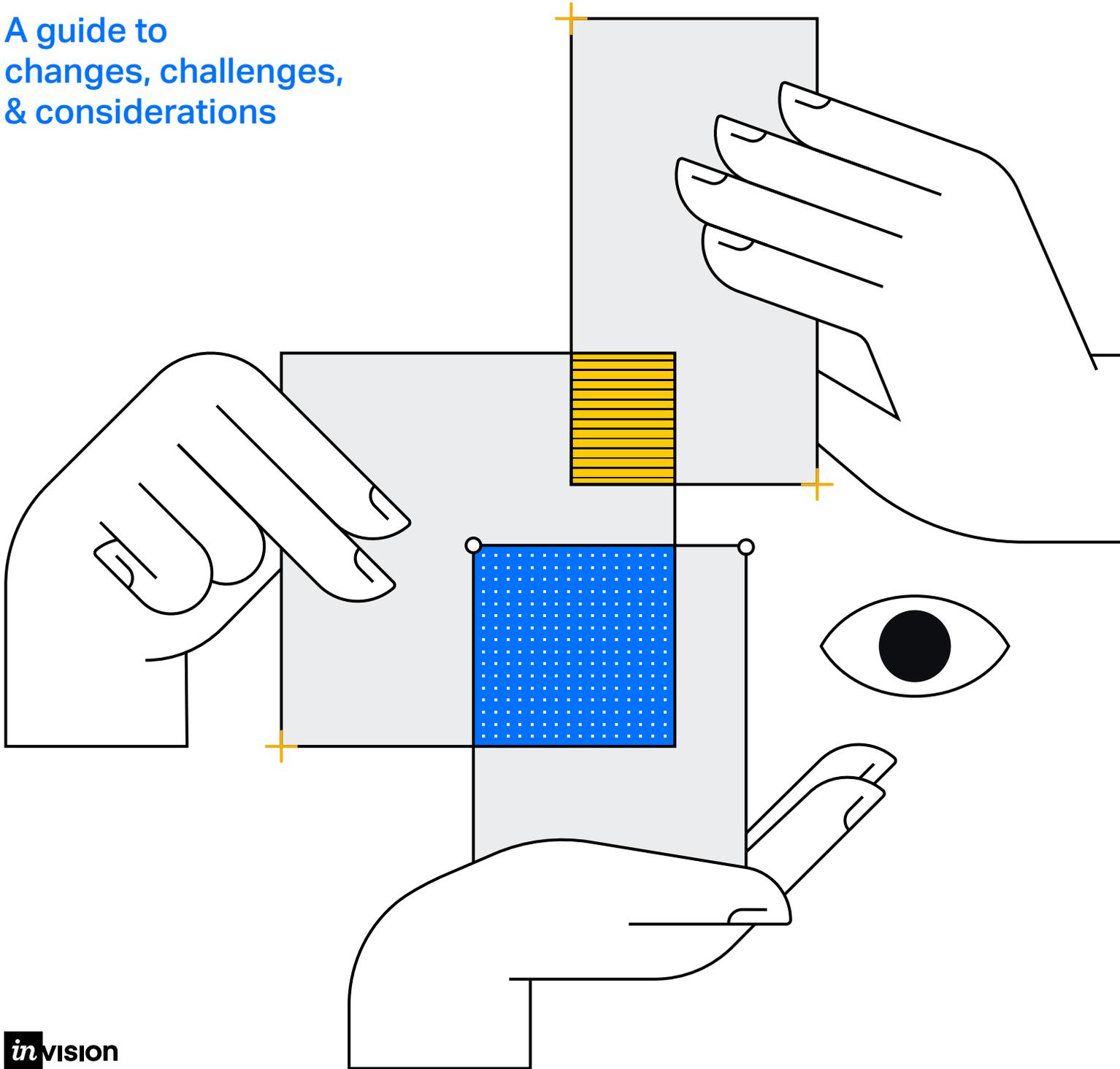


# Hybrid Collaboration

A guide to  
changes, challenges,  
& considerations



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# Now is the time to reimagine hybrid collaboration.

“With 75% of hybrid or remote knowledge workers agreeing their expectations for working flexibly have increased, there is no doubt that the future is hybrid.”  
Gartner®<sup>1</sup>

Although teams can serve customers effectively while working from home, the rise of hybrid workforces has exposed problems that have plagued organizations for decades—especially when it comes to collaboration.

During the pandemic, remote teams quickly learned that video conferences don't produce the same results as working together in person.

While some employees are now eager to ditch their home offices and return to the office, most people, especially young adults, don't want to give up the flexibility of working from home. Over 60% of Millennials and Gen Z employees would like to work remotely more often and use collaboration tools instead of traveling for business.<sup>2</sup>

1. Gartner®, “Redesigning Work for the Hybrid World”, By Gartner Human Resources Research Team, Published April 29, 2021. GARTNER is a registered trademark and service mark of Gartner, Inc. and/or its affiliates in the U.S. and internationally and is used herein with permission. All rights reserved.

