Building a Collaborative Writing Strategy

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Doing business in a global marketplace demands virtual collaboration. Sharing topics in a content management system requires writers to collaborate virtually. What does collaboration mean in technical writing organizations? To answer this question, we surveyed models of collaboration, especially one developed by Morten Hansen in *Collaboration: How Leaders Avoid the Traps, Create Unity, and Reap Big Results*. In this article, we examine how Hansen’s methodology can support the process of building and implementing a collaborative writing strategy, one that supports successful single sourcing solutions. We explore the benefits of collaboration, why barriers occur, and how to overcome those barriers. We also provide useful tools and strategies to help teams reach their collaborative potential.

**WHY IS COLLABORATION IMPORTANT?**

In his book, *Collaboration: How Leaders Avoid the Traps, Create Unity, and Reap Big Results*, Morten Hansen appeals to the business world precisely because the benefits of collaboration are measurable in the following areas:

- Innovation
- Creative problem solving
- Operational efficiency
- Agility
- Sales and supportability
- Customer satisfaction

Hansen provides compelling examples that point to the benefits of integrating people across different business areas and technologies to create or leverage innovations from existing ideas. He refers specifically to measurable results at Procter & Gamble, Wells Fargo, and Apple (Hansen, pp. 33-35). For instance, Proctor & Gamble leveraged 13 products to market 24 brands using collaboration strategies; each brand generated at least 1 billion in annual sales. This example highlights the measurable value of collaboration in business settings.

In an intensively competitive global marketplace, organizations must respond to customer needs. Increasingly, customers access product information—including product descriptions, documentation, and reviews—anywhere, anytime, and on any device. As the demand for information increases, writing teams are challenged to deliver quality content quickly through ever-expanding distribution channels. Delivering on-demand content requires automation to ensure consistency and translation efficiency. Single sourcing solutions allow organizations to produce the topic-based, modular information that customers seek. But for organizations to do this work successfully, individuals must learn how to work together to develop and deliver content.

**WHAT IS COLLABORATION?**

Collaboration is about people working together to achieve goals. But what does working together really mean? What does it take to make this happen?

Of the different definitions of collaboration that we reviewed, we found that Hansen’s definition best gets at what collaboration really is and why it is so difficult to do well. For 15 years, Hansen conducted research on collaboration in a wide range of companies, including Hewlett-Packard, searching for answers to the question, “What is the difference between good and bad collaboration?” His research led him to define collaboration as a discipline: “The leadership practice of properly assessing when to collaborate (and when not to) and instilling in people both the willingness and the ability to collaborate when required” (Hansen, p. 15).

Three concepts are central to Hansen’s definition of disciplined collaboration: leadership, motivation, and ability. Cultivating a culture of collaboration requires leaders—from the executive level down to the department manager level—to lead the collaboration effort. And that means motivating people to want to collaborate and equipping them with the ability to do so.

- Motivation is about instilling in people feelings of being valued and necessary, connected, set up for success, and part of a larger purpose.
Ability is about enabling collaboration through the right resources and tools, communication channels, process structures, and training.

Leading the collaborative effort does not mean simply telling people that they must collaborate or creating a mission statement that says that the organization values collaboration. These all-too-common practices do not motivate people, and they certainly do not provide people the support they need to collaborate successfully.

To cultivate a culture of collaboration, leaders need to model the kind of collaborative culture that they envision by establishing a management framework that not only values and rewards collaboration but also offers training, tools, and processes in support of this kind of interactive work. For example, if a leader wants writers to develop shared content, then she needs to set specific performance targets that can be measured to determine the level of collaboration carried out by the team.

**What Makes Collaboration Difficult?**

Collaboration is essential to achieving results in today’s business climate. But collaboration is not easy and runs counter to management practices. Collaboration is not something leaders can just ask or expect people to do. It is a disciplined practice that requires know-how. Most people have never been taught how to collaborate successfully. In higher education, for example, the emphasis is on individual performance—on proving one’s individual knowledge and capabilities; as a result, most graduates enter the workforce not understanding what it means to collaborate, why they should collaborate, or how to collaborate. This experience then creates a culture that is not prepared for collaboration, which is the reason why cultivating a culture of collaboration is so critical; it’s an adaptation that leaders in education and in business need to lead.

