

# A Smarter Way to Work:

Online Collaboration Tools for Online Customer Working Groups



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# Overview

This white paper examines the current standard for customer working groups and outlines the advantages of using digital tools and technologies for communication and collaboration.

## Part 1 | The Present Industry Model

We provide an overview of the traditional model of a customer working group and posit that there is a smarter, leaner and more efficient way to work.

## Part 2 | A Smarter Way to Work

We recommend the use of online collaboration tools and portals to enhance and supplement working groups by keeping action items and key objectives moving forward in between live meetings.

## Part 3 | Online Working Group Benefits

We highlight the benefits and advantages of using an online portal to facilitate or augment a working group.

## Part 4 | The Impetus Approach

We review the Impetus approach to online customer working groups and how we help organizations create continuous conversations that produce high quality end results.

## Part 5 | Conclusions

We summarize the key insights and recommendations provided in this white paper.



# Part 1 | The Present Industry Model

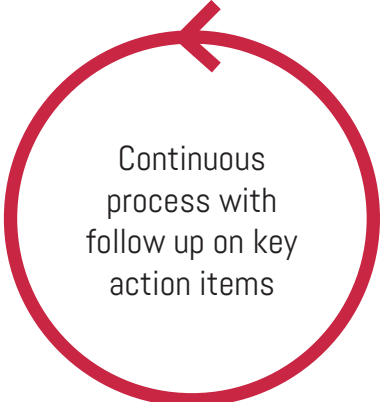
A working group is a collection of subject matter experts who are brought together over a definite period of time to achieve a specific end goal or result. In B2B companies, a working group most often takes two forms: an external working group comprised of C-Suite Executives or Key Opinion Leaders developing educational materials or consensus papers, or an internal team collaborating on marketing messages or materials.

Unfortunately, the strongest and best experts are not necessarily geographically based, making planning and coordinating a working group a lengthy and complicated process. Gathering comments and feedback often requires a series of costly and time-consuming meetings with limited opportunity for interaction and insight sharing and little to no follow up on key action items. Additionally, due to personality types and group dynamics, people with the strongest opinions may be the only voices heard during live meetings, influencing the feedback and insights received.

## Series of costly & time-consuming live meetings



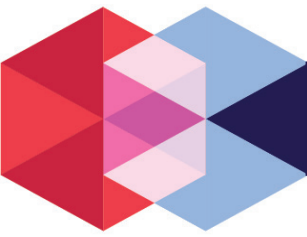
vs.



Continuous  
process with  
follow up on key  
action items

Indeed, working group members need to remain engaged and provided with opportunities to actively participate in order to keep momentum going and ensure that objectives are met to produce high quality deliverables. When timelines are tight and budgets are already stretched thin, it can be challenging to foster a sense of continuity between live meetings, meaning valuable insights can easily be lost and projects can quickly begin to go over cost and over budget. When meetings are the key vehicle to moving project objectives forward, large and overwhelming goals are often tackled from the outset, and groups can get bogged down with gigantic project scope.

Although customer working groups are an important component of both internal and external organizational strategy and tactical planning and development, focusing on the logistics of multiple live meetings can detract from the end goal and may not be the most efficient use of time and resources. Furthermore, increased compliance requirements among companies may create a stringent process of multiple checks and approvals before an initiative can be launched, causing backlogs, delays and frustration. Ultimately, a smarter way of working is required in order for companies to foster deeper and more insightful relationships with their customers and meet their objectives in a timely and cost-effective fashion.



## Part 2 | A Smarter Way to Work

Beyond the traditional industry model of a working group, there are significant opportunities to engage working group members beyond a live meeting and garner valuable insights to produce high quality deliverables. It is recommended that a working group be conceptualized not just as a series of live meetings that lead to a finished product, but as a dynamic process that fosters conversations that continue and encourages members to actively participate.

Online collaboration tools and portals introduce a smarter, more effective way for working groups to meet deadlines, stay on budget and produce high quality end results. Using an online working group portal can replace or augment live meetings and keep action items moving forward, transforming the entire process from transactional and complicated to continual and streamlined. Rather than relying on “one-off” face-to-face meetings or exchanges to progress working group objectives, an online portal can create sustained engagement via strategic touchpoints. Tasks can be broken down into “digestible” mini online assignments, and comments and feedback can be collected and collated quickly and easily so multiple iterations or drafts of documents can be collated.

An online portal can also help to increase efficiency, productivity and project delivery times while developing and cultivating deeper key opinion leader insights and relationships by offering working group members an opportunity to participate at a time and place most convenient for them. Indeed, busy executives and key customers welcome the convenience of being able to contribute from anywhere at any time.

### Online Working Group Interaction Opportunities:

- Replace or augment live meetings with multiple online touchpoints, breaking work into digestible assignments
- Review and/or annotate draft slide decks, articles, and resources in an iterative manner
- Provide insights or feedback through an online discussion forum
- Pre- and/or post-meeting questionnaires to guide meeting discussion
- Communicate and follow up on key working group meeting discussion points or action items
- Share relevant slide decks, articles, resources and information
- Facilitation of individual work and contributions, as well as “group think” and discussions

In addition, using technology can also assist with streamlining the recruitment and logistics support required in getting working group members on board and service agreements signed and returned in a timely and efficient manner. Member activity can be tracked online in real time, ensuring that reminders and follow ups for specific action items are sent out accordingly.



