



How to architect Enterprise Chat for your organisation

A Knowledge Guide by MindLink Software

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Introduction

The aspect of both roll-out and realisation of ROI of Enterprise Chat is often a topic overlooked and little formalised or talked about. We're not talking about architecture in a technical or infrastructure sense – we mean the very cultural and people-based problem of creating and maintaining the right chat rooms for your organisation.

Our argument is this: To realise the full potential of enterprise chat within any business, careful up-front planning of which chat rooms you will need and which users will have access to them is absolutely necessary to drive adoption and build value from the chat room content.



The Challenge

All too often, we see Persistent Chat/ Enterprise Chat deployments that have let both users and administrators run wild with chat room creation, not least the worst case where chat rooms are treated as ad-hoc text-based conferences. This leads to:

- >> Fragmented and often completely duplicate collaboration streams
- >> Un-focused or incomplete chat history around a specific topic
- >> Simultaneous duplication of conversation on email



Why Chat Management Matters

Carefully managed chat rooms provide a multitude of benefits, most of which are summarised and listed below:

1. The collaboration culture shifts such that **teams move all day-to-day communication into a chat room**. This requires assignment of a specific chat room to each team, and also closing the members list to only the members of that team
2. Natural adoption of the collaboration paradigm is faster, if the purpose of **each chat room is intuitively mapped to a user's mental model of the company structure and structure of work**
3. All knowledge on a particular topic (and discussion around that topic) gets accrued into the chat room history, which is of course fully searchable. **This builds an organic and invaluable repository of knowledge around that topic**. Again, this requires specific assignment of a chat room to a given topic – and that all experts relevant to that topic know that the chat room exists
4. Answers to a question on a given topic are easily obtained by asking in a chat room dedicated to that topic. This requires that the **experts on the topic know about the chat room**, and that those who may need to ask questions on the topic also know about the room's existence
5. A succinct overview of all company activity relevant to you is easily obtainable by scanning recent messages in the chat rooms. This is possible when the entire company has migrated to Enterprise Chat and **understands which conversations should happen in which chat room**
6. A well-managed chat room ecosystem will mean that new users appreciate the usefulness of using chat rooms quicker, and hence **accelerate the adoption process** themselves

The process of implementing such a chat room architecture requires a careful analysis of your company's organisational structure and working culture, and then re-creating this in chat room form.

The 5 Types of Chat Rooms

We've found that it helps to think of the following, 5 different types of chat rooms, and then map them to your enterprise:

1) Team-based chat rooms:

- Day-to-day running of each team happens in these rooms
- Their membership is locked down to only the users on that particular team
- Implemented correctly, ad-hoc text-based conferencing and group email will naturally migrate over to chat room-based collaboration

Example: A chat room for the marketing team, engineering, sales etc.

2) Project-based chat rooms:

- Day-to-day work on a specific project happens in these rooms
- All employees working on or dependent on the project are in the room
- CC-email chains or endless conferences are replaced by the chat room's collaboration stream

Example: A chat room for an IT system migration, Product Launch etc.

3) Topic-based chat rooms:

- All discussions & knowledge sharing around a particular topic happens here
- Membership is less restrictive but the experts on the topic are in the room
- The persistence of the chat history builds an automatic repository of knowledge
- Chat room becomes a go-to place to find knowledge on a topic and to ask for help

Example: A chat room for product X, contacts & policies etc.

4) Auditorium chat rooms:

- General announcement or work-based conversation happen in these rooms
- Entire divisions or the whole company is a member of the room
- The chat room may be an "auditorium" to restrict those who can send messages to those important enough to make announcements

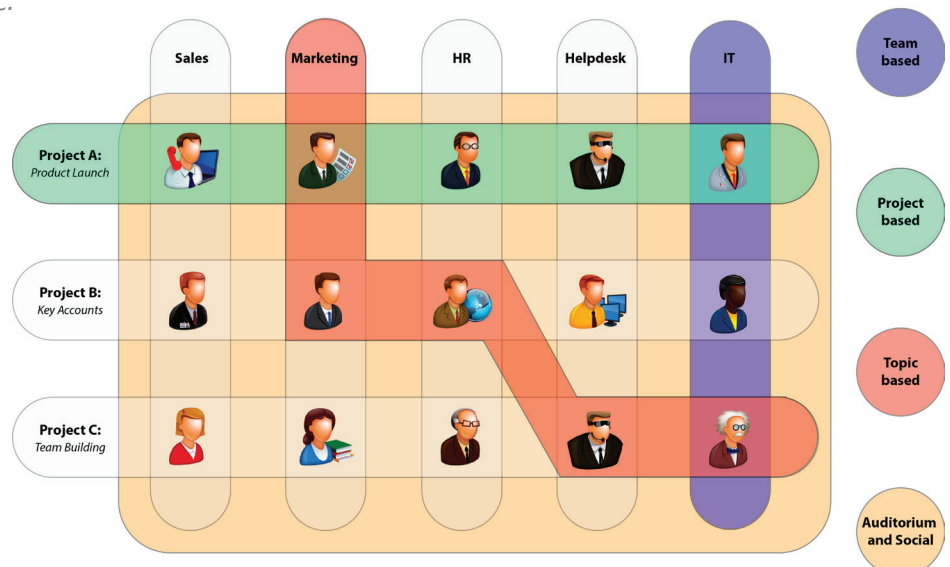
Example: A chat room for the whole company containing updates from the CEO

