

Do we need to be co-located to collaborate successfully?

COLLABORATION 2.0

COLLABORATION | 2023 White Paper
Debunking the myth of co-location



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INTRODUCTION

Almost three years into a global remote-work trial, many companies are forcing their employees back to the office, either partially¹ or full time². Different claims about the effectiveness of remote work are being made: remote work “*doesn’t work for spontaneous idea generation,*” “*speed and quality are sacrificed*” when working from home, and “*the pivot to hybrid work is a ‘reimagining’ of the office, designed to create ‘collaboration, team spirit, innovation and a culture of belonging.’*”³

However, multiple recent studies show that approximately half of employees are able and willing to work remotely⁴. A hybrid setting, allowing people to work both remotely and at the office might actually be the best solution. But whatever the optimal setting will be, we need to accept the fact: remote work is here to stay.



But why is this discussion about remote versus in-person work—also known as co-location—so important? The first

reason is that much of our current work is based on collaboration⁵. That need to collaborate is the reason many managers give for a return of staff to in-person work, whether full time or in a hybrid arrangement. As shared in an internal memo alerting Yahoo employees that they were expected back in the office⁶, “*To become the absolute best place to work, communication and collaboration will be important, so we need to be working side-by-side.*”

However, being at the office in person does not guarantee successful collaboration. In fact, due to remote and async work, it's essential that we look beyond co-location as the main factor. Leaders that focus on co-location for successful collaboration and ignore the skills, tools, methodologies and leadership style necessary for collaboration run the risk of their teams being ill-equipped without the strong collaboration skills needed to survive.

This white paper is for team leaders, leaders of collaborations, or managers concerned about the quality of collaboration within their company, and who feel that “work from home” is negatively impacting their employees’ ability to collaborate. In this white paper we uncover six factors of successful collaboration to discover what is required to collaborate effectively and determine the role played by location. We answer the question: **do people need to be co-located to collaborate successfully?** Finally, we provide tools, tips and best practices to enhance collaboration, no matter where your team members are located.

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COLLABORATION BASICS

What is collaboration?

Collaboration is often understood as a process towards a shared goal that emerges from interaction and communication between people.

According to the Oxford Learner's Dictionary, collaboration is a noun meaning "the action of working with someone to produce something."⁷

The Cambridge dictionary⁸ takes it a step further: the noun "collaboration" is defined as "the situation of two or more people working together to create or achieve the same thing." The same dictionary defines the verb "collaborate"⁹ as "to work together or with someone else for a special purpose."

Cooperation, teamwork and collaboration are survival skills; groups of humans who learned how to come together to hunt and gather food, divide up the labour, protect the young and vulnerable and increase the size of the group simply survived longer. Thus, humans have an inner need¹⁰ or drive to collaborate. We are genetically programmed to join groups and work together on a shared task, just as we are programmed to run or fight if threatened or find food if we're hungry¹⁰.

Team collaboration

Collaboration can be categorized in many ways, including by who is collaborating, the output of the collaboration, whether the collaboration is taking place virtually or in-person, the tools used for collaboration, and more. Identifying the "type" of collaboration can help determine the best approach to the collaborative effort.

For the purposes of this white paper, we focus on ongoing team collaboration within organizations. Within a team environment, collaboration takes place continuously as the team engages in various activities to meet its objectives, including:

- Assignment to a special project with defined objectives and outcomes
- One-off requests from the team leader or other team members for ideas, insights and decisions.

Ongoing collaboration requires a workplace culture and/or team culture that is optimized for this type of collaboration, with attention paid to success factors such as relationships and trust.

COLLABORATION & CO-LOCATION

The authors of this paper made a concerted effort to find reliable information that supports the claim “collaboration requires co-location.” We discovered that spontaneous interactions are said to improve collaboration¹¹. These spontaneous interactions are often addressed as “watercooler moments” at the office, basically referring to a space that creates situational opportunities to share, based on feelings of safety and trust among colleagues¹². Also, it is said that being in the same place facilitates the sharing of tacit knowledge that is more related to the person and embedded in experiences and know-how.

Possibly, “watercooler” moments are where one-off requests from team leaders or other team members for ideas and insights take place, which is a type of ongoing collaboration as mentioned in the previous section. However, co-location does not necessarily lead to an improvement in this type of collaboration and ignores collaboration for specific projects. Not everyone is ready or willing to engage in spontaneous interactions even at the office¹³. Also, successful tacit knowledge transfer requires personal involvement¹⁴ over being present in the same location.

