

TIPS, TECHNIQUES, AND TOOLS FOR COLLABORATION AT A DISTANCE

by Shawna Vyhmeister, PhD

Director of Research and Extensions, Adventist University of Africa

vyhmeisters@aua.ac.ke

Abstract

In our world, collaboration is increasing in every field. Collaboration is common, useful, and necessary, yet we spend very little time talking about what it really means and how to do it well. This study points out how e-mail, a common tool for collaboration, differs from regular mail or phone calls. It then spends time with three areas: tips for improving electronic communication, techniques for meeting deadlines at a distance, and tools for managing documents in a distance collaboration setting. There are many tools available, and many will be demonstrated here, and none is perfect or a requirement for success. The important thing is to choose one that works for you. Since most articles are published with 2 or more authors, the suggestion is to begin collaborating with someone, and the tools will be learned in the process, as they are used.

Keywords: distance collaboration, electronic communication, netiquette

Introduction

In our global village, we are called upon almost daily to transact business with people who do not live in our immediate community. We must collaborate with people at a distance, since it is frequently not possible to be in the same place, even though we are working on research or a project together. Some of the techniques useful for collaboration are not second nature to many of us, even though we frequently presume that “everyone knows” how to work with someone at a distance.

“Collaboration” can mean anything from getting a colleague’s advice on a letter you have written to doing research together across multiple time zones. Frequently the final output is some sort of text that all the people in the group will have to agree on. Almost always the collaboration also has some sort of deadline by which to produce that final product, which can add to the stress.

Collaboration at a distance requires much better communication skills than when the participants can be in the same room. It requires knowing when to phone, when to e-mail, when to print, and when to work electronically, and knowing what to say, and when to say it to achieve results. Working on a collaborative project at a distance requires discipline, planning, and commitment. It requires clear instructions and requests, the ability to keep track of multiple documents, and a knowledge of how to use electronic resources and tools effectively for collaboration. This paper considers skills, tools, communication rules, and

etiquette from a variety of sources (as well as personal experience) that can be learned in order to make collaboration a more effective and satisfying experience.

Most of my work as Research Director for a school with multiple campuses involves working with students and faculty who do not live on the central campus where I live. Many of them struggle with internet access and must drive a great distance just to check their mail. Most are employed full-time, and work or study with AUA in their “free time.” Most do not have extensive experience in electronic collaboration. Because of this, the way I model what is to be done, and the way I communicate not only teaches them how one is “supposed to” work at a distance. My approach also potentially determines who gets done with their studies and graduates, and whether they meet the graduation deadlines. I have recognized more and more the importance of HOW one communicates, WHEN one communicates, and in WHAT WAY one communicates when collaborating with someone at a distance. Much of this presentation stems from my own learning to cope, survive, and even thrive in the world of electronic collaboration.

The title for this presentation sets the tone for the entire talk: First we will talk about **tips** for effective electronic communication, then about **techniques** for meeting deadlines, and finally about **tools** for managing documents at a distance. While we can really only scratch the surface in each of these areas in the time we have together, it is my hope that you will leave this place to become “doers of the word, and



not hearers only.”

Differences Between E-mail and Other Forms of Communication

First of all, welcome to the world of electronic communication. Most of us are immigrants to this world, and as immigrants, we need to be taught the culture, the rules, and the proper etiquette, because we truly come from another generation. Many of the younger students today are natives of this electronic age, and some of this comes more naturally to them, but a few reminders are still worthwhile.

E-mail is unique among communication methods, and since it is a commonly-used collaboration tool, we need to begin by understanding what it is, and what it isn't.

