

Consolidating Communication:

Leslie Science & Nature Center

& Ann Arbor Hands-On Museum



Group

def innovations()

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Table of Contents

Executive Summary	2
Introduction	3
Background Information	4
Influential factors in mergers and acquisitions	4
Methodology	5
Findings	6
F1: Breakdowns in communication workflow	6
F2: Platforms	7
F3: Instant messaging	8
F4: Employee exhaustion	9
F5: Change inertia	9
F6: Training considerations	10
Recommendations	11
R1: Office 365, a unified platform	11
R2: Combating inertia	12
R3: Employee training and accountability	12
R4: Standardized communication protocol	13
Conclusion	13
Our Team	14

Executive Summary

The Leslie Science and Nature Center (LSNC) is a non-profit organization located in Ann Arbor, Michigan. In early 2017, LSNC merged with the Ann Arbor Hands-On Museum (AAHOM).

LSNC and AAHOM have experienced difficulties with cross-organization communication in the period since their merging, consistent with background research on mergers and acquisitions. It has been challenging to share important information across the two platforms due to their incompatible natures. LSNC operates on Google's G Suite, while AAHOM uses Microsoft's Office 365. Of primary importance to employees at both organizations is the use of the calendar and email features provided by their respective systems. However, users have long faced issues concerning the coordination and scheduling of meetings and events across platforms, as well as in other forms of e-communication. Furthermore, staff at each location have grown accustomed to their respective uses of either G Suite or Office 365, propagating a sense of inertia that has resulted in some hesitancy to switch over to other systems.

With these issues in mind, our team was asked to assist LSNC and AAHOM in choosing a single communication platform on which both organizations could operate efficiently. Our approach to a solution incorporated qualitative interviews with five employees (managers, directors, and personnel) from both locations, as well as in-depth background research into areas of concern related to the core issue.

In response to the demonstrated inefficiency of running the two incompatible platforms in parallel, and cognizant of the potential costs that would arise if both organizations were to switch to a completely new platform, our consultants proposed several suggestions:

- Choose Office 365 as the primary system.
- Implement changes in several descriptive steps so that people can visualize the progress towards the mutual goals. Emphasize that everyone wins from the change.
- Offer multiple training formats to accommodate people's learning preferences.
- Consider hiring a temporary IT person or team to be accountable for facilitating the change.
- Create a uniform understanding of the communication protocol

Introduction

The Leslie Science and Nature Center (LSNC) is a non-profit organization that aims to connect the Ann Arbor community with the natural environment around it. Located on 50 acres of forest, pond, prairie, and fields. Visitors are able to engage with the Center's woodlands and ponds, as well as participate in the Center's educational public programs and camps. Currently, LSNC employees a staff of around 20 people, which often changes on a seasonal basis and is frequently influenced by their spring/summer programming. The Ann Arbor Hands-On Museum (AAHOM) is a STEAM (science, technology, engineering, arts, and mathematics) museum located in the Kerrytown district of downtown Ann Arbor. The majority of their programming accommodates children, but the museum is accessible to all ages. Thousands of visitors and many school groups visit the museum on a year-round basis; as a result, they staff closer to around 70 employees to keep up with their daily operations.

With LSNC as our primary client, our project also concerns AAHOM and is principally focused on the resultant merged organization, formed in early 2017. AAHOM and LSNC have distinctly unique identities, demonstrated by their mission statements, facilities, and employee distributions. Their recent merger has brought to attention some unique challenges that have led to a combined desire to hear an outside perspective, particularly in regards to their use of different software suites. AAHOM uses Microsoft's Office 365, whereas LSNC uses Google's G Suite. Unfortunately, running the two systems in parallel has been inefficient due to their incompatible natures, especially in the realm of e-communication.