Apparently, in-person meetings, co-location and knowledge transfer are more common in organizations where less knowledge is made explicit, conversations are less transparent and learning processes are not (sufficiently) documented. It seems that the executives are basing their requests to be in-person on, as one article points out, “mythology and fairytales!”¹⁵.

SIX FACTORS FOR SUCCESSFUL COLLABORATION

We wanted to discover the factors that lead to successful collaboration and determine if working “side by side” is required. By comparing several reports of successful collaborations, we identified what these collaborations had in common. We found that the success of a collaboration depends on multiple factors^{16,17,18,19,20}, described in the following paragraphs; co-location is not one of them.

1. Trust

Of all the success factors, trust seems to be the most important. Trust is a funny thing though.

Think of driving as an act of collaboration amongst people who don’t know each other and who have not had the benefit of developing a relationship. Although they don’t know each other, they trust that their fellow drivers share the goal of arriving safely at their destination, have adequate driving skills and experience, ensure their vehicles function properly, care equally about safety for themselves and others, and will follow the traffic rules.

Basically, drivers start from a place of trust until another driver breaks that trust.

Just as we trust that other drivers have taken the requisite training and passed their driver's test, we trust our fellow team members have the required knowledge, skills, understanding and passion to achieve the established goal of the collaboration. We also trust that the team is a safe place where everyone can feel seen and heard, can share thoughts and ideas without judgment or other repercussions, and can give and receive constructive feedback.

Teams also start from a place of trust. We don't ask to see each team mate's resumé, interview their former manager or make them pass a test. Rather than relying on hard data, we base our trust on the relationships we have developed with each other and on the team leader's ability to recruit people who have the right skills, training and personality. The onus is on the leader to recruit the right people to the team, build and maintain relationships between team members, and assign the right people to the collaboration.

Why are trust, relationships and team composition important for collaboration?

A dysfunctional team that doesn't trust each other, work well together, have the required skill set or knowledge or is not committed to the mission will be a disaster for the collaboration's outcomes. The people who are the most passionate and knowledgeable about the mission and who have the necessary commitment, relevant skills and background will end up carrying the workload of those who don't, and people will quickly become disengaged.

2. A common goal

Successful collaboration requires that everyone understand and align with the goal to be achieved. The team should share a passion and commitment to the mission, even if the final outcomes are not yet clear.

Recent studies on causes of disengagement²¹ have shown the importance of aligning personal mission with the organization's mission, which also speaks to deriving meaning and purpose from work. When people are aligned with the mission of an organization, team and/or project, they will be excited to contribute—and excitement is contagious! A sense of uniqueness to the project—a belief that no one else is trying to do what they are doing—also builds commitment and excitement, along with a genuine belief that what the group is trying to achieve would not be possible by people working individually.

3. Clear benefits

To get buy-in for your collaboration, the benefits of participating must be clear. People need to see a benefit to themselves (e.g., being seen as successful in the eyes of management, additional income, the satisfaction of being part of something bigger than themselves, deriving meaning and

purpose from participation, and the chance to fulfill a mission). They will want their involvement in the collaboration to be a good use of their time.

4. Resources

Collaboration leaders must determine what resources are required, and ensure they are available and approved, including:

- Staff with the right skills and knowledge
- Tools (e.g., software, hardware, methodologies)
- Sufficient training to use the tools
- Budget for tools, training, staff, facilitators, travel, meeting space, etc.
- Time to participate in the collaboration, both in meetings or conferences and in asynchronous work outside of meetings.

An under-funded or under-resourced project is doomed at the outset. Not only do struggling for funds, operating without the right tools and training, or not being able to staff the collaboration properly make it difficult to achieve the end goal, but under-resourcing a project gives the impression from above that the project is not considered important, which can impact the team's motivation and commitment to the project.

5. Skilled leadership

Every collaboration needs a leader. Whether this person is appointed specially for a specific project or is the leader of a team engaged in ongoing collaboration, the leader is responsible for myriad tasks, including:

- Recruiting team members
- Coming up with a plan and managing the project
- Designing, implementing and managing the process
- Making decisions
- Obtaining resources
- Ensuring group guidelines and policies are understood and heeded
- Communicating to sponsors and stakeholders.

Basically the leader must have the skills to ensure the factors for success are working—and be accountable if something goes wrong!

Equally, if not more important, the leader must take a human-centric approach to leadership, which will go a long way toward keeping people engaged and contributing their best to the team. Human-centric leadership skills include:

- Motivating the team
- Providing appropriate feedback

- Listening to and evaluating ideas
- Being approachable and welcome to input from the team
- Recognizing the need for team members to contribute to the project and do everything they can to facilitate this contribution
- Showing appreciation and celebrating achievements.