In their book, *Virtual Collaborative Writing in the Workplace: Computer-Mediated Communication Technologies and Processes*, Beth Hewett and Charlotte Robidoux attribute many of the collaboration challenges in single sourcing environments to this general lack of know-how:

> To the extent that individuals typically are more accustomed to producing whole texts rather than smaller pieces of content, many writers do not understand how to contribute efficiently to jointly developed written materials. Furthermore, many geographically distributed writing teams lack guidance and experience on how to coordinate complex activities across space and time. (p. xxiii)

A collaborative writing strategy must go beyond plans for what writers, or others contributing to the development of information, are expected to do; the strategy must also include plans for how writers will be enabled to successfully achieve business goals (see Overcoming Collaboration Barriers, pg. 66).

Understanding what the how component should entail, though, means understanding organizational obstacles to collaboration—obstacles that must be overcome if writers are to be motivated to want to collaborate and equipped with the ability to do so. Primary organizational obstacles include modern management, silos, and competition; an information transfer approach to communication; and cultural factors.

**Modern Management, Silos, and Competition**

As Hansen’s research indicates, modern management often discourages rather than encourages collaboration insofar as performance management practices in the workplace reward individualism. That is, business environments openly thrive on competition at various levels in the organization, from business area silos and functional units to individual employees. Performance objectives often guide individuals to work at cross purposes. Even when working on a team, each contributor often has a separate set of targets that induce competition.

For technical writers, the individual focus is hard to avoid since the practice of writing is normally a solitary activity. But when writing practices are automated, writers must transcend the inclination to work alone and own whole documents. Yet if the management framework in which they work does not endorse a collaborative culture, writers will have little reason to change their writing behavior. Thus to establish a collaborative culture, leaders must re-examine and redesign their performance management practices.

**Information Transfer Approach to Communication**

In addition to modern management, silos, and competition, an information transfer approach to communication in organizations accounts for why business areas are often self-reliant and why groups tend to hoard information, have difficulties finding information, and have weak connections with others in the organization (see Collaboration Barriers, pg. 64).
An information transfer approach to communication focuses on the one-way transmission of a message from sender to receiver, often through various communication channels, and assumes that the meaning transmitted is the meaning received—that the message means the same for the sender as it does for the receiver. This approach presupposes that if a message is well written and transmitted with reasonable accuracy from sender to receiver that the receiver will be able to apply that information successfully to her problem-solving activities (see Figure 1).

The information transfer approach to communication has faced much scrutiny from communication and social science experts (see, for example, Brown & Duguid, 2000; Doheny-Farina, 1992; and Rogers, 2003), as it fails to account for how individuals come to understand what the transmitted information might mean in terms of the social context in which it is to be used. Stephen Doheny-Farina argues that an information transfer approach to communication “separates knowledge from communication” and assumes that communication means “sending information through channels” and sending facts to receivers—when receivers successfully possess the facts, communication is successful” (Dohney-Farina, p. 8). The problem with this view, however, is that it “does not explain how information comes to mean something to a participant in communication activities, nor does it tell why people have difficulty communicating with one another” (Dohney-Farina, p. 9).

In single sourcing environments, people representing different business areas must work together to achieve common content goals. These goals are difficult if not impossible to achieve, however, in organizations that primarily depend on an information transfer approach to communication.

Studies show that communication channels that facilitate synchronous, interactive communication, such as video conferencing and face-to-face meetings, are inherently more effective than asynchronous, one-way communication channels, such as email and webinars, in helping individuals of different groups and expertise come to shared understandings of meaning. Synchronous, interactive communication channels allow for “a negotiation and sharing of perspectives, values, language, knowledge, and so forth” as opposed to exchanges of objectified pieces of information through technological channels (Doheny-Farina, p. 10).

Organizations developing a collaborative writing strategy need to implement synchronous, interactive communication channels that support innovation, provide shared access to information, and facilitate interaction, knowledge acquisition, and learning. These channels, thoughtfully implemented, can increase people’s motivation to collaborate and their ability to do so successfully.

