Codes of Conduct for mobile device use in meetings: An exploratory analysis

Neville Meyers

Queensland University of Technology;

n.meyers@qut.edu.au

Dr. Neville Meyers is Senior Lecturer in Information Systems in the Faculty of Information technology at the Queensland Institute of Technology, Brisbane, Australia. His research focus/publications are the personal and environmental factors that make telework sustainable and contribute to employee job satisfaction- productivity-lifestyle satisfaction as well as to overall organisational effectiveness. Dr. Meyers' earlier research on telework has been endorsed by Hewlett-Packard, Palo Alto and has subsequently included consultancies with Australia's two leading telecommunications providers Optus Australia and Telstra. Currently, he is Research Coordinator for the QUT-Griffith Universities' Mobile Staff Productivity Project.

Greg Hearn

Queensland University of Technology;

g.hearn@qut.edu.au

Greg Hearn is Research Professor in the Creative Industries Faculty at QUT. His work focuses on policy development and R and D for new technologies and services in the creative industries. He has authored or co-authored over 20 major research reports and books, including, Public policy in knowledge-based economies (2003: Edward Elgar) and The knowledge economy handbook (2005: Edward Elgar); Knowledge policy: Challenges for the 21st Century (2008: Edward Elgar) and Action research and new media. (2008: Hampton Press).

Heather Gray

Griffith University;

heather.leona.gray@gmail.com

Heather Gray is a PhD candidate in the Department of Management, Griffith University. She has been widely published in book chapters, journal articles and has presented papers at international conferences. Ms Grays' research areas include: Information technology research, Human-Computer Engagement, and IT engagement motivations in developing and developed countries. She also teaches in the areas of Globalisation and Management; Organisational Change and Development and Business Informatics. Ms Gray is the Research Associate for the Mobile Staff Productivity Project, a collaborative project between Griffith University and Queensland University of Technology, which aims to boost productivity with administrative roles through the improved use of mobile technologies and practices.

Louis Sanzogni

 Griffith University;

l.sanzogni@griffith.edu.au

Louis Sanzogni is the Head of Department, Department of Management, at Griffith University. He has been widely published in book chapters, journal articles and has presented papers at international conferences. Dr Sanzogni's research areas include: Information technology research, Internet research, and Organisational intelligence technologies. He is also on the steering committee for the Federal Government funded Mobile Staff Productivity Project, spanning two university's in Queensland Australia.

Abstract

The present paper addresses the findings of a preliminary investigation into policy and codes of conduct pertaining to the use of laptops and PDA's in business meetings. The purpose of this study was to conduct a review of policies or codes of conduct pertaining to the use of laptops and PDAs in meetings. The investigation included academic literature, policy searches in the public domain of the Internet, as well as personal contact with target industries (large corporations – N=1000 + employees). The results highlight the dearth of policy and codes of conducts pertaining to the use of laptops and PDA's in business meetings. Consequently, given the growing interdependence between mobile technologies and the contemporary workplace, there exists an opportunity for communication professionals to further research and develop policy and codes of conduct in this area. Implications for corporate communication policies and practices are also discussed.

Key Words

Code of Conduct; Mobile Technology; Technology use in meetings

Introduction

This paper presents the results of a preliminary investigation into codes of conduct using mobile technologies in meetings. The preliminary investigation was conducted to contribute to research into mobile staff productivity at the Queensland University of Technology and Griffith University following a $1.36m Grant funded by the Australian Federal Department of Education, Employment and Workplace Relations (DEEWR). Taking a broader perspective, it is timely to investigate the potential of mobile technologies in the meeting forum, with potential application at the two universities. These technologies include PDA's, Laptops, Mobile Phones and Smart Phones (all of which are able to connect to the internet for the purpose of reading emails and conducting internet searches). Chairs of meetings, some of

whom responded to our research, have indicated that using these technologies has enabled some highly productive meetings, while other meetings have been less productive. For example, meeting attendees may be sceptical when a colleague takes notes on his or her Smart Phone or PDA. On the other hand, using a chat facility on a laptop, may be readily accepted as good practice.