2. The Deloitte Global Millennial Survey 2020

Now is the time to  
reimagine hybrid  
collaboration



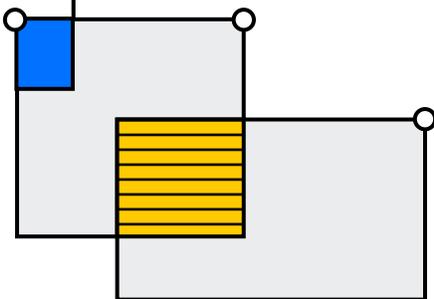
To engage top talent, you must give employees the technology they need to collaborate from any location. Forrester Research, Inc. states, "Access to technology that helps employees solve problems is vital to maintaining engagement and can shorten the resolution time for customer-facing interactions."<sup>3</sup>

Empowering employees to collaborate improves your HR recruiting and retention strategies and makes cross-functional workflows more efficient. The result? An enhanced customer experience. When employees collaborate on problems, they will provide customers with higher levels of service.

## Engaged workers improve customer satisfaction by 10% and lift sales by 20%<sup>4</sup>

But to succeed with hybrid work, you must recognize that remote collaboration is vastly different from collaborating in an office.

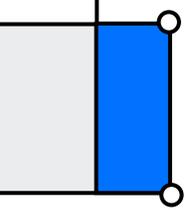
At InVision, we've been working remotely since Day 1 and understand the unique challenges of remote collaboration. We've put together this guide to share our best practices and help you discover a reimagined hybrid workplace that will ultimately boost innovation across your company.



3. "Effective Enterprise Collaboration Grows Your Bottom Line", Forrester Research, Inc., November 13, 2020, TJ Keitt and Liz Witherspoon

4. Dale Carnegie: Every Manager's Guide to the Fundamentals of Employee Engagement

# Productivity tools can hinder collaboration instead of nurturing it.



44% of employees fear that remote work will lead to the loss of community and connection to colleagues, while 43% worry that it will reduce team collaboration.<sup>5</sup>

Teams across any discipline—whether it’s design, development, operations, or recruiting—require daily collaboration to innovate and move projects forward.

In an office, this collaboration happens naturally. People share ideas over coffee, pop by each other’s desks, chat before meetings, and use whiteboards to brainstorm ideas.

Yes, tools such as Google Docs and video conferencing platforms can help enable remote collaboration. **However, many of these tools have limitations. For example:**

- ✘ It’s hard to follow conversations in productivity apps or email chains
- ✘ If you use too many tools, you’ll lack a single source of the truth and a centralized place to share ideas synchronously
- ✘ When your colleagues are spread across multiple locations and time zones, an inability to work asynchronously becomes a massive impediment to forward progress on workflows

5. McKinsey & Company: [What employees are saying about the future of remote work](#)

## Productivity tools can hinder collaboration instead of nurturing it

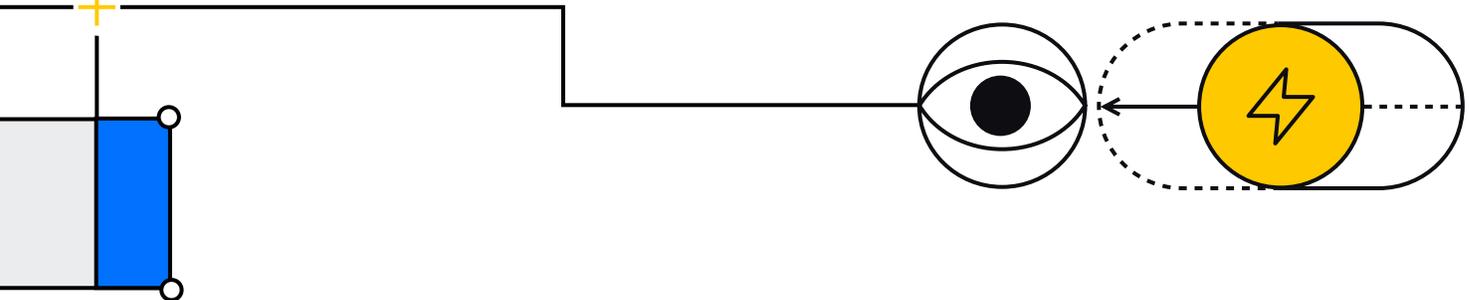
- ✦ Collaboration software is built for project managers and contains advanced features that most employees don't need. These tools can overwhelm people and prevent them from collaborating

Many virtual meeting platforms also inhibit collaboration instead of fostering it. In virtual meetings, only one person can speak at a time. The person who leads the conversation is usually the highest-ranking employee. If this person dominates the discussion, others may not feel comfortable speaking up and presenting new ideas.

If you have a hybrid team, some people may gather in a conference room while others call in to meetings. Inclusion becomes a growing issue — dialing in can make remote attendees feel left out. Plus, people in the room may forget remote employees are present and ignore them, making them feel like secondary participants.

**This poses a significant question — how do you make your collaboration sessions more equitable and inclusionary?**

# Unleash your teams' creative potential with visual collaboration.



Visual communication has emerged as a key tool to address the issues we outlined above — building human connections and making remote workers feel like part of your team.

