MeetX

Purpose-Built Collaboration for Leadership

Key insights about leadership communication in the mobile enterprise

Joe Ruck
President and CEO
BoardVantage
January 2014

www.boardvantage.com

Inside

1 A Changing Landscape

Dispersion of leadership teams is a fact of life in the mobile enterprise. Those teams have communication needs that go beyond email and paper.

The use of mobile devices among executives has grown along with the dispersion of leadership teams. Today, these teams are common in large enterprises across different industries. They are also increasingly common in smaller, fast moving organizations because mobility is a force that lends a competitive edge to any organization, large or small.

So what are the pain points in this rapidly changing landscape?

At the highest level, executives expect a secure environment where they can share documents confidentially with other members of the team. They also need tools to conduct secure meetings. Finally, they need a way to drive initiatives and make decisions when they are on the go, typically in-between meetings.

But most of the tools on the market fall far short of addressing those needs. Email is overloaded, and impossible to organize into a workflow. Mobile devices – smartphones and tablets – are pervasive, but left by themselves (BYOD), have created unresolved security challenges. The share-and-sync solutions, so popular with consumers, do not meet the standards of enterprise IT. And in the meantime, critical meetings, like monthly operations reviews and quarterly planning sessions, are overloaded with paper documents.

At BoardVantage, we are acutely aware of these issues. So when customers approached us with requests to modify our board portal for executive use, we listened. Customers valued the BoardVantage security and user experience, but found that the formal board process imbedded in our Director product didn't work for execs, whose collaboration is often informal and fluid. What became clear is that organizations were looking for a tool that wasn't a mere modification of the board portal but rather a new architectural platform developed from the ground up for leadership teams. That's what we built in MeetX – a secure and mobile platform that lets leadership collaborate in meetings and in between, while delivering an executive experience optimized for their use case.

Much as we filled the need for the paperless boardroom with our Director product, we are now addressing the need for collaboration at the leadership level with MeetX.

2 What Matters in Leadership Collaboration

Mobile devices are a good fit for dispersed leadership teams, but without a purpose-built platform, security is compromised and the system will not find acceptance.

Executive Experience

Whether green-lighting an initiative, signing an agreement, or presenting at a conference, leadership teams always work under deadline pressures. Unsurprisingly, they do not want to spend valuable time learning new tools. When they access a new system, they expect to have the information they need at their fingertips and they will insist on intuitive flows before relinquishing a long-standing process that is familiar to them. On mobile devices this means taking maximum advantage of graphics and animation, introducing context along important content, and creation of a seamless online/offline experience. Without these attributes, the system will not find acceptance. **Creating an Executive Experience** lays these points out in greater depth.

Productivity

Increasing productivity is the second major challenge. Leadership work is invariably meeting-centric. That points to tools that make meetings more efficient while improving the ways execs drive process in between those meetings. Email was never designed for this purpose, while generic sharing solutions, with their simplistic file-posting functionality, lack any meaningful productivity tools. Also, because a support team initially creates materials for subsequent review by the executive team, it means that the tools need to be calibrated for this producer-consumer environment. General-purpose solutions, while perfectly adequate for collaboration among the rank and file, were never designed for this task. In **The Producer-Consumer Model**, we discuss how this model defines the task-driven nature of MeetX.

Security

Information security is an obvious concern when leadership teams function outside of the relative safety of a firewall. So before these business users can begin accessing documents, they require a system with security that meets or exceeds the standards of enterprise IT. General-purpose mobile solutions, such as cloud-based file sharing, make cross-firewall access easy, but fall woefully short of those standards. Critically, they lack access control, which assures that content is communicated on a need-to-know basis. In **Controlled Distribution** we elaborate on the challenge of striking a balance between the need to share and the need to control.

③ Creating an Executive Experience

No matter the environment, executives expect information at their fingertips. On mobile devices, that means a visual experience that lets them accelerate their decision-making in meetings, and while on the go.