6. A plan

Team collaboration is a journey, and like any journey, you need plans for how to get from A to B, a map so you don't get sidetracked, and roles and responsibilities for everyone on the team. You also need to communicate your plan and update everyone when the plan changes.

Your plan provides a process, structure and accountability to your collaboration, and should include:

- Tools and resources required
- Scope and timeframe
- Any constraints imposed on the collaboration (e.g., time, budget)
- Incentives for participation
- A process for brainstorming and evaluating ideas, converging on solutions, and making decisions
- Clearly defined roles in relation to the process
- An appropriate pace of development that meets the needs and resources of the members
- A team-developed code of conduct or group rules
- Details such as whether there will be dedicated workshops, where they will take place, who will facilitate, etc.
- Contingencies in case of significant changes in conditions during the collaboration (e.g., changes in resources, membership, political environment, circumstances, stakeholders).

WHEN TO GET TOGETHER: BUILDING RELATIONSHIPS IN REMOTE & HYBRID TEAMS

While being co-located is not a critical success factor for ongoing collaboration, being together *is* important to relationship-building, which can fast-forward the degree of trust that a team has for each other.

Team relationships have suffered due to remote work during the pandemic, leading to a breakdown in trust which then impacts collaboration²². The authors would like to point out though that it is not remote work that has hurt team relationships, but the team leaders and organizations' lack of know-how to build relationships virtually, including their understanding of when and how to optimize the times when their teams are co-located.

Many executives depend on “watercooler” moments and serendipitous conversations as being essential for collaboration. These chance encounters might provide additional insights, ideas and in some cases lead to decision-making. However, successful organizational performance should not rely on chance conversations. And taking away the flexibility that comes with hybrid or remote work might lead to the opposite results and loss in the war for talent²³. We thus invite leaders to be strategic about:

- When to get everyone together in the same space and what to do when they are there, and
- Implementing tools and best practices that enhance virtual collaboration.

When to Get Everyone Together

It makes sense to get everyone together in the same space when:

- You need to build relationships on the team for the purpose of increasing trust. Aim to have one in-person meeting at the beginning of the collaboration process if possible. Continue to build relationships virtually thereafter
- Time is of essence (usually it is faster to arrive at the decision in person, also if there is not sufficient training to prepare for online collaboration, etc)
- Collaboration is not well structured (no clear goal, a new collaboration needs to be initiated, no clear processes in the organization for collaboration)
- Collaboration is based on tacit knowledge (lack of structured, explicit information)
- Lack of motivation/collaboration culture (all the aspects of getting the right people in).

How to Make the Most of Your Time Together

Teams should maximize their time together by focusing on activities that build relationships and create the trust essential to collaboration. This does not necessarily mean traditional “team building activities!” Here are three ways to make the most of your time together.

Hold a Team Retreat

A team retreat can be a valuable and enjoyable way to bring together a remote or hybrid team for focused work and social activities. By building relationships and fostering a sense of community through a team retreat, you can help your team work more effectively and support their overall well-being. Hiring a facilitator to design and lead the retreat agenda can help ensure that the retreat meets your objectives.

A team retreat can vary in length. Include time for productive and collaborative work as well as informal socializing and personal downtime. It is important to choose a location that is functional and comfortable, with options for activities and meals, rather than focusing on more exotic locations or tourist attractions.

Develop a Team Charter

During your retreat or as a one-day workshop, co-create a Team Charter that lays out the shared values of the team, clarifies the mission, and provides a basis for conversations about how the team will work together in a remote or hybrid arrangement.

Because the Team Charter is co-created and co-owned, it creates a sense of belonging as it defines what they belong to and how to participate; the Team Charter becomes the team's operating manual. A Living Team Charter is updated every few months to reflect the team's experience of working together under the guidelines laid out in the charter.

Talk About Hybrid Work Arrangements

Leaders can take a bottom-up approach to determining hybrid work arrangements rather than imposing rules on the team. Take the time in-person to discuss your team's preferences in terms of where, when, and how to work. You all might have different preferences such as working fully at the office, at home, in other locations or a mixture of any. Some might have personal or professional commitments or prefer working during certain hours. As a team, try to find the solution that works the best for everyone.

A facilitator is recommended to guide the potentially difficult conversation about hybrid work arrangements. A facilitator frees up the leader to participate in the conversation, ensures everyone's preferences are heard and assists the group in reaching a consensus or compromise.