Taking a positive viewpoint, each mobile technology has the potential to be a useful tool in meetings, but also has the potential to disrupt the meeting or prove to be an annoyance to other meeting attendees. Additionally, as suggested in our preliminary research, there are several types of meetings, each having its own unwritten code of conduct or etiquette, accepted in varying degrees amongst attendees. As will be apparent from contemporary work practices, meetings may embrace a somewhat wide range of formal to informal settings. In order to ensure appropriate use of mobile technologies in meetings and support paperless meetings, however, contemporary organisations are encouraged to consider, and where appropriate actually adopt, a code of conduct for the use of these technologies in meetings.

Initial Literature Review

Policy papers on the use of mobile technology in the workplace – based on our extensive searching of company websites - are apparently unavailable. This is not to say that the topic is not of interest; rather, the absence of such policies highlights the fact that the publications and research currently being undertaken, with respect to workplace mobility, are more specifically related to public policy, travel, telework, work/life balance and issues of freedom and flexibility, productivity and job satisfaction (representatively, see Hislop, 2008). The challenges as we see them are three-fold: public, organisational and individual. Firstly, the literature focus in the public sector has been directed towards provision of infrastructure for the mobile organisation and implications that this has on service provision, governance and support (Hislop, 2008; Wheatley, Hardill, & Philp, 2008). Secondly, with respect to organisational development, the focus has been directed towards the technical, management and policy aspects that support the ever-changing work environment from office-bound employee to teleworker and now the dynamic mobile worker (Hislop, 2008). Finally, regarding issues that impact directly on the individual, there has been considerable interest with respect to the employee's 24/7 availability, conflicts between employer-employee expectations, and attendant work/life balance issues. Additional recent studies from Europe have additionally highlighted some of the issues facing organisations pertaining specifically to work/life balance and time worked (Bishop, 2004; Wheatley, 2008).

Research Impetus: Studies of Workplace Mobility at two major Australian Universities

As already indicated, major research into workplace mobility is being conducted at two major universities. The two Australian Universities have dispersed campuses across the south east corner of the State of Queensland, Australia. Both institutions are multi-campus, complex organisations where staff, both academic and general, is often required to work across campuses. Both campuses are technologically sophisticated, with high quality fibre optic networks, expanding wireless coverage and an increasing use of laptops and mobile devices. While the technology exists to support a more flexible, mobile workforce and take-up of laptops is strong, diffusion of emerging mobile devices and collaborative technology is slower and not being leveraged for improved productivity, improved decision making, reduced consumption of paper and reduced travel as quickly as one might expect. Owing to the dispersed nature of the campuses across the south east corner of the state, attending meetings can mean travelling up to 2 hours (70.2 km distance from the southern most campus, to the northern most campus at one University) for the return journey to another campus. Inter campus shuttles run regularly between campuses, however using these shuttles increases the time away from the office as they feed to each campus, sometimes requiring changing shuttles along the way. In these instances, attendees usually take advantage of the University's car pool, or corporate taxi service, while others, in an endeavour to utilise the time as best as possible, arrange several meetings at the same site on the same day and use their personal vehicles for travel.

However, based on the present researchers' recent semi-structured interviews with manager, administrators and deans across both universities' campuses, staff reported in open questions growing use of mobile technologies in their meetings. Further, in a recent questionnaire (The Mobile Technology Work Needs Survey) administered across the two universities, 29.7% of 1,202 respondents reported that using mobile technologies improved their decision-making in meetings; whereas, 45.17% disagreed; and 25.12% were neutral. Consequently, there appears across both universities to be sufficient (and potentially growing) interest to warrant further investigation into the use of mobile technologies for meetings, supporting further research and development of policies and codes of conduct pertaining to mobile technologies in meetings.

