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Beyond blogs and wikis, there's Traction

KMW... ...007 Annual Conference

...rategies & Enterprise 2.0 in Action

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About Traction Software, About Me

- Leading Enterprise Wiki and Blog Platform
  - Traction TeamPage commercial release in 2002
  - Current release 3.7.x
- Funded: 2000 and 2002
  - by In-Q-Tel (Venture arm of the CIA)
  - Slater Interactive and private investors
- Customer Leadership
  - 8 of the top 20 Pharmaceutical firms
  - 14+ of the Global 100
  - DOD, US Air Force & Navy, DOJ, In-Q-Tel
  - State of CT, State of TX Health
- Deployments with
  - 10s to 100s to 100,000s of users
  - 100s to 100s of 1000s of posts
- Black belt blogger?
  - Read mine at: www.tractionsoftware.com

InfoWorld 2007 TECHNOLOGY OF THE YEAR AWARDS "Best Enterprise Wiki"

Now Free for 5 Users
www.tractionsoftware.com

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Web 2.0 Non-Subject Tagging

"Tags such as @toread, tobuy, todo, fun and cool suggest that users see their relationship to these documents in different ways (than by subject index)"

"Users relate information to time related tasks, activities and own emotional reactions"

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Three E2.0 "Wiki" Use Cases

- **Unordered Documentation**
  - "pedia," glossary, policies, FAQs

- **Ordered Documentation**
  - reference manuals, proposals

- **Project Team Collaboration**
  - "wiki" content:
    - unordered and ordered documentation
    - project requirements, policies, proposals, feedback
  - "blog" content:
    - questions, issues, status, meeting notes

How are wikis used? (top 4 cases)

- *82% - knowledge base*

- *59% - project collaboration*

- *59% - idea generation*

- *44% - collaborative doc writing*

Mangaging Wikis in Business
September 2007
Penny Edwards
Open University Business School

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Go Beyond "Subjects"

5 tag types for E2.0 blog & wiki use cases:

- Content type

- Importance

- Status

- Assignment

- Category

32% say a barrier to adoption is the wiki bieing to unstructured and appearing chaotic

Mangaging Wikis in Business
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Open University Business School

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Go Beyond "Subjects"

- Content type
- Importance
- Status
- Assignment
- Category

- Bulletin
- Requirement
- Meeting
- Issue
- Milestone
- FAQ
- Process
- Best Practice
- Profile

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Go Beyond "Subjects"

- Content type
- Importance
- Status
- Assignment
- Category

- Headline
- Alert
- Priority 1, 2, 3
- Next

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Go Beyond "Subjects"

- Content type
- Importance
- **Status**
- Assignment
- Category

- To Do
- Done
- Stalled
- Skipped
- Waiting
- No

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Go Beyond "Subjects"

- Content type
- Importance
- Status
- **Assignment**
- Category

- Alpha, Beta
- FCS
- V1, V2
- Clay, Ashwini
- Project Manager
- Finance, Legal, Engineering

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Go Beyond "Subjects"

- Content type
- Priority
- Status
- Assignment
- Category

- Price, Product, Place, Promotion
- Strength, Weakness, Opportunity, Threat
- Car, Truck, Shoe
- Security, Architecture, Design, GUI, Quality

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Putting it Together

Assigning Project Team Requirements

- Content type ⟶ Requirement
- Priority ⟶ Priority 2, Next
- Status ⟶ To Do
- Assignment ⟶ Manager:Stanley, FCS
- Category ⟶ Security

This is the *Coordinated Collaboration **Yin*** of blog and wiki structure

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The Yin-Yang of E2.0

Coordinated
Collaboration

Collaborative
Creativity
(and some Chaos)

Traction TeamPage Drives *Milestone Management* at ShoreBank

TeamPage is the way we fuel our project management activities as well as the project portfolio as a whole," adds Evans. "We can track all the relevant materials that have to do with any project that's going on."