According to research, 65% of the population are visual learners<sup>6</sup> —unsurprising when you consider that the brain processes images and videos 60,000X faster than text.<sup>7</sup>

When you use visuals, you can boost employee engagement and make your collaboration sessions more productive.

In the past, “visual communication” meant brainstorming ideas on a whiteboard set up in your conference room. But in today’s era of distributed workforces, online whiteboards are helping teams be more efficient and productive.

A digital whiteboard bridges the gap between remote and in-office workers by providing an online space where everyone can collaborate. Send your team members a link to a live session so you can mark up drawings, wireframe, brainstorm, and participate in any type of visually collaborative project in real time. Similarly, you have a single place to revisit your work after the fact, maintaining continuity and avoiding another meeting to rehash decisions that have already been made.

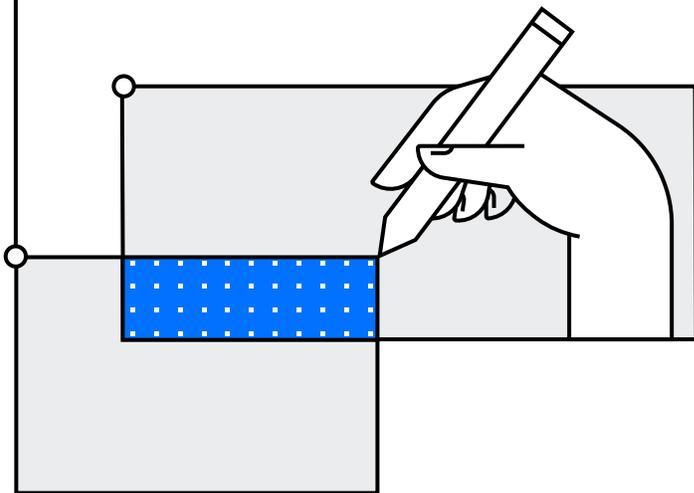
6. SSRN: Reaching the Visual Learner: Teaching Property Through Art

7. 3M: Polishing your presentation

Unleash your teams  
creative potential with  
visual collaboration

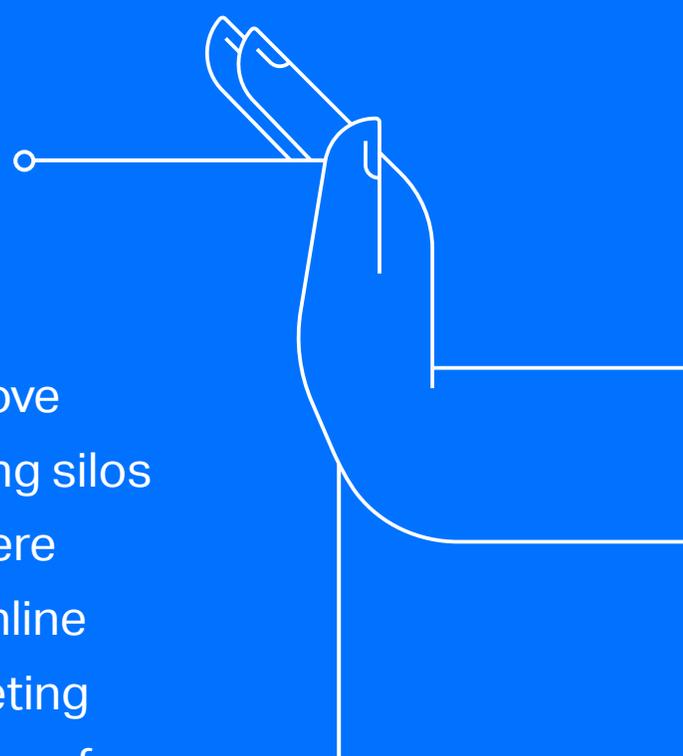
**With digital whiteboards, you can:**

- ✓ Unlock your teams' creative potential by providing an easy way to express ideas and spark new ones
- ✓ Make your meetings more inclusive, as everyone can lend their talent to projects instead of just listening to one person present and then completing assigned tasks
- ✓ Eliminate duplicate workstreams and miscommunications by putting everyone on the same page, all in one place
- ✓ Boost employee engagement and productivity so you can drive innovation
- ✓ Feel more connected with your team, as you can easily collaborate and share ideas
- ✓ Have fun. Use digital whiteboards for games and [icebreakers](#). Make your meetings more interactive by allowing attendees to leave feedback via GIFs, emojis, and up/down votes
- ✓ Support flexible work models. Attract and retain skilled employees by allowing them to work from any location, on any time zone

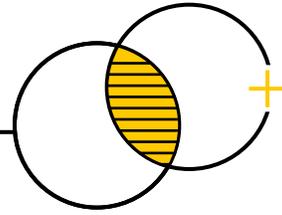


# 5 ways digital whiteboards bring teams together.

Digital whiteboards can improve visual collaboration, removing silos across your organization. Here are five ways you can use online whiteboarding to boost meeting productivity and free up more of your resources for execution.

- 
- 
- 1—Brainstorming
  - 2—Planning
  - 3—Workshops
  - 4—Customer journey mapping
  - 5—Organization charts

5 ways digital whiteboards bring teams together



## 1—Brainstorming

Digital whiteboards can handle all the ideas that your teams throw at them. Unlike their physical counterpart, digital whiteboards have infinite canvases that allow you to brainstorm endless possibilities.

