Breaking the Mold in Developing Training Courses on Collaboration

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Introduction

Although major progress has been made in recent years to inculcate more collaborative work practices into the daily routines of analysts, collectors, and operators, a common complaint has been the lack of robust community-wide training programs. Several organizations in the Intelligence Community and the military have developed and are teaching courses on collaboration, but the demand far exceeds supply. Efforts to develop effective training programs focusing on collaboration, however, face several unique challenges.

- Most training courses are developed and taught by established school houses and tailored to the needs of their particular organization. This stove-pipe approach to training, however, runs directly counter to the ideal that any course on collaboration include officers from a broad range of agencies and commands. Some agencies invite officers from other organizations to attend their courses, but this is not the same as creating a truly community-based course. School house principals would also have difficulty justifying a course in which most of the students would come from outside the home organizations.

- The press of daily business makes it difficult for managers to release their analysts, operators, and collectors for several days to take a course on collaboration. A key assumption is that critical work is not being done at the office when officers are busy taking courses. Analysts are disincentivized because they know the longer the course, the harder it will be for them to catch up when they return to work.

- Generic courses on collaboration run the risk of trying to be "all things for all people." As a result, specific student needs are not well addressed. Recent hires, for example, have much different needs than established analysts and senior executives face different challenges than first line supervisors. Putting both in the same course simply increases everyone's level of frustration.

This paper attempts to address these challenges by proposing a different approach to collaboration training that is based on a simple concept: "Train as you should work." For example, officers should not just hear about the value of establishing interagency networks, they should be building them as part of the course. Instead of talking about the need for metrics, class time should be focused on developing a set of metrics that works for their particular problem. And class exercises should be based on issues students are currently working on, not on historical case studies.

Collaboration Training as a Joint Experience

Training on collaboration should focus less on explaining the values of collaboration and more on helping officers build collaborative teams and utilize collaboration tools more effectively. Workshops should be populated by *teams* of analysts from different agencies who work the same issue and need to share their insights and pool their data. Officers would be encouraged to nominate themselves *as a team* to attend a workshop and to bring a specific issue or problem to the course that they would like to work on together.

Train as Teams on Current Issues. The first principle of developing an effective training program is to populate the course with officers who share the same challenge. Students who want to reach across organizational boundaries and collaborate on a given project should identify their "interagency team." The team should agree to take the training together. Engaging the whole team in the training process generates several benefits:

- Students can leverage the training opportunity to build a team that has met face-to-face, knows each others' strengths and weaknesses, and has developed mutual trust.

- By focusing on a particular issue of common concern, students are no longer "away at training" but doing real work.

- Joint training also gives participants valuable time together to discover if they share the same assumptions, use the same definitions, and are working from the same evidence. Even more important, the team will be operating in an environment where they can quickly identify points of disagreement and explore the reasons why.

Build a Common Framework. In a joint training environment, students can develop a common understanding of what constitutes effective collaboration and apply this new-found knowledge to their particular problem. The workshop would draw on many of the concepts and ideas outlined in other articles in this White Paper. The workshop needs to engage students in short exercises that help establish:

- A common lexicon for talking about collaboration.[i]

- The rationale behind several core principles including the responsibility to share, the concept of empowerment, and the requirement that users—not the IT provider—own the environment.

- The critical need to ensure that all collaborative networks are built on a foundation characterized by as mutual trust, mutual benefit, mission criticality, proper incentives, established metrics, easy access, and agile systems.[ii]

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Tailor the Message. Collaboration training should be keyed to at least four distinct audiences: New hires, officers with at least three years on the job, first-line supervisors, and senior executives.

- For new officers, training would focus on developing the necessary skills to exploit existing (or soon to be created) collaborative tools and environments. For example, intelligence officers would be taught how to add themselves to various registries (such as the Intelligence Community's Analytic Resources Catalogue (ARC); access and exploit Intelink, Intellipedia, and A-Space; create wikis and blogs; and use social discovery tools.

- For journeyman officers, the focus would shift to developing strategies to break down cultural and organizational barriers to collaboration. Analysts would learn more about collection and collection systems; collectors would gain a better understanding of how analysis is produced for disparate consumers (in hard copy and virtually) and how analysts can help them identify targets and establish collection priorities; and operators would become more aware of the constraints under which analysts and collectors function.