**Cultural Factors**

Implementing communication channels that facilitate interaction, knowledge acquisition, and learning are not going to automatically result in successful collaboration, just like developing a shared vision alone is not going to automatically result in a collaborative culture. Leaders also have to be mindful of cultural factors that may hinder successful collaboration (see Figure 2).

Technical documentation, engineering, training, marketing—these groups represent some of the common cultures that must work together in a content management system (CMS). Each culture shares a language, history, value system, structure, and set of rules, practices, and artifacts unique to that culture. These cultural factors define each culture and influence how members of each culture interpret new information.

When a technical documentation team is adopting a new CMS, for example, team members’ individual and collective interpretation of the new system will be influenced by the language, rules, habits of practice, and tools with which the members are already familiar. Members who are resistant to collaborating in the system may be resistant not because they lack motivation to collaborate but because the system is a far departure from long-ingrained habits of practice. Learning new habits of practice takes time and requires the right resources and tools, communication channels, process structures, and training.

Just as cultural factors can hinder successful collaboration within a team, so too can they hinder successful collaboration between teams. When two widely differing cultures, such as a technical documentation team and an engineering team, attempt to collaborate, cultural factors tend to be the biggest barriers to successful collaboration. Because the two cultures in effect speak a different language; share different values, practices, and roles; and draw on different problem-solving strategies, the two cultures often struggle to come to shared understandings of meaning. Without a common ground on which the two cultures

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**Figure 2: Cultural Factors That May Hinder Successful Collaboration**

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can understand each other—that is, without a shared vocabulary and opportunities to come to shared understandings of meaning through highly interactive negotiations—the two cultures will struggle to collaborate successfully.

**Collaboration Barriers**
Organizations accustomed to competition, independence, and information transfer approaches to communication are likely to encounter multiple collaboration barriers. According to Hansen, the first two barriers, **hoarding** and **innovation**, pertain to motivation. And the second two, **search** and **knowledge transfer**, involve ability.

**Hoarding**
This barrier results because individuals have little incentive to share their time, data, or resources. Performance goals often encourage hoarders to operate this way. The characteristics of hoarding in writers include a reluctance to give up control and a reliance on one’s own way of doing things. These characteristics are symptoms of the following:

- **Competition and perfectionism.** Places emphasis on owning books and controlling words.
- **Being too busy.** Invites someone to just do it “my way,” especially in the face of meeting release deadlines.
- **Fear of losing power.** Centers around control or ownership of a book.

Because writers follow a natural tendency inherent in the writing process—to work alone—leaders need to implement management strategies that encourage writers to share ideas, coordinate activities, and coauthor topics. When people do not know what others are up to or thinking, they tend to fear the worst and hoard information as a kind of self-preservation behavior.

**Innovation**
Business areas that have been siloed for a long time often lack incentive to innovate with other groups (Hansen calls this barrier the “not-invented-here” barrier). Business areas tend to believe that ideas developed within the group are the best whereas ideas developed outside the group are suspect. Such an insular culture, according to Hansen, can lead to a “We’re better than they are” and “Need to fix our own problems” attitude, as well as a fear of exposing weaknesses. This attitude and fear prevents groups from wanting to collaborate with other groups within the organization. Innovation is also discouraged when groups rely on information transfer approaches to communication, as one-way communication means that people are not participating in the kinds of interactions and negotiations necessary to innovate.

Consider, for example, the case of an HVAC manufacturing company at which Rebekka worked as a technical editor. The technical documentation group felt like a scapegoat in the organization, as they were frequently blamed for late releases and for slowing up projects. When the documentation group received the go ahead to move to single sourcing with a CMS, the group was afraid that the engineers, who received frequent recognition for their achievements, would not support the initiative if the benefits were not immediately evident to them.

Because the documentation group was new to single sourcing with a CMS and had a lot to learn, the group decided to go at single sourcing and evaluating a CMS on their own, first, before getting buy-in from engineering or product management. The group did not want other departments to discredit its proposal before it had a chance to prove that it was a good idea. This belief that ideas developed within the group were best deterred the group from innovating with other groups in the organization.

Because the group was afraid of exposing its weaknesses, it resisted inviting other groups to help problem solve.