Current Meeting Practices at the two Universities

From anecdotal evidence and observations of practices in several faculties, attendees often arrive with copious paper documentation, which are then distributed to other attendees. Other items that could be brought to the meeting might include: overhead transparencies, laptops and or USB Drives containing power point presentations. At times, this has meant carrying

large boxes and bags of resources that are used once, distributed, then either added to the collection of documents and meeting minutes, or shredded for recycling.

The general formats of the meetings are as follows: Large formal meetings of Faculty heads that are conducted monthly, medium formal meetings with Department managers and Heads of Schools that are conducted weekly. Medium semi-formal and informal, within department or school staff meetings, that are conducted monthly within the campus where the head of the department or school is located, and small semi-formal or informal staff meetings that are conducted at each campus on a weekly, fortnightly or adhoc basis.

Mobile Technology Use in Large Formal Meetings

Mobile technology development has advanced, where many employees are either provided with or use mobile devices including, mobile phones, PDA's, as well as laptops, in their daily work activities. These have become commonplace in faculty meetings. Managers attending meetings at all levels indicated a number of uses of mobile technologies in meetings had become accepted practice; however, other practices seemed adhoc. One manager indicated using a Smart Phone to contact a subordinate staff member, requesting a document be emailed for use later in the meeting, where further details of a project were required. In another instance the manager sent "a quick Chat message to a support staff member" to retrieve a needed file, which was then presented to the other meeting members on the manager's laptop during the meeting. This enabled the meeting to continue while the file was being retrieved.

Another manager allowed the practice of using mobile phones in meetings (for sending and receiving text messages related to the meeting) as long as the phones were set to silent. While setting the mobile phone to silent during the meeting was one of etiquette, failure to comply with the "silent" setting carried the penalty of "a round of drinks at the end of the week."

Latent mobile technology adopters had issues pertaining to the technical skills, finding it difficult to comply with the "paperless" meeting requirements often resorting to support staff preparing a presentation that the manager then spoke to. As this requirement was a training and technical support issue, these were highlighted to be addressed in further research and another support project. Therefore, it has been determined that policies and or codes of conduct should be developed that incorporate the use of these technologies in three types of meetings: large formal meetings; medium formal and or informal meetings; and small semi-informal meetings.

An example of a large formal meeting would be a Chancellor or Deputy Chancellor meeting with Faculty Heads, which usually includes reports on the progress of each Faculty, presentations of goals achieved, and agreement on targets for the next time period. These meetings can take up to a full day; therefore, constant communication with support office staff during break periods is essential. Previously meetings have included such technologies as PowerPoint presentations and or written reports. At times, these meetings have also included teleconferencing and or video conferencing to connect all meeting members at the same time. However, members of these meetings are also utilising laptops for note taking; retrieving files from either the laptop or the Universities network over the Virtual Private Network (VPN); reviewing reports from other meeting members; and or retrieving and answering emails during break periods throughout the day. While staff are strongly encouraged to use mobile technologies in these meetings, some late adopters also bring documents and or printed reports to these meetings, although this practice is frowned upon.

Mobile Technology Use in Medium-Size Formal/Informal Meetings

An example of a medium formal or informal meeting that a Faculty Head holds with the Heads of Schools or Department Managers, usually includes reports on the progress of each school or department; presentations of goals achieved; and agreement on targets for the next time period. Previous meetings would have included such technologies as PowerPoint presentations and or written reports. These individuals may be co-located within the same city and or building or may be located at another campus and may at times be teleworkers or at conferences, but are still required to provide feedback to the meeting. Mobile technologies currently being used in these in these meetings include PDA's, Smart Phones and Laptops for retrieving files from either the laptop or the Universities network over the VPN; reviewing reports for discussion and feedback; sending text messages or quick chats to support staff members for additional files or documents that may be required; and taking notes in meetings. Management of the use of mobile technologies in these meetings falls to the individual chairing the meeting.

