



# COLLABORATING IN THE CLOUD

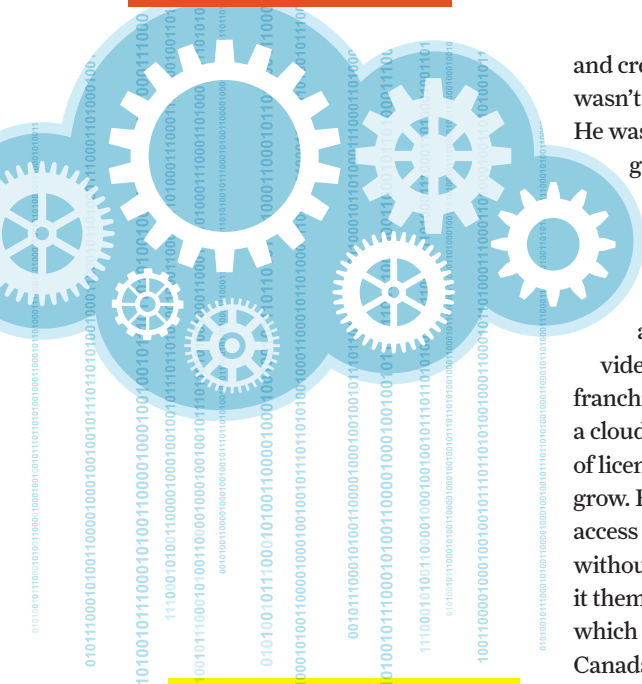
How collaborative software that lives in cyberspace can help your business.

BY JEAN THILMANY

**LORNE CASSOFF, PRESIDENT OF** Canadian restaurant chain Ben & Florentine discovered the power of collaborative technology after struggling to keep tabs on the 40 franchise locations in his company's network. Though the chain is a franchise operation, company headquarters oversees much of the overall operations—everything from hiring managers to supervising a branch's paint job.

Until two years ago, the company was communicating primarily by email, with management using Microsoft Outlook to assign tasks and request updates. "With email, information I needed to see was falling through cracks and not getting to me," explains Cassoff, who notes that his chain had essentially outgrown the technology. Flagging email threads

**PART I** OF OUR  
TWO-PART SERIES  
ON CLOUD-BASED  
COLLABORATIVE  
SOFTWARE.



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**—Lorne Cassoff, president,  
Ben & Florentine**

and creating inbox folders simply wasn't getting the job done, he says. He was always struggling to stay organized, to find the right emails and to connect with the people responsible for tasks and organizing projects.

Cassoff began looking for a cloud-based solution to provide visibility into how each of the franchisees is performing. He wanted a cloud solution because the number of licenses needed could then easily grow. Franchisees would be able to access the software via the cloud without needing to buy and maintain it themselves. Also, the restaurants—which are scattered across eastern Canada and together serve about 2.5 million customers yearly—could be pulled together via the tool, which resides on the software vendor's server.

Ultimately, he chose Wrike, which provided many of the features Cassoff needed, including the capability to house continuously updated franchise information in one place. Since transitioning Ben & Florentine to Wrike about a year ago, Cassoff has been monitoring all of his restaurants as separate projects and has visibility into the tasks listed under each.

"If I'm talking about a certain project or, more specifically, a certain franchisee, I can go into that project and see everything that's happening with that franchisee and all the information is accessible to all my employees," he explains. The move also reduced inbox traffic by about 90 percent, he adds.

#### **CEO-DRIVEN SOFTWARE SOLUTIONS**

That Cassoff was able to identify the type of collaborative tool his company needed, that it should be cloud-based and that it required specific capabilities isn't so unusual, says Joe Cowan, CEO of Epicor, which makes collaborative, cloud-based solutions for retail-related businesses. Increasingly, Cowan finds himself speaking directly with C-suite decision makers at companies looking to adopt the

type of software Epicor provides.

Several factors are driving the swelling interest in collaborative technologies—as well as the need for business leaders to helm decision-making on which technology to choose, says Cowan. The technology can help companies boost productivity and streamline communications across the enterprise, especially when employees are scattered across the country—or even around the globe—yet working together more tightly than ever before. Enabling team members to efficiently communicate and coordinate efforts and to offer feedback is quickly becoming a competitive imperative.

