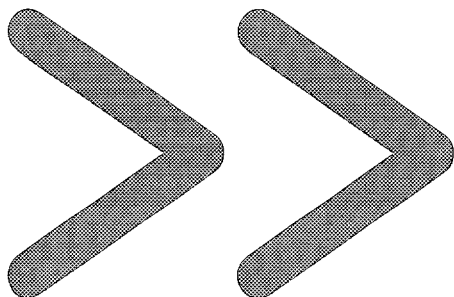


ILLUSTRATION BY VICTORIA KANN

IM N, R U?

Instant messaging holds the promise of increasingly speedy communication. The decision to implement, however, may not come quite as fast.



BY PETER DE JAGER

IF WE WERE TO THINK OF instant messaging (IM) as nothing more than a slimmed down, more immediate, more mobile version of e-mail, we'd be guilty of misunderstanding how human behavior changes when technology increases our ability to communicate. E-mail made staying in touch and informed *de rigueur*. And now, IM is here to up the ante. Instant messaging, while similar to e-mail in that it involves electronic text, is as different from it as sending a letter by snail mail is from the pony express. When it comes to speed and instant accessibility, IM has the more latent e-mail systems beat by using pop-ups to immediately convey messages.

The central sales pitch for the business use of IM is that it increases productivity by allowing us to contact anyone, anywhere, anytime either through their computers, cell phones, or personal digital assistants. And while we can safely assume that across time people will adapt their behavior to take advantage of this technology, what we don't yet know is whether IM can deliver quality communication along with the quantity and whether productivity will be increased by the ability to communicate immediately or lost because of constant interruptions. The answers to these questions largely depend on whom you ask.

Who's using IM, and who's not

It is hard to argue that reducing the time between an informational need and its gratification do *not* increase a worker's efficiency and productivity. Take Michele Dennis's experience as an example.

Although Dennis, executive director, Professionals in Human Resources Association (PIHRA), Los Angeles, did not formally plan to adopt IM, her staff of nine started using a free version of it two years ago. The benefits were undeniable. Thanks to IM, her three-person member services department is able to more efficiently answer the approximately 2,000 e-mails it receives each month. In addition, phone queries are more easily answered within the span of the call because of the ability to send a quick question by IM to another department.

Beyond customer service perks, Dennis has found that IM helps her and her staff stay on task. "I'd rather quickly message an easy 'yes' or 'no' than have a line of staff members out of my door, which was the case before we were using [instant messaging]," she says. Operating IM under what she calls "loose guidelines," Dennis and her staff have fully embraced instant messaging as an integral part of the PIHRA service experience.

Andrea Pendleton, executive director, American Association of Anatomists, Bethesda, Maryland, is on the other end of the spectrum. "Instant messaging is the equivalent of leaving your office door open all day as the entire world walks by, and inviting everyone to pop in whenever they choose," she cautions. After trying out IM on her home computer, Pendleton quickly realized the drawbacks such a system would have when played out on company time. "It's hard enough

fighting the urge and/or meeting the expectation that you must respond to an e-mail immediately without having agonizingly slow real-time conversations via computer, while trying to work on something totally unrelated," she says.

Pendleton's remarks highlight one of the drawbacks of the system, but of equal concern are the quality and usefulness of communication resulting from IM. "The more that I find people being misunderstood via poor written communication in e-mail, the more I'm thinking we could all benefit from using the telephone more often," she says. "E-mail and IM increase the *amount* of communicating but not necessarily the quality."

Regardless of where you or your organization are on the Dennis-Pendleton spectrum, the decision to use instant messaging, or not, does not stop with customer service efficiencies and your internal audiences. Some organizations are using IM to communicate externally.

The Nashville-based Gospel Music Association, for example, has implemented an ingenious awareness program using IM functionality. Concerned about the freewheeling exchange of copyrighted music, GMA is sending IMs to file swappers to raise awareness of both the ethical and legal risks of swapping copyrighted music and to demonstrate to these users that they are not anonymous.

While sending out a



Dennis Gano, CAE

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warning message to music swappers is a creative, clever, and arguably justifiable use of instant messaging, it is also, by anyone's definition, unsolicited. That makes it a peculiar form of spam, something that should be considered when setting up guidelines for an organization's external use of IM.

So is instant messaging an internal and external communication booster, or is it a reincarnation of passing notes in school? The jury is still out, but continued forward progress is inevitable in technology, and the latest, coolest, shiniest thing needn't be avoided so long as it is strategically integrated. Consider, for example, creating a deliberate organizational pol-

icy on IM as a safeguard rather than allowing its use to grow unchecked. Be aware, too, of other IM concerns, such as security and legal liability.