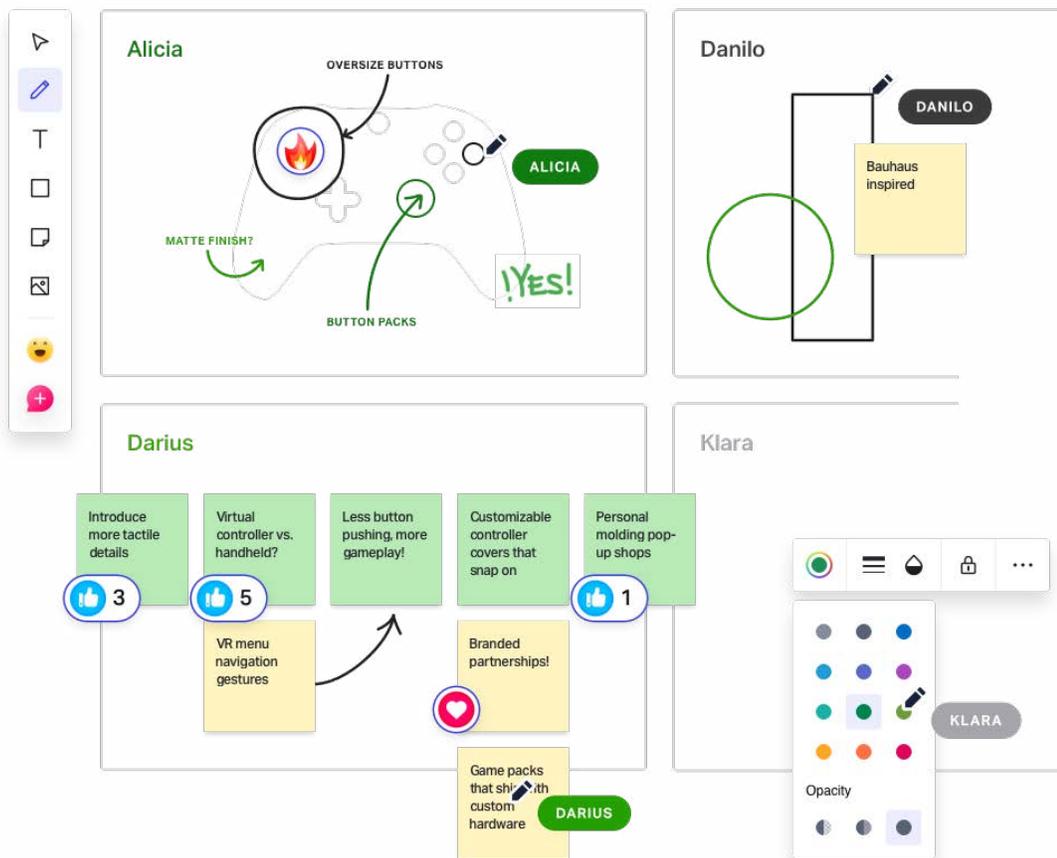
The technology is easy to use, as it's designed for everyone. You don't need advanced training or knowledge of project management software to use it. Simply send someone a link so they can join your brainstorming session. Then, draw and add sticky notes, images, videos, and text to your whiteboard. You can copy, cut, paste, and move points around until you are happy with the outcome.

Once you are satisfied, save your brainstorming sessions so you can refer to them in the future. You don't need to worry about erasing the whiteboard before the next meeting and misplacing all your hard work.

Digital whiteboards are much more secure than physical whiteboards in boardrooms, where anyone can walk in and see what you're planning. You can also keep your proprietary information secure, as only those with permission can view your content.

✓ VISUAL COLLABORATION IN ACTION: XBOX

The Xbox Research and Design Team uses this [brainstorming template](#) to spark creativity and invite a diverse set of perspectives to their brainstorming sessions.



“Having a digital space to brainstorm your ideas gives everyone a voice. Using this brainstorming template gave everyone equal input.”