Technology Use in Small Semi-Formal Meetings

An example of a small semi-formal meeting would be a Department or School meeting, which usually includes reports on the progress of each individual in the Department/School, presentations of goals achieved, and agreement on targets for the next time period. Previous meetings would have included such technologies as PowerPoint presentations and or written reports. These individuals may be co-located within the same city and or building; however,

they may also be teleworkers or located at other campuses and are rarely at the campus where the Head of the Department or School's office is located. Mobile technologies currently being used in these meetings include PDA's, Smart Phones and Laptops for responding to emails; retrieving files from either the laptop or the Universities network over the VPN; reviewing reports for discussion and feedback; sending text messages or quick chats with other staff members; and taking notes in meetings. While some of these practices are not considered meeting etiquette or supported, without codes of conduct to stipulate what is or is not accepted, management of these practices falls to the individual chairing the meeting.

Other technologies are also being offered to support these meetings including Smart Phone's (with internet access); laptops with Bluetooth, wifi and or wireless internet access; video conferencing; Voice over Internet Protocol (VOIP); document sharing technologies accessed via a VPN; live chat facilities linked to email software solutions; and individual and or group video chat solutions offered by third party web providers (Skype or Live Messenger); as well as Web 2 technologies including wiki's either supported within a VPN or by a third party with password access. Therefore, any code of conduct developed should also take into consideration the adoption and use of these Web 2 technologies, reducing the need for further code of conduct development.

Technology Use in Meetings - Overview

The following table provides an overview of key themes as revealed thus far in our preliminary research:

Table 1: Technologies and their uses in meetings (Overview of key themes from preliminary literature searching and informal interviews within the two universities)

Technology	Use in meetings
Mobile phones (Smartphone's with internet access);	On silence Text to other staff to locate items required for the meeting, outside the scope of meeting preparation. Enter dates and contact details provided by other colleagues. Take notes.
Laptops with Bluetooth, wifi and or wireless internet access;	On silence Chat to other staff to locate items required for the meeting,

	outside the scope of meeting preparation.
	Chat with staff within the meeting to add comment without tabling the comment (remind about a forgotten point).
	Enter dates and contact details provided by other colleagues in network calendar.
	Locate documents on the network required to support a report or presentation.
	Share/View presentation directly from the laptop.
	Connect laptop to other meeting room technologies for presentation purposes.
	Take notes.
Video conferencing;	Connecting one or more individuals from one fixed location to another fixed location.
Voice over Internet Protocol (VOIP);	Used juxtaposed to computer/laptop use over a wired or wireless network as a virtual conference call, or with additional software providing virtual conference and video connectivity.
Document sharing technologies accessed via a Virtual Private Network (VPN);	Version controlling and document sharing software such as SharePoint, for building/developing documents throughout a meeting forum where all stakeholders take part.
Live chat facilities linked to email software solutions;	Use for quick comments/notes to and from meeting participants, or to quickly and silently resolve urgent issues that may arise outside the meeting (mostly used in workshop meeting breaks, where the meeting/workshop may be over a longer period of time 1-3 or more days).
Individual and or group video chat solutions offered by third party web providers (Skype or Live Messenger);	Used juxtaposed to computer/laptop use over a wired or wireless network as a virtual conference call with the addition of video software providing virtual conference and video connectivity.
Wiki's either supported within a VPN or by a third party with	Maintaining discussion flows and version control for building/developing documents throughout a meeting forum

password access.	where all stakeholders take part, which is then continued and developed further outside the meeting forum.

While these summative user patterns provided useful overviews, it was considered necessary to adopt further lines of enquiry.