- John Evans, ShoreBank Senior VP and IT Director

CONTENT, DOCUMENT and KNOWLEDGE *Management*
KMWorld

Blogs & Wikis: Ready for prime time?
By Judith Lamont, 1 January 2007
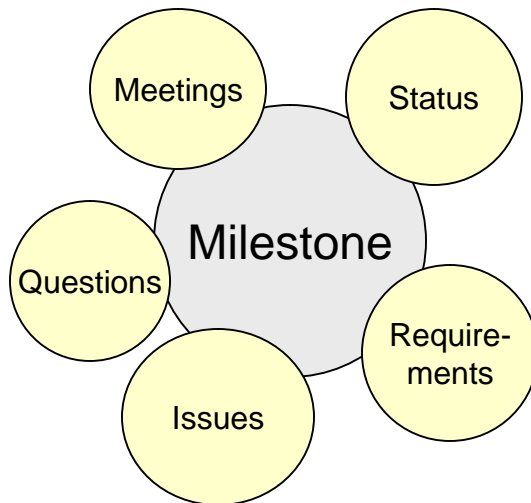
Project milestones form the nucleus around which the project information and communication are organized, including the individual responsible, the milestone, the requirements, the issues to be addressed and any open questions.

- Author (Judith Lamont) regarding ShoreBank

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Project Communication Surrounds Milestones
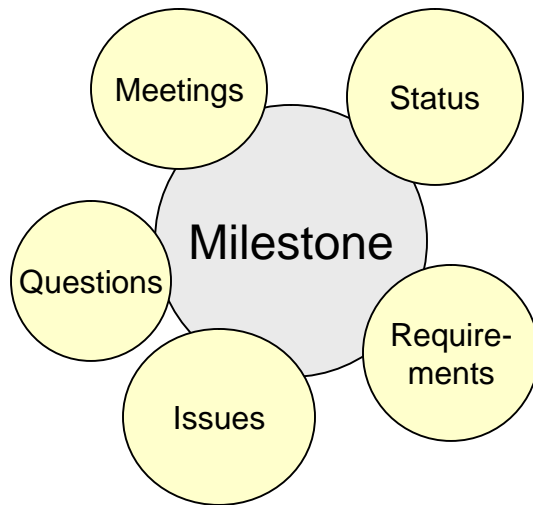
- *Milestones* are definitions of objectives you pursue

- *Issues* are show stoppers

- *Questions* are knowledge manager process accelerators
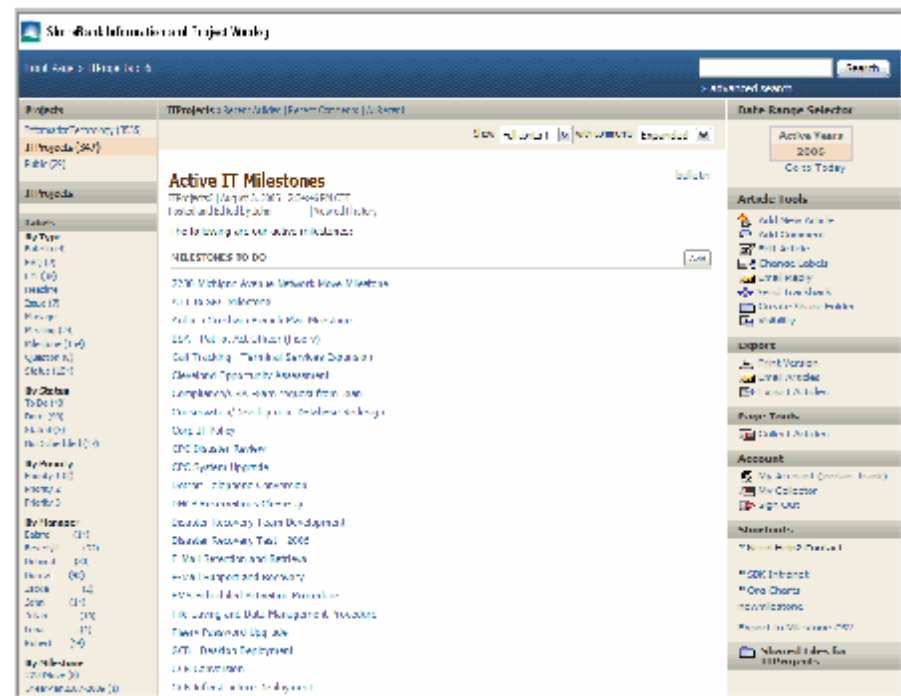
List of *open Milestones* in Alpha order (above) and in exported spreadsheet (below)

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Communication Surrounds Milestones

A specific *milestone* with labels for the *milestone* and its *manager*, as well as its *status* (to do).

A *To Do* action is identified for each key requirement.

Custom Milestone Editor with date fields and Label selectors

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Communication Surrounds Milestones

milestone:2230Move
2230 Michigan - Network Move

Add to This Topic

October 4, 2006

Senior Staff Meeting 10/3/06
ITProjects851 | October 4, 2006 | 6:09:05 AM CDT | Posted by John

Beverly stated that they are waiting on SBC to pull the T1 kine form the demarc into the building.

