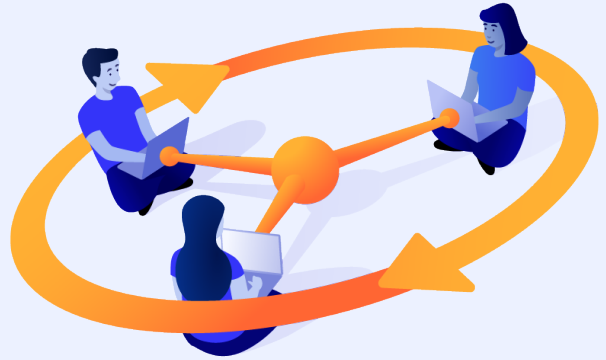


A complete guide to collaborative work management

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Contents

Introduction	1
Your guide to work management	1
Part one	
Everything you need to know about work management	2
What is collaborative work management (CWM)?	4
What is CWM software?	4
What should I look for when choosing CWM software?	5
Why is CWM different from other solutions?	6
Part two	
The benefits of CWM Software	7
Part three	
Challenges when implementing CWM software	9
Part four	
Taking a tool-agnostic approach	11
Summary	
Work management and your business	13



Introduction

Your guide to work management

Planning, organising, and managing the completion of a project; while ensuring that it delivers the expected results on time, on budget, and within scope is a challenge in itself. When you consider how to keep up with ever-evolving tech solutions and how to effectively manage a remote or hybrid workforce, it can feel as though the goalposts are constantly shifting. The question of how to coordinate teams – and teams of teams – is one that comes up regularly for many organisations. Without coordination, businesses will not be able to create effective, productive teams and have less chance of encouraging collaboration.

That's where work management comes in.

In this eBook, we'll help you gain a clear understanding of work management and how it can help you to provide a space for collaboration, manage a hybrid workforce, improve business processes and establish workflow, among many more benefits. We'll explore:

- The meaning of work management and collaborative work management (CWM)
- The differences between CWM and other solutions
- How CWM software can transform your team and strengthen your organisation
- Challenges you may face when implementing CWM software, including practical tips on successful adoption among your team
- The importance of a tool agnostic approach, including how it can benefit your business

If you're ready, let's dive in.



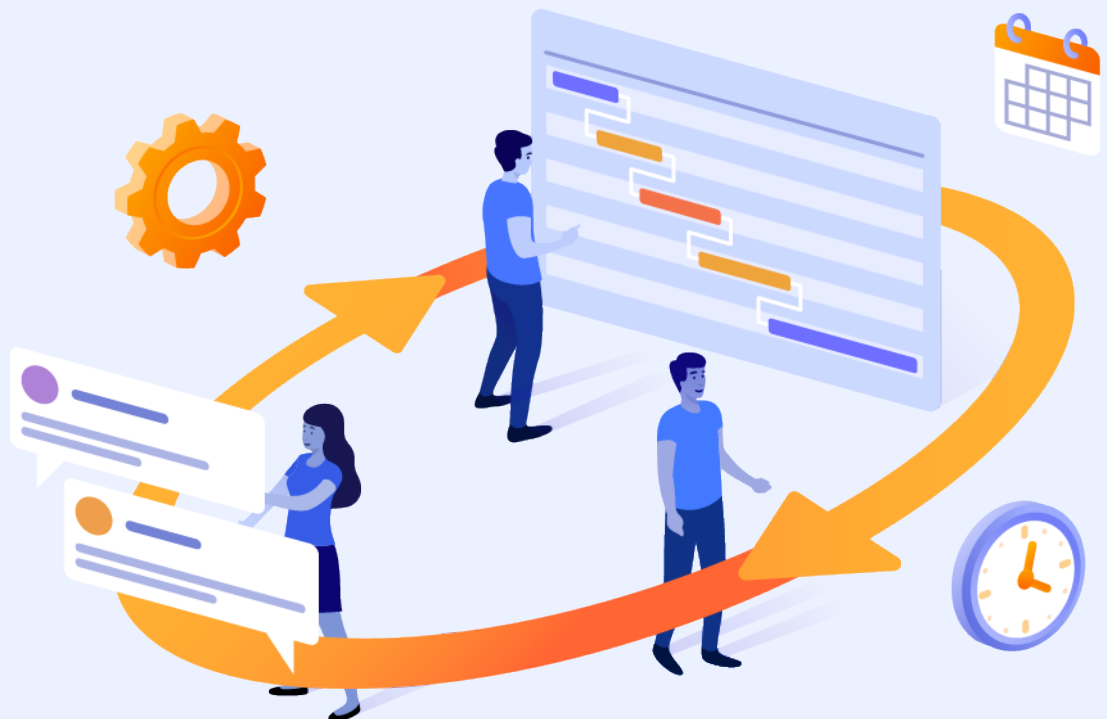
Part one:

Everything you need to know about work management

Success is not accidental, and successful teams do not become so without concerted effort. But there's a lot that goes into managing a team in today's working environment – so how do you keep everything coordinated?

Scattered business processes and a hybrid workforce are just a few of the obstacles decision makers and managers will face. Many organisations are realising the importance of tools and software to help manage the process.

Enter: work management.



Work management facilitates team workflows and creates procedures for employees to follow when completing projects and tasks. Work management software is a digital tool that enables planning, tracking, organising, and reviewing of project and non-project tasks to help you achieve the best business results. Work management software comprises different features, including:

- **Task management**

Assign team members with tasks and set priorities and deadlines.

- **Task automation**

Automate time-consuming and repetitive tasks (for example, automatic notifications for calendar updates and work status updates), and increase workflow productivity by freeing team members from spending valuable time on unimportant tasks.

- **Communication tools**

Encourage communication with different ways to comment on tasks or message boards.

- **File storing and sharing**

Access your files easily in one place and save valuable cloud storage space, including file storing and sharing.

- **Time tracking**

Track the time spent on a task or project with time clocks that monitor task progression. Additionally, with select work management tools and subscriptions, you will have access to time reports which enable you to further analyse where time is being spent.

- **Reporting**

Keep track of budgets, project statuses, milestones, and more with detailed and accurate reporting capabilities.

Collaboration is crucial for team success. With that in mind, it's not surprising that work management has naturally progressed and gravitated towards a collaboration-focused software.

What is collaborative work management (CWM)?

Collaborative work management (CWM) incorporates work management and project management tools, while supporting and encouraging real-time collaboration. The outcome? Next-level project orchestration and a more productive, innovative, and efficient team.

CWM is an evolution or extension of work management. It uses a combination of technologies and solutions to enable your team to communicate and collaborate more efficiently, while also providing a unified hub for project planning and execution. Thanks in part to the rise of remote and hybrid working after the COVID-19 pandemic, CWM is gaining traction with businesses. Remote workforces need to be managed effectively from anywhere, whether in the office or not. No matter where employees are based, CWM enables easy sharing of work documents and files, facilitates discussions, and manages workload through task management features.

What is CWM software?

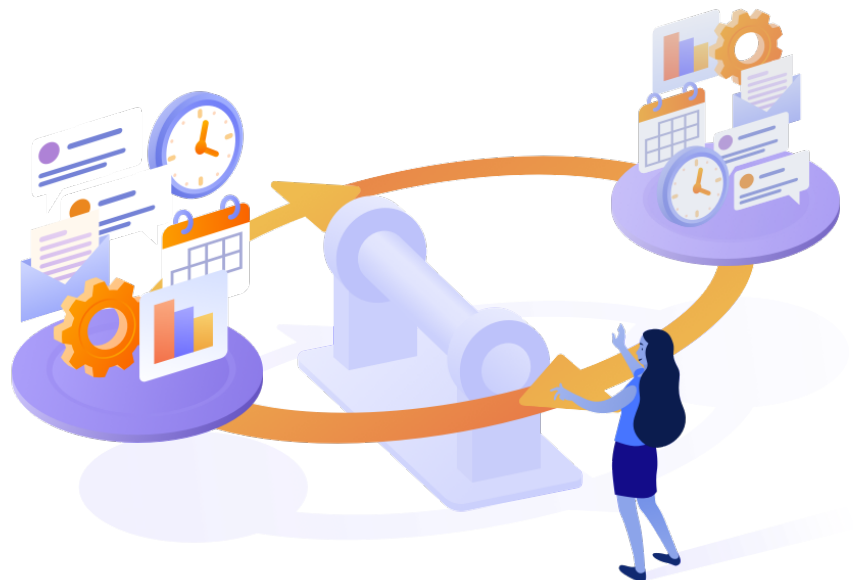
CWM software is a platform which gives your team access to a unified hub that allows them to conduct work-related discussions and access and share business documents, data, and information freely. Collaboration software can help with a large range of management tasks, such as accessing reporting dashboards and analytics, assigning responsibilities, creating timelines or measuring costs. It's also set up for team collaboration and is geared towards aiding clear communication, which is particularly useful when team members communicate remotely.