Consumer apps are now the standard-bearers for good software design. Aware of this trend, business users have raised their expectations and are making user experience a key criterion in their purchase selections. But unlike consumer apps, business software captures a range of workflows and user preferences. The experience a sales team wants from CRM is different from what a lawyer seeks from a virtual data room. What finance wants from an accounting system is different from what directors look for from their board portal, and so forth. So what is the right combination of ingredients for a leadership team? At BoardVantage we have identified four focal points for creating a truly executive experience:

Mobile
The same forces that drove technology into the board-room are now sweeping across enterprise leadership teams. Geographic dispersion and the ascent of the iPad have convinced executives to rethink long-standing email and paper processes with initiatives such as "leave the laptop behind" or "go paperless". Underneath these efforts lies a common theme: the need to go mobile. It's common to think of mobility as synonymous with being online, but as business travellers know, network access is spotty on the road, and often unavailable in conference settings. Delivering a good user experience means creating an offline capability, but that capability needs to be designed around a seamless online/offline experience. Without that capability, the system will not find acceptance among leadership teams.

There is also the matter of devices. Unlike a few years ago, the market is no longer just about iPads. Other tablets have gained popularity and smart phones are capable of handling tasks that not long ago could only be performed on laptops. That's why in 2014, mobility means support for the full range of devices and operating systems, not just iPads and iOS.

Visual
A thorny challenge in software development is screen-size limitations of mobile devices. It is doubly difficult to convey complex information so common in the executive suite. What further compounds the challenge is that executives usually are not open to spending time learning new tools. Yet, when they access the system, they still expect to locate what they need promptly and efficiently. The best way to bridge that gap is to make their experience visual. A visual presentation lets the user absorb information quicker and makes complex information actionable even from something as diminutive as a smartphone. On mobile devices, graphics and animation are the key to overcoming screen-size limitations.

Context
A rich interface goes hand-in-hand with a good experience, but before users will relinquish long-standing process, they require productivity improvements in their day-to-day activities. For members of leadership teams, that means introducing context along with content throughout their environment. Individual documents can be presented in the context of an agenda. A current meeting can be presented in the context of a timeline of previous meetings, and events can be presented in the context of a calendar. For executives who are often overloaded with information, contextualizing will provide the productivity increase that many look for today.

Process
The 24x7 business environment has reset expectations for executive communication. Always on the go, they need process continuity, whether in meetings or in between, in the office or on the road. The fact is continuity drives efficiency, but more importantly, it accelerates the decision-making process, which requires more than passive document sharing. Executive communication needs a range of productivy tools: web conferencing to let them present at remote meetings, approvals for green-lighting initiatives or eSigning agreements, and secure email to support the need for one-on-one communication. They all share the same objective: driving process while on the go.

4 Controlled Distribution

When critical decisions are on the line every day, executives need a platform where every step in the collaboration chain is controlled.

Today, many organizations rely on consumer tools such as Box or Dropbox for file sharing. These products offer an appealing simplicity – but that comes at a price. That same ease of distribution is also an Achilles' heel because control is sacrificed along the way. And while sharing information at the right time with the right people is central to creating organizational efficiencies, sharing that same information at the wrong time or with the wrong people backfires. This is especially true for leadership, where major decisions are on the line every day, and control over who sees what is essential. That's why we designed MeetX, so that every aspect of the collaboration chain is controlled. This preserves the benefits of file sharing and ready access to updated content, without the worry of information leaks. Here are the attributes that make this a reality.

Enterprise Sync

Desktop Sync is a popular feature in consumer apps because it treats file uploads and file sharing as if they are synonymous: once users upload files and sync their desktops, the new files will become instantaneously available to their colleagues. This rudimentary approach may work for the rank-and-file, but it fails to address the security and control needs of leadership, where document access needs to be tightly controlled. That's why, in Enterprise Sync, we decouple the upload function from the sharing function. Only after user permissions have been set can a particular file be shared. However once initialized, subsequent updates are auto-synced. This approach provides the benefit of instant access to updates but without the risk of inadvertent sharing with unauthorized users, an ever-present risk in Desktop Sync.

Content Segregation

The MeetX architecture segregates content in separate portals, which function as focal points for particular initiatives. Because these portals are ring-fenced for security, executives only have access to the content for which they are explicitly authorized, thereby reducing the risk of sharing outside the team. At the same time, its user-friendly design lets authorized execs easily switch back and forth between the portals without the burden of additional passwords.