Security scares

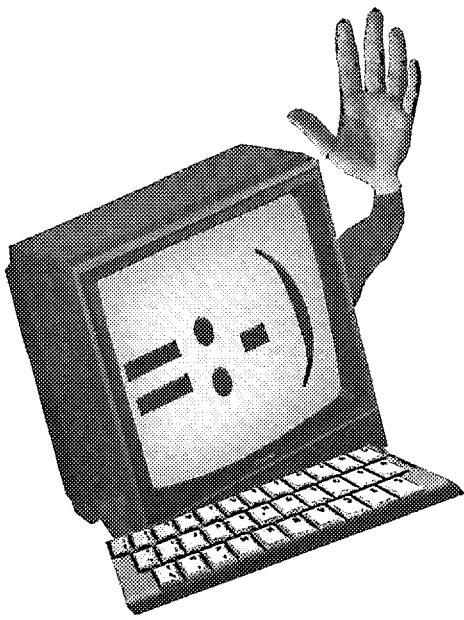
Because IM use is in its infancy, security issues have yet to become a major problem. But as more people flock to the technology, it will become increasingly visible as a target for the type of viruses, denial-of-service attacks, and so forth with which traditional e-mail systems have been plagued. And according to Internet security firm Symantec, Cupertino, California, IM provides a platform even more vulnerable to attack than does e-mail.

Without delving into the technical bits and bytes, suffice it to say that IM isn't e-mail, and traditional firewalls and security measures are not designed to monitor its traffic. All is not lost, however. Dennis Gano, CAE, of Innovative Technology Consulting, Algonquin, Illinois, and former Internet technology director of the Chicago Association of Realtors, was able to successfully handle IM security con-



Andrea Pendleton

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cerns while at CAR. He used the instant messaging capabilities built into the organization's Microsoft Exchange software package. Because the IM system was managed internally and configured so that messages couldn't go outside the organization, CAR was safeguarded against the third-party intrusions that can be found with other, less expensive versions of IM software. "We didn't feel comfortable with anything free from the Internet because you have no control over what comes through," says Gano.

And control is definitely an issue. Executives intrigued with IM but worried about the security risks should ask: "What level of security do I desire?" and "Can the current state of IM security measures deliver this to my users?" Finding finite answers may be difficult, as both good and bad technology are always changing. But taking the time to factor in possible system vulnerabilities *before* implementing IM may prevent later headaches.

Legal liabilities

Another, potentially more damaging, issue is not susceptible to any technological solution. What is your staff communicating through IM, and do these extremely casual messages present new legal liabilities to your organization? Will an off-color joke provide evidence in a sexual harassment lawsuit? Will a comment on the pricing of services violate antitrust legislation? These risks aren't unique to IM, but they are aggravated by the casual nature of the medium.

The best way to head off these issues is by issuing a firm edict via an organizational policy, just as you did for e-mail (you did, right?). Guidelines should address

- discussions concerning anything that is confidential;
- libel and slander;
- negotiation strategies;
- political commentary;
- jokes of any sort;
- sexually explicit postings; and
- threats, in jest or otherwise.

Also include procedures for archiving and backing up instant messages. For example, at the Professionals in Human Resources Association, Dennis requires back up of any messages involving the board of directors and encourages her staff to leave a paper trail when they feel they may need it.

Financial findings

The cost of IM is hard to pin down because so much depends upon individual decisions regarding usage and controls. If you use the various free Internet solutions that are available, you have no cost but you also have no control. If you want full control, you may spend a significant sum (up to tens of thousands of dollars) to implement the necessary hardware and software solutions. If you have a limited number of users and feel comfortable with minimal controls, an IM system could cost the association a few hundred dollars. Additional administrative costs, such as installation, maintenance, security, and oversight, depend upon the specific needs of the organization.

Cost savings. While some IM systems may be more costly on the front end than others, savings can often be found on the back end. For example, Chris Stelzig, marketing manager, Entomological Society of America, Lan-

ham, Maryland, realized a savings when he replaced 11-cent-per-minute telephone calls with instant messaging for his data processors, outsourcing partners located in Virginia who handle member service issues such as dues payment processing and member inquiries. The 50-mile geographic gap between Stelzig and the processors was also virtually erased. "We use IM continually and it works great," he says.