—Megan Sempre, Senior Designer at Xbox

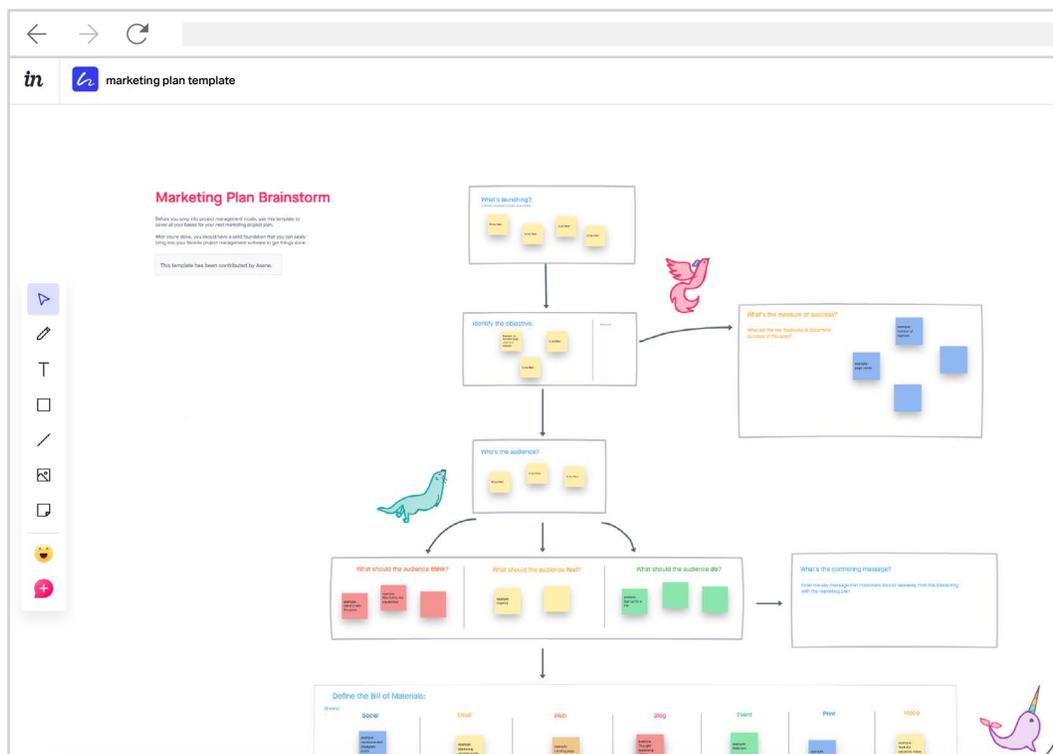
5 ways digital whiteboards bring teams together

## 2—Planning

Digital whiteboards streamline planning across all parts of your organization. Bring your teams together, from operations to product development, to brainstorm ideas and create strategies that will grow your business.

Use [marketing project](#) and [product planning templates](#) to jumpstart your strategy sessions. The templates will save you time while aligning cross-functional teams around a shared vision and giving everyone a voice.

### Marketing Plan Template



[Preview template](#) →

5 ways digital whiteboards bring teams together

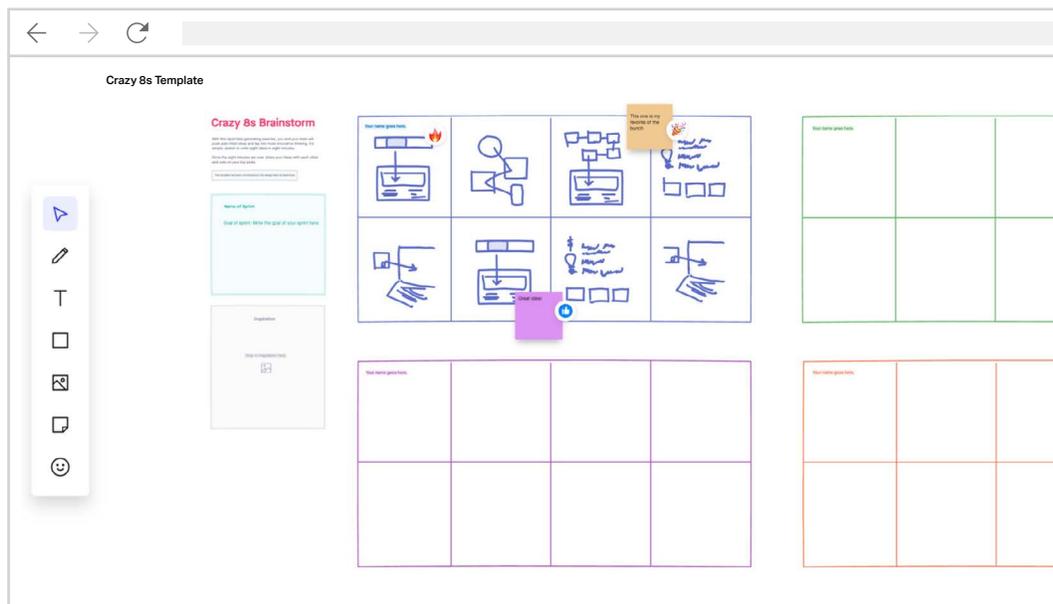
## 3—Workshops

Digital whiteboards are ideal for design and development workshops. They help you make the most of your time by providing [templates for design sprints](#) and [Crazy 8s](#). Since you don't need to start from a blank page, you can make progress without dedicating additional time to set up.

Share your prototypes and allow your team to comment on them in real time. Users can add sticky notes, post emojis, and vote designs up or down. If someone can't attend a live workshop, you can send them a link so that they can share feedback at their convenience.

Since everyone works on one canvas, you don't need to worry about miscommunications and versioning problems. Everyone will have a single source of truth.