September 7, 2006

Status Update from Beverly 8/30/06
ITProjects709 | September 7, 2006 | 2:31:02 PM CDT | Posted by John

The T1 for 2230 has been installed at both 2230 and 71st. The next steps:1) Have the line extended to the server room at 2230; the extension has been ordered and we expect the work to be done by September 8th. a. We need about 2 weeks to test for continuous and reliable connectivity between the two locations.b. During the testing phase, we will set up the DMZ to separate the ...

September 6, 2006

Senior Staff Meeting 9/5/06
ITProjects701 | September 6, 2006 | 5:42:31 AM CDT | Posted by John

The project's Delivery Date was changed from 8/31/2006 to 9/30/2006.

August 23, 2006

Beverly answers Cisco router question from John 8/23/06
ITProjects443 | August 23, 2006 | 10:21:55 AM CDT | Posted by John

No, we really can't use what they already have because the original router for the new configuration which will be located here but it will keep 2230 on a separate T1.

Router information from Beverly Harris 8/22/2006
ITProjects423 | August 23, 2006 | 5:29:58 AM CDT | Posted by John

The routers for connecting 2230 to 71st have been ordered. The cost is $3,922.69.

August 7, 2006

Status Report on 2230 Michigan move
ITProjects75 | August 7, 2006 | 7:04:26 AM CDT | Posted by John

Meetings

Status

Questions

Milestone

Require-
ments

Issues
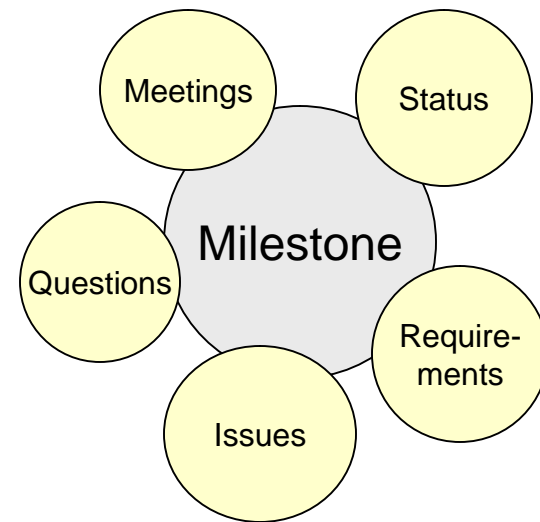
Multi-entry view of
*all activity against
the milestone*

Shown in "snippets"
volume

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Communication Surrounds Milestones
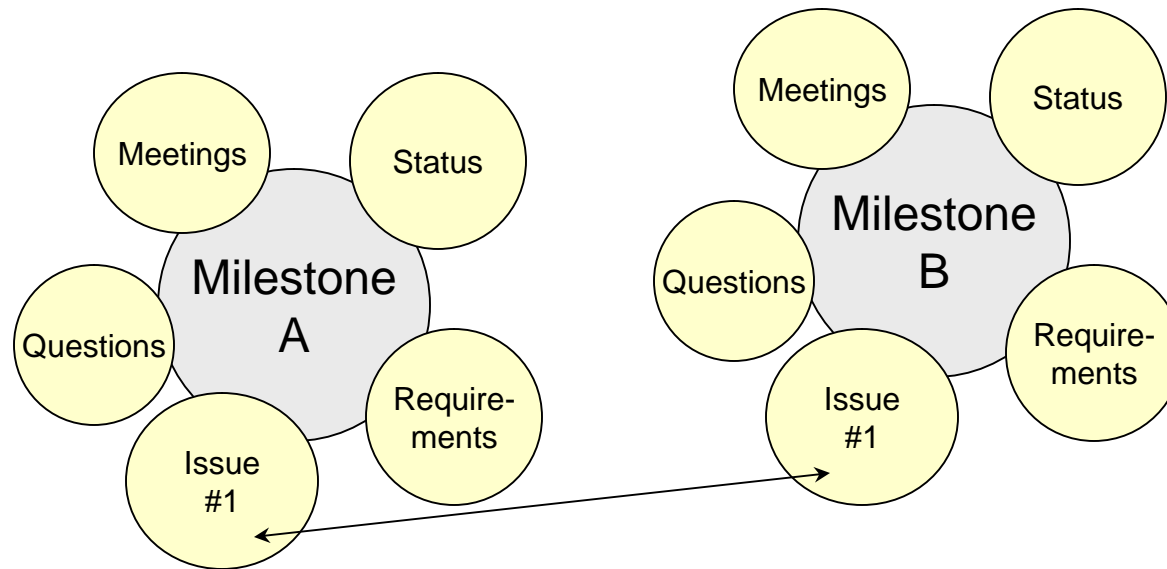

