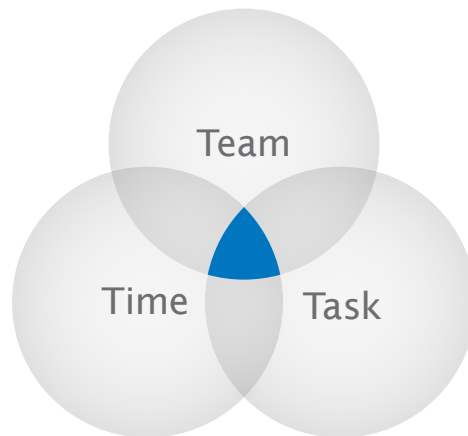


# Team, Task and Time—Capturing Fluidity in Leadership Communications

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**A**dapting leadership team communication for the digital age brings with it both challenges and opportunities. One such challenge is confidentiality. Although it is generally understood that communication between members of a leadership team requires confidentiality, it's not always clear what that entails. It is not that every subject is top secret, but there are plenty of sensitive topics, and even the most mundane subjects can be misinterpreted or taken out of context, sometimes deliberately. So an effective leadership team communication platform must serve as a secure environment, not just to protect against external breaches, but to allow leadership to concentrate on the substance of their discussions, rather than to agonize over the precise meaning of a word or phrase.

The added challenge to capturing those communications is that their trajectory doesn't follow a rigid, or even predictable, path. They are often evolving, adding participants or reshaping themselves around a changing objective or environment. This fluidity dictates a platform with the flexibility to accommodate those changes. At BoardVantage we use a model internally referred to as "Team, Task and Time" to assure that our NextGen platform maps to evolving requirements.

**Teams** are eclectic.

Leadership communication is not necessarily confined within hierarchical or structural boundaries. While members of leadership form the core of the team, outside auditors or advisors may participate to fulfill a process requirement. In other instances, individual contributors are added to provide a particular expertise. It's this eclectic team composition that precludes uniform access and dictates a layered set of access privileges where permissions are granted in accordance with organizational position or other criteria.

**Tasks** vary broadly.

The fluidity of communication is also driven by the variations in the underlying process. Next-Gen supports three distinct but related process sets: Staging vs. Screening, Co-authoring vs. Presenting, Broadcasting vs. Interacting.

*Staging vs. Screening*—Although related, these processes are sufficiently different to impact functionality. Screening implies a permanent exclusion of a group of users, whereas staging implies a communication process where a group is initially excluded but subsequently included,

typically after certain milestones have been met. It is essential that the platform can swiftly reset from a state of exclusiveness to inclusiveness.

*Co-authoring vs. Presenting*—Collaboration can mean little more than sharing final work product with a peer group. In this simple case, the platform needs to support a dynamic of granting the authorized users access, but without the right to change the underlying content. At other times, collaboration means a form of co-authoring where two or more professionals create or edit content. This of course implies more stringent access control. Another use case would be document mark-up done through annotation or highlighting where the underlying document is not altered. Regardless, the permission model must be sophisticated enough to understand how to correlate changes, notes and highlights with the associated user.

*Broadcasting vs. Interacting*—In the not-so-distant past, communication to a large group often took the form of a one-way update with no feedback desired or expected. In today's business world, some form of interactivity is generally encouraged. The platform needs to support both cases and include the granular control to constrain communication streams where necessary.

Structure evolves over **Time**.

Process-driven environments tend to be stable over an extended period of time. Most board communication falls into this category. Board meeting schedules are defined well in advance, sometimes years, and most board members will stay on a board for several years at a time. But this level of stability is not necessarily present at the leadership team level. Team members may be added or removed more frequently, and movement is often correlated with milestone achievement or member expertise. M&A environments are created around a particular deal and only for a limited period of time. Temporary work spaces may be formed for external auditors and finance to collaborate around an audit. These changes in team composition are frequently the case in

events-driven environments. An effective leadership team communication platform needs to support both common use cases.

It was this high degree of confidentiality and fluidity that led BoardVantage to build two essential elements into our NextGen platform architecture:

*Granular Controls*—A platform for leadership team communication requires access and process controls that are granular enough to capture a broad and evolving set of use cases.

*Self Sufficiency*—Leadership team environments change at a lightening clip. Any delays in capturing changes will make the environment irrelevant and will alienate users. This means a premium should be placed on self sufficiency—the ability to manage all aspects of the platform. Whether creating the team experience (e.g. TeamSpace formation), administering users (e.g. provisioning), managing content (e.g. remote purge) or delivering service (e.g. password reset), third-party reliance should be avoided.

The NextGen platform delivers a broad set of user friendly administrative controls, and by allowing the permission model to exercise control over all communication streams, effectively placing security in the service of collaboration.

### Take-Aways

- » Leadership Team collaboration is dynamic by nature. Teams are eclectic, tasks vary and structure evolves.
- » In a rapidly changing environment self-sufficiency is key. NextGen delivers the self-sufficiency necessary to maintain control over those changes. This is essential in a fluid environment where delays in capturing changes may drive users away.
- » NextGen puts security architecture in the service of collaboration, letting the permission model exercise control over all communication streams.