### Crazy 8s Template



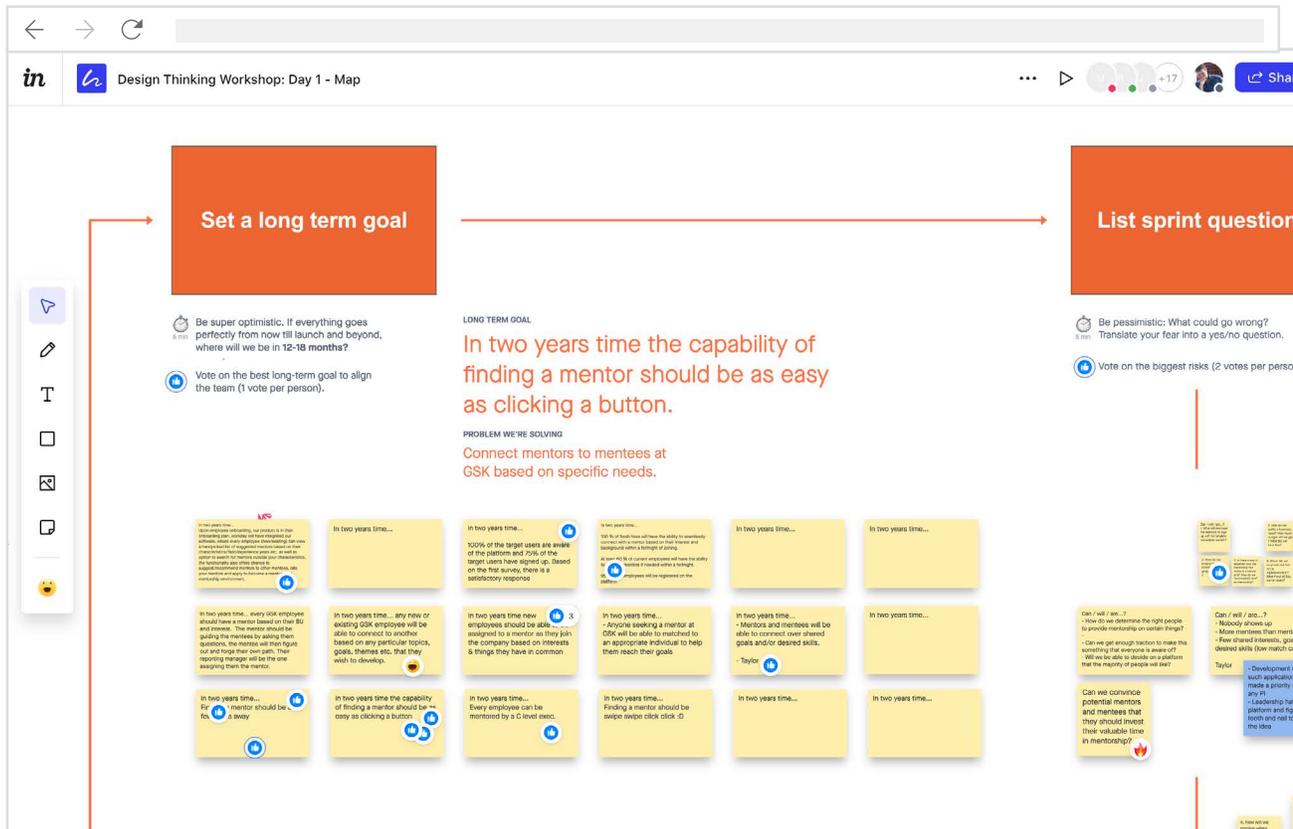
[Preview template](#) →

5 ways digital whiteboards bring teams together

3—Workshops

VISUAL COLLABORATION IN ACTION: GSK

GSK, a science-led global healthcare company, uses the [design sprint template](#) to connect team members from around the world to collaborate in an engaging and productive way.



“The sprint leveled the playing field. Our digital whiteboard facilitated a space to brainstorm ideas where everyone had a voice. Even with no design experience, the tool was easy enough that there was no learning curve whatsoever.”



—Marah Faron, Innovation Analyst at GSK

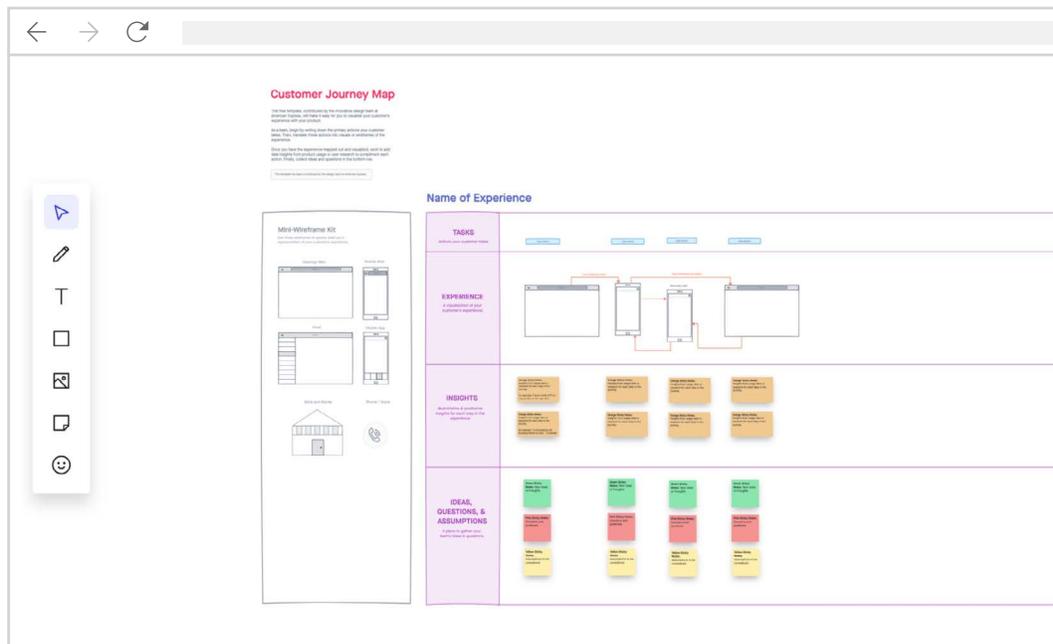
5 ways digital whiteboards bring teams together

