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Drink Your Own Champagne: Analysis of the Transformation of a Technology Provider with Real Time Collaboration from a Strategic and Organizational Point of View

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**Drink Your Own Champagne:
Analysis of the Transformation of a Technology Provider
with Real Time Collaboration from a Strategic and
Organizational Point of View**

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Abstract

We are reporting on a case of a Real Time Communication (RTC) service provider who implemented a set of RTC tools to reach the twofold goal of supporting organizational restructuring after an economic crisis and simultaneously improving its competitive position in a marketplace driven by increasing commoditization. In contrast to other technology implementations where management follows an application view, we present a case where management introduces RTC as an infrastructure, i.e. it looks at a complex ensemble of technology artifacts which are used by heterogeneous users in a multitude of ways, many of whom are unforeseen. The paper uses a framework of managerial tasks and responsibilities to explain the balancing act between managerial dictum on the one side and providing space for experimentation and organizational learning on the other side. The organizational design shows a high level of management sensitivity to the complementarity principles of organizational and technical choices. The case further provides rich insights into the processes of rule setting and organizational embedding of RTC. We found that the specific hardware and software constellation do matter and the establishment of the user experience team creates and fosters a new level of innovative discourse within the organization.

Keywords: Organizational transformation, strategic positioning, RTC, infrastructure view

1 Introduction

The paper studies the managerial and organizational design of Real Time Communication (RTC) in the subsidiary of a European RTC service provider. The RTC service provider faced a severe financial crisis and used the momentum of the turnaround for an organizational transformation. The implementation of an aligned set of hardware and software RTC tools was an essential part of the transformation strategy. Management's main rationales for the technology rollout were to support organizational restructuring and build an identity as leading player in the market for employees in order to improve positioning in a highly competitive marketplace facing commoditization of technology.

While specific components and functionalities of RTC, such as instant messaging, chat, or management of a buddy list (Riemer & Fröbner, 2007) have been identified and described, the technology itself is flexible and open to diverse modes of use. Because of this we are looking at RTC as a platform technology or infrastructure, which provides a rich set of affordances (Gibson, 1979; Norman, 1988). In contrast to other new technological implementations where management follows an application view, we present a case where management introduces RTC as an infrastructure. This means that the management surrenders assumptions about the concrete use and is open to emerging use patterns. While technology is seen as an enabler to achieve the strategic goals, management is at the same time acutely aware that the impact the technology will have depends on the specific modes and practices of use that the employees will identify and develop. Therefore, for the implementation, management had to perform a balancing act between managerial guidance and space for user appropriation. In order to additionally support the strategic goals, the set of technology was carefully selected and dovetailed to the needs of the employees.

In our studies we are analyzing the implementation process of RTC for company internal usage (cf. Klein et al, 2010; Schallennmüller 2012, Vehring & Kramer 2012). We use the case study design to capture a holistic picture of the cases and their context as we see that context matters. Each case is individual and linked to a high level of contingencies and dependencies. We are considering the individual characteristics and the contextual background to look for patterns and to identify similarities between cases as we see the characteristics to be contingent but not arbitrary. We use the present case to show how management uses the implementation of RTC to reach its operational goals and to stabilize and facilitate an emerging process.

We present the concept of RTC and illustrate some aspects of the existing research on managerial aspects related to the use of RTC. Based on these aspects we will describe this case and its managerial challenges in the third and fourth section. We will discuss our findings in the fifth section and end with a conclusion in the sixth section.

2 Conceptual building blocks

2.1 Real Time Communication

Real-time communication and collaboration technology (RTC in a broader sense) is an emerging genre of communication and collaboration systems (Fröbner, 2008). Resulting from

a convergence of the telecommunication and groupware market, RTC systems are a combination of communication technologies, such as Voice-over-IP (VoIP) telephony, video conferencing, instant messaging, and various collaborative applications. Although the discussion about RTC has been partly replaced by a discussion about Social Media and Enterprise 2.0 technologies, their communication features address essentially the same RTC functionalities and integration scenarios.