CWM tools can be accessed outside of the office, from anywhere in the world. So, if your team members are located in different areas, operate fully remotely or work in a mix of office and remote environments, CWM software can bridge the gap.

What should I look for when choosing CWM software?

Most collaboration softwares share common features, making it more difficult to commit to one tool. Although features differ, they all attempt to achieve the same outcome: to maximise team efficiency. Here are some of the key features to look out for when conducting your research:

- **File/document sharing** – collaboration software provides one place for all your project related files and documents. Using the platform, team members can easily share documents and access them from any device or location. Plus, you don't need to search through email threads to access documents.
- **Real-time data accessibility and reporting** – use the software to easily access interactive reports and dashboards. Plus, you can view this information across different projects.
- **Project planning and tracking** – use project planning and tracking features to monitor and manage team progress. For planning, you can use built-in templates to create project workflows. In tracking, you can distribute deadlines, timeframes, and task owners. Plus, you can set priorities depending on the urgency of the task.
- **Smart messaging** – collaboration tools use tag-based messaging and updates for easier, faster communications. Using the tool, teams can tag and update each other straight from the project, specific task, or announcement.
- **Integration** - ensure the software you choose integrates with your preferred tools, such as email and docs, to reduce tool and context-switching. Plus, the ability to add apps through an app marketplace can extend out-of-the-box functionality.



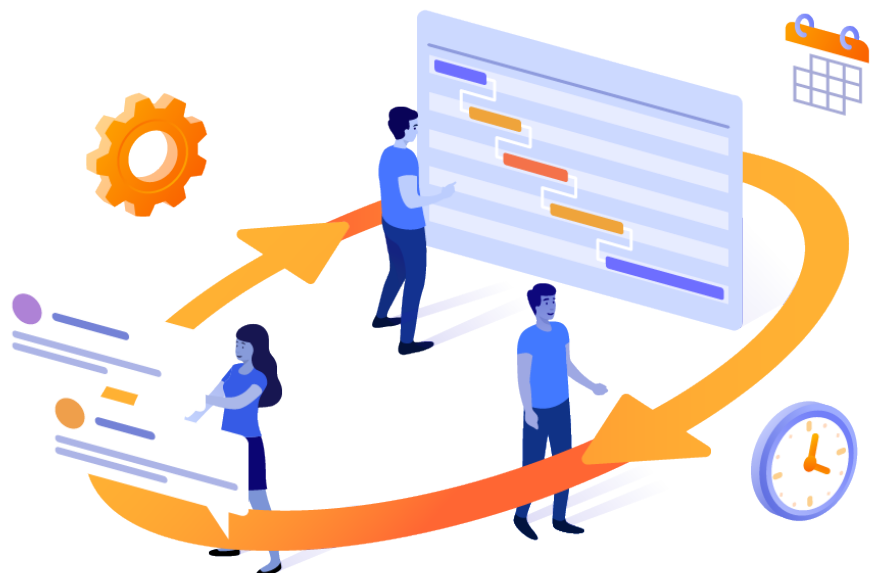
Why is CWM different from other solutions?

CWM is closely tied with project management and work management, so you may be wondering what, if any, differences there are between the three. While there are similarities between CWM, project management, and work management, CWM tools differ because they take a ground-up approach. They involve everyone in the decision-making process and are team-centric to incorporate self-management and independent working. This is the opposite of project management software, which is based on the traditional top-down approach whereby a project manager creates a plan and employees follow.

An important distinction to make is between work management and project management. Project management, as the name suggests, is restricted to managing projects, and does not encompass broader activities across an organisation. It is a narrow, deliverable-focused section of work management, which can be used to guide both internal and external work.

On the other hand, work management is a flexible system that can create an efficient workflow structure for every level in an organisation. It focuses on the organisation overall, including how teams collaborate. With effective work management, you can improve efficiency, capacity and quality, and streamline crucial business processes to achieve maximum profits or results.