**Search**
The search barrier, in many ways, is a symptom of the information age. Even so, as the number of communication channels grow so does the amount of information. Businesses that make use of myriad communication channels invite employees to sort through overwhelming amounts of data. The need to find the right information to write documentation can result in hours and even days lost hunting down the right details.

The need to find information suggests a lack of sharing information or working together. Search problems that affect writers are related to the following:

- **Knowing where to begin looking for content.**
- **Refraining from spontaneous conversations about where to locate information.**
- **Lacking the right connections and established processes for working collaboratively.**

A struggle to find the right information might point to an underlying problem with information transfer or one-way communication. How information is delivered makes a difference to individuals who may lack a predetermined interpretation of products or services being developed. Distributing more information in various forms is not the answer. Rather, leaders must seek more opportunities for interactivity (consider a team that relies on email communication versus an interactive wiki that includes essential information, resources, and contact information).

**Knowledge Transfer**
The terms **information** and **knowledge** are often used interchangeably. But these terms represent different levels of understanding, expertise, experience, and know-how. Information
is a message that contains meaning; information helps people understand more “about” something. Knowledge is the ability to judiciously apply that “about” understanding in practice. In their well-known book, Working Knowledge: How Organizations Manage What They Know, Davenport and Prusak define knowledge as “a fluid mix of framed experience, values, contextual information, and expert insight that provides a framework for evaluating and incorporating new experiences and information” (Davenport and Prusak, p. 5). Because a person develops knowledge about a practice, technology, or other entity over a long period of time, that knowledge cannot be easily transferred.

Knowledge transfer, like information transfer, is a major barrier to collaboration. This barrier results when people from different business areas need to work together but do not know how to do so; they lack critical how-to knowledge. According to Hansen, “This transfer problem is not about motivations but about abilities: people can be highly motivated to work together, but they find it difficult to do so” (Hansen, p. 60). Knowledge transfer problems can occur for the following reasons:

♦ **Tacit knowledge is hard to convey.** Some people know a lot about how things work, why they work the way that they do, and who to talk to about what. These people have gained tacit knowledge about the organization over many years. Transferring this knowledge is difficult to do without sufficient support and resources.

♦ **No common framework for working together.** People do not share common visions, values, processes, or tools. They don’t, according to Hansen, have “an understanding of each other’s working habits, subtle ways of articulating something, a liking of each other, and an appreciation for each other’s moods” (Hansen, p. 62). They thus struggle to work together.

♦ **Weak rapport for knowledge transfer.** When people in an organization don’t know each other, they find it difficult to transfer knowledge. They have not developed a learned sense of how to communicate with each other, how to phrase questions and comments, or how to interpret each other’s nonverbal, verbal, or written signals. Strong, interpersonal relationships are necessary for knowledge transfer.

♦ **No process structure to enable know-how.** People might be motivated to share knowledge, but if they don’t know how to do so or if they lack the right tools with which to do so, knowledge transfer is not likely to occur. People need to be enabled to share knowledge (see Implementing Enablers for a list of knowledge transfer enablers, p. 68).

### Overcoming Collaboration Barriers

A cultural change is required when organizations transition from individually-owned documents stored on PCs to shared content modules stored in a shared repository. This change requires leaders to recognize that different barriers to collaboration require different solutions, or what Hansen calls “levers.” These solutions include implementing a unifying vision, T-shaped management, a network of alliances, and collaboration enablers.

### Unifying Vision

An organization chooses to create vision statements for a number of reasons, one of which entails making the entity more focused and thus successful. Indeed, some studies indicate that companies with a clear vision are more effective. That said, many employees share the experience that a stated vision does little to motivate them. How to make a vision compelling, while not an easy task, is an important one, especially if organizations seek improved collaboration. Hansen describes the motivational power of a well-crafted vision, namely, JFK’s challenge to send a man to the moon and bring him back safely (Hansen, p. 79).

A powerful vision, like an effective tag line, can permeate attitudes andshape behaviors; “going green” is a simple example of how words and phrases can mobilize collective behavior. Understanding the reason why a course of action is important can make it easier to recall the words that embody a vision. The quest for a collaborative culture thus begins with a leader committed to establishing a framework that engages the organization and motivates individuals to collaborate. This unifying purpose functions as a kind of connective tissue that spurs collaboration inside an organization, outside and across other organizations, and even with customers. The process of creating a vision always begins with a compelling set of questions:

♦ Why is your organization’s work valuable?