Prior work on RTC has been focused on sense making (What is it? In which way is it different from prior communication technologies? Does it represent a unique genre of communication technologies? e.g. Burton et al., 2007; Lazar, 2006) as well as the adoption and appropriation of RTC on a group level (identification of communication genre; practices of use etc., e.g. Dourish, 2003; Riemer & Filius, 2009).

The number of specialized and differentiated computer-mediated communication modes is rising quickly and the (relatively) new modes such as instant messaging, desktop video conferencing and application or desk-sharing are complementing existing modes of communication such as face-to-face conversations and meetings, written letters, phone calls or emails. Yet little is known about emerging communication repertoires, patterns, drivers and issues of productivity (e.g. Cameron & Webster, 2005; Rennecker & Godwin, 2003). Riemer and Filius (2009) have developed an approach for contextualizing media choice based on a thorough communication genre analysis.

New communication media yield a level of uncertainty about the expected modes of use, protocols of communication and accepted or expected modes of signaling and related patterns of response (Cameron & Webster, 2005).

The versatility of the technology creates a complex set of technical and even more importantly organizational design options. This poses numerous challenges for IT managers (e.g. Berlecon Research, 2009, see also the hands-on business guide for IM in an US context by Flynn, 2004).

2.2 Mayor Subsections

Communication technology and in particular RTC is often seen as a core part of the organizational infrastructure. The notion of infrastructure highlights the dynamics of adoption, appropriation and adjustment. Vehring's (2012) framework of socio-technical and multilevel dynamics focusses on the dynamics between the technology characteristics of RTC and management's and employees' actions during rollout and adoption. It further emphasizes the dependencies between users and management's actions (see Figure 1). Given the organizational impact of RTC and potential tensions between managerial rule setting and emerging rules and routines within and across groups, we see managerial opportunities and responsibilities. While one could argue for a hands-off approach which relies on self-organization, appropriation, and emerging forms of use, most organizations will take a more active stance of framing, contextualizing, and embedding RTC.

In consequence we see an interdependent set of management decisions with particular emphasis on the early stages of the RTC implementation. Managing the implementation of RTC appears like a balancing act between the characteristics of RTC, organizational goals and organizational culture. We hypothesize that the organizational and managerial framing as well as the process of implementation will shape the outcome.