## 4—Customer journey mapping

Traditional whiteboards limit your mapping, as you must fit your customer journey in the allotted space. Digital whiteboards provide you with an infinite canvas where you can add all your buyer journey steps and personas. With a digital whiteboard, you can focus on building an accurate customer journey instead of thinking about what steps you can fit on a single sheet of paper.

You can use a [customer journey map template](#) to identify friction points, ensure a seamless experience for customers, map your key personas to your business goals, and help your marketing team engage visitors along every step of their journey.

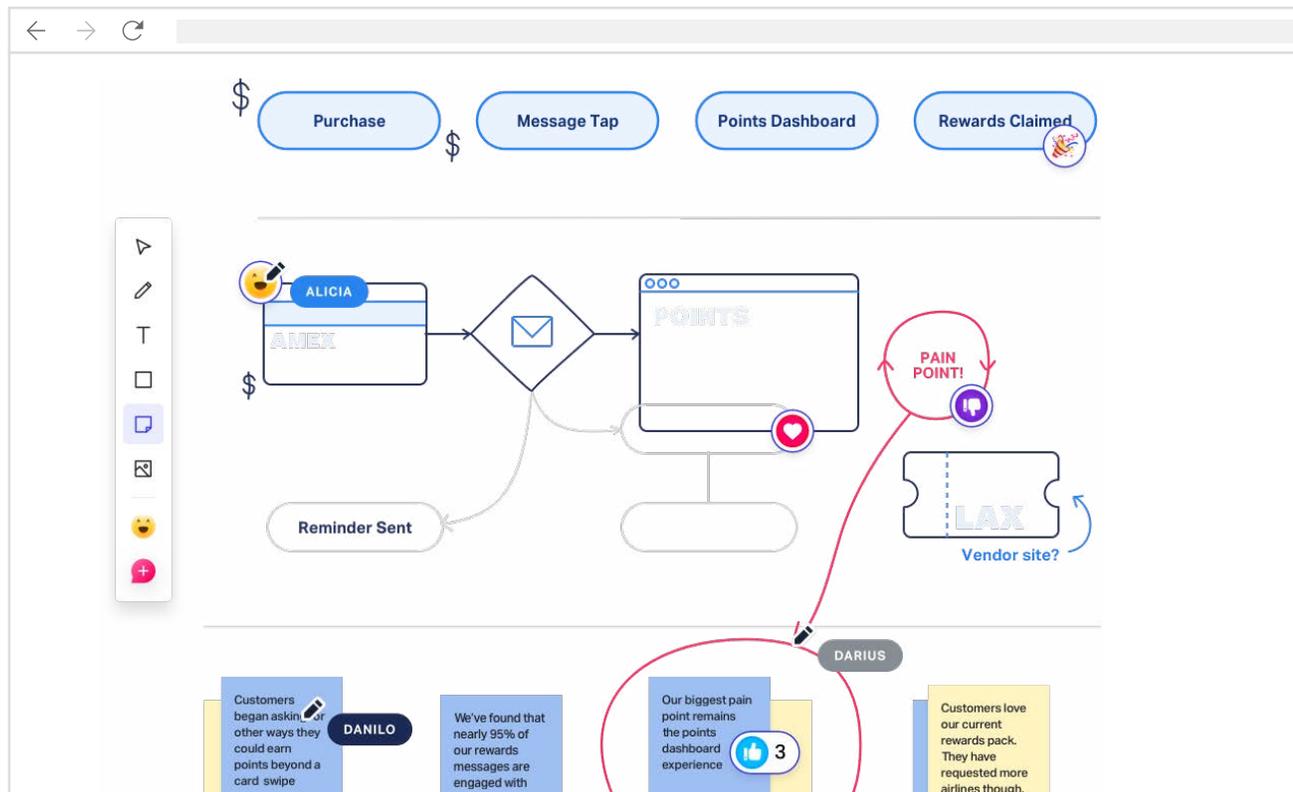
### Customer journey map template



[Preview template](#) →

✓ VISUAL COLLABORATION IN ACTION: AMEX

The American Express Enterprise Digital Product Design & User Experience Research team uses this [customer journey map template](#) to isolate pain points and opportunities. The template also keeps their team aligned on areas that will have the biggest impact on both customers and the business.



“We want to make sure we have a shared vision and that we’re all coming together around a shared goal. Having this template allows us to collaborate effectively.”