Our team was asked to examine the current workflows and communication systems at both locations, and to assist them in choosing a single software suite to operate on. Additionally, we were asked to propose best practices in implementing the transition to a single platform, as well as how to onboard employees throughout. In doing so, we were asked to keep in perspective other important situational concerns, including but not limited to: potential training and labour costs incurred by switching; possible organizational growth and future expansion; and sensitivity to the distinct identities and usage policies that inform each organization's work culture. This report details our process of contextual inquiry into the workflow and culture of both the Leslie Science and Nature Center and the Ann Arbor Hands-On Museum that lead us to formulate this solution. Additionally, we provide suggestions for how to best synthesize and implement usage policies and protocols for improved efficiency in cross-organization communication.

Background Information

Influential factors in mergers and acquisitions

In order to strategize how to best approach a solution for our task, our team began by researching what common logistical and organizational challenges mergers encounter, and how such elements shape the outcomes of mergers and acquisitions

Communication. Communication is a vital aspect of mergers that “significantly influences the adoption of a new culture”; this underlines the importance of understanding communication and information flow, and how its “leanness” or “richness” can impact organizational change (Appelbaum et al., 2000). Lean communication comes in the form of less face-to-face and less interpersonal types of media, whereas rich communication produces rapid responses, uses multiple forms of information (Appelbaum et al., 2000). As the non-routine nature of the information increases (as would be the case with mergers) the better it is to utilize richer means of communication (Appelbaum et al., 2000).

Culture. Culture can serve as a cohesive mechanism to draw otherwise disparate members of an organization together; without such cohesion, cultural differences can severely impede integration in mergers (Schraeder and Self, 2003). Appelbaum offers a definition of such culture; citing Dennison, 1996, he writes, “Culture refers to the deep structure of organizations, which is rooted in the values, beliefs, and assumptions held by organizational members.”

Inertia. Inertia in the workplace can be defined as “a lack of plasticity, which is the strong persistence of existing form and function” (Gupta et. al, 2001). Organizations may experience high levels of inertia when “the speed of reorganization [core feature change] is much lower than the rate at which environmental conditions change”; due to strong organizational cultures, many members are hesitant to change the existing norms (Kelly and Amburgey, 1991). It is difficult to find information on how to “resolve” the issue of inertia in mergers; however, in a paper by Castellaneta, Valentini, and Zolo, 2018, it is suggested that when knowledge codification - the process of systematically organizing information into a form or code (such as manuals or spreadsheets) - is high, it moves from “strengthening [decision] inertia to promoting learning” (2).

Methodology

For this project, our team followed a user-centered methodology to gain a thorough understanding of both of our two clients, as well as the context of the environments they are working in. We began by conducting background research of the clients and client problem areas to inform question topics. Contextual inquiry interviews are semi-structured and take place within the natural context of the interviewee's work, such as within their office (Holtzblatt, Wendell & Wood, 2005). It is essential that the interviewer(s) emphasize that the interview must not interrupt the interviewee's workplace responsibilities. As such, the interviewee should maintain their daily flow, answering coworkers questions or the phone as necessary. The clients provided us a list of twelve people that we could potentially interview. At first it was slightly difficult to select interviewees because we were not provided job responsibilities of each person. We strategically selected interviewees based on their job responsibilities and where they primarily work. We made sure to select at least one employee who splits work time between both locations to provide a unique perspective to the communication problems. Our clients provided feedback on our initial interviewee list and suggested alternatives based on topics or workflows we wanted to focus on. Ultimately, we complied and settled on a final number of five interviewees. Two team members attended each interview; one person was the interviewer while the other recorded the interview and took notes. After completing each interview the entire team met to work on the second phase of our research methods.

Consistent with Holtzblatt et al. (2005) we created affinity notes for each interview that capture issues and themes from the interview. We had an affinity note for approximately every minute of the interview. Some were direct quotations while others paraphrased what the interviewee said. After five interviews, we gathered more than 250 affinity notes. We created three additional hierarchies over our yellow affinity notes (Figure 1). The green notes are descriptive enough such that they accurately represent nuances within the yellow notes. Next, the orange notes further cluster the green tags into larger groupings of opinions and pain points. Lastly, the red notes depict the chronology of the client situation. The leftmost red notes describe the client problem before our consulting team was brought on board, whereas the rightmost depict employees' suggestions for implementing a shared communication platform in domains such as training and accountability.