And because the executives themselves will be using them for insight into how their entire operation is functioning, they often want a hand in selecting the best tools for their jobs, reports Cowan, who adds that incoming generations of employees are also driving adoption. "The industry we're in has been older and stodgier, but as my generation starts to retire and millennials come in, they expect to be doing things in a different way," he explains, noting that younger employees expect the kind of transparency, speed and accessibility these solutions offer.

"They don't want an office. They want an iPad and an iPhone and, if they're on the floor of a plant, they want to see what's going on or to check on the status of orders," Cowan says. "And if someone delivers products to a customer, they want to see where that product is. Collaborative systems need to be able to do that."

Via customized permissions, collaborative software systems allow employees to coordinate on real-time conversations, upload, comment on and edit resources stored in the cloud, as well as manage projects within a single software tool, regardless of location or department. The systems can be tailored for a variety of needs, including project management, communication—such as real-time, threaded conversations—as well as document management, customer communica-



tion, human capital management and project lifecycle management.

### CAPITALIZING ON THE CLOUD

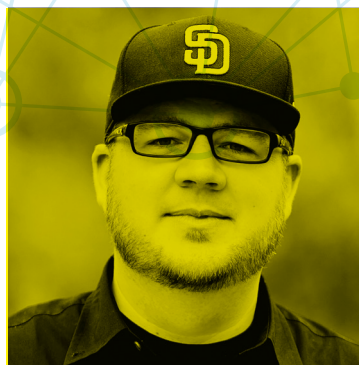
"Cloud collaboration providers are now replacing a complicated mix of email clients, FTP clients and instant messengers," reports Abdul Salam, a co-author of "Deploying and Managing the Cloud Infrastructure." Putting tools into one software system reduces complexity for users and helps support task management through solutions like enabling employees to see who is viewing a document and integrating email alerts into collaborative tools.

Enterprise cloud applications bring a variety of collaborative tools—all from the same vendor—and tie them together across a common platform. This approach appeals to companies seeking a streamlined way to meet all of their collaboration needs across the enterprise rather than relying on multiple solutions.

Companies that choose enterprise applications do so as a business strategy, says Gretchen Alarcon, Oracle group vice president, product strategy. The choice also depends on the culture of an organization and how many departments it seeks to tie together. "You have to look at where you want the collaboration to happen, within what areas, and what you're trying to accomplish within these systems," she says. "If collaboration is tied to a business process, then collaboration within the enterprise system makes more sense than using ad hoc systems."

While many companies opt for cloud-based subscription models that take security and update management off their hands, there are pros and cons to that approach, notes Laurence Goasduff, an analyst at business analysis firm Gartner, and author of the research report "The Financial Case for Moving the Cloud."

For example, choosing a cloud-based model saves companies on both upfront investment in pricey IT



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infrastructure and ongoing updates. That cash can then be freed up to fund other business needs.

However, an expanding company will invariably need to purchase more licenses as it grows, which can become less cost-efficient than developing or purchasing a system outright. Subscription fees also go on forever and may increase over time. Plus, it can be both difficult and expensive to part ways with a provider, given the cost of extricating data collected in the cloud.

Choosing wisely can help guard against these pitfalls and, fortunately, there are plenty of tools from which to choose. A large number of vendors have entered the market in the past seven years, offering a range of solutions tailored toward different company size ranges and industries.

Autodesk Fusion Lifecycle, for example, allows engineers and industrial designers to manage their design projects across teams on the cloud, while Basecamp is widely used by website designers and media companies.

To find the right tools and to enable smooth implementation, Gartner recommends that companies “document the internal processes that will be affected by the identified cloud services and map applications and workloads to the associated cloud services. The document and the map should be targeted to achieve business outcomes—for example, cost-efficiencies, operational efficiencies and agility.”

### USE, DON'T ABUSE

In addition to finding the right software fit companies need to train workers on using the technology effectively, notes Syntex Creative CEO Tim Trudeau. His \$9.5 million independent digital music distribution company uses a number of independent collaborative cloud technologies, including Google Apps for calendar invites and to share employee calendars.

“I travel all the time, so employees can see where I am, what's going on and whether it would be a good time to reach out,” says Trudeau. “It's access to data like that that takes work off of the backs of people. We can remove a lot of nonsense that clutters inboxes, like an email saying ‘What are your plans for tomorrow?’”