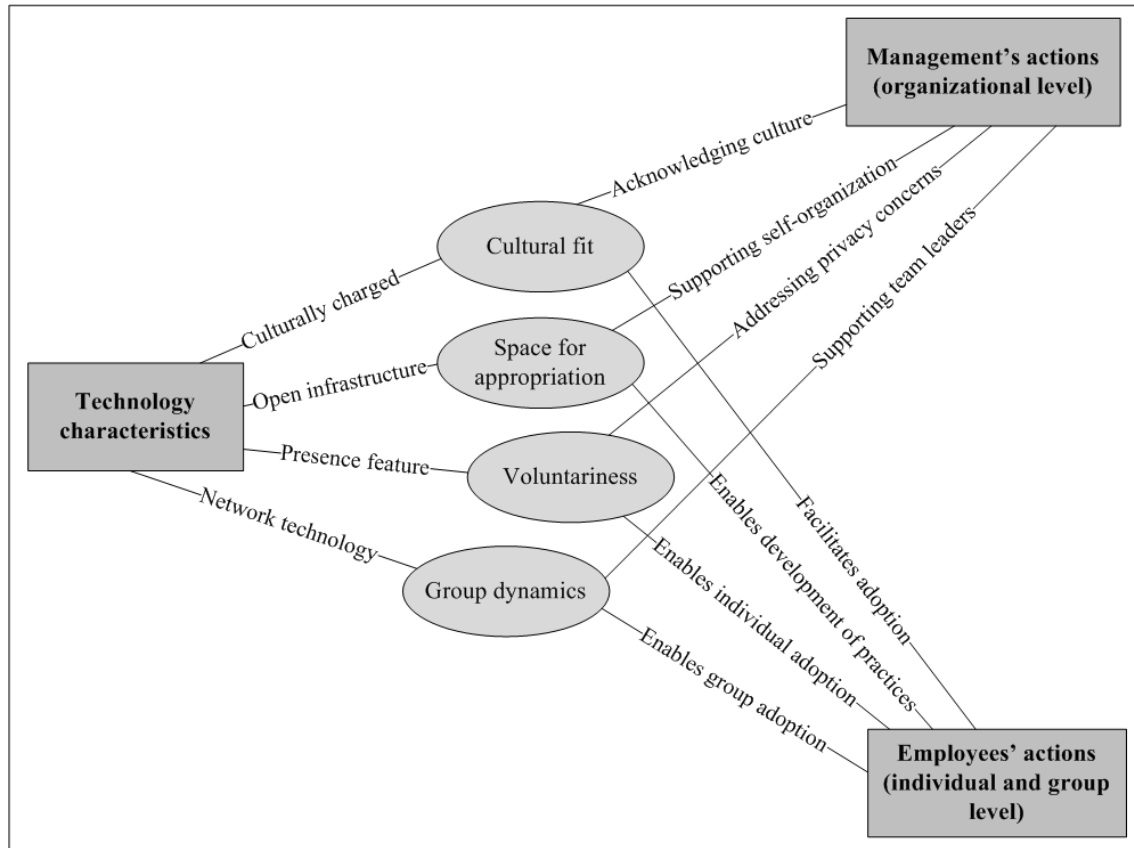


Figure 1: “Framework of socio-technical and multilevel dynamics” (Vehring, 2012)

2.3 Mayor Subsections

We are doing a case study about a subsidiary of a large European RTC service provider, identified by the pseudonym Phoenix, in order to illustrate managerial considerations and specifically the configuration of scoping, organizational embedding, rule setting and managing the implementation process.

Based on an ongoing collaboration with Phoenix on a number of occasions, we have had several meetings to discuss and familiarize ourselves with the organization and specifically the context of the RTC implementation linked to the reorganization and restructuring of Phoenix during the past 7 months.

In order to get a holistic view of the company and being able to analyze the different levels from top management to daily users, we interviewed employees being involved at different stages and levels of the implementation. In January, we conducted an extensive interview with the executive responsible for sponsoring the RTC implementation and we have conducted several interviews with the head of the user experience team to scrutinize our interpretations. We have further conducted an interview with 2 change agents whose roles were to support the employees during the restructuring phase and we analyzed internal information and training materials for employees, i.e. internal announcements and functionality and user guides. Subsequently, we conducted semistructured interviews with 6

pilot users from various departments and different levels of hierarchy, each for about 30 minutes. The interviews were tape recorded and transcribed. Afterwards we cross validated the findings and compiled the findings in a joint process of sense making.

Obviously we are aware that this case study has a limited empirical base and we can only report on early stage findings. Yet we have been intrigued by the opportunity to elaborate on this unique case and the specific situation of Phoenix, coming from a massive restructuring (40% of the employees have been made redundant) and a complete shift from de-central to central structures. Thus we have been able to study the framing of RTC in response to a crisis and turn-around.

3 Case background and rationale for the introduction of RTC

3.1 Case setting

The company (Phoenix) is a subsidiary of a globally operating technology integrator which provides RTC software technologies, integration services, and related hardware infrastructure from various vendors to medium and large enterprises. Before the restructuring Phoenix had almost 900 employees and 200 million EUR revenue.

During the last 12 months, Phoenix has gone through a period of restructuring and reorganization. It has changed from a decentralized structure for sales and services to a centralized structure, while also laying off 40% of the employees across all departments.

Also, processes have changed massively by separating standard business (e.g. delivery of network switches) from complex business (e.g. delivery and integration of contact centers).

While the transformation process was still ongoing, management decided to introduce a broad set of RTC technologies to support the new processes, new organizational structure, the identity of the employees, and the company's position in the marketplace.

3.2 Role of RTC at Phoenix

As a vendor and integrator in the RTC arena, Phoenix has been using RTC technology for more than 10 years. Due to the financial restrictions over the last decade Phoenix had been able to keep up with the technical progress for selling and servicing technologies but had not created a consistent state of the workspace environment for its employees. Various bits of RTC technology from various vendors and at various maturity levels were in use with no guidelines or policies.

