is not quite there yet. But more urgent than that, the workforce is not prepared with adequate collaboration and communication skills to use the tools once they are perfected. Without a skilled person, collaboration tools—and collaborative work processes—cannot work.

Collaboration is so simple it's difficult. People first, or the technology and methodology are pointless.

conflict. Expert collaborators develop skills that help them distinguish interests, issues, and positions when trying to problem-solve in a conflict or negotiation. Maintaining relationships over time is the highest value in a collaborative environment. Expert collaborators focus on achieving common interests when problem solving, flushing out each person's issues, and being wary of taking up a position that unnecessarily narrows the field of possible mutually satisfactory solutions. Managing your own assumption-making process or resolving conflicts that arise when you have not done so requires a great deal of creative thinking.

When threatened by the negative assumptions of a colleague, our emotional state engages our fight-or-flight response, diminishing our ability to think creatively and objectively. Therefore, the expert collaborator is also aware of the impact and import of both her and her colleague's emotional state. To resolve a misunderstanding, achieve a common understanding of an issue, or make a lasting decision, all participants' creative thinking faculties are required. Good collaborators know that identifying distracting emotional states and addressing them effectively are part of maintaining the collaborative relationship for the greater good and the co-creative process.

The skills of processing multiple perspectives and managing defensiveness are also founded on the basic skills of self-reflection and listening. Both skills can initially be taught procedurally, focusing on the nature of inquiry versus the nature of advocacy (see the box on page 116). Advocacy is more familiar to us in western cultures than inquiry is, just as competition is more familiar than collaboration. Advocacy is often over-used to the detriment of all parties, negating non-dominant perspectives that may have value in the co-creation process and increasing the incidence of defensiveness, which reduces the dialogue to a debate.

The basic mechanics of decision-making, including various forms of voting and consensus, are tools that collaborators use to cement a decision-making process that they know takes place over time. Though many people perceive

that a decision is made at a single point in time, collaborators engaged in true co-creation see themselves engaged in what is a dialogic process that contains the project they are collaborating on. They know that decisions of any complexity in the process are typically the result of a network of smaller understandings and agreements that lead up to the decision that is made using a technique such as voting.

Many teams require online collaboration skills as well. And because online communication lacks as much as 60 percent of the content available in face-to-face communication, online collaboration is an additional skill set to overlay those I have already discussed.

THE NEW SUPER-COLLABORATOR

We ask a lot of our teams when we ask them to work on collaborative projects these days. The software-based collaboration tools available to them are rudimentary in comparison to what is really needed. And for most of their working lives, these workers have been encouraged or indulged in what is a fairly common preference to work independently. Previously, technical communicators could resolve style differences by dividing up a project according to deliverables: one or more deliverables to one writer. "This is my book!" has been the last cry of the besieged technical communicator on many projects. Their "book" was their sanctum, that place where no perplexing or difficult colleague could trespass, that place where they could lay claim to territory, draw lines in the sand, and take that final, sacred position.

One writer/one book is becoming less and less of an option. Managers will have to both manage and hire differently as collaboration among technical communicators becomes more and more key to getting information to customers. And a previously neglected skill set will come to the forefront for a generation of writers on the cusp of a work style revolution that will delight some and dizzy and dismay others.

It is wise not to underestimate the scope of the task of facilitating the conversion of this workforce. By comparison, the technical challenges of database publishing and learning-management systems are paltry. □

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