1. **Asynchronous.** Of course, the biggest point in favor of e-mail, besides being quick and leaving a paper trail, is that it is asynchronous. You can write a message when you are available, and your colleague can answer at her convenience. This is a huge positive, but we also need to be aware of other implications and potential problems with using e-mail.
2. **Informal.** Note that electronic media tends to lend itself to informality. Although e-mail frequently replaces a formal letter, it is generally much shorter and less formal, and often less care goes into its creation (Woodhouse, 2008).
3. **Short.** Long e-mails are annoying. The mode lends itself to short messages, and people tend to expect others to respect this norm (Tschabitscher, n.d.). Generally, one or two screens should be the maximum length. Because of this need to be short, an e-mail message can often appear rude. A more formal approach often involves adding extra words to “soften” a request: “Do you think you would have the time to help me?” is more polite than “Can you help?” (Lesson 15, n.d.).
4. **Unclear.** E-mail often replaces phone calls or conversations, as well, but not fully. When you talk with someone, you can see their facial expressions or hear their tone of voice. In chat or e-mail, these are missing. People often misunderstand texts or e-mail, and this can even lead to serious disagreements (Nogales, 2010). This is the reason that emoticons became popular—so we could insert expression into text to help us understand the author's emotions

more clearly. It doesn't entirely solve the problem, but it makes us aware of how serious it is, if we have invented an entirely new language to help alleviate the problem.

5. **One-way.** E-mail, unlike a phone call, is a one-way street. The person sends you a message, but has no idea what you think about it, or how you have reacted. If you don't answer, they will never know. This is the reason many people prefer chatting, even though both involve written text—if something is unclear in a chat, you can let the person know immediately. Because of these differences with other common means of communication, there are things that e-mail lacks, or weaknesses it tends to have, if care is not taken.

Tips: Secrets for Improving Electronic Communication

Here are some secrets that will help your e-mails be better understood and more effective.

1. **Keep your mail short.** E-mails need to be short. If you need to make a longer mail, put it in an attachment, and let the person know there is a lengthy letter there, which may need to be printed. But put a brief summary in the main e-mail message so the recipient knows why he/she should open the attachment and read it.
2. **Be clear and specific.** Though short, your message must be CLEAR, and as specific as possible. If you have two major ideas to discuss with someone, it is better to make two separate messages than one longer one (Tschabitscher, n.d.). If you need to put several points in one message, make a numbered list—don't just hide the things in paragraphs. Be very clear what you are asking for, and by when. If you need information, be specific about what you need to know, and ask when you should expect to have it done. Recap at the conclusion of your mail, if needed, like you might do in a conversation, so that the main points are emphasized and stand out.
3. **Be positive.** Because e-mail messages are short, they can appear rude. Go out of your way to sound kind and positive in your message, so the other person can “hear” this

in your writing. If reading e-mail, presume the most positive interpretation.

4. **Communicate emotions.** Remember that e-mails are like a conversation in many respects, but without the facial expressions and tone of voice to tell how you are feeling. If you say something that is meant to be funny, let your reader know. Use emoticons or explanations of your emotions (joke!) to communicate your message more clearly. Remember that using all capital letters is understood to mean that you are shouting (Landsberger, n.d.).
5. **Read it!** Before sending an e-mail, go back over it and read every word you wrote, preferably out loud. Imagine what it would feel like to receive this mail (Shea, 1994). It's amazing what you will find you DIDN'T say that you thought you had said!
6. **Give a CLEAR subject line.** Give your mail a CLEAR and DESCRIPTIVE subject line (Landsberger, n.d.). Many mails get filed, or lost in an ocean of other mails. Make sure that the reader can find your message and recognize it based on the title you gave it.
7. **Copy the right individuals.** Know when to copy others and when to send mail to just one individual. Sometimes copying a group can be rude or embarrassing; sometimes it is helpful. Copying a person's superior can suggest that you don't trust them to do what you ask but need to tell their boss about it. Consider carefully who should be included, and whether a blind copy is appropriate—but it is not commonly a good idea to talk behind some one's back without telling them you are doing it. If you are unsure of whether to forward a message to someone, get permission from the writer before forwarding it (Landsberger, n.d.).
8. **Include the prior message in the response.** This way there can be no doubt about what you are talking about. Any questions can be clarified in the message below. Be careful, however, to check all the prior messages included in the mail before deciding who should be copied—not all messages are appropriate for all individuals, and some should be deleted sometimes.
9. **Respond quickly!** When you get mail, respond within 48 hours. If you know it will take you

2 weeks to get the information requested, write and tell the person what to expect. A short “Got your mail—I'll get back with you in a week or so” is very welcome (see Tugend, 2013). Don't make the other person wonder if you got their mail.