The initiative launched at the end of the restructuring process coincided with positive developments in the financial situation. This laid the groundwork for the decision to introduce a consistent set of RTC capabilities across all departments and all levels with a set of consistent policies and guidelines.

RTC technology and tools are used in three different settings. After the reorganization, Phoenix introduced a flexible work model supporting regular offices, home offices, and mobile work. 90% of their desktop computers have been replaced by notebooks and HD webcams have been provided for every employee. At home, a special network device provides transparent access to the intranet, supporting both desk phones and file management.

For mobile workers, notebooks with UMTS / LTE sticks or tablets (iPad) are the standard tools. Each employee has been given the latest smartphone from Apple to provide a consistent platform for mobile apps.

Table 2 illustrates the constellation of functionality and tools or technology for all three settings:

Functional scope	Tools / Technology
Audio (telephony)	Alcatel (MS Lync for the mobile setting)
Chat, Presence	MS Lync
Collaboration	CiscoWebex
Video	CiscoWebex or Cisco Jabber
Document Management	MS Sharepoint

Table 2: Technological ensemble of tools for partly overlapping functions

Consistency among tool and technology usage by employees was an important goal. This is reflected both by a defined set of tools and the deployment of a common smart phone device to each employee.

Also, the mixture of various vendors was intentional and interfaces were created to bridge between various tools based on use cases. So Webex-Meetings are planned from MS Outlook calendar and a special implementation of Lync and Alcatel – client was introduced to ensure a seamless switch between Lync and traditional telephony functions.

Based on a roadmap more sophisticated integrations with business software, such as a sales force automation tools, are in preparation

3.3 Rationale of using RTC for reaching transformation goals

Management followed a well-considered dual approach as it addressed both internal and external goals. Both goals are interlinked. The roll-out of the internal RTC infrastructure should address the heterogeneity of tools and working practices combined with deployment of a state of the art RTC tool-base. From a management point of view, the transformation process within Phoenix has been positioned and designed to become a template for external service offerings. The usage and working patterns that are emerging alongside the use of the new technology are meant to inspire and enable the employees to act as a living show case driving sales activities and demonstrating innovation to the customers.

3.3.1 The internal goal(s)

Support of new processes and organizational structure

Driven by the new organizational setup, the earlier regional structure of the company was changed into a fully centralized approach. In combination with a massive reduction of headcount, Phoenix was facing severe communication and motivational challenges. In some locations only one employee of a now centralized unit was left with no direct superior or colleague he could interact on same topics and content. Also by concentrating locations and

shutting down smaller offices, a high share of employees moved to a home office location. Therefore, employees were missing peers from their networks. Management recognized the potential threat of losing valuable skills, since employees would no longer feel as connected to the company. With the new RTC tools, isolated colleagues were linked and felt connected again.

Next to these effects, the need for nationwide communication and collaboration has increased significantly since decisions were made centrally or from a manager in a different location.

The deployment of broader RTC support became mission critical in order to reduce the initial negative effects of the re-organization.

The use of multi-party-video with integrated collaboration features for sharing documents or joint work on offers and presentations were highly appreciated by the distributed teams. Presence status for signaling availability and instant video and collaboration sessions with MS Lync became important. In the past, most of the work has been done face-to-face in a regional office location. Now sales, pre-sales, and professional services teams are highly distributed and need a common set of tools for efficient virtual collaboration.

Identity building of the employees

Phoenix's employees have grown up in a technical environment and most of them have a technical education. Possessing highly complete market skills and capabilities are key for every employee to be successful both in a sales/pre-sales and a delivery role.

Being provided with a highly integrated multimedia enabled RTC environment made employees proud of the technical capabilities of their own company. By investing in the latest state of the art technology, management intended to signal the beginning of a new era. With financial restrictions in the past, the company can focus on innovation and the empowerment of individual employees. This guideline of the management was especially reflected in giving the latest smart phone from Apple to every employee, instead of going for a selective approach by role or hierarchy.

In this sense, the deployment of an RTC infrastructure became a motivational instrument which should give the individual employee the opportunity to develop an identity as a member of an innovative, highly skilled community and company working within a state of the art technical environment.

