

# Best Practices in Collaborative Document Development

# Collaborative Document Development

Text is often the main output of many teams however effective collaborative authoring requires an understanding of:

- o The **stages** in collaborative document development
- o The different collaborative authoring **styles**
- o Effective approaches for document **review**
- o Which “**channels**”, **technologies**, **tools** and **techniques** are appropriate for which activities (covered in previous section)
- o How to recognise and avoid some of the potential **difficulties** including “**Information Overload**”
- o How to **plan** a collaborative document production

# 3 Stages in Collaborative Writing

## \* **The Invention Stage**

Preliminary discussions of ideas, approaches and information typically using strategies such as Note Sharing, Brainstorming and Preliminary Debating.

## \* **The Drafting Stage**

The critical aspects in this stage are:

- the effective division of labour
- the choice of collaborative authoring style

## \* **The Revision Stage**

After the draft has been completed the group has to revise the paper into its final form. Here the design of the Document Review Process is particularly critical.

(based on educational research e.g. Margaret Fleming "Getting Out of the Writing Vacuum")

## 3 Collaborative Authoring Styles

### \* **Sequential**

Output is passed from one person to another.

### \* **Parallel**

The Work is divided so that collaborators work on different parts of the document at the same time.

### \* **Reciprocal**

People work on the same document at the same time and they adjust their activities to take into account one another's input.

(e.g. see "Mastering Virtual Teams")

## 2 Document Review Approaches

### \* Star Routing

The draft document goes to all members of the group at the same time. Each makes their comments separately

Pro: Fast and people not overly influenced by other peoples comments

Con: Can be a bigger editing job to consolidate and incorporate all the individual comments

### \* Ring Routing

There is an agreed order that the document be passed from one member to the next. Each opens the file and adds their comments (in the body or as a separate section) and posts to the next person

Pro: Good sense of team consensus at the end - the review process feels collaborative

Con: Slow and people may start to comment more on the comments that the document

Note both approaches can be implemented either through email or a collaborative working platform. The latter approach is much easier.

(ref: Jan Houseman, University of Ottawa)

# Preventing Information Overload (1)

A problem that can occur in on-line collaborative authoring is **information overload**, that is, a situation when the quantity of the information to be mentally processed is overwhelming. There are two components to information overload: 1) there are too many communications presented to the user by too many people; and/or 2) new messages are not always sufficiently well organized to enable the user to see the relationship to previous messages. The user response to both of these conditions might involve them in:

- failing to respond to certain inputs
- responding less accurately than they would otherwise
- responding incorrectly
- storing communications and then responding to them as time permits
- systematically ignoring (or filtering) some features of input
- recording the information in a more compact or effective form
- quitting (in extreme cases)

The above conditions are less likely to occur when you participate frequently in online discussions and tasks, and most likely to occur if you are absent from the online activities for several days and are then confronted by a large number of messages, files and other information resources to be read or responded to.

Source: Collaborative Technologies Institute, University of Texas

## Preventing Information Overload (2)

The following processes and tools have been identified to help prevent information overload:

### **Processes**

- length limitations - team members agree that information should be presented in single-screen size pieces. Long inputs of more than a screen are discouraged (and in practice often ignored unless a good reason is offered for a longer presentation)
- advance organizers - alert other users to the length and type of information in the first line of response
- team leader presents a list of items to be addressed in introductory greeting.
- each item or task is managed by one person - this shares the work of managing the conference as a whole
- use different conferences for different purposes

### **Tools**

- giving each item a title to reflect the content
- searching for key words or phrases and only read items/responses where those words appear
- moving backward through the communications

# Collaborative Document "Cells"

<b>Collaborative Document Cell Structure</b>			
Objective	Overall Document	Devel Stage	Output Docs
Collab Channel	Collab Tool	Collab Style	Review Process
Input Docs	Ref Docs	Formats	Standards
Doc Owner	Involves	Coach	Other





