- First-line supervisors need direct exposure to their counterparts across the community, the challenges their colleagues face, and the tools that would work best to facilitate collaboration. Their training would devote more time to cross-cultural awareness and how to leverage expertise that resides outside their work units.

- Senior executives need opportunities to pool their experiences as they explore how to create joint databases and build more robust bridges across the community. Most important, attention would focus on how to transform a culture where managers control what their units produce to a much different culture where the primary function of managers is to orchestrate and facilitate high quality, joint production.

Advantages to the Joint Training Approach

Adopting a joint workshop approach to collaboration training will generate some major benefits both within the traditional stovepipes and across the entire community.

Building Teams. The first step in most collaborative projects is organizing a face-to-face meeting that allows the team members to interact personally and build trusting relationships across organizations. This can be accomplished most efficiently by having a new team sign up for the same workshop and take the same course together. Not only does this provide the opportunity for several days of personal interaction, but the team members can actually leverage the experience to get started on their new project. If there are no classification or confidentiality issues with the project, class exercises can be organized in a way that the team members use their project as a case study during the course.

Building Networks. The classroom environment offers a superb opportunity for all participants to make new contacts and significantly expand their networks into several other organizations. Even if the student does not have professional reasons to interact with classmates who are not working on his or her particular topic, that classmate can help the student connect with the appropriate person in their organization after both return to work. Some courses organize special alumni events involving all the students who have taken a particular class in a given year. Such events give the students a chance not only to catch up with their classmates but also to connect with students who had taken the same class at a different time, further expanding their network.

Developing Realistic Incentives and Metrics. Courses can be used as test beds for developing realistic systems of incentives. For example, students could be tasked in a workshop exercise to answer the question: What incentives would best motivate you to work collaboratively to complete this task? A list of effective incentives could be developed that harvested the best ideas that emerge each time the course is taught.[iii] A similar approach could be taken for developing metrics of successful collaboration. Each team in the workshop would be asked to come up with a set of metrics that could be used to measure their future success in bringing their project to completion. Again, lists could be made of the most creative and useful ideas. These lists could then be shared with staff officers who are charged with developing metrics and incentive structures for collaborative behavior.

Generating Collection Strategies. The presence of students from multiple agencies—and most likely several key collection agencies—in the same workshop provides an unparalleled opportunity for students to brainstorm multi-INT collection strategies. Collectors can share insights on the strengths and weaknesses of their collection systems and apply that knowledge to the various projects teams are working on in the class. As the days in class unfolded and students became familiar with each others' projects, the opportunities for conceptualizing more innovative and more synergistic collection strategies would increase.

Improving Product Quality. Another benefit of adopting a workshop approach with teams of officers representing multiple agencies is that such expertise can be tapped to improve the overall quality of the final product. Engaging such expertise at the beginning of a project is almost always more productive than asking them to comment on a finished product. The mindset shifts from a coordination perspective that seeks to protect other organization's equities to a collaborative approach that focuses on how the issue is framed and what are the most productive lines of enquiry.

Establishing a Common Lexicon. Last but not least, the workshop approach provides an ideal setting for establishing common definitions and a common lexicon across all organizations. Differences in how various organizations define terms can be surfaced and

differences in how they set priorities can be explained. Teams can also help each other explore key assumptions that underlie a team's analysis and its proposed strategies for moving forward.

Designing Course Curricula

All collaboration courses and workshops should include exercises that reinforce the importance of:

- Framing the issue correctly and defining the intelligence question precisely.

- Core principles that guide the behavior of all members of the community including the responsibility to provide, empowering all officers to participate, and ensuring a user-driven environment.

- The six imperatives that must be present for a collaborative effort to succeed: Mutual trust, mutual benefit, mission criticality, effective incentives, access and agility, and a common understanding of the rules of the road.

- Anticipating which obstacles are most likely to be encountered and a discussion of strategies to overcome them.

- Incentives structures that further empower and institutionalize the collaborative effort.

- Metrics to monitor progress and document success.

- A wrap-up session that focuses on how the students will apply what they have learned when they return to their offices.