We employed qualitative research rather than a mixed methods approach (e.g. survey and contextual inquiry) due to the discrepancy in the number of employees across the two organizations. Additionally, our clients emphasized that communication issues are transparent which may have allowed interviewees to speak freely. The affinity wall process uniquely provided us opportunities to utilize qualitative coding methods and for our team to discuss our intuition around content areas.



[Figure 1] The completed affinity wall of approximately 250 affinity notes and 3 levels of clustering.

Findings

F1: Breakdowns in communication workflow

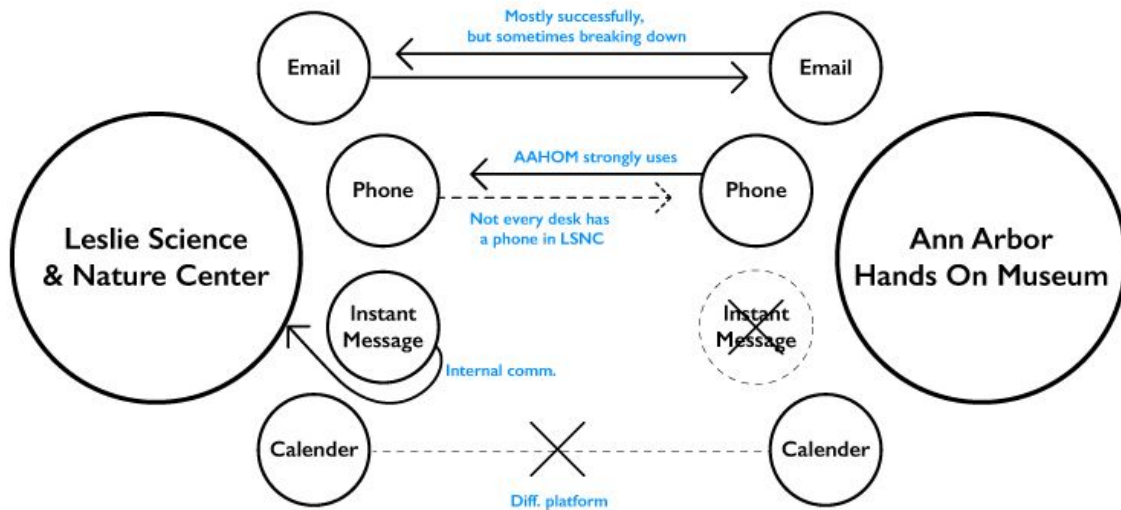
Our affinity notes highlighted inconsistencies in communication culture between the two organizations: for instance, what is perceived as standard at one location did not always mirror its counterpart at the other. From calendaring and emailing to placing calls or setting up birthday parties, the variation in what was expected from employees in their interactions and responses between work cultures were a noticeable contributor to the current synchronization issues. Departments may possess the same name at both locations, but serve different purposes; staff with similar titles could bear dissimilar responsibilities. Discontinuities such as these have the potential to lead to confusion regarding who to contact, what responsibilities are required, and/or how to proceed with an action.

A major inhibitor to fluid communication between the two organizations is the incompatibility of their calendar platforms. Employees operating on G Suite are unable to see the availabilities or schedules of employees on Office 365 with ease, and vice versa. Without such a bridge, calendaring includes redundant and inefficient steps, such as extra phone calls or emails that would be rendered unnecessary if the process were consolidated on a single platform (see Figure 2).