## Part 3 | Online Working Group Benefits

Utilizing an online portal to augment a working group offers a multitude of benefits for both organizations and working group members:

- **Accessible:** Online portals are available 24/7 and on any device so members can participate at a time and place convenient for them
- **Cost-effective:** Collecting comments and feedback digitally can eliminate or reduce the amount of live meetings required, thus cutting back on costs associated with travel and logistics
- **Organized:** Moving key action items forward using a digital platform can foster a sense of community and ensure deadlines are met
- **Convenient:** Increased reach and frequency to engage diverse subject matter experts

### Accessible:

Using an online portal, working group members can participate at their own convenience — whether it be on their laptop at home, their iPad at work, or their smartphone in an airport — meaning much more can be achieved in a shorter period of time. Comments, feedback and insights can be provided from anywhere at any time asynchronously without a live meeting, which can improve the quantity and quality of knowledge and insights shared.

### Cost-effective:

Augmenting or replacing live meetings with an online portal can significantly affect an organization's bottom line by reducing the amount of time and money spent on arranging travel, accommodation and meeting logistics. In addition, potential top line return on investment includes consistent and meaningful communication with key customers, positive reputational impact and increased reach and frequency on a wider range of customers.

### Organized:

Online portals can help to increase productivity and efficiency, as the time spent between live working group meetings could be leveraged as opportunities to follow up on key action items. Members can view timelines and activity can be tracked for reminders and follow ups. Having a central hub for communication also ensures that there is a repository of feedback and that comments are archived and easily accessible for group review.

### Convenient:

Reduce global time and geographic barriers and increase reach and frequency across a variety of clients by creating a convenient online hub for communication and collaboration. Working group members appreciate the opportunity to participate and contribute without having to travel or invest a great deal of time or effort.

# Part 4 | The Impetus Approach

We are the Online Customer Advisory Board experts, offering the most comprehensive B2B Online Customer Advisory Board solutions. Impetus helps B2B companies looking to increase customer intimacy, engagement and retention by creating a shared future direction with their customer executives and key opinion leaders. We have extensive experience with the world's leading companies and brands. Our proven process, Customer Advisory Board best practices and proprietary online platform ensures success in creating a new Customer Advisory Board or re-igniting an existing program that is not providing the necessary value to the sponsoring company or to the Customer Advisory Board members.

The outcome of our proven services comes in many forms, such as:

- Invaluable customer insight from senior decision makers on the benefits and value of your strategy and solutions
- Creation of internal executive alignment on the best course of action
- High-level strategic opportunity discovery by fostering non-threatening executive interactions with C-level customers, prospects and key opinion stakeholders

Impetus is transforming interactional, "one-off" customer meetings into ongoing conversations through online touchpoint assignments housed within a client owned, password protected Impetus InSite Platform™ and leveraging a strategic Campaign of Interactions™ plan. Impetus is quickly becoming the new gold standard for key customer insights management.

## The Impetus Solution

An efficient and cost effective way to get the most from your advisory boards and working groups



### Campaign of Interactions™ (COI) Process

Strategic consultation to create your online advisory board or steering committee annual objectives, calendar of touchpoints, key topics and assignments as well as metrics for success



### Impetus InSite Platform™

Your own branded and customized password protected platform used to deliver your COI touchpoint assignments for customer collaboration and sharing



### Project Management

Disseminates each online touchpoint assignment to advisors via email which links them to the portal as well as send customized reminders until the assignment deadline has been reached



### On-Demand Reporting

Tracks assignment completions in online activity trackers that can be reviewed on-demand and collates responses into transcript summary reports at the end of each online assignment

## The Impetus Impact

+ 90%

Engagement Rates

+ 86%

Improvement in Convenience

+ 72%

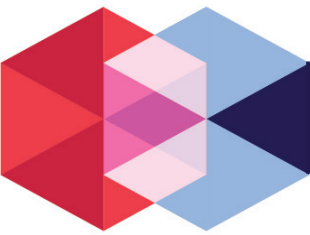
Increase in Speed to Access Insights and Data

+ 40%

Improvement in Quantity and Quality of Information Shared

+ 30%

Improvement in Costs of Running Live Meetings







## Part 5 | Conclusions

The current model of customer working groups tends to focus on face-to-face interactions and overlooks the opportunity to keep momentum going and action items moving forward. Utilizing online collaboration tools and portals for working groups provides organizations with a smarter, leaner and more engaging way to work by supplementing or replacing in-person interactions and offering an online hub that can act as a repository for discussion and feedback.

Among others, the advantages of online portals are that they are accessible, cost-effective, organized and convenient. Working group members appreciate the opportunity to provide insights and comments at their own time without always having to travel for a live meeting, and organizations can benefit from the reduction in time and money spent on coordinating travel, accommodation and meeting logistics.

Impetus offers a wide range of options for organizations seeking to optimize working group meetings with digital solutions for communication and collaboration. As a strategic partner, Impetus can assist with dividing large projects into digestible parts and can manage the process of gathering and collecting insights in a granular, measurable way. Working with Impetus ensures that subject matter experts have the processing time to think through and provide valuable insights rather than responding with a “knee jerk” reaction to a live meeting. Not only can Impetus assist with working group project management and the development of an online portal, we can also help with the logistics and facilitation of live and web meetings as well as content and creative.

### Digital Tools for Online Touchpoint Assignments

 <b>Questionnaires</b> Capture granular details to specific questions	 <b>Discussion Forums</b> Allow customers to share their comments with colleagues	 <b>Web Meetings</b> Allow customers share in an online meeting to further dialogue and reach consensus	 <b>Annotation Exercises</b> Enable documents to get annotated real time online and not worry about version control
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To find out more about what Impetus can do for your organization, don't hesitate to reach out directly by email at [connect@impetusdigital.com](mailto:connect@impetusdigital.com) or by telephone at 416-992-8557.