Break down the document into its activities

Create a "cell" to define best collaboration approach for each critical activity

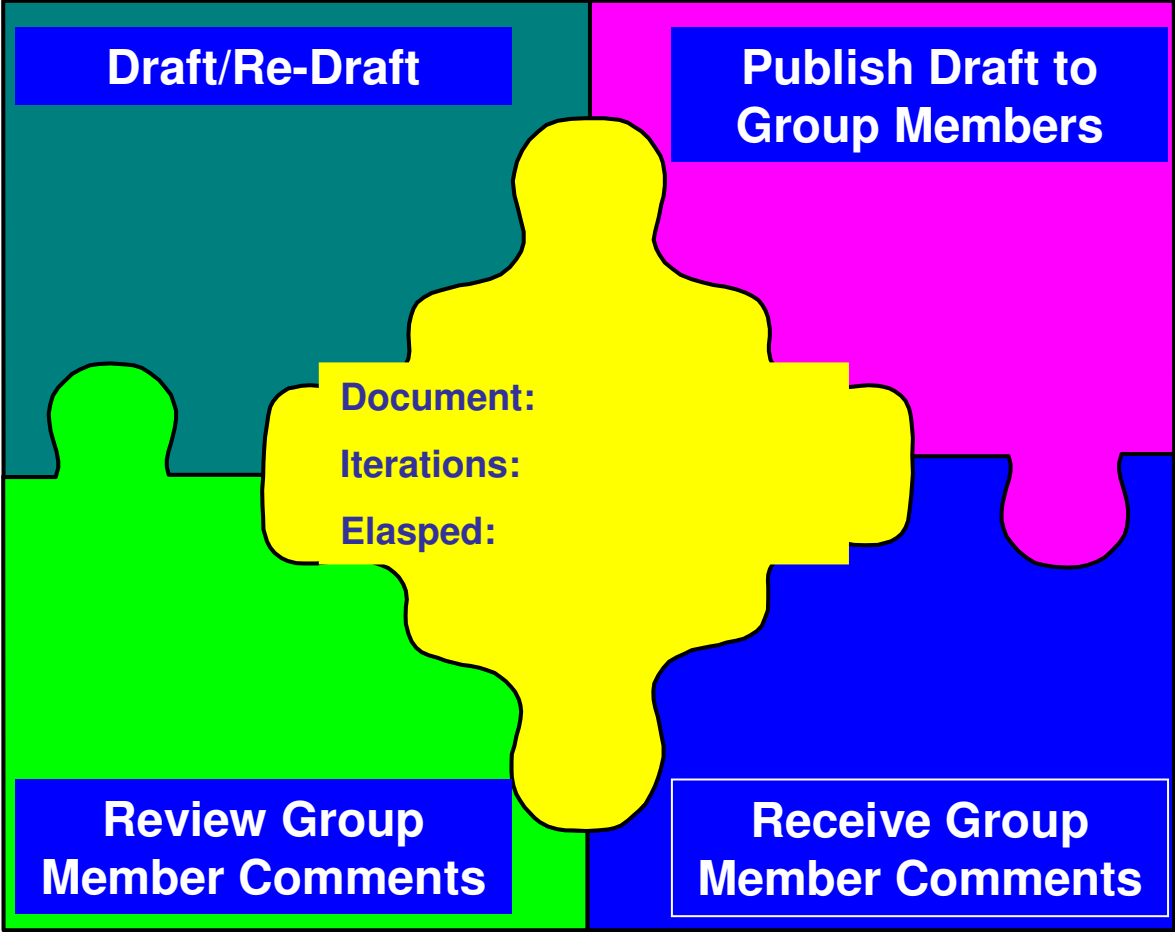
See over for example



# COLLABORATIVE DOCUMENT DEVELOPMENT: BUSINESS PROPOSAL EXAMPLE

Activity	Outputs	Channel	Tool	Review	Ref Docs	Owns	Coach	Involves
1 Summarise RFQ	Summary	Post		Author Drafts	Batch On-Line	RFQ		X
2 Prepare a SWOT Analysis	SWOT Table/Bid/No Bid	F2F/OD 		Team Workshop				X
3 Bid Strategy Document	Bid Strategy	Post		Author Drafts	Batch On-Line			
4 Bid Schedule	Bid Schedule	Post		Author Drafts	Batch On-Line			
5 Bid planning Session	Revised Strat & Sched	F2F/CC		Team Discussion	Update Docs			X
6 Structure the Bid	Contents Page & Resps	Post+CC 		Author Drafts	Discussion			X
7 Create a Bid Template	Bid Template	Post		Author Drafts	Batch On-Line	Prop Template		
8 Develop Executive Summary	Document Section	Post		Author Drafts	Batch On-Line			
9 Develop Section 1	Document Section	Post		Author Drafts	Batch On-Line			
10 Develop Section 2	Document Section	Post		Author Drafts	Batch On-Line			
11 Develop Section 3	Document Section	Post		Author Drafts	Batch On-Line			
12 Develop Section 4	Document Section	Post		Author Drafts	Batch On-Line			
13 Develop Credentials	Document Section	Post		Author Drafts	Batch On-Line	Std Creds.		
14 Develop Appendices	Document Section	Post		Author Drafts	Batch On-Line	CV Template		
15 Merge the Individual Sections	Consolidated Document	Post		Author Drafts	Batch On-Line			
16 Identify Review Roles	Agreed Review Roles	F2F/CC 		Team Discussion	Batch On-Line			X
17 Collective Review Entire Bid	Agreed Changes	F2F/CC 		Role Discussion	Update Docs			
18 Make Changes to Document	Final Document Master	Post		Author Drafts	Batch On-Line			
19 Sign-offs on Document	Sign-offs	F2F/CC 		Role Discussion	Update Docs			X
20 Final Copies Prodn	Final Document Copies	=====	=====	=====	=====			
			F2F = Face-to-Face					
			CC = Conference Call					
			Post = Post Doc on Team Site					
			OD = On-llne Discussion/Chat					

Simplified Cell for developing any document collaboratively



# Simplified Generic Process for developing any document collaboratively