Currently in place at both locations is the use of the email command term [ACTION], with moderate success. Originating from email patterns at LSNC, [ACTION] in the title of an email indicates that some specific action must be undertaken as a response to the content of the message. However, due to the undocumented nature of the term's meaning and intent, there

have been instances of incorrect usages of the keyword, or a lack of sufficient response in follow-ups.

At both LSNC and AAHOM, current communication protocols are relatively undocumented, intuitive between employees, and learned over time. This makes it more difficult to onboard new employees, and, in context of the merger, attempts to marry the two unwritten communication etiquettes have been fraught.



[Figure 2] Standing communication flow between LSNC and AAHOM. The solid lines represent where communication is flowing well. Dashed lines represent where lines of communication are being missed.

F2: Platforms

Features of Office 365 and G Suite

Office 365 is a line of subscription services offered by Microsoft, as part of the Microsoft Office product line. The brand includes plans that allow the use of the Microsoft Office software suite, as well as cloud-based software as a service product for business environments. G Suite is a brand of cloud computing, productivity, and collaboration tools, software and products developed by Google. G Suite is comprised of Gmail, Hangouts, Calendar, and Google+ for communication; Drive for storage; Docs, Sheets, Slides, Forms, and Sites for collaboration; and, depending on the plan, an Admin panel and Vault for managing users and the services.

The primary features that both organizations actively use with each platform are calendar, email, and collaborative documentation. Both calendars are very flexible in integrating data from

emails. However, only Office 365 offers a divided view of calendars in which one-half is the user's and the other is a shared one, while G Suite cannot separate the view of calendars. In both email systems, basic functions work in very similar ways. Office 365 offers additional functions, such as connecting with other services through Office 365 Connectors. Regarding documentation, both platforms offer collaborating functions that allow users to work at the same time. Office 365 offers more advanced functions which are the same as the Office desktop applications. In addition, Office 365 has the ability to place a user's account under a legal freeze to preserve and archive confidential information. This feature is a requirement for the AAHOM and it is not something that G Suite is capable of.

Employee Opinions about Office 365 and G Suite

Two employees we interviewed strongly disliked Google, but several interviewees also noted its advantages for collaborative work. People disliked Google for reasons ranging from perceived professionalism to its seemingly unfriendly user interface.

Interviewees critiqued Google:

- "I hate Google."
- "The Google interface is too busy."
- "Google makes me sign in and sign out a lot."
- "G Suite should only be used for personal use."

Despite these criticisms, people noted the obvious benefits that Google provides, especially when interfacing on projects in the local community and for organizing their personal calendar.

F3: Instant messaging

Instant Messaging Research

More and more companies are starting to incorporate instant messaging services to facilitate communication between their employees in a workplace setting. Instant messaging can provide numerous benefits to a business and can be extremely useful for businesses who have employees in multiple locations or employees who are frequently on the go (Tollhurst, 2018). It speeds up communication between two or more people because it can elicit quicker responses than an email would and is far more convenient than a phone call. Both of these situations are applicable to LSNC and AAHOM. LSNC often has employees on the trails leading walks or in the classroom teaching, while AAHOM has many employees walking around the museum floor interacting with customers. Instant messaging services can also promote real time project collaboration (Attkinson, 2018) between 2 or more employees, something email cannot always provide.

LSNC and AAHOM Opinions about Instant Messaging

There are clear benefits to implementing an instant messaging platform to aid communication within businesses. Through our interviews with LSNC and AAHOM employees it became clear that employees from both organizations did not like the idea of doing so for a variety of reasons. In our initial interview with LSNC and AAHOM it was mentioned that the organizations had held a optional Slack trial for employees that was met with mixed reviews. It was also a topic of discussion in our private interviews with LSNC and AAHOM employees. In one interview, an employee mentioned that they failed to see the use of an instant messaging platform like Slack because they felt that sending an email would accomplish the same thing that using an instant messaging platform would. In another interview, it was mentioned that Slack seemed like it was beneficial as a tool to aid communication for projects, but not as a primary means of communication. Another thing we considered while deciding whether to suggest an instant messaging platform to aid communication was that if one was to be implemented, it would likely mean that employees would need to install an a mobile application on their phone to maximize the effectiveness of it. Interviewees cautioned against requiring the use of people's personal cellular devices for work, saying that it could lead to the organizations being required to provide cellular devices for their employees, which neither organization would be able to afford to do.