The next stages of our enquiry

Despite the initial user patterns, as already reported, investigating the potential use of these technologies, invariably required research into other organisations' policies and codes of conduct. Moreover, investigating mobile technology research highlighted a number of research areas that applied, or could be applied, to a university environment. These included mobile workers and teleworkers (Meyers 2006; Bailey & Kurland, 2002), software packages that support mobility (Mark, Grudin & Poltrock 1999; Bergqvist, Dahlberg, & Ljungberg, 1999; Nakata, Fukuda, Fukuda & Suzuki 2005), hardware technology as well as knowledge (Leibowitz, 2007) and management issues (Timbrell, Foth & Hearn 2006; Hearn & Mandeville 2005; Hasan & Pfaff 2006; Hearn, Foth & Gray, 2009) pertaining to mobile technologies. Each of these research areas addresses specific fields pertaining to management of these technologies. For example, they include: aspects of the human-computer interactions; organisational adaptations; and individual management preferences regarding how these technologies might be utilised. Furthermore, organisations looking to utilise these technologies while reducing other costs, see the paperless meeting as an achievable goal. Sorenson (2004) highlighted trust and new management styles for mobile technology use, expounding the need for management to trust their mobile staff rather than micro-manage. On the other hand, Chan (2003) highlights the difficulty managers in large corporations face balancing trust and distrust while addressing corporate espionage. Others are more concerned with utilising mobile technologies that enable flexibility in meeting locations (Bergqvist, Dahlberg & Ljungberg 1999; Mark, Grudin & Poltrock 1999). Although there is a glut of literature dealing with mobile technology use and or supporting technology use, locating literature dealing specifically with policy development and codes of conduct using mobile technologies once more proved extremely difficult.

Results of Further Literature Searches – Academic, Government, Corporate Websites

Due to limited academic literature pertaining to use of mobile technologies in meetings and supporting mobile technology use in meetings, and or policies or codes of conduct, further searches were conducted. These searches included academic, government and corporate

internet sites, which were investigated to determine whether there was public information that identified the codes of conduct, and more specifically codes of conduct dealing with the use of mobile technologies in meetings. This search identified codes of conduct for computer and laptop use when accessing the Internet and particularly detailed inappropriate use of these technologies to access offensive or sexually explicit websites. The limitations of these searchers were local and included federal government websites in the US, UK, Australia and New Zealand. Similar codes of conduct were located on academic websites for universities across these same countries. Corporate websites were less transparent with their personnel codes of conduct but were much more forthcoming with their customer interaction codes of conduct. As a result emails were sent to the Forbes 25 top growing IT companies (international); large Australian corporations that employed over 1,000 employees, as well as Australian state government website, contact staff as provided on the organizations website.

The results of the preliminary academic, corporate and government website searches included: Literature searches which offered a plethora of information pertaining to usage and security of the technologies investigated, but a dearth of literature identified (in the allotted time frame) that addressed the use of laptops and or PDA's in business meetings. Academic sites, which were also searched, also provided access to policies that addressed the use of mobile technology within the organization with respect to appropriateness of Internet and website access; security against viruses, fraudulent activity and theft; and use in lectures theatres and at conferences. Only one institute, Carlson Business School within the University of Minnesota, had a policy that specifically addressed the use of laptops in lectures relating to business use:

> "As in a professional conference or formal business meeting, students are expected to refrain from potentially distracting behaviors such as eating during class, using laptops to instant message, surf the Web, play games, check email, or hold side conversations." (Carlson Business School, 2009).

However, this statement was not supported with reference to any organization and/or government policy. Nor were there academic citations offered to suggest that these practices had been researched, policies developed or any formalization of organisational guidelines.

Overall, corporate Sites addressed the appropriate use of computers within the organizational setting, with some corporations also addressing privacy and customer communication conduct. However, no corporate website included guidelines for employee's use of these technologies in meetings. Government sites were the same as corporate sites although they

also included information pertaining to the purchase and or development of technologies for government and the codes of conduct and procedures to be followed when conducting business with government.

Contacts via Email – The organisational responses

Due to the lack of this public information regarding the use of mobile technology in meetings, it was decided to carry out follow-up contacts via e-mail to ascertain whether such codes of conduct existed in these and other organizations. Our focus was the Forbes 25 growing IT companies (international). Altogether, 12 of the 25 companies were e-mailed using a standard e-mail text as shown in Table 1. Three responded, all indicating that they did not have a specific policy for the use of laptops and smart phones in meetings. Nine of the eleven Australian corporations contacted also responded. Two of these responses were redirections to other contacts within the organization. All remaining responses indicated "we do not have a policy…" Queensland and New South Wales Government personnel were contacted, but there was no response. Finally, a communication specialist consultant who drafted communication policies for a large number of public and private organisations also agreed to respond – making a total of N=13 respondents.