♦ What qualities would describe future success in your organization?

♦ How can collaboration enable this success?

♦ What results are difficult to achieve without collaboration?

♦ What words and phrases encapsulate your future success?

♦ What words create an image of what you’re trying to achieve?

♦ What words and phrases are lasting and inspiring?

♦ Can the organization see the future success as attainable?

A unifying vision is central to any organization that seeks advancement—that sees the possibility of transforming itself in the future. A vision is essential for any organization committed to the results that collaboration makes possible. Because writing organizations need collaboration to create shared content, managers will enable transformation by establishing a vision that serves as a basis for guiding the team.

### Practicing T-Shaped Management

Hansen refers to the second lever of motivation as “T-shaped management.” The driving force behind this management framework is the emphasis placed on individual accountability and on collaborative performance. Four work styles define his model:
A T-shaped management structure enables leaders to combine the performance objectives with goals for collaborating. Establishing this framework requires the following components:

- Build a top-down strategy and strong leadership engagement and support
- Create performance plans (individual & collaborative)
- Reward T-shaped behaviors for existing staff and when hiring
- Set goals for collaborating
- Provide leadership coaching
- Conduct 360˚ reviews
- Measure and track progress

In practice, a T-shaped performer could be measured on the number and quality of co-authored topics delivered on time for a product release rather than on owning, updating, and delivering a document. Additionally, measures can be defined around how effectively a writer supports specific roles that benefit the whole organization.

Valuing information developers who are accountable both for their individual and their shared contributions is central to creating a collaborative culture. That is, describing the importance of collaboration without implementing a performance management structure to drive interactive work behaviors will do little to change the culture. Instead, leaders who want collaboration to characterize their business areas need to offset both the individualism that typifies the modern management culture and the tendency to see writing strictly as a solitary activity.

**Building a Network of Alliances**

This lever is about establishing diverse, strategic, and extensive top-down and bottom-up connections across the organization. When people are well-connected—when individuals have established relationships with other individuals within their unit and across business areas—they are more motivated and better enabled to collaborate.

This lever speaks specifically to the search and knowledge transfer barriers. Finding information and people who have the right knowledge is harder in bigger companies. Where do you look? Who do you ask? What kind of response can you expect? Well-connected people better enable knowledge transfer—tacit knowledge is hard to convey or codify. When people don’t know each other, they’re less likely to ask for the information they need and more likely to complete a task on their own with whatever information they can find on their own. This does not lead to innovation and results.

In cultivating a culture of collaboration, leaders need to develop a structure for connecting people. This structure might include regular social events, social media, informal intra- and inter-unit meetings, who’s who maps or diagrams, an interactive knowledge base, or inter-unit focus groups (also referred to as communities of practice).

**Implementing Enablers**

This lever relates to equipping people with the tools and know-how necessary for successful collaboration. We refer to this grouping as the “enablers” lever, which seemed absent from much research that we reviewed on collaboration and collaborative writing. Enablers, however, are critical to cultivating a culture of collaboration.

Enablers not only facilitate knowledge acquisition and learning, but also guide teams in problem solving. In addition, they help structure team member interactions. Enablers, such as process scripts and interactive web conference software, keep everyone focused on the task at hand, and they help team members know who is doing what, when, how, where, and why (Lowry, Nunamaker, Curtis, & Lowry, 2005). Figure 3 shows different types of enablers:

![Figure 3: Enablers Lever: Equipping People with Know-How through Training, Tools, Guides, and Meetings](image-url)
Training. New processes, methodologies, and tools should be supported with hands-on, interactive, guided, and tailored training.

Tools. These should facilitate interactive communication and knowledge transfer—some tool enablers include knowledge bases, interactive communication channels, instant messaging, web conference software, and content management systems.

Guides. Team members need direction—guides such as process scripts, vision statements, meeting agendas, style guides, and who's who maps or diagrams help equip team members for successful collaboration.

Meetings. Successful collaboration requires team members to meet often—highly interactive, structured meetings that are goal driven and that facilitate consensus building help teams achieve goals more efficiently and effectively.