F4: Employee exhaustion

In our interviews and analyses, we noticed a strong emphasis on the idea that employees “just [wanted] a decision to be made,” or “for someone else to make a decision,” often as a result of feeling oversaturated with change in the post-merger period. There were also references to feeling as if the new environment was in a state of continuous flux.

A prominent theme that we were not expecting was that the source of inertia was not driven by individual employees, but was rather a result of the organizational structure. There is ambiguity as to whose responsibility it is to overhaul these anticipated changes because there no one is specifically tasked with implementing the change. An added barrier is that neither organization has IT personnel on site. Instead, complicated IT issues are outsourced to a third party service.

F5: Change inertia

Across interviews at both locations there were some notable quotes relating to resistance to change:

- “I don't want to change what I'm working with.”
- “If I have to change I will, but I don't want to.”
- “I am open to change but I know that others are not.”

This is consistent with our findings about change theory. Well renowned organizational consultant William Bridges juxtaposes “changes” with “transitions” because he argues that transitions have mental, emotional components while change is objective (Bridges, 2009). Therefore, a stage of transition is a true test for workgroup and likely a successful transition will predict how sustainable LSNC and AAHOM’s merged IT system will be. The focal piece of Bridges’ transition model is what is known as the “neutral zone” (Bridges, 2009). The neutral zone is situated between the “ending” of the old status and the “new beginning”. We researched which factors relating to the upcoming software change should be emphasized to combat internal inertia.

Many factors can be in people’s minds during a transition. We referenced old training materials that date close to the exponential growth of computer usage in businesses. In the book *Diffusion of Innovations*, Rogers examines many case studies to determine the aspects of innovations that most strongly anticipate their adoption within groups (Rogers, 1995). He concludes that the following five factors influence adoption: “relative advantage,” “compatibility,” “complexity,” “trialability,” and “observability.” Therefore, if either or both AAHOM or LSNC were to change their system, the above five factors may be used to compare system recommendations to each other and perform cost-benefits analysis. Relative advantage would represent whether or not the new system is perceived as more useful than the previous system. For example, does G Suite provide new benefits that Office 365 does not? Compatibility would describe how the new system is incorporated with people’s needs and values (for example, some employees may be expecting and want change), whereas complexity would describe how easy the change is perceived to be (Rogers, 1995). Trialability would describe that if the system was permitted to be trialed short-term, it would be more likely to be adopted. Lastly, observability would describe that if the change was able to be monitored, then it would be more easily adopted. As such, “Employees must see the proof (concrete reasons) that the changes work and are beneficial; otherwise, they could cease subscribing to the new culture,” writes Applebaum. In the context of this project, changes are represented by the use of an unfamiliar information system software in an otherwise familiar situation. We looked into how to implement a training protocol to facilitate this change.

F6: Training considerations

Throughout our interviews we asked several employees what their greatest advice would be to help the organization structure its training. We were advised that people who currently know how to use the new technology platform should not expect to bear the burden of training colleagues during the transition. We were cautioned that this could place additional expectations on employees without added compensation. We wanted to research factors that could affect training paradigms based on employee demographics such as comfort level with technology and age. We received a de-identified list of employee ages so we used this to guide our searching process.

