



Patricia Seybold Group

Trusted Advisors to Customer-Centric Executives

Instant Messaging at Work

Key Policies and Practices for Leveraging IM
in Business

By David S. Marshak

Sr. VP and Sr. Consultant, Patricia Seybold Group



Instant Messaging at Work

Key Policies and Practices for Leveraging IM in Business

By David S. Marshak, Sr. VP and Sr. Consultant, Patricia Seybold Group

January 22, 2004

NETTING IT OUT

Businesses seeking to become more responsive to their customers by implementing instant messaging (IM) systems face a serious challenge in balancing their organizational goals with individual fears of loss of privacy and personal productivity. One way to leverage IM effectively while making users more comfortable is to create a set of well-publicized policies and practices.

These policies and practices should address specific issues, such as the expectations an IM requester should have for getting a response from another user who is “Available,” and the expectation that a user who is “Busy” will not be interrupted.

BALANCING PERSONAL EFFICIENCY WITH ORGANIZATIONAL RESPONSIVENESS

More and more businesses are beginning to see the use of instant messaging (IM) as an interesting—if not compelling—way to make their organizations more responsive and effective. By using IM, particularly its presence-awareness features, companies can significantly reduce the time it takes to deal with customer issues, sometimes resolving them in real time. Effective use of IM can also eliminate much of the internal churning (emails, voice mails, walks past someone’s office) it takes for one employee to get information and assistance from another. And for many companies, IM provides a direct mode of communications with their customers—a mode that enables far closer relationships than we’ve seen since electronic communications became the norm.

Effectively (there’s that word again) leveraging IM in business settings is not as simple as it may seem. There are some critical corporate issues, such as security and compliance, that need to be addressed. However, we are seeing more and more capabilities in these areas from the major enterprise IM providers and from third parties, so while we consider these issues major, we feel they are waning (or at least issues for another discussion).

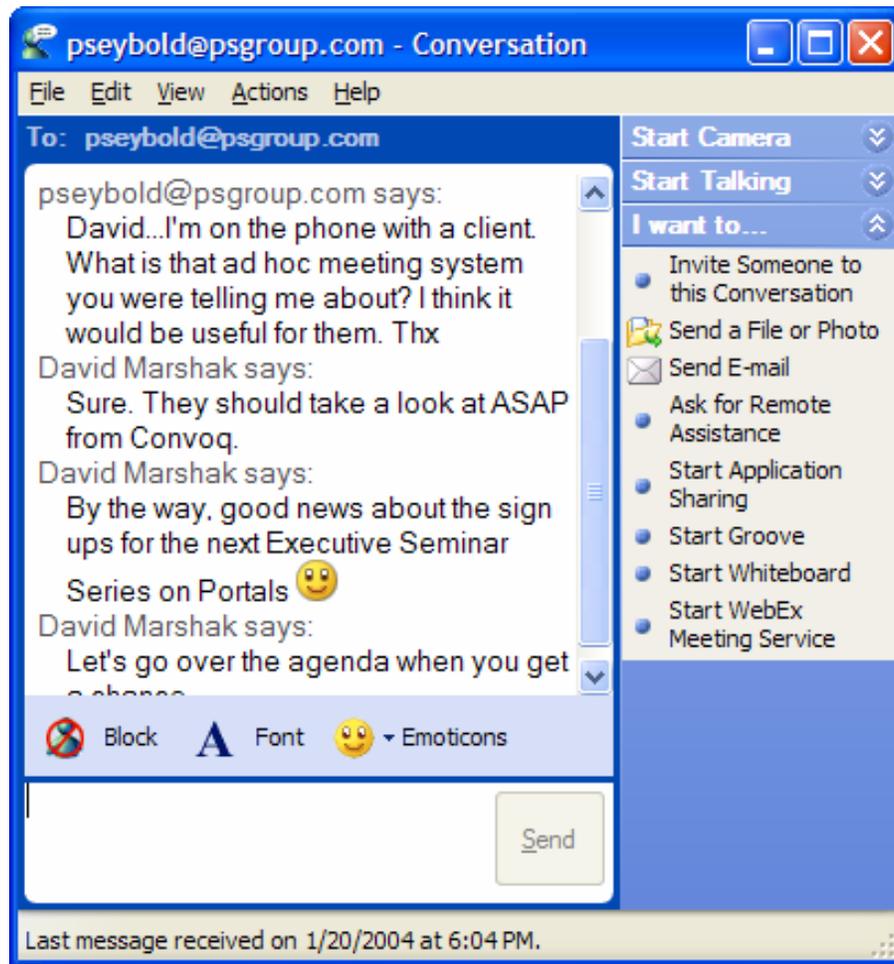
On the other hand, companies implementing IM are finding that getting employees to use IM properly is a greater challenge.

Resistance to IM

IM is frequently viewed as an invasion of privacy, a time sink, and, most of all, a source of endless interruptions. These objections stem from the experience or perception of consumer IM, wherein going online can lead to a series of “Hello! How are you?” messages from dozens of people. (Family members seem to be the greatest offenders.) This view of IM as an intrusion particularly holds true for those who are under the gun with time and deadline pressures—but that seems to be all of us these days.