This activity can be combined with a Team Charter so that the "how" can be documented in the living document.

TIPS, TOOLS & BEST PRACTICES FOR COLLABORATION

Creating a virtual or hybrid workplace primed for collaboration presents challenges for team leaders who are not well-versed in tools and techniques for managing remote teams. In this section, we provide leaders of collaboration with some tips, tools and best practices for creating a workplace and team culture that is primed for ongoing team collaboration.

Building Relationships & Trust Virtually

Understand Your Team's Thinking Styles: The [FourSight® Assessment](#) helps teams understand how each person's thinking and approach to problem-solving impact how they collaborate. For example, some people are natural idea machines, while others specialize in asking questions to understand the problem. Others are great at developing alternative solutions or planning implementation. Better relationships result from understanding how each team member contributes to collaborations, which leads to fewer misunderstandings, less conflict, improved problem solving and more creative solutions. Individual assessments are done online, and team debriefs can be virtual.

Use Team Chat for Team Building: Asynchronous communication platforms such as Slack or Zoom Team Chat are crucial for building and maintaining trust and relationships within remote and hybrid teams. Leaders should utilize these tools not only for project updates and decision-making, but also as a way to connect with team members socially and promote well-being. The [Neolé team](#) to which one of the authors belongs includes several channels in their Zoom Team Chat hub for this purpose, such as the Daily Check-in & Gratitude channel where team members share their work schedule for the day and something they are grateful for, the Team Café channel for sharing glimpses into team members' daily lives and personal interests, and the Team Achievements channel where people can publicly recognize and praise their colleagues, including team leaders, for exceptional contributions.

Weekly Team Meetings: Most teams strive to reduce the minutes they spend in Zoom meetings. However, virtual meetings do provide vital “facetime” with team members and a chance for everyone to provide updates, input and feedback. Ensure the team lead doesn't do all the talking by sharing the meeting leader role between team members. Invite everyone to contribute to the agenda, posted publicly on your team chat hub. Limit weekly meetings to 45 minutes to give you time to include a team-building activity and a check-in. Daily stand-ups, if required, should be limited to 10-15 minutes.

Support the Team with an Established Ideation Process: Processes such as the Creative Problem Solving (CPS) help teams converge on a goal if the goal isn't clear, and to create a clear sense of purpose, a shared vision, buy-in and shared ownership. (For more on CPS, [click here](#).)

Virtual Project Resourcing & Planning

Is the Collaboration Justified?: Leaders should be clear on the justification for the collaboration and what is to be achieved. Ask: Is it even necessary to bring people together for a special project? Can the issue be solved another way? People do not appreciate their time being wasted.

Plan!: Understand the role of each team member, and how you envision them contributing to the collaboration. Be clear on the budget, tools, people and training required for the collaboration.

Cloud-based Project Management: Use cloud-based project management tools so that each team member has access to the most recent updates no matter where they are working. Cloud-based project management platforms include Monday, Asana, ToDoist and Trello. Such tools help you plan the project, assign roles and responsibilities, estimate timelines, keep track of tasks, and track time and report on progress.

Communication: Open and frequent communication about the project—both internally and externally—including formal and informal communication within the group (e.g., social time helps to build trust). Think about who is in the network of people that needs to be kept informed of the project and how communication will take place. For example, think about a tool for asynchronous communication within the team (e.g., Slack or Zoom Team Chat), a way to document and share knowledge, external reporting guidelines, and communicating information to stakeholders not involved in the collaboration but who have an interest in it.

Training: Make sure team members have access to and the training for virtual collaboration software, including a chat platform (e.g., Slack, Zoom, Teams) for communication, collaborative documents (e.g., Google Docs/Sheets, MS Office), and online meetings (e.g., Zoom, Teams).

Efficient & Productive Virtual Meetings

Group Rules: Either as part of a Team Charter or separately, co-create a set of ground rules with the team for meeting participation. The ground rules can serve as a reminder to be inclusive, respectful, non-judgemental, and how each team member prefers to communicate.

Distribute an Agenda: Send out an agenda ahead of your meeting. Your meeting agenda should have clear outcomes and ensure people involved in the meeting understand their roles and responsibilities for the meeting. Give people time to prepare. Assign action items and track them.

Hint: The Neolé team has a Team Meetings channel in their Zoom Team Chat where they post agenda items for the upcoming weekly team meeting. The meeting date and name of the team member leading the meeting is pinned to the top of the channel. Anyone on the team can add items to the agenda throughout the week.