To address the wide range of employee ages, we researched technology training strategies to examine whether older and younger employees responded differently across training methods. Researchers studying training older adults to use technology found that people performed significantly better when provided training that guided each step (Hickman, Rogers, & Fisk, 2007). This may be because guided step training emphasizes working memory. Additionally, related to implicit bias, a university psychology study viewed the effects that perceived age had on trainer attitudes and training (McCausland et al., 2015). They manipulated both trainee and trainer ages using photo and voice software while trainers trained people to use Microsoft Excel. They provided trainers the opportunity to set the pace of training the trainees and gathered that trainers provided poorer quality of training when they thought the trainee was an older adult. This resulted in worse task performance by the trainees. Informing trainers of implicit bias and providing an array of training methods were integrated into our recommendations.

Recommendations

R1: Office 365, a unified platform

Based on the findings from our background research and interviews, we suggest making Office 365 the primary platform for both organizations to facilitate communication. In order to decide the primary platform, we compared the features of each platform as well as employee preferences for software suites (See F2). While some employees value the ability to share documents in real time through Google's suite of applications (Docs, Sheets, Slides, etc.), they do not have to sacrifice this feature by moving to Office 365 because Office 365 also has a cloud sharing feature offered within their document editing applications (Word, PowerPoint, Excel). Office 365 also offers one of the essential features for AAHOM, account freezing. In interviews, we were told that AAHOM is required by law to place employee accounts under and intense legal freeze anytime they leave. This was not a feature we were able to find within G Suite, only within Office 365. In addition, we also took into account the size of each organization. LSNC has about 15 employees, while AAHOM has about 60. Due to the relatively large size difference, and the fact that AAHOM uses Office 365, we felt that the cost of training and implementation would be far lower if LSNC was asked to move to Office 365 rather than the other way around.

Referencing F3 (Instant Messaging Opinions) and the prior Slack pilot, we decided that moving forward with suggesting an instant message service in addition to Office 365 or G Suite would be inappropriate at this time. If the organizations decide at a later date to use instant messaging, Office 365 includes an instant messaging tool within their communication suite called Microsoft Teams. Microsoft Teams is very similar to Slack in that allows for group messaging, direct messaging, and the creation of channels (Microsoft Teams, n.d.). The creation of channels would be extremely useful for project communication, which was something an interviewee felt instant messaging could be useful for. In addition to the desktop

application, Microsoft Teams is also readily available on the iPhone and Android app stores as a mobile application, which would be beneficial for employees of each organizations who are consistently on the move and away from their desks.

R2: Combating inertia

In alignment with recommendations made by Rogers (1995) in F5, we would suggest that the clients emphasize the following concepts to employees at AAHOM and LSNC who will use Office 365:

- *Relative advantage* - Office 365 offers features required for AAHOM, such as account freezing, that G Suite does not. Additionally, Office 365 still offers real time document editing, which was the most praised feature of G Suite via interviews.
- *Compatibility* - This change is compatible with our mission to marry our communication systems and create a shared communication culture.
- *Complexity* - Office 365 is not difficult to learn. We will be offering many training resources to help along the way (See R3: Employee training and accountability)
- *Trialability* - We suggest that new features in Office 365 are introduced through short trial periods. For example, a small group could pilot the document sharing feature in 365. If people highly dislike it, then there is time to figure out what could make the feature useful or something else can be agreed on.
- *Observability* - It is important that employees are able to view the progress towards this greater goal. We suggest breaking out the implementation into several descriptive steps so that people can visualize the progress towards the mutual goals.

The inertia that employees are experiencing at both locations could potentially be a result of communication and cultural changes that are happening in the environment of the newly merged organization. Because of its recency, the merger may still see LSNC and AAHOM following decision inertia, as described by Castellaneta, Valentini, and Zolo (2017), especially when their information and communication systems have yet to be fully synched.

R3: Employee training and accountability

The broad age spread and lack of an in-house IT team inform our proposed training protocol. We suggest that trainers should be ready to explain concepts using several formats such as step-by-step directions and live demonstrations. Related to combating potential implicit bias, we suggest that trainers are encouraged to not stereotype trainees because of their age and approach the training with empathy and openness. Our research suggested that expecting differences in trainee performance based on age is maladaptive to training success. To address concerns around who is expected to train employees on the new system, we strongly suggest seeking advice from outside professional help if possible, or looking for a short-term or part-time IT technician.