Some companies can mandate use of IM from the top down—and those that do are generally successful, since the value can be quickly realized once there is general participation. But some of these organizations, and most companies that implement IM with voluntary participation, need to “sell” the value of IM in the business context and make the case that IM, if used effectively(!), can be used to help save time and meet deadlines—both for individuals and for the organization as a whole.

Instant Messaging at Work



© 2004 Patricia Seybold Group, Inc.

Illustration 1. Instant messaging in a business context provides responsiveness to customer needs and increased collaboration.

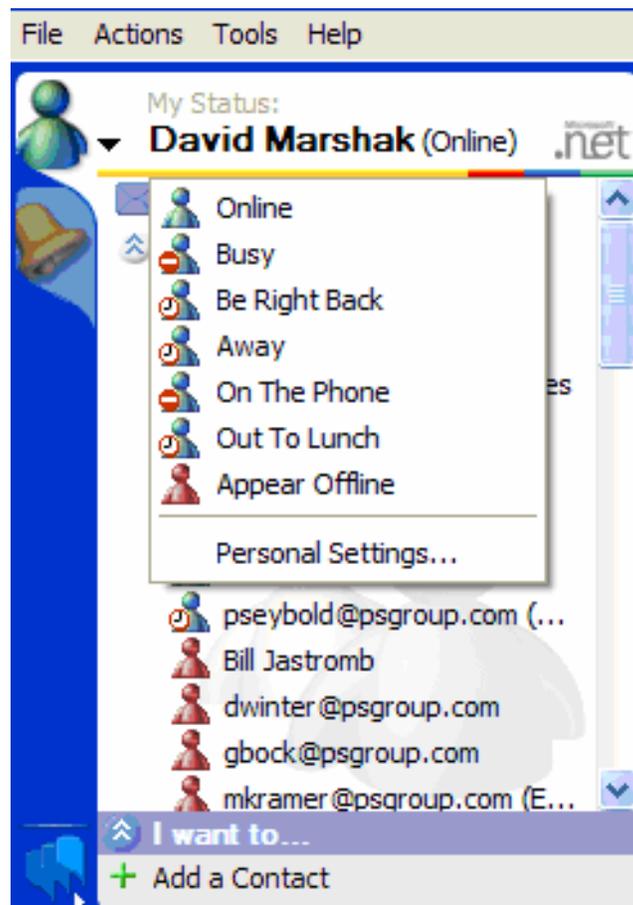
On Buddy Lists and Co-Workers

The key to achieving the business value of IM is to change the view of IM contact lists from that of “Buddies” (people you hang out with and schmooze) to that of business co-workers, collaborators, and resources. Rather than being notified when Buddies come online (a feature that we recommend be turned off for business users), interactions should be driven by business context to find the appropriate resource that is currently available (e.g., by looking for a list of co-workers, a group of experts, or the author of a document). Seen that way, our IM conversations will

take place less frequently than those of our teenagers, but they will have more urgency and context. Rather than saying “Hi” whenever a Buddy comes online (and losing time for both of you), business IM conversations will focus on the “Hey, I need your help to deal with this important and urgent issue” situations. (See Illustration 1.)

In order to make this happen, companies need to create a set of policies and practices that enhance the value of IM, while increasing the comfort of those who are reluctant to use it (or, in their view, be used by it). We believe the following set of policies and practices will be useful to companies rolling out IM

Setting Availability Status



© 2004 Patricia Seybold Group, Inc.

Illustration 2. With a standard IM package, users can easily set their availability.

for the first time, as well as to those that have tried to roll it out and are meeting passive or active user resistance.

RECOMMENDED POLICIES AND PRACTICES

We recommend that companies establish explicit policies in the following three areas:

- Expectations of privacy and responsiveness
- Logging in
- Availability

We also recommend that companies promote accepted practices in the areas of courtesy and respect.

Setting Expectations of Privacy and Responsiveness

Each IM interaction has two participants, the requester (who is asking for the interaction) and the responder (who chooses whether to accept the request). Each participant should have a clear set of expectations of whether a request will be responded to and in what timeframe. With today's IM systems, the key to the expectation is in the responder's availability status setting.

In the situation where the responder is shown to be "Available" or "Online," the requester should have a very specific expectation of the time within which he or she will get a response. We recommend this time be measured in minutes: two, five, or ten

could make sense depending on the organization. Note that this expectation of a response does not in any way preclude the response from being “I’m too busy to talk now” or “I’ll get back to you in an hour.” But leaving the requester hanging for more than the prescribed time is unacceptable.

At the other end of the spectrum of availability is the status generally called “Busy.” Potential responders who cannot be interrupted should set their status to Busy. Requesters should treat Busy as they would a closed office door (“Knock at your own risk”) and should not expect an answer within a specified amount of time. If the request is indeed an emergency, the responder can accept the request. Here, of course, the “Boy Who Cried Wolf” effect will become evident.