In addition to the core precepts listed above, workshops for newly hired employees should include segments that:

- Sensitize students to the wide range of cultures manifested across all organizations and how this can benefit or impede community collaboration.

- Help analysts assess whether they are natural collaborators, by applying established personality profile tests, if available.

- Provide an overview of the collaborative tools and techniques available in their work areas and where to go for help in using these tools and techniques.

- Assist new officers in getting connected and building their personal social networks.

Workshops for established officers with at least three years' experience on the job should include segments that:

- Spur students to compare and contrast their organizational cultures and how these differences can enable or impede effective collaboration.

- Force a critical appraisal of what traps the students have encountered that make it hard to work collaboratively.

- Allow students to share best practices that demonstrate a higher quality final product as a result of collaboration.

Courses designed for first-line supervisors who face unique challenges should emphasize problem-solving. Key segments to include are:

- Exercises that illustrate the high potential for miscommunication when interacting in virtual environments.

- The role of organizational cultures and how different cultures can view a problem differently.

- Where to find help.

- How to build effective incentive systems.

- How to adjust their personal management styles to encourage more effective collaboration within their units and better connect their officers to colleagues in other organizations.

Senior executives usually can devote little time to training. This makes it all the more important to focus on several key themes:

- The core principles and six imperatives for effective collaboration.

- The most common obstacles to collaboration and strategies to overcome them.

- The importance of establishing effective incentives—and even consider disincentives if subordinate managers are acting more to impede than support collaboration.

- How to adjust personal management styles to encourage greater collaboration within their organizations and leverage cross-organizational networks.

Begin at the Top

While, over time, training in collaborative practices should be taking place at all levels, private industry has learned that when new training programs are needed to change an organization's work culture, the best strategy is to begin at the top and work down through the organization.

A top-down strategy has two major benefits. First, by beginning at the top, a strong signal goes out to the workforce that this training is important. If your boss is taking the course, it is hard to complain when it becomes your turn. More important, by starting at the top, senior executives have an opportunity to mold the content of the training and identify which areas require the most emphasis. In so doing, the senior executives are much more likely to "own" the message; they will also be in a much stronger position to reinforce the core concepts and help promote cultural change. Senior executive might even consider sponsoring a workshop on a theme contained in their organization's research plan or on an emerging area of concern that would benefit from a collaborative approach.

Another advantage of beginning the training at the senior executive level is that senior managers will have already established a network of contacts with colleagues in other agencies that might come in handy as their subordinates begin to reach out to those organizations. Senior managers may also turn out to be one of the harder audiences to educate.   Most senior executives are unfamiliar with, and disinclined to use, social networking and other collaborative tools and uncertain—if not openly critical—of their benefits. One creative idea for dealing with this problem is to assign senior officers with "reverse mentors." A "reverse mentor" is a younger officer who grew up in the world of wikis, blogs, RSS feeds, Twitter, and Facebook and can help a more senior officer to integrate such tools into his or her personal workspace, while explaining how such tools can enhance mission performance.

Meeting the Challenge

As the world shifts from a linear, hierarchical, and output-oriented mentality to a more dynamic, complex, flatter, and increasingly interdependent "ecosystem," the need to find connectiveness through social networking systems and use collaborative systems smartly is a growing imperative.   The way we structure our work processes is increasingly diverging from the world we live in. The danger is that if we don't adopt a more organic, connected, and collaborative work style, we will be increasingly surprised by emerging trends and daily events. Transforming how our day-to-day business is conducted will require our leaders to articulate a compelling story explaining why change is necessary, institute consistent policies across organizational boundaries, and provide the necessary human and technical support to get the job done.

[i] See Joan McIntyre's article, "A Framework for Thinking about Collaboration within the Intelligence Community" for a richer discussion of this topic.

[ii] The three core principles and six imperatives for effective collaboration are discussed in more detail in Randy Pherson and Joan McIntyre's article, "The Essence of Collaboration: The IC Experience." Thomas Rieger's article, "Barriers to Collaboration: Imbalanced Empowerment and Accountability" helps make the case for empowerment.

[iii] A good place to start begins with Kerry Buckley's "Checklist for Successful Collaboration."

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