A further motivational aspect in the decision for state-of-the-art technology is the perceived ease of use. As state-of-the-art technology integrates the latest design innovations, it becomes more user friendly.

This was a clear break with the past, when old fashioned Nokia 65xx mobiles had been the standard for most of the employees and mobile mail communication had been limited to a small group of people.

3.3.2 The external goal: Strengthen position in the marketplace

By deploying a multi-vendor RTC infrastructure, Phoenix became a showcase for using the latest RTC technology across various departments in a nationwide setup. The technical scenarios were chosen in order to represent typical customer use cases and scenarios. Through this approach, Phoenix employees can demonstrate solutions to customers by referring to their own working environment. This has created a significant increase in credibility within the customer community both by demonstrating the willingness to invest (e.g. iPhones to every employee) and the ability for cross-vendor integrations. Also, Phoenix was able to advocate its own solution to their key vendors - Alcatel, Cisco and Microsoft – making the Phoenix story a success story for each of the key vendors.

4 Designing for transformation

Management's rationale for RTC at Phoenix was quite ambitious. Using technology to cope with a painful organizational transformation and defining the new practices simultaneously as a showcase has set the stakes for success quite high. The following sections describe how management has designed the transformation process to address these challenges.

4.1 Implementing the strategic goals

Reflecting on the way Phoenix initiated and executed the roll out of RTC across the company, we observed a stringent way of following a strategic path. We use the framework (Table 1) to identify the different stages of the RTC initiative.

Strategic orientation

Companies driving RTC usage are typically looking for productivity increases. However, in the case of Phoenix, the initiative was primarily motivated by distinct goals such as employee retention and facilitating the transformation process. As described, the overall goals combined support for the re-organization and improvement of the competitive position.

The initiative was announced during a town hall meeting with all employees together with an aggressive schedule of 8 weeks to implementation. Regardless of the short timeframe, a major part of the time was allocated for user appropriation.

Organizational design

The intent of the organizational design was to provide structure and infrastructure for the employees to support the internal communication and collaboration processes. Further design elements were employee mobilization and motivation.

The CEO and an executive sponsor representing the biggest unit within Phoenix were the drivers at the top management level. Both managers set a clear context for the initiative referring to the organizational issues and market challenges. They made the initiative a relevant program to achieve the company's goals. The initiative was driven centrally with integration of employees across Phoenix by adding a user experience management group of 10 employees and a pilot group of 50 employees.

In the past, RTC had been used incoherently within Phoenix. Various tools and different types of usages had diffused within the sales and service teams. Now, each employee has become involved in the new initiative. Moreover, Phoenix decided to go for a companywide roll-out to capture all processes and departments as quickly as possible.

Therefore, a set of rules and technical settings had to be enacted companywide in order to create clarity about the dedicated purpose of the different components of the RTC tool set. As the usage of RTC had become an integral part of the daily work practices, support structures had to be created as well.

Implementation process

The implementation of a user experience team (UXT) was a key element in conjunction with the technical support structures. The UXT engaged a critical mass of employees engaged in the early stages and by extending the pilot group to 50 employees from various departments, almost 15% of the workforce became involved in the pilot roll out. Creating a community was another important mechanism to promote and collect feedback.

Thus, the implementation process involved users from various departments from the very beginning. The first phase concentrated on providing a consistent infrastructure without specific solutions for individual departments. Since other IT initiatives were going on in parallel involving MS Lync and Smart phones, there was a clear roadmap establishing how the implementation would be merged or integrated over time. Implementation started with the UXT users, before involving 50 pilot users, followed by a full roll-out to all employees. Beside the UXT and the technical project team, the internal service desks were utilized to provide additional technical support.

A specific challenge occurred involving the administrative staff from the very beginning. This group had not been using RTC thus far. A series of dedicated webinars were supporting this group specifically during the rollout. The project team relied on the multiplication of knowledge through lead users. These lead users were pushing hard to make the new RTC capabilities a part of their daily work routine. Of course the pressure from centralization and home office users were enabling this strategy.