5) Social chat rooms:

- A place to talk about specific or general non-work based topics
- Membership list is generally unrestricted
- Keeps non-business critical conversation separate from "work" rooms
- Useful to aid in the initial adoption of the use of chat rooms

Example: A Gaming chat room, After-work activities etc.

The 5 types of Chat Room Structure



Let's look at a real life example

Take the above and map them to a real-life make-believe company.
This company has:

- 100 employees distributed world-wide
- Small cross-functional teams working on individual projects
- Plus some non-project based teams
- Projects that relate to one another
- Functional departments from which members work on each project
- Same-function teams working together e.g. HR
- A small collection of products

Now let's assign the necessary chat rooms:

1. First, let's assign a locked-down **team-based chat room** to each non-project team. The team's day-to-day collaboration stream can happen in this chat room such as status updates, sharing of news, updates, files and other information
2. Now for the rest of the teams, let's assign a locked-down **project-based chat room** to each project team. Day-to-day collaboration on the project can happen in this chat room.
3. Projects are interrelated to each other, so we can create chat rooms that can be used to discuss shared information and make decisions that relate to the projects as a whole. The members can be the union of all the sub-teams
4. There are employees on each project team that **perform the same role**. We can create a chat room for all of these across the entire company to discuss the technicalities of their specific role
5. The company makes a number of products. It is highly likely that there will be a need to share information between say, those making the product and those supporting or selling the product. This is a good use-case for **long-running topic-based chat rooms** that can be used as a go-to area to find out about that product, by all involved
6. Finally, we should create a **general chat room** for the whole company to discuss work-related announcements, and a couple of **social chat rooms** to encourage adoption and keep social collaboration separate from the main chat room content.



Enterprise/ Persistent Chat has an elegant but powerful category and permission based system to assign visibility and membership access to each chat room. We're not going to go into the technical details of how to configure this here – there are plenty of blogs and articles on Technet – but suffice to say that the crux of implementing your chat room architecture is mapping your design to the right categories and right visibility modes and permissions.

Management & Maintenance

– Centralized Or Decentralized?

All companies evolve, however, and despite your best planning as part of your Enterprise Chat roll-out, there will be a time when new chat rooms need to be created. By now you should have gathered that letting users create chat rooms themselves is something we would not recommend.

Doing this will pollute, dilute, and fragment your carefully architected chat room structure, and ultimately end in chaos. In fact, we recommend you assign as few, select people the rights to create and manage rooms and hold regular triages to clean-up and consolidate the rooms that are available.

If you have made this mistake already, (don't worry, most companies will get to a stage when they have to revisit their chat room structure), MindLink can provide the tools and expertise to help you realign your chat room architecture – we regularly undertake discovery and documentation processes for Enterprise Chat deployments at firms of various sizes and in numerous industries.



Creating a Naming Convention

Ensure that you have the correct tooling in place to define a chat room creation request and approval process through which end users can notify the administration team of the need for a new chat room, and with which the administration team can automatically approve or deny the request – including creating the chat room automatically.