R4: Standardized communication protocol

In order to streamline communication across organizations, we support the formation of a standardized protocol that would increase the effectiveness of transmitting and understanding emails. In particular, through our findings, we noted the introduction of particular keywords in email subject lines, a feature which served to indicate to the receiver the intent of the message, or what the subsequent response should entail. Building upon the [ACTION] keyword currently in use (see F1), we suggest further implementation of a constrained set of vocabulary (command terms) for such signaling.

For instance, the following are some suggested command terms (borrowed from *How to Write Email with Military Precision* by Kabir Sehgal):

ACTION	Some specified action must be executed
URGENT	Time-sensitive material; a decision must be made or an action taken as soon as possible
REQUEST	Requesting approval or permission from the recipient
INFO	Informational only - no response or action needed
DECISION	Some decision is required from the recipient

In creating a new synthesized communication protocol, we suggest keeping in mind the distinct work cultures and conventions - what works, what doesn't work, and what could be improved - that are inherent to LSNC and AAHOM. Giacomazzi et al. (1997) view successful integration as an "exchange of data and organizational processes, according to the merged organization needs." This suggests a mutual understanding of either organization's individual needs and processes, which could then be explored and combined to shape those of the merged company (recalling the idea of creating a new cultural identity for an organization after having defined that of each individual agent).

Conclusion

After interviewing five employees representing a variety of work roles at Leslie Science and Nature Center (LSNC) and Ann Arbor Hands-On Museum (AAHOM), several key themes emerged around the inefficiency of running these two systems in parallel, including diverse employee preferences and some resistance to change. Interviewees offered their unique insights about how this upcoming change should be implemented in order to preserve the individual identities of each organization. The consulting team also performed background research that comprehensively explored G Suite and Office 365 and best practices to implement a platform change.

Keeping in mind the potential for growth and expansion of LSNC and AAHOM, our team believes it is important to work towards resolving the communication issues that have materialized in the period since the merger as soon as possible. Accordingly, we suggest selecting Microsoft's Office 365 as the primary software suite for both organizations. Doing so would enable more fluid email and calendaring communication for all staff, regardless of locations and/or affiliations. To this end, we also encourage: working to understand the root causes of inertia, and approaching them through the lens of future productivity; the formulation of a standardized communication protocol that would be uniform across locations; and emphasizing platform advantages and mutual benefits for both organizations, as well as supporting employees as they onboard and prepare for change.

Our Team

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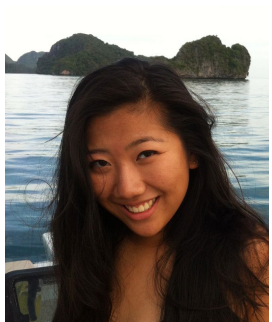
Chance Murphy

I graduated from Siena Heights University in May 2018. While there I studied Computers and Information Systems as well as Graphic Design. I currently work for Artonic Web as a Junior Graphic Designer and UX Designer. During my time at UMSI I intend to focus my studies on UI/UX Design.



Laima Augustaitis

I graduated from the University of Michigan with a Bachelor of Science in April 2017. I am a first year master's student in the School of Information planning doing the Data and UX Research tracks. I chose this project because I feel connected to helping an organization address an information challenge within the local community.



Vivian Jiang

My current course of study is focused on UI/UX Research and Design. I graduated from the University of Michigan, Ann Arbor, in 2016 with a BA in Economics and a minor in Creative Writing, and I am currently a first year master's student at the School of Information at UMich.



Youngmin Kim

My study focuses on User experience design and Human-centered Interaction. I graduated from Handong Global University in Feb 2015 with BA in Visual Communication Design, Business management, and BS in Products Design. I wish I could improve people's lives giving a positive impact on their lifestyles and behaviors.

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