Another supportive element was using the RTC environment for training and introducing a new communication channel called SolutionTV. This communication channel had published video podcasts on the specific technology and solutions Phoenix was selling. Now it was used to promote the new RTC capabilities as well. Since all employees had received iPhones, the video podcasts were made available to their mobile devices.

4.2 User experience management team as design element of the RTC introduction

To reach the strategic goals of the RTC introduction, the management was convinced that just a simple deployment of the technology without further managerial framing would most likely fail. The expectations of the employees after the crisis were high and processes still needed to be adjusted. Also, breaking up the former regional setup was not consistently perceived as a positive development. Therefore the management decided to set up a user experience management team (UXT) focusing on use case building, communication on the initiative, and feedback allocation.

The UXT manager stated: “A shift from technology centric to people centric. In the triangle of technology, processes and people historically technology always came first. The restructuring brought a shift to put people first.”

This shift resulted in an extensive definition of use case scenarios. These use cases were created with UXT members from various areas of the company. Clearly, a cross departmental approach is a key element of the initiative in order to achieve consistent use of RTC throughout the company. Typical use cases include the integration of MS Office with the collaboration tools but also the definition of virtual meeting rooms for specific purposes or the integration of collaboration functionality with business applications such as salesforce.com.

Still the RTC infrastructure at Phoenix allows the establishment of individual practices for using MS Lync instead of Cisco Webex for collaboration.

Therefore the UXT has created a community on MS Sharepoint to promote best practices and collect feedback. The UXT discussions with the technical expert community generated suggestions and - even more importantly - provided immediate feedback to the user community, fostering an ongoing dialogue.

5 Discussion

Reflecting on this case against the theoretical deliberations brings two issues to the fore:

- (1) What is the role of the media constellation (RTC configuration) that has been chosen for the transformation project consisting of specific hardware (iPhone 5) and software (WebEx)? In other words does the specific media constellation matter?
- (2) Management faces the challenge of aligning organizational and strategic issues and enacting or implementing the chosen path in a manner that provides both direction and space for experimentation and appropriation.

5.1 Media constellation

As mentioned in the initial results, one of the most important goals for the rollout of the new RTC tools was to achieve a high ease of use. Most of the functionality of the new tools is not new to Phoenix employees per se. Neither video conferencing technology nor Web sharing or mobile email communication is new. Conference-room-systems as well as a web based video conferencing and Web sharing system were installed before, but the usage was very moderate. Usage of these systems was perceived to be complicated. For setting up meetings you had to log in into the solution and setup a virtual meeting room, to participate in a meeting you again would have to login and enter a special meeting ID to attend. Most of the colleagues therefore didn't even bother to deal with the system at all. The new system is integrated into the email-solution Outlook. Therefore the setup of a virtual meeting is integrated into the process of fixing a meeting date. The meeting then is automatically entered into the calendar from where it can be attended by clicking a link. This exemplary process shows where design choices in

the implementation and integration influence the ease of use of RTC infrastructure. It further highlights that functionality alone does not describe if an RTC tool is useful for a specific purpose. As Norman (1988) describes in his book “the design of everyday things” function of a technology is elementary but the design is crucial. The design determines ease of use. By the decision to implement the state-of-the-art technologies of Phoenix’s key vendors, the decision was also made for well-designed technology.

Moreover, in the decision for the technology an additional element of design is addressed. It can be argued that the ease of use is not just determined by the design of the functional elements, but it is furthermore a perception of the affordances which are ascribed to the specific technology. This can be best illustrated by the decision to rollout the newest Apple iPhone to every employee. Apple products, and especially iPhones, have not only the reputation to be easy to use, but evoke an emotional response in their users. Without arguing whether this reputation is reasonable or not, it can be argued that this reputation facilitates the adoption and integration as it influences the perceived ease of use and also the fun of using it.

5.2 How to enact the organizational transformation?

Given that the RTC constellation has not only been assigned a key role for the transformation process, but additionally a strategic role that builds on the successful organizational and technical transformation, the stakes for Phoenix are considerable.