The emailed responses, while most did not provide copies of their codes of conduct, offered interesting comments. These responses at least partially describe and provide insights into how behaviours are managed in meetings where there are no direct codes of conduct governing the individual's behaviour.

> "We do not have a uniform policy on the use of notebook PCs or smart phones during meetings. In practice, different managers will have different agreements with their teams, based on what makes them most productive. And of course the agenda for a specific meeting will determine whether or not notebook PCs or smart phones will make the meeting more or less productive."

Others offered less formal solutions to managing technology in meetings:

> "If … has a policy in regards to dealing with laptops in business meetings I've not heard of it. Restrictions / behaviour like you mentioned (can't read emails,) are widely ignored in almost all the meetings I attend."

And

"We do not have a policy for smart phones or computers in meetings. I think we should have one. However, at the beginning of all meetings people are told to put phones on silent or a carton of beer if it rings out loud."

As all organizations contacted indicated that they did not have a policy for the use of laptops or smart phones in meetings, a consultancy firm that assists organization to develop codes of conduct was contacted with the same request. Their response supported the evidence above.

"We do not have a policy as such, nor have we been asked by our clients to develop such a code."

It should be noted that 3 of the organizations contacted, indicated that they *"should have one (Code of conduct for using mobile technology in meetings)."*

To summarise, respondents almost unanimously indicated that they did not have a policy or code of conduct for the use of mobile technologies in meetings, although one respondent indicated that they thought the organization should have such a policy or code of conduct.

"…we do encourage our people to consider etiquette when in a business meeting; however, there will be circumstances when laptops and PDAs are required for the success of a meeting."

Another respondent indicated:

"… different managers will have different agreements with their teams, based on what makes them most productive. And of course the agenda for a specific meeting will determine whether or not notebook PCs or smart phones will make the meeting more or less productive."

The overall summative finding (Appendix B) was that none of the companies contacted reinforced what we had earlier discovered via our literature review: namely, that companies overwhelmingly do not have corporate communication policies with respect to mobile technologies' use in meetings.

Conclusion

As noted in a standard text in the corporate communications field (Cornelissen, 2004), "corporate communications operates at the interface between the organization and its environment" (p. 95). Accordingly, as the organisation's environment becomes increasingly technologically sophisticated, one of the cornerstones of corporation communication – the meeting – is an area where policy needs to be addressed. However, from our initial research, there seems to be a dearth of information that specifically addresses the use of laptops and PDA's in business meetings. As technical devices in meetings are becoming more frequent, the lack of codes of conduct concerning their appropriate use seems to be a current need. Moreover, there are other underlying issues that might usefully be investigated: namely, self-efficacy issues with respect to how confident meeting attendees might be with respect to performing appropriate behaviours and making effective use of mobile technologies in front of their peers in meetings' settings (Bandura, 1997) and achieving productivity outcomes. The Carlson Business School approach seems to indicate one set of accepted behaviours. On the other hand, interviews previously conducted by our research group highlight conflicting meeting etiquette (Meyers and Gray, 2007). For example, managers we interviewed had highlighted the benefits of being able quickly to contact office staff to locate and e-mail files required (but not expected) in meetings as the meetings progressed; however, these same managers appeared not to see the necessity for formal guidelines. Therefore, any discussions on developing codes of conduct pertaining to the use of laptops and smart phones in meetings should consider the meeting matrix outlined above as well as the expected outcomes of the meeting.

Another key consideration are the productivity benefits that might be gained from use of these technologies given both (i) current organisational trends towards the distributed work environment and globalisation and (ii) within these new work environments, often the need to contact key staff or clients "anytime, anywhere". Finally, the results of this investigation highlight the dearth of codes of conducts pertaining to the use of laptops and PDA's in business meetings.