A particularly effective enabler for teams is a knowledge base—a centralized, open access repository of all of the resources teams need for effective collaboration. A knowledge base can facilitate interaction and encourage discussion. It might include process scripts, who’s who maps and personal introductions, and frequently asked questions. It might also include status updates, best practices, tips, and ideas. The knowledge base serves as a knowledge management tool, facilitates learning and knowledge acquisition, and codifies tacit knowledge.

In cultivating a culture of collaboration, leaders need to implement enablers that equip team members with the know-how necessary to achieve business goals in collaborative environments.

Assembling Your Culture and Areas to Improve

Attempting to make collaboration improvements without assessing the elements needing improvement can be counterproductive. If your team is having difficulty learning to collaborate, consider some self-assessment tools to help you understand the impediments. For example, if motivation is an issue, the corrective measures will be different from those used to address ability-based problems as defined by Hansen.

As T-shaped management principles suggest, writing teams need to be proficient at knowing when to collaborate and when to work independently. Just as a sports team’s performance depends on individual skill combined with coordinated interactions, writing teams need to acquire a comparable kind of proficiency. But doing so must begin with the assessment process. Table 1 describes some of the tools available to help writing teams evaluate their ability to collaborate effectively.

Determining what assessment protocol to use depends on your organization and the level of detail or dimensions you want to capture through the inventory. The value of a self-assessment is that it provides leaders with constructive baseline information that they can use to create collaborative transformations.

The assessment of a team at Hewlett-Packard exemplifies how the assessment process can help leaders focus on meaningful improvements. With the help of students at U.C. Berkeley under the direction of Hansen, HP administered Hansen’s survey in an organization consisting of business analysts, product consultants, information developers, and instructional designers. The results of the study indicated that while there were some motivational obstacles to address, the major issues at hand concerned the

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Table 1: Tools for Evaluating Collaboration
collaborative ability of the organization as a whole. Specifically, the team struggled most with search problems followed by difficulty conveying complex ideas and transferring knowledge from one subgroup to another.

The results of the study helped the HP team develop a strategy focused on collaboration enablers: improving team member relationships, building online networks, reorganizing and classifying information, and implementing more effective processes, tools, and technologies that support effective collaboration. The HP team also discovered, through analyzing the survey results, that team members needed help determining when collaboration would be most effective. Team members needed protocols for when to work independently, when to work interactively, and how to coordinate handing off tasks to one another.

**Mapping Your Plan**

Assessing existing collaboration practices is the first step of mapping a plan for successful collaboration. The Cisco Collaboration Framework recommends a three-stage process for creating a culture of collaboration. In addition to assessing existing practices, what Cisco terms the investigation stage, Cisco proposes two additional stages:

- **Performance.** Efforts shift from an organic and opportunistic approach to collaboration to a more structured and prescriptive approach to collaboration.
- **Transformative.** Collaboration is used to reinvent the organization.

Creating a literal map of what your organization can do in each of these stages helps team members see the overall collaboration plan and the progress. Figure 4 offers an example of a collaboration road map.

In addition to creating a collaboration road map, we recommend an action plan that includes the following components:

- **Action Steps:** What will be done?
- **Leadership:** Who will lead?
- **Timeline:** By when?
- **Resources:** Those available? Those needed?
- **Other Roadblocks:** Who might resist? How?
- **Communications:** Stakeholders? Modes? Frequency?

**Understanding Collaborative Writing**

Some would argue that assigning more than one individual to similar work products can be inefficient. Productivity can be compromised if assignments are not clear, structured, or coordinated. However, when leaders implement disciplined collaboration, the benefits can be substantial, even in a field like writing, that seems less suitable to group effort.

Not only do researchers indicate that repeatable, structured processes can promote productivity (Lowry, Nunamaker, Curtis, & Lowry, 2005), but also practitioners report efficiency gains among writing teams collaborating in content repositories. While the effort involved in cultivating collaborative writing efficiency is extensive, the effort involved is not a reason to avoid collaborating. Teams increasingly are pursuing content management system solutions precisely because they want to do more with less—to produce high quality content more efficiently with fewer resources. Disciplined collaboration can make this kind of transformation possible.

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**Figure 4: Collaboration Road Map**

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