Techniques: Meeting Deadlines at a Distance

The secret of meeting deadlines has a lot to do with being clear, being persistent, and being prompt yourself. When you set goals and deadlines to meet as a team, remember to be just a little generous with yourselves. Too often, there are other emergencies that come up, and the deadlines are hard to meet. Giving yourselves a little extra time makes sense. But more than anything, don't push the agreed-upon deadlines, as the situation will only get worse.

1. **Pre-empt.** If you have agreed that your colleague will send you something by a given date, send an e-mail reminder 5-10 days BEFORE that deadline (try to include a weekend). Just let the person know that you are expecting their work on the agreed-on deadline, and remind them when it is. Too often, people don't check on their colleagues until AFTER the due date has been missed.
2. **Send a second mail.** When you are waiting for a colleague to do something, and you sent a reminder (as in point number 1), send them a SECOND reminder around the actual due date. Don't wait. Remind them politely of the agreement, and ask them to get the document to you as soon as possible. This second mail is often effective where the first one brings no response (Tugend, 2013). If you wait till the due date to send a FIRST mail, it is not nearly as effective as when the SECOND reminder comes on the due date.
3. **Resend the document.** If you haven't heard from your colleague in quite some time, resend any documents you expect her to work on. Let them know you are “resending the documents for your convenience” so that there is no confusion about which file should be used.
4. **Keep in contact.** If you have not heard from your colleague in 2 weeks or more, don't continue to wait for a response. Make



- contact and ask how things are going. Ask when you are likely to receive the completed work back from the person. If you still don't hear back, it may be time to text or phone your colleague. Don't let the person lose contact totally. If e-mail doesn't get a response, change the contact system (Tugend, 2013). It helps if you have agreed in advance how often you will check your mail and/or communicate with each other. Certain types of conversations are easier to have orally than in writing. In other situations it is better when the person has time to think and study the situation before responding. Know when it is worth it to talk, and when an e-mail is preferred.
5. **Know when to print.** If you are the one struggling to meet the deadlines, consider what you should print, so that you see it lying around to draw your attention to it. Sometimes electronic documents are out of sight, and therefore out of mind. Know yourself, and if you need to print a schedule, a plan, or whatever will help you stay on target, print it without qualms. Suggest to your teammates that they do the same. Ask your colleague if they prefer to receive the work electronically, or on paper. Paper versions don't necessarily imply mailing the document. If the person has a secretary, send it to her and have her print it, and also input the recommended changes once they are ready. Talk about these work preferences in advance, so that each of you knows what to expect.
 6. **Work with your body clock.** Not everyone works on the same schedule. Find the time of day that works best for you. Note the schedule when your teammate e-mails you, and you may deduce what time of day he/she prefers to work. Use this knowledge to help you send e-mails on a schedule where they will be answered quickly. Note also the weekly pattern of productivity. If your colleague works mainly on Sundays, for example, don't expect her to get a major activity done from Monday to Friday.
 7. **Know when to disconnect.** If you are having a problem getting your task done because your internet connection is a distraction, disconnect for blocks of time so that you can focus (see for example harmon.ie, 2013).
 8. **Keep everyone focused.** First, make sure you meet your own deadlines, so that you have a right to speak to other members of the team about deadlines. Often people forget exactly what they promised to do, and when. You may need to send a note that says exactly what you are waiting for, and when you need it. Remain polite, but be CLEAR about what is needed. Be grateful for work done (again, being specific helps) but be equally specific about what needs to be done next. Things come up sometimes that get us off track. Presume that your colleague intends to complete the work, and maintain that positive belief that it is possible to do so. Listen politely to excuses, but bring it back to your concern: "when should I expect to receive this document from you?"
 9. **Be careful.** If the relationship is student/professor, this process is even more of a minefield. While students have some rights as tuition-paying customers, professors have other pressures and responsibilities that students likely know nothing of. Students have a right to ask, remind, clarify, but not insist. Say "when should I expect to see my work from you?" Say "you've had my paper for 5 weeks now—when do you think you will be able to start on it?" (often teachers don't realize how long they have had the work). Say "what should I be working on while I wait for you to read my paper?" Be respectful, but also be persistent. Waiting patiently and saying nothing frequently does not help. It's the squeaky wheel that gets the grease.
 10. **File!** It is easy to lose track of your own promises and responsibilities if your inbox is overflowing with messages. Create folders and file things when you are done with them so that your inbox becomes a to-do list. Try to keep it no longer than one or two screens long, so that you easily see the things that need your attention.