Recommendations

From our previous and on-going research in the context of the current DEEWR Research Grant, there seem to be opportunities for researchers to develop codes of conduct in the area of mobile technologies' uses in business meetings. Moreover, to reinforce an earlier point: Mobile technology developments and uses have advanced to the point where many employees are either provided with, or select to use, mobile devices, (for example, mobile phones,

PDA's, and laptops), in their daily work activities. However, from the research we have conducted thus far, codes of conduct for using these technologies in the work-place, particularly with regard to their uses in meetings' settings, have lagged behind. Accordingly, it is not clear whether optimum benefits with respect to productivity are being realised by use of these technologies within meetings; where staff training needs might exist to ensure productive use of such technologies in meetings' settings; or where and how the impact of the organisation's overall "culture" might facilitate or inhibit such technological adoptions in meetings. Finally, it is recommended that organisations might consider a 'communications audit' of current meeting practices – and where and how innovative technologies might enhance productivity aspects in meetings' settings. Management and corporate communication professionals, with input from other staff, might then work together in developing appropriate policies and user guidelines

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Appendix A

Email text sent to organisation contacts:

I am a Research Associate working on a conjoint Griffith University and Queensland University of Technology Project. One of the areas I have been asked to investigate is business policy or codes of conduct for the use of laptops and or smart phones in business meetings.

I am assuming that you would have a policy or code of conduct pertaining to the use of Laptops and or smart phones in your business meetings. If I am correct would it be possible for me to have a PDF copy of this document for my research.

Email sent to organizations that provide codes of conduct creation service for other organizations (their primary source of income).

I am a Research Associate working on a conjoint Griffith University and Queensland University of Technology Project. One of the areas I have been asked to investigate is business policy or codes of conduct for the use of laptops and or smart phones in business meetings.

I am assuming that you would have a policy or code of conduct pertaining to the use of Laptops and or smart phones in your business meetings. If I am correct would it be possible for me to have a PDF copy of this document for my research. If not, could you let me know if you get enquiries to create such a code of conduct and if so are there many companies that have requested them?

At present I am not having any success in identifying companies that are not educational institutions that have or follow this type of code of conduct.

Appendix B

Individual Organisation Responses

ID	Response
1	Acknowledge receipt of email - asked to email … Australia for response.
2	Acknowledge receipt of email (auto-reply)
3	At … **we do not have** a specific written policy outlining the use of laptops and PDAs in business meetings. We do encourage our people to consider etiquette when in a business meeting, however there will be circumstances when laptops and PDAs are required for the success of a meeting.
4	I have attached most of the guidelines we have regarding Electronic communication usage. As far as a policy for meetings **we do not have** one. We feel this type of thing is the call of the meeting facilitator. No policy needed. For many meetings, laptops are essential to have all data at ones disposal. Some people take meeting notes on their laptops.
5	If … has a policy in regards to dealing with laptops in business meetings **I've not heard of it**. Restrictions / behaviour like you mentioned (can'/t read emails,) are widely ignored in almost all the meetings I attend.
6	Phone Call received. Directed me to view the Equal Employment for All Policy on the website. **No Policy** on the use of laptops or smart phones in meetings was located.
7	Provided Policy documents, but **do not have** a policy for use of PDA's and Laptops in meetings.
8	**We do have various policies**, however these are only for internal distribution.
9	*We do not have a policy as such, nor have we been asked by our clients to develop such a code.*
10	**We do not have** a policy for smart phones or computers in meetings" (I think we should have one). However, at the beginning of all meetings people are told to put phones on silent and a carton of beer if it rings out loud.
11	**We do not have** a uniform policy on the use of notebook PCs or smart phones during meetings. In practice, different managers will have different agreements with their teams, based on what makes them most productive. And of course the agenda for a specific meeting will determine whether or not notebook PCs or smart phones will make the meeting more or less productive.
12	**We do not have** an official policy about using either PDAs or laptops in meetings. Decorum would suggest that the use of PDAs is less distractive than laptops

13   **We do not have** such a policy

Acknowledgement