Remote Purge

Execs carry their devices wherever they go. Not unreasonably, they expect ready access to those materials even if they're out of Wi-Fi range. But there is a tension between this mobility and information security, particularly with downloaded materials. MeetX tackles this challenge with the Briefcase, an encrypted folder, which functions so that any content, whether viewed online or offline, remains under central administrative control. Even if an exec neglects to delete downloaded documents, or the notes on those documents, the administrator can manage that task, and purge all the content, including the notes, remotely.

By exercising control over every aspect of the collaboration chain, MeetX bridges the gap between the need to share and the need to maintain control.

5 The Producer-Consumer Model

Executive collaboration requires a platform architecture,
which is purpose built for the typical workflows found
in leadership teams.

As organizations prepare to select a tool for mobile leadership collaboration, it is important that they develop an appreciation of the typical workflows that exist at the executive level, because the way leadership teams communicate and collaborate is different from what is typically found at the department level.

One key difference is that executives will rarely, if ever, edit native content. Instead, a support team will produce content that is subsequently distributed to the relevant executives. Whatever written commentary is contributed by the execs will come in the form of annotation, which does not alter the native document. We refer to this form of collaboration as "Producer-Consumer." This model stands in sharp contrast to the collaboration model in use among the rank-and-file, where there is no real distinction between these two functions; so all team members will freely edit the native documents. Think of this latter form of collaboration as a "Peer-Producer" model.

A quarterly business review is a prime example of the Producer-Consumer model in action. In preparation, a support team of producers aggregates reports and other documents as the quarter comes to an end. This content is then assembled into a comprehensive package for distribution to the executives (the consumers).

As should be apparent, producers and consumers have vastly different experiences, which means that they require different tools. The executive (consumer) reviews and approves, but does not create content, so the devices of choice - tablets and phones – have to be optimized for consumption. In contrast, the producer needs a rich toolkit to support document preparation and distribution, as well as meeting creation and administration. These tasks are most efficiently accomplished on a laptop with a browser.

Enabling both the consumer and producer requires a platform designed with these roles in mind, and with features that address their respective needs. The MeetX platform was based on the Producer-Consumer model and is optimized to support the collaboration structure preferred by leadership teams.

About the Author

Joe Ruck, President & Chief Executive Officer

Joe is President and CEO of BoardVantage. Joe drives the planning and design of the MeetX and Director products, placing a particular emphasis on the user experience and the ongoing effort to improve leadership communication in today's mobile enterprise. A frequent speaker on the impact of technology in the C-suite and boardroom, Joe has authored numerous articles on that topic in the press and on his blog.

Prior to joining BoardVantage, Joe was senior vice-president of marketing at Interwoven (acquired by Hewlett-Packard). Previously, he held sales, marketing, and executive positions at Sun Microsystems and Network Appliance. Joe holds a BS in engineering from Oregon State University and an MBA from Santa Clara University.

Corporate

4300 Bohannon Drive
Suite 110
Menlo Park, CA 94025
USA

T +1 650 614 6000
F +1 650 614 6099

Australia

Level 4, Plaza Building
Australia Square
95 Pitt Street
Sydney NSW 2000

T +61 2 8249 8233
F +61 2 8079 2998

Brazil

LEAD
Rua Prof. Manoelito de
Ornellas, 303 6° andar
Chácara Santo Antônio
São Paulo, 04719-917

T +55 11 3529 3777

Canada

100 King Street West
Suite 5700
Toronto, ON M5X 1C7
Canada

T +1 855 751 7500
T +1 416 253 7500
F +1 650 614 6099

Singapore

1 Raffles Place
#20-61, Tower 2
Singapore 048616

T +65 6808 5672
F +65 6808 5801

South Africa

4th Floor
The Firs
Cradock Avenue
Rosebank, Johannesburg

T +27 11 759 4060
F +27 11 759 4001

UK

Aston Court
Kingsmead Business Park
Frederick Place
High Wycombe
HP11 1LA
United Kingdom

T +44 1494 616086
F +44 1494 616186

Hong Kong

Room 3B
235 Wing Lok Street Trade Centre
Sheung Wan

T +852 2108 4600
F +852 2108 4933

BoardVantage

www.boardvantage.com