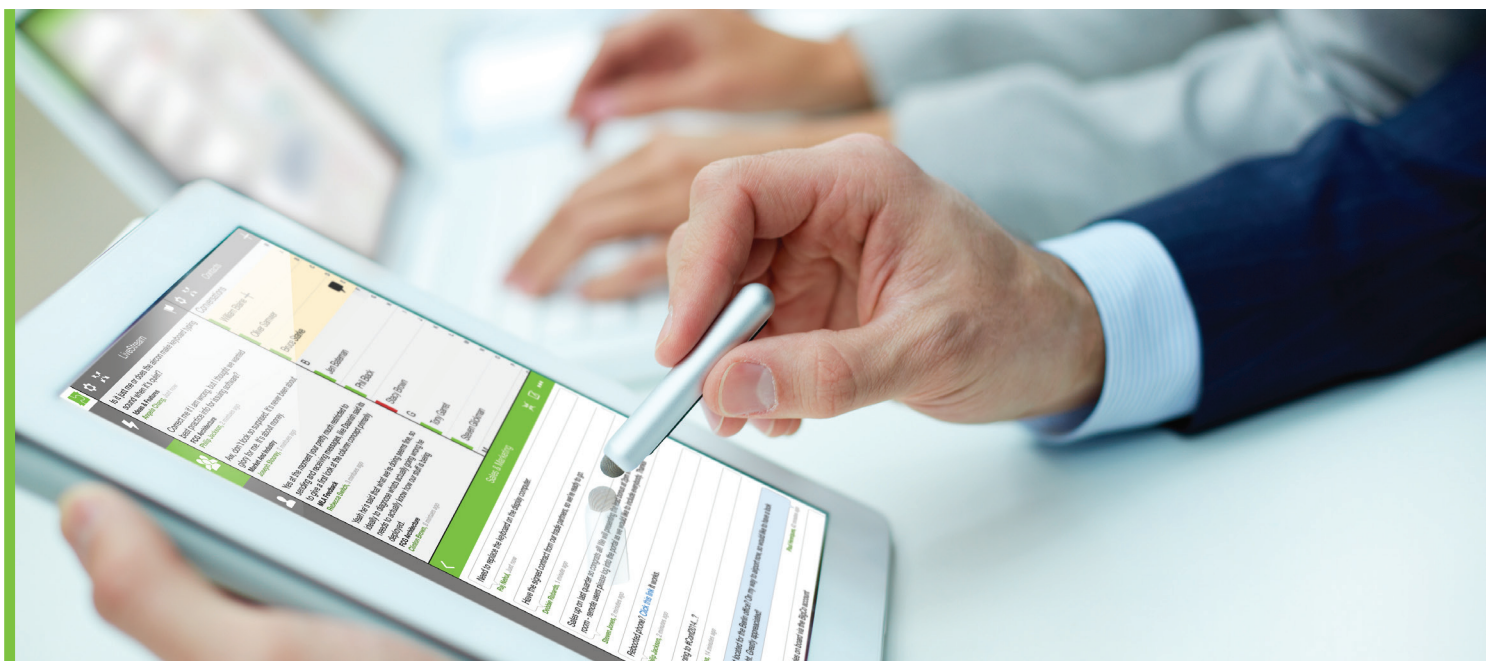
We recommend from the start that you establish a consistent and obvious naming convention for your chat rooms. Doing so makes it easier for users to understand the purpose of each chat room just by looking at the name, helps to avoid accidental creation of chat rooms with a similar or duplicate purpose, and in general helps to focus the collaboration flow in each room. We can help you define a suitable naming convention, and our chat room creation tooling can help enforce such conventions also.

Our Top 4 Rules For A Successful Enterprise Chat Deployment:

1. Carefully architect the chat rooms and membership permissions from the start
2. Lock down chat room creation, and chat room membership modification permissions to the administration team only
3. For team-based chat rooms, make sure only those who need to be in a room have access – this encourages team members to use the chat room rather than email for their internal communication
4. Use a naming convention to help give each room an obvious purpose and to shape the chat room architecture

In this knowledge guide, we've talked about how to optimise your implementation and day-to-day usage of Enterprise Chat through planning and administration of the chat room permissions system.

In the next part in this series, we'll talk about how to drive critical collaboration through mobility and how to conduct rich contextual collaboration through integration with your enterprise's systems.



What is MindLink™?

At MindLink Software, we put your team's objectives first.

MindLink provides integrated, **Secure Enterprise Chat** (also known as Persistent Chat or Group Chat) with emphasis on Business Critical Collaboration i.e. it changes the way you work.

Built specifically for Microsoft Lync™ and Skype for Business, MindLink is **fully mobile**. Accessible on tablets and smartphones, it is also available on web and desktop for Windows, Mac & Linux. MindLink's **deep integration** with internal line-of-business applications, portals and Email as well as external sources such as social media caters for the collaboration needs of modern businesses. It is highly **secure and compliant** with features and functionalities specifically build for enterprise use.

MindLink's advanced enterprise chat helps teams exchange vital information, data & files real-time across the enterprise transforming how teams collaborate.



MindLink™ Suite

MindLink Anywhere

Enterprise Chat on Windows, Mac, Linux, for employees working in the office or from home, exposing Chat to external users through the web

MindLink Mobile

For an increasingly mobile workforce – Chat access via iOS, BlackBerry & Android with unique mobile features

MindLink Tablet

Enterprise Chat for users of iOS & Android tablet devices

MindLink Integrations

Seamless integration of external sources and line-of-business applications with Chat Channels (Email, Social and Restful API)

MindLink Compliance

Legally compliant storage of Instant Messaging & Group Chat messages

MindLink for SharePoint

Integration with web-based portals incl. SharePoint for easy access & adoption