Collaborative work management can be thought of as a further extension of project management and work management, or, alternatively, as an evolution of work management and project management.





Part two:

The benefits of CWM software

While the rise of CWM software may at least partly be the result of a need to manage a hybrid workforce, leveraging it in your organisation can have a far-reaching positive impact. Let's take a look at the potential impact of implementing CWM software:

A more productive and efficient team

With collaboration software, you can keep everything project related in one place. CWM software provides a single place to unify all company data, track goals and assignments, and send messages. When everything is located in one place, your team will save time that they would have otherwise spent sifting through confusing email threads and searching for documents. You can eliminate spreadsheet management and forgo unnecessary meetings when you monitor task progression through work status updates. Task automation features take care of repetitive and mundane tasks so your team can concentrate their time on more meaningful, productive work. All time-saving features combined enable your team to concentrate on more important tasks around problem-solving or decision-making.

Be location independent

CWM software is entirely cloud-based, meaning you can access it from anywhere. This answers a lot of remote or hybrid working challenges as team members can access resources and send messages at any time, wherever in the world they are based. You can use any device to access CWM software - smartphone, laptop, or desktop. CWM grants a certain level of freedom, and your teams will benefit from a greater amount of flexibility, autonomy, and self-direction.

Transparency through information sharing

With status updates, dashboards, notifications, and real-time visibility of activities, you get a clear picture of who's working on what and when. You can use charts to show project details, or you can choose a calendar view to show multiple projects. And with automatic updates, task and project stakeholders can be kept up-to-date. Mistakes are easily traceable, so you can prevent them from happening in the future. Activity timestamping means you get a clear picture of how long a task has taken, and user-tagging provides a quick way to view who owns what task.

It's accessible to all

CWM uses a ground-up approach. Instead of being targeted at managers, CWM platforms are team-centric and designed to be used by all. It is different from other platforms as other work management platforms are management-led from the top-down, whereby a leader will set the workload and the employees follow. But CWM is accessible to non-technical business users, easy to use, reliable and offers good integration with other software.

Reduced costs

One of the major strengths of CWM is that it enables efficient remote working. A side effect of remote working is that businesses can save money on overheads and office space. When used alongside video conferencing tools that enable meetings to take place from anywhere, you can reduce business travel and its associated expenses, too. Additionally, CWM aids communication and cuts down the chances of employee mistakes and errors. This helps to reduce the cost of mistakes, which can add up throughout the year and cost a business in the long run.

Improved project outcomes

Team collaboration results in better project outcomes. Open, transparent working environments produce more positive results for the team and the business overall. It becomes increasingly challenging to ensure open communication and encourage sharing ideas, experiences, and opinions in a hybrid or remote working environment. CWM encourages idea sharing and collaboration and grants employees the tools to connect freely and easily. Working together as a team in this way will produce better results than working in isolation.



Part three:

Challenges when implementing CWM software

CWM software has the potential to streamline processes and practices, boost productivity, and ultimately take your business to the next level. But it's important to be aware of any potential challenges, especially at the start of the process. If you can identify problems early on, or better yet, prevent potential challenges from arising, then you have the best chance of smooth CWM tool implementation. Here are three potential challenges you may face when implementing CWM software.

1. Getting your team to adopt tools

For CWM software to be effective, both teams and leaders must fully engage with it. It's not enough to set up the software, introduce it to your team, and then leave them to their own devices. For the tool to become a part of day-to-day operations, action is needed to ensure its success.

- Change percolates from the top, so those at the top and influential stakeholders should promote and reinforce its use.
- Support your team from the beginning of tool implementation with a kick-off meeting to set expectations. You have one chance to make a good impression, so make it count.
- Gain support from the organisation's IT department through dedicated administrators. This will help to ensure the tool's usage.
- Organise team training. Online tutorials and basic training may give an overview, but it's worthwhile to consider providing comprehensive training so that your team feels supported and confident using the tool.
- Identify internal champions. By finding employees who are passionate about the tool being used right, their support and enthusiasm will spread to their colleagues.
- Finally, make sure you are using the tool at every opportunity to send messages and notifications. A lot of influence comes from reinforcing the use of software and setting a good example to your team.