Use a Digital Ideation Platform for Brainstorming: A digital platform is an online space that replaces the traditional flipchart and sticky notes. As it's online, it is accessible by both virtual and

in-person participants, meaning that team members can contribute their ideas equally with no barriers to participation. Neolé uses Stormz (stormz.me) for its simplicity, intuitive interface and reporting capabilities. Stormz also allows for anonymous contributions by participants so that no one needs feel nervous about expressing their ideas or being judged.

Other Ways to Support Ideation Virtually: For your important collaboration and innovation workshops where ideas are to be generated and decisions to be made, hire a facilitator who specializes in virtual and hybrid meetings and who understands how to support people to contribute their ideas virtually both through video conferencing and digital platforms. Incorporate a collaboration process (e.g., FourSight is a process that draws upon team member’s strengths, click [here](#) for more) and small group work in breakout rooms.

Video Conferencing Quality Matters: Neolé specializes in virtual and hybrid meetings and events, and uses Zoom. Over hundreds of meetings and events, Neolé has found that its stability, good quality video and audio, accessibility, chat functionality, reaction emojis and more contribute to ensuring everyone on the video call can participate equally with no issues getting into the meeting. This is not the case with all video conferencing platforms, which can lead to frustration, dropped meetings, and people being excluded from meetings.

Moderate Discussion: People talking over each other or monopolizing the conversation can be an even bigger issue virtually. The meeting leader can moderate the discussion by asking attendees to use either the “raise hand” function or indicate in chat that they would like to speak. Doing so queues up people for questions and comments. The meeting leader should also be aware of people who are not speaking; just as with in-person meetings, some people are not comfortable speaking out. Make a point of inviting them to add their thoughts either verbally or privately through chat. A digital platform such as Stormz that allows for anonymous contribution of ideas can also help to tap into the thoughts of people who prefer silence!

Leading Remote & Hybrid Teams

Team Motivation: When recruiting for the team, ask them what they feel is the benefit of being a part of the project. You will be clearer on the motivation of the team members and get buy-in.

Method for Evaluating Ideas: Adopting an evaluation system such as [POINT](#) can help leaders be more objective in evaluating ideas. A positive-first approach, the positive aspects of an idea are identified first, followed by opportunities that this idea might present. Only then do you examine issues and encourage some New Thinking to alleviate these issues.

A Bottom-Up Approach: Make sure the team feels genuine ownership of the plan, methodology and outcomes of the collaboration, to the extent that they are able to determine team objectives and prioritize the team’s work.

CONCLUSION

This paper points out that successful collaboration in organizations depends on multiple factors:

1. Trust
2. A common goal
3. Clear benefits
4. Resources
5. Skilled leadership
6. A plan.

The key success factor is trust, which speaks to the importance of building relationships within the team. Being co-located is not a success factor, and we believe that collaborators do not need to be co-located in order to collaborate successfully. However, an appropriate reason to get together would be to build relationships and trust, and this can be achieved through team retreats and offsites, for example.

It seems the majority agrees that remote work practices are here to stay, which means that we all need to find how to work together in remote and hybrid settings. By understanding what really matters in collaboration, one can find a successful combination between virtual collaboration and occasional gatherings in a physical location, leading to multiple benefits to organizations and collaborators themselves.

Mastering all the elements of collaboration to many leaders can be challenging in itself. Learning how to address them in virtual settings might add an extra layer of difficulty. If you need assistance with team collaboration, upskilling the leadership team, or team retreats and team charters, do not hesitate to reach out to the authors and discuss this with Neolé. We are here to help!

FOR MORE INFORMATION

The authors welcome your thoughts on COLLABORATION 2.0. Please feel free to contact us with your questions or comments, or for assistance with virtual collaboration.

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Vitalija holds a PhD in Real Estate Economics and specializes in Corporate Real Estate Management. Whilst studying the role of the (physical) workplace, she also looks into the new ways of working, especially in virtual and hybrid environments. She is a co-editor of the book [series](#) *Transdisciplinary Workplace Research and Management* by Taylor & Francis group. You can download world-class research insights on workplace design and management in a version of e-books for free.

Laura Bowley

Laura is a facilitator and meeting designer with a passion for creating virtual spaces that connect people and promote dialogue. In her work, she seeks to create improbable conversations that transcend differences and spark change.

She holds a BA in business management and is a Fellow of the School for Social Entrepreneurs. She has completed the Professional Facilitator Program with ICA Associates, gaining expertise in group facilitation methods, meeting design, and transformational strategies. As an early adopter of digital nomadism and a lover of new technology, Laura is interested in the future of work and the role of AI in facilitating connections and driving innovation.

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