

10 Things to Look For When Buying a Collaboration Tool

Team collaboration is essential to maximise your team's productivity and success. Achieving your team goals is dependent on how well your team works together, supports each other and shares information. This is getting harder as teams are situated in different locations and time zones.

An online Collaboration Tool allows the team to work more cohesively and allows you to both track and manage your teams, projects, tasks, and priorities in one place.

The right tool should help centralise your communication, documents, and timelines, create more accountability, increase transparency and lead to increased productivity.

However, there are hundreds of tools to pick from, so how do you choose? We would recommend trailing a few so you understand the different options, and what feels right for your business. Here are our top ten things we think you need to look for when creating your requirements list:

1 – Top 10 Features – Consider what specific features your business need. Here we have listed some core features you should expect and ask for:

- **Team Communication** – ability for the team to communicate with each other and key stakeholders, internally and externally. This includes chats, video, and audio calls. Allowing for group chats and calls or subgroup private chats and calls. Ability to add a late or new participant on the go.
- **Project Management** – Everything from creating a task to meeting deadlines, should be shareable and trackable, i.e., time tracking will allow you to understand the cost of labour
- **Document Management** – ability to collect upload, store, share documents in a central location allowing you to organise and share files for easy collaboration in a secure and private way so only those who need to see it can. Ability to link to a file in another repository, not always necessary to migrate the files across. Real time editing of documents, document chat, document history.
- **Accessibility and Compatibility**– ability for the team to use on any device you use in the business, smartphone, tablet, laptop, or desktop for ease of access, also the ability to switch devices halfway through a call or chat.
- **Workflow automations** – must be able to automate any repetitive tasks by creating workflows, find out if this capability is core or an upgrade feature
- **Customisations** – ability to customise the tool to your processes and business, although the more customisations you make the costlier the tool becomes to manage and support
- **Shared Calendar Feature** –This will allow you to share deadlines, vacation schedules, milestone events, project due dates and other key events with the team, but also only see your own events
- **Reporting** – most will have ability to do analytics and reporting, however, ensure you can drill down into the data to make it useful for you. Find out if this is an upgrade feature
- **Ease of use** – if intuitive and easy to use, the adoption rate is likely to be higher, including easy, intuitive onboarding and off boarding of team members. Simplicity and usability are key. Each user should be able to see their 'own' tasks or view a task dashboard.
- **Scalability** – will this tool be able to grow with you as you grow, is it flexible and scalable? or will you need to move to another tool as you grow?

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2 – Multiple Users – the Collaboration tool should allow multiple users at any one time and sharing of information between the teams, and should be able to scale as your team grows bigger

3– Ongoing Support – ensure you get ongoing support for your tool and configuration. Should be able to access via email, phone, or live chat, if hosted they should have an availability Service Level Agreement

4 – Security – ensuring the security of yours and your customers data is of the utmost importance from hacking etc – ensure all sensitive data is encrypted competently – look for end to end encryption on chats, multifactor authentication, integration with Active Directory, Admin control, ability for teams to have private conversations or collaborate separately where sensitive data is involved. Losing sensitive information will mean losing the trust of your customer

5 – Cloud vs On Premise – with a cloud version you don't need a server or technical expertise on your side – all the info resides on the vendors server – with on prem you own the software, and it is physically hosted by you on your hardware – you have direct access to the servers and no recurring subscription charges, but will mean higher upfront costs

6 – Integration - make sure the Collaboration tool integrates with your other tools and allows for interoperability.

7 – Due Diligence – ensure company Stability and reputation, choose an industry specific vendor with local customers, this will ensure you have less customisations to do, ensure you get references, and conduct due diligence and understand the adoption rate. Request a demo and request to test drive a free trial.

8 - Total cost of ownership – Take a holistic view and weigh up the cost of the tool and associated costs to your business including – implementation, infrastructure requirements, does your network have enough bandwidth? time required to update and maintain. Setup should be fast and simple, no extensive training, no admin person required to run it and no manual entry

9 – Ownership of Data – if the software and data is being hosted in a cloud environment the ownership of data becomes more important, you should own the data. Ask the vendor if they will have access to your customers data, and what happens when you leave the subscription, who will retain data.

10 - GDPR compliant – there are some laws around data privacy and the tool needs to support that. The customers data and where it is stored and who can access it is very important