All other availability status options should be treated as similar to busy—with no specific expectation of getting a response within a certain amount of time. We will talk more about using these other options in “Setting Availability,” below.

Logging In

The most basic status of IM is being online or offline. We recommend that all participants be required (automatically) to show themselves as online when they are connected and working. Not logging in or spoofing the system by showing oneself as offline defeats the use of IM as a business tool. On the other hand, companies should not use being logged in as a virtual punch clock—this will create a level of distrust that again will defeat the value.

We also believe that “Blocking” (not letting a specific individual see that you are online) is not appropriate in a business context. It is better to use the Busy setting. However, there may be situations that call for some people (perhaps some executives) to hide the fact that they are online, and until we get more granular presence capabilities (see “Granular Presence,” below), Blocking or spoofing may be used.

Setting Availability

We’ve already discussed the two most important availability status settings: Available and Busy. Most systems provide a number of other status settings, including some that users can create themselves. (See Illustration 2.) There are two types of additional status settings. The first type provides potential requesters more information, which can help them determine whether to initiate an IM request or try some other form of communication. For example, the status Busy can also appear as On the Phone, Out to Lunch, or In a Meeting. Each company can set specific expectations around the differ-

ent use of these settings, or they can assume that they are all forms of Busy and let the specific users decide whether they want to provide the additional information.

A special type of status is generally shown as “Away.” With most systems, this status is not set by the user (though it can be—in our view another form of spoofing), but it is calculated based on the last time the user touched the keyboard. If users set their Show Away Status time

to five minutes in their user preferences, then their status will automatically change to Away after five minutes of keyboard or mouse inactivity. This is very useful when someone leaves their computer, but the computer remains online. A good corporate policy would be to standardize the Show Away Status time setting. This setting should be shorter than the expected response—so that if I expect a response within five minutes I don’t have to wait 10 minutes to find out the person has already left.

In some situations, Away could be an event that signals that an online computer is unattended, which could be a security violation in many large corporation. While not an intended use, this could trigger a response visit from security.

Courtesy and Respect

There are several appropriate practices that can make the IM experience more palatable—if not pleasant—for all. One basic principle is to provide

One basic principle is to provide appropriate information in the request. For example, a request that says “Are you there?” is much less useful than one that says “Can you give me five minutes to discuss our proposal for XYZ company?”

appropriate information in the request. For example, a request that says “Are you there?” is much less useful than one that says “Can you give me five minutes to discuss our proposal for XYZ company?”

In another situation, if I make a request and the responder changes status (e.g., to Busy or Away) before I get a response, I might want to send a “Never Mind” message so I don’t force a response that is no longer useful to me. This gets around the problem that current IM systems do not have a way to withdraw a request.

Hello and Goodbye are nice to use in conversation, and it is generally useful to signify that your end of the conversation is over by typing “later,” “bye,” or the ever popular “TTFN”—ta ta for now.

Within conversations, it is useful to watch for others who are typing—most systems support showing this to the other participant(s). When you ask a question and the other person is typing, it’s probably best not to ask a second question or open another topic of discussion. (We’ve been pushing IM vendors to enable threaded IMs, but so far with no success.)

Finally, many IM systems provide smileys or other graphical and sometimes animated ways of showing one’s mood. (See Illustration 1.) In a business context, they can be very useful to take the edge off a conversation and convey information that is not generally shown in emails. However, over-using these graphics can become burdensome and make the conversation less business-like and seem less important.

GOING FORWARD

As companies and individuals become more comfortable with instant messaging, and as the technology matures, we will see IM extended into several areas. While we believe that these areas will add significant value, we recommend that companies become comfortable with basic instant messaging before considering these emerging capabilities.

Some of the capabilities to watch are online meetings and mobile IM.

Messages and Meetings

Today there are pretty clear lines between IM and online meetings. The former is ad hoc and consists mainly of text, while the latter is generally scheduled and consists of text, presentations, shared screens, whiteboards, and, in more and more cases, audio and video. In the near future, these categories will come together so that a conversation that began as a simple IM text interaction could seamlessly include shared screens, audio, video, and so forth.

Mobility

IM is a powerful tool that is useful from a connected PC. We are now seeing IM being extended to mobile devices, including PDAs and cell phones, increasing the number of situations where IM and presence awareness can be used to great advantage. Already, it is relatively easy to send an IM as an SMS to a person’s cell phone if they are not online with a PC. Eventually,

users will be able to see not only whether another user is online, but whether they are on the phone and/or in cell phone range. This certainly raises some privacy and security issues—issues that need to be carefully considered before requiring employees to “broadcast” that they are away from their desks or homes.

Granular Presence

Finally, we strongly believe that IM will truly take off and become part of the fabric of doing business when users can easily designate their availability to be different for different sets of users. For example, this afternoon I am Available to my team and certain customer contacts but Busy to everyone else. Or I may be Busy except for those who want to discuss the Business Plan for next quarter. We have not yet seen a good implementation of this type of granular presence, but we hope to see it very soon.

We strongly believe that IM will truly take off and become part of the fabric of doing business when users can easily designate their availability to be different for different sets of users.