"Though the data processors are not my *employees*, in some ways they could be seen as such, and [IM] allows me to...provide a greater level of supervision than would otherwise be possible." Stelzig and his processors use a free version of IM with an offline receipt option. "If you send an IM when the other person is not logged on, it will pop up on [his or her] desktop as soon as [he or she] logs on in the morning," he says. "We work slightly different schedules, so this is beneficial." As to why he uses instant messaging instead of e-mail for these communications: "I get hundreds, sometimes thousands, of e-mails every week. [IM] keeps my supervisory communications separated

from the rest and ensures that I can respond immediately," says Stelzig.

While at the Chicago Association of Realtors, Gano also experienced an IM eureka moment. For him, instant messaging was an appealing technical solution because the association had offices on multiple floors of the building and separate phone systems to boot. IM allowed staff to communicate without running up and down the stairs. IM also proved to be cost effective, even if in an intangible way. "While the association expended the same amount of money for salaries, there was a direct savings [through] the increased production of the staff," Gano says. "Staff spent



Chris Stelzig

"[IM] keeps my supervisory communications separated from the rest and ensures that I can respond immediately."

less time waiting around to talk with someone and, therefore, had more productive time getting additional work done.”

Unanticipated expenses. To some extent the degree of distraction caused by an interruption is a personal idiosyncrasy, but it's also an aspect of the type of work being done—say, writing, reading, or working directly with customers. Repeated instant messages,

similar to phone calls or knocks on the door, can disrupt work flow for 30 minutes to an hour, if not longer. Worse, they can ruin concentration, which also causes productivity and work quality to plummet.

One way to lessen this problem is to install some constraints on IM usage. Define in advance what types of messages are allowed. Set some reasonable guidelines on when messages can be sent and how they should be

handled. For example, must people respond immediately, regardless of whom they are speaking with at the time the machine chirps? Not at PIHRA. Dennis allows her staff to modulate their accessibility according to their workloads. Under this guideline, staffers who want to work uninterrupted can set their IM status as *unavailable*, and then check any backlog of messages at a set point during the day.

Making the leap

In his former capacity as Internet technology director at CAR, Gano rolled out instant messaging use in phases throughout the organization, conducting quality assurance testing each time to ensure that the product was working correctly and that the staff understood the proper use of all of its capabilities. Likewise, organizations should consider all of the benefits and detractions of IM before leaping on the bandwagon. By starting with a pilot project, or at least laying some preliminary guidelines, the experience can be fine-tuned in the association's favor.

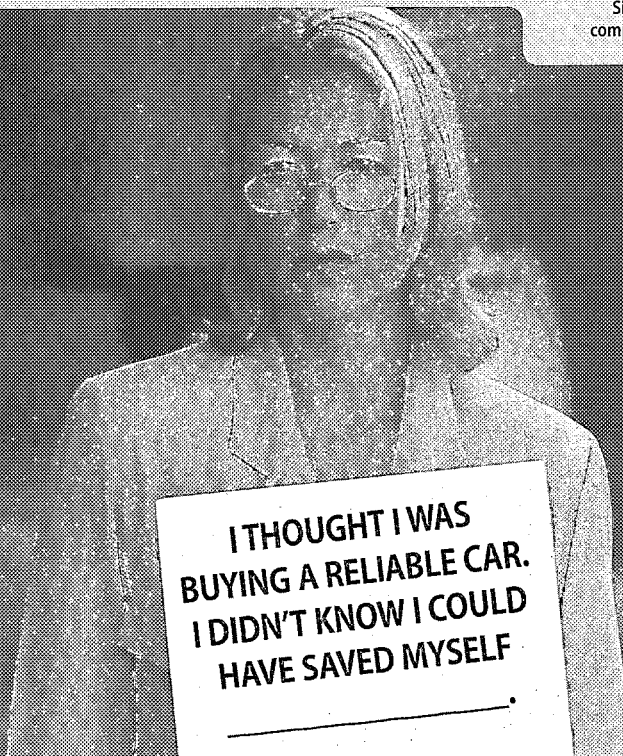
Instant messaging is undoubtedly a technology that leverages our ability to communicate, and as such it cannot help but offer solutions to a variety of communication problems and needs. However, like most technologies, it is not a panacea, and in certain circumstances it will only make things worse.

The key to making any new technology, including this one, work for your association is to be active in your planning. A deliberate implementation from the top down will allow you to not only anticipate inevitable problems that will arise, but also ensure the right fit for your organization's needs. The challenge in planning, as always, is to consider each technology solution independent of outside opinion and hype and not simply follow a fad. ■

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