At one level, we can instantiate a framework of managerial tasks and responsibilities (cf. table 3) for the introduction of RTC which we have developed from previous cases and adapted over time (Klein et al., 2010; Schallenmueller, 2010). The structuration of the managerial tasks helps to understand the challenge of instantiating the strategic orientation into concrete actions. But we find that the framework does not properly address the technical design choices discussed in the previous section. Particularly, the framework does not depict the interdependencies of socio-technical and multilevel dynamics highlighted by the framework of Vehring (2012) (cf. Figure 1). This specific instance of RTC implementation illustrated the interdependency of the different tasks: the organizational design had immediate strategic implications and required active user participation.

Despite the need for experimentation, a stronger guidance of the implementation process reflects not only the importance of the project but also an assumption that the development of use cases can and should be moderated in an organizational environment. The use cases are not just for an individual or one group but many of them are expected to be relevant for major parts of the organization.

Scope	Managerial tasks	Specifically ...
Strategic Orientation	Framing	Internal use as showcase for customers and competitive move..
Organizational design	Context setting	The organizational transformation has been defined as relevant context.
	Embedding	The media constellation and design have been geared towards embedding into daily routines.
	Rule setting	Establishment of best practice routines are stimulated by proactive use case promotion.
	Creating support infrastructures	UXT and user support have been developed.
Implementation process	Managing the implementation	The UXT has been created and works with executive support and feedback in order to facilitate processes of appropriation and user-driven use case development.

Table 3: Managerial tasks and responsibilities at Phoenix

The establishment of the user experience teams illustrated a high level of managerial sensitivity towards appropriation and organizational innovation processes. Yet the balancing act between guidance and encouragement for participation and appropriation eventually became a matter of organizational culture and trust among the participants.

The fact that the company is still operating somewhat in the shadow of the crisis might actually be productive for the transformation process. Our initial results indicate that the employees are willing to accept the personal challenges to change their work practices and do so in light of contributing to the corporate showcase. The fact that management has decided to equip the entire team with high-end state-of-the-art hardware and software has been perceived as a signal of management's confidence in and support of their team.

Only the future will tell whether the impulse that clearly has been set will suffice to achieve the high goals that have been set.

6 Conclusion

This paper presents a unique case of RTC deployment in a turn-around situation. Our analysis has highlighted four findings from the specific case:

- While we have seen a broad diffusion of RTC and social media tools in the market, the specific hardware and software constellations matter. Ease and joy of use as well as potential productivity gains are the result of design and configuration processes and choices.
- The organizational design shows a high level of management sensitivity to the complementarities of organizational and technical choices. While the crisis and turnaround have enforced drastic cuts in the workforce, technology use has been designed to (re-)create an efficient organization in which technology partly substitutes

for physical proximity, where density of the organizational network was lost due to the lay-off of employees, new virtual density is achieved through intensified communication and collaboration over distance.

- As if this were not difficult enough, management decided to make this organizational experiment the showcase for the company's clients. While some employees may perceive this as undue pressure, others might excel in front of the opportunity this poses to achieve a new level of credibility and authenticity in their work.
- Finally, the establishment of the user experience team created and fostered a new level of innovation discourse within the organization. It encouraged engaged employees to co-design new technically facilitated ways of working under the supportive eyes of leading executives.

Reflecting our findings from the specific case and comparing evidence from other cases (Schallenmueller, 2010; Stieglitz et al., 2013; Klein et al., 2010) we believe that the relevance of communication and user experience management are key to successful RTC deployments in the sense of user acceptance and development of sustainable working patterns.

Also, the creation of user excitement through internal marketing measures and coaches managing user expectations are observed having a high impact on user acceptance and usage of RTC technology.

Management sensitivity and involvement is an imminent ingredient to ensure invest in resources for communication and experience management since RTC deployments mostly fail to prove sustainable business case or ROI calculations and communication measures/user experience management efforts are often seen as extra costs not related with the core technology deployment.

We do see a major focus in further research in this area, since facing an increase in social media and RTC technologies becoming integrated into daily workspaces the industry is still looking for guidance on making investments work, realizing that change management and transformation efforts from the traditional IT-System deployment are limited.

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