Tools: Managing Documents at a Distance

Many people have a lot of enthusiasm and

willingness to work on something, but they simply don't know the tools. Knowing some of the technical skills makes a huge difference in working at a distance, and can save hours of frustration and re-doing.

1. **Learn to type!** If you are using the computer to collaborate at a distance, one of the most important tools you will need is the ability to type well. There are sometimes people who can help, but there is really no replacement for being able to get ideas from your head to the computer, where they can be shared. If you don't know how (and we're talking TOUCH typing here), learn! There are many free programs on the computer to teach you to type (see for example Rapid Typing, downloadable from <http://www.rapidtyping.com/downloads.html>). Only 10 minutes a day for a month or two will give you plenty of skill in typing. You only need 20 words per minute most of the time—you can't compose much faster than that, anyway.
2. **Learn word processing software.** You don't need to know the advanced features, but know enough to use tabs (not spaces) for basic for matting, to set up margins, page size, font, and spacing, and to pay attention to the spell-checker and grammar-checker. A few basic skills will save others a lot of effort.
3. **Filing and document handling.** It sounds simple, but if you are working on a document over time, you need to know how to name multiple versions of the file so that it is clear which is the most recent one. You need to file mails or documents in such a way that they are easy to find. As you increase the number of documents you work with, having a clear filing system becomes more and more necessary. You also need to be adept at attaching files to e-mail, downloading them, and saving them in the right places. You need to know how to attach files to e-mail (not embedding the file in the e-mail), how to keep track of multiple documents, and how to figure out what your colleague did to the document if she failed to track her changes (yes, tracking can be done after the fact).
4. **Highlight.** There are many times when a simple highlight will do to point something out, whether for your own reminder or for someone else's. Use color to draw your attention to what

needs to be done.

5. **Learn to use Track Changes.** This feature of Microsoft Word can save more time than all the other tips here put together. The idea is that whatever you have done to a document, your colleague can see it exactly, so he does not need to read the entire document again, but only the parts you have actually changed. This can save hours. Major features you should know include WHERE to put the comments (do you want them in the text, or off to the side?), and how to use the comment feature as well as the tracking of additions or subtractions. Equally as important is knowing how to respond to a tracked document without losing a lot of time.
 6. **Know how to share the document.** One crucial rule of collaboration is to not work on the same part of the document at the same time as someone else. When you have the file, the other person should consider it "locked" to him, and should work on something else. Nothing stalls a project faster than having two versions running around and not knowing how to combine them into one again. For this reason, it is important to agree that one person will do something else while the other person works on a shared document, so that the overall project will move ahead.
 7. **Learn sharing tools.** Other tools are available for sharing: Google docs, Wikis, etc. The tool is not so important as what you do with it. The idea is to have something which is easy to use, and that makes it easy to share ideas and comments back and forth. Find something that works for you and use it—the point is to do SOMETHING rather than wringing your hands because you don't know more about technology.
- In closing, it is important to recognize that the majority of publications today are multi-author works. From over 30% of publications being by a single author in the 1980s, today only about 10% of publications have just one author, with the average being 5 authors per paper (King, 2013). Research is not something you do on your own privately—it is a corporate venture.

And in the end, it is not the technology that



counts—it is what you do with it. There is no heroism in knowing 6 different methods for collaboration, but not publishing a single article collaboratively. Most technical skills are learned in the context of a project where you need that skill. When you have a need, you will develop the necessary ability. It doesn't hurt to learn a skill in advance, but it's when you jump into the water that you will perfect your swimming ability. So, learn these tips for better communication skills, yes. And learn some techniques for managing collaborative projects. And get acquainted with some of the tools available for collaboration. But above all, get out there and do something, and the rest will follow.

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