2. Choose the right tool for the job

A quick internet search will tell you that there are many work management solutions, all promising to answer all your business needs. Before making any decisions, take stock of exactly what features you need to prioritise. Establish your team and business needs, and go into the search with this in mind. There's no point opting for complex software that offers all the bells and whistles, requiring a lot of training, when your team only needs basic functionality. There's a greater chance of team engagement if the features and functions are right. With that in mind, ensure the tool you choose is able to scale with your organisation - you might not need all those bells and whistles now, but consider whether some of them might be valuable in the future.

3. Consider security

Data breaches and security are key concerns for businesses these days. Make sure your tool offers advanced security options for watertight security. While it's crucial to guard the data against external threats, your focus should also fall on protecting against leaks from within the organisation. It's important to choose a tool that provides advanced security options for approvals and permission. This will allow you to work with team members in a group and individually, while ensuring information is kept secure. Additionally, work management tools have an audit log of sorts, which can be very beneficial when trying to identify how a breach occurred.





Part four:

Taking a tool-agnostic approach

The only thing that's certain is that change is constant. Work management tools, features, and techniques are always evolving. Whether your main focus is to better manage your hybrid or remote workforce, encourage team collaboration, or manage business needs, managers should put their focus on the future.

As more and more technologies emerge in the market, staying on top of the tech stack will help you react more easily to changes and developments. You can achieve this through taking a tool-agnostic approach to tools and software. A tool agnostic attitude is a more flexible and noncommittal approach, whereby leaders and managers will switch tools if it becomes necessary to achieve better results for the team and business.

Leaders and managers who take this approach place their product and team needs ahead of their dedication to any one tool, staying on top of new technologies and developments to select the best software that benefits the needs of the team. This means stopping using a tool to work with another product if it is more suitable to accomplish the aim, outcome or task. Essentially, it makes your team more flexible and encourages innovative thinking.

So, how do you take a tool agnostic approach? First, establish your needs, the business needs and the needs of your team. Conduct thorough research about the products and technologies that could potentially help with fulfilling the needs you established. Revisit the tools at regular intervals to expose potential misalignments. Repeat the process at regular intervals to keep on top of new tools and technologies, which are constantly evolving.

Staying on top of your tech stack is a dynamic and effective way to save money and time in the long run. The right tools will equip you and your team with an efficient workflow structure with room for collaboration and innovation - ultimately driving business revenue and user adoption. A unified CWM tool can act as a central hub, tying your technologies together.

What are the benefits of being tool-agnostic?

Being tool-agnostic enables you to develop a great relationship between you and your team. Understanding the needs of your team automatically sends a message that you care about them and support them. Let's take a look at some of the other reasons why you should consider taking a tool-agnostic approach:

- **Reduced costs**

When using a unified platform, all your existing systems can be connected into a single source. You will not need to purchase multiple technologies to support different platforms.

- **Consistency**

In the case of an organisation whereby multiple systems are in effect, the differences of the underlying systems are removed. This provides a more consistent user experience and less disruption when interacting with the platform.

- **Greater flexibility and reactivity**

You are not tied to one platform, tool or software, so you can select the best technology for your specific needs and quickly react to changes in the market.

- **Timeless appeal**

Agnostic platforms can integrate with all other technologies, so looking ahead, you will be better prepared to keep up with what comes next and integrate with new technology. Essentially, you are better equipped and able to future-proof.





Summary:

Work management and your business

With hybrid work a relatively recent concept for many, companies are learning on the go. Teams and leaders need to reinvent and adapt to the hybrid work environment through optimisation – and work management tools can help with exactly that. You and your team can achieve better results through your dedication to building an optimised, supported, and efficient work environment.

An extension of work management, collaborative work management (CWM) is much more than project management. CWM is gaining traction as it harnesses the beneficial features of work management and project management, while providing a space for collaboration. The question of how to preserve and encourage collaboration and clear communication among a remote or hybrid workforce is one that concerns many, and CWM may just provide the solution.

Are you ready to start your work management journey? At Adaptavist, our expert consultants guide you through set-up and take the uncertainty out of a project. With help, you can assess your processes, set up and define new workflows, redefine existing workflows, integrate your work management platform with your broader technology stack, and build customisations to fit your team.

Learn more about how our team of experts can help drive team collaboration and efficiency in your organisation.

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