—Danny Forst, VP, Product Design at American Express

5 ways digital whiteboards bring teams together

## 5—Organization charts

Organization charts aren't just for HR and people teams — they require input from leaders across the organization. Online whiteboards bring all your stakeholders together in a single tool that streamlines collaboration and gives everyone a voice.

Start your planning with a [flowchart template](#) that allows you to copy and paste pre-built elements into your organization chart. Then, you can easily move cards around until you get the structure that you want. Finally, export your organization chart to Microsoft Excel or Microsoft Teams to make it available to others.

### Flowchart template

The screenshot displays a digital whiteboard interface for creating flowcharts. It features a toolbar on the left with icons for navigation, editing, and adding elements. The main workspace is divided into three sections:

- Diagram:** Includes instructions on how to use the template and a small diagram with a "Copy & paste!" callout.
- Diagram Stickers:** A collection of pre-built elements categorized by size (XL, Large, Medium, Small) and type (Text, Objects, Arrows). The text stickers include headers, titles, and body text. The objects section shows various shapes like rectangles, diamonds, and cylinders. The arrows section shows various arrow styles.
- Start building!:** A section titled "Here's a quick example of what you can build. The only thing's missing!" showing a sample flowchart with decision diamonds and process rectangles.

[Preview template](#) →

5 ways digital whiteboards bring teams together

✓ VISUAL COLLABORATION IN ACTION: DEUTSCHE BANK

## How the design and development teams at Deutsche Bank used digital whiteboards to keep collaboration alive during the COVID-19 pandemic

SEBASTIAN HEITZMANN



Markus Kopf and Sebastian Heitzmann's teams are responsible for the digital products at the forefront of Deutsche Bank's ambitious digital transformation.

When the duo joined Deutsche Bank four years ago, they set out to redefine the way developers and designers collaborate. Before, an external agency designed products and handed them off to an in-house developer to build in a silo. This workflow perpetuated the chasm between the two teams and led to communication misfires.

"Markus and I changed that completely," says Sebastian. "We decided to sit together, work together, and talk as we build products. This way, both sides learn the design and technical aspects, which creates a shared understanding and language so that work becomes seamless and fun."

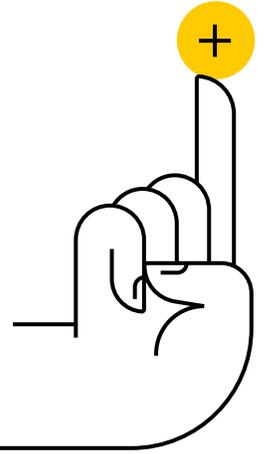
Then, the COVID-19 pandemic hit. Markus and Sebastian had to work with distributed teams while maintaining creativity and cross-functional collaboration without their most valuable tool: talking face to face.

Their teams already had a tool stack that helped the product, design, and development teams work remotely. But since they could no longer brainstorm ideas around the studio table, they brought in [digital whiteboards](#) to keep collaboration alive. They use these tools during strategy meetings, design sessions, and brainstorms to create mind maps, flow charts, wireframe sketches, mood boards, and brain-dump boards.

"Our teams work with digital whiteboards every day, which has removed barriers and breaks in the workflow between engineers and designers," said Markus. "As a result, creative design and development are much closer and have an improved workflow that gives both disciplines more space and time—ultimately leading to better products and customer experiences."

[Read the full Deutsche Bank case study.](#)

# How to succeed with hybrid collaboration.



Whether your teams work on site or remotely, visual collaboration can boost everyone's efficiency and productivity. Here are five best practices that will help you choose the right visual collaboration tools for your workforce.

## Remove barriers.

Your collaboration technology should be built for everyone—not one specific role or a facilitator who needs advanced features. Look for tools that are simple and don't require extensive training to use. The more intuitive your technology, the faster you will drive adoption and improve communications between teams.

## Promote psychological safety.

Many remote conferencing tools are built for presenters and only allow one person to speak at a time. If a high-ranking person leads the conversation, some of your team members may be afraid to speak up during meetings. Look for a tool that has an approachable interface that encourages everyone to share their ideas without fear.

## Choose tools that will scale with you.

When you choose visual collaboration tools, don't just think about your needs today. Consider how things will change in the future. Can teams extend their visual collaboration tools with plug-ins? Does the technology integrate with your other mission-critical tools, such as Microsoft Teams and Slack? Can you use each tool for more than one use case to support cross-functional teams and processes?

### Support synchronous and asynchronous communications.

Look for tools that allow teams to collaborate in real time and provide feedback outside of scheduled meetings. For example, users may want to record videos or walk-throughs and get immediate feedback. They should also have the option to send links to team members who can't attend live meetings so they can post comments at their convenience.

### Create a single source of truth.

Bring designers, engineers, and product teams together in a single tool that makes it easy for them to collaborate and share ideas. When everyone works from the same file, you'll avoid miscommunications that can delay projects and cause you to miss deadlines.

# Try InVision Freehand

HYBRID COLLABORATION: A GUIDE TO CHANGES, CHALLENGES, & CONSIDERATIONS • INVISION

Discover how visual collaboration can bring your in-house and remote teams together and drive more business.

Go to [invisionapp.com/freehand](https://invisionapp.com/freehand) to try a digital whiteboard free today.