Collaboration software also helped Trudeau keep his company's head count in check, as the tools can do the jobs staff members carried out in the past. “Maybe one person's job used to be to manage travel and executive calendars—now, with collaborative tools that do that, you're able to have a much leaner team,” he explains.


However, too much collaboration, or a too firm a focus on collaborative tools can have a downside, warns Trudeau, who considers the potential

for misuse as a possible drawback. Executives may start monitoring every thread and employee conversation, which is rarely necessary and takes time away from more pertinent tasks, he says.

“You feel you've accomplished something by responding to this or that, but really you haven't,” he says.

Adoption of new, yet ultimately unnecessary technology is also a potential pitfall, he adds. “Sometimes executives get so gung ho about the technology that they're constantly bouncing around and sort of creating instability for their employees,” he says. “Once someone learns and knows [a tool], you pull the rug out from under them by going to another one and that's very frustrating.

“If you're running the company you need to be aware of people's feelings on this stuff,” he says. “There are ways to do it that can be fun and enjoyable and ways to exasperate people with it.”

The bottom line? Collaborative cloud software is often a significant investment for most companies. Software choices need to be made with care, but taking the time to choose well and implement the tools effectively can pay off handsomely in the end. Perhaps Cassoff sums up the business benefits best: “There's nothing falling through the cracks anymore,” he says. 

*Jean Thilmany is a Minneapolis-based technology writer.*

## Next Up

**Look for Part II of our cloud-based collaboration software series in March/April's CEO Tech:  
THE CEO'S GUIDE TO CLOUD-BASED COLLABORATION SOFTWARE**

- Tips on how to choose the right cloud-based collaboration software for your company
- A guide to the features, cost and usage of some of the top applications

## AD INDEX

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OUTSIDE BACK COVER

### CEO AND SENIOR EXECUTIVE COMPENSATION REPORT FOR PRIVATE COMPANIES

[www.chiefexecutive.net/compreport](http://www.chiefexecutive.net/compreport)  
25

### CHIEF EXECUTIVE NETWORK

[www.chiefexecutivenetwork.com](http://www.chiefexecutivenetwork.com)  
12

### CONCERGE AUCTIONS

[www.conciergeauctions.com](http://www.conciergeauctions.com)  
INSIDE BACK COVER

### E-NEWSLETTER

[www.chiefexecutive.net/newsletters](http://www.chiefexecutive.net/newsletters)  
5

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[www.floridathefutureishere.com](http://www.floridathefutureishere.com)  
17

### HARVARD BUSINESS SCHOOL

[www.exed.hbs.edu/CEM](http://www.exed.hbs.edu/CEM)  
7

### HOSPITAL FOR SPECIAL SURGERY

[www.hss.edu](http://www.hss.edu)  
69

### IBM

[www.ibm.com/outthink](http://www.ibm.com/outthink)  
43

### INDIANA ECONOMIC DEVELOPMENT

[www.astatethatworks.com](http://www.astatethatworks.com)  
32

### JOBS OHIO

<http://jobs-ohio.com/saama>  
59

### LOUISIANA ECONOMIC DEVELOPMENT

[www.louisianaworkswithyou.com](http://www.louisianaworkswithyou.com)  
9

### MEMORIAL SLOAN-KETTERING CANCER CENTER

[www.mskcc.org](http://www.mskcc.org)  
71

### MICROSOFT

[www.microsoftcloud.com](http://www.microsoftcloud.com)  
INSIDE FRONT COVER, PAGE 1

### NICHOLAS AIR

[www.nicholasair.com](http://www.nicholasair.com)  
3

### NEW YORK-PRESBYTERIAN

[www.nyp.org/EXECHEALTH](http://www.nyp.org/EXECHEALTH)  
66

### PURE INSURANCE

[www.pureinsurance.com](http://www.pureinsurance.com)  
21

### SENIOR EXECUTIVE NETWORK

[www.seniorexecutivenetwork.com](http://www.seniorexecutivenetwork.com)  
37

### SMART MANUFACTURING SUMMIT

[www.smartmanufacturingsummit.com/home](http://www.smartmanufacturingsummit.com/home)  
23

### TEXTRON AVIATION

[www.txtav.com](http://www.txtav.com)  
10, 11

### WOUNDED WARRIOR PROJECT

[www.findwwp.org](http://www.findwwp.org)  
45