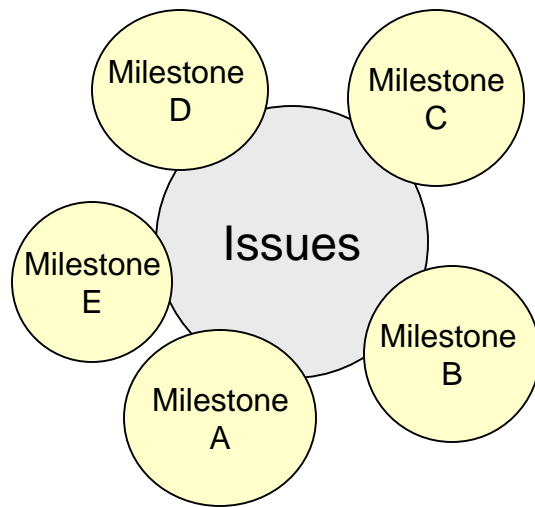Drill down on *"Status" for the 2230Move Milestone*

Issues (or other items) may span milestones

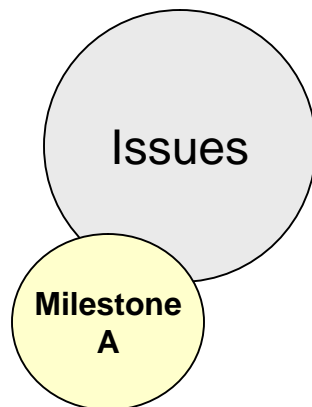The same issue "*Issue #1*" may span "*Milestone A*" as well as "*Milestone B.*"

The issue page can be tagged for both.

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Managers may need to change the vector

to examine *issues, as they relate to all milestones.*

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Managers may need to refine the vector

to examine all *open issues for one milestone.*

- The issues are tagged To Do, and are checked Done when closed.

Managers may need to change the vector

Milestones
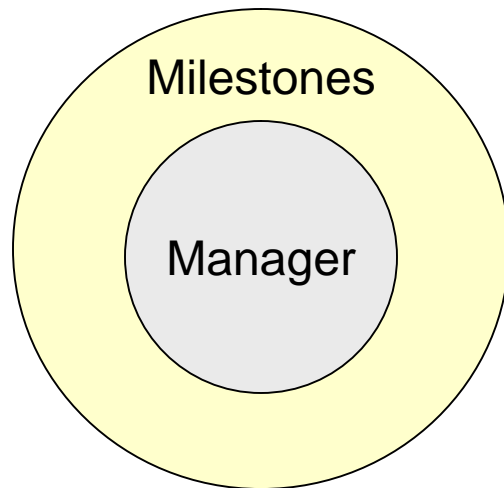
Manager

For example, to examine *all milestones for one manager*

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Meetings **Status** **Meetings** **Status** **Meetings** **Status**

Milestone A

Question **Require-ments** Question **Require-ments** Question **Require-ments**

Issues Issues Issues

Reporting and communication occurs over time

Meetings **Status** **Meetings** **Status** **Meetings** **Status**

Milestone B

Question **Require-ments** Question **Require-ments** Question **Require-ments**

Issues Issues Issues

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Reporting and communication occurs over time

Traction project pages

and time based views

help managers and team members follow the progress,

by any vector, or combination of vectors.

Project Page shows:
- *Left*: Labels
- *Middle*: "Sections"
- *Up Right*: Date Navigator
- *Right*: Shortcuts

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Wiki *is* Quick at ShoreBank

- Overnight adoption
- The wiki is embedded into a key process
- 197 Milestones tracked in less than 1 year
  - 39 To Do, 136 Done
  - 3 Stalled, 19 Not Scheduled
- Coherent status reporting, issue and question tracking, and general communication and content sharing

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(more) Enterprise Examples

real results

Non Profit Association: IJIS
DOD: CIO Funded Liberty Project
Finance: Global Bank
Pharmaceutical: Ipsen

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NHS Orkney (UK)

- NHS is worlds 4th Largest Employer

- Orkney site had Mandate to improve communication across the board

- "The volume of corporate spam has dropped substantially, to the point where we are on the cusp of turning off 'all-staff" and other large group mailing lists"

Front Page rolls up Blog/Wiki project activity into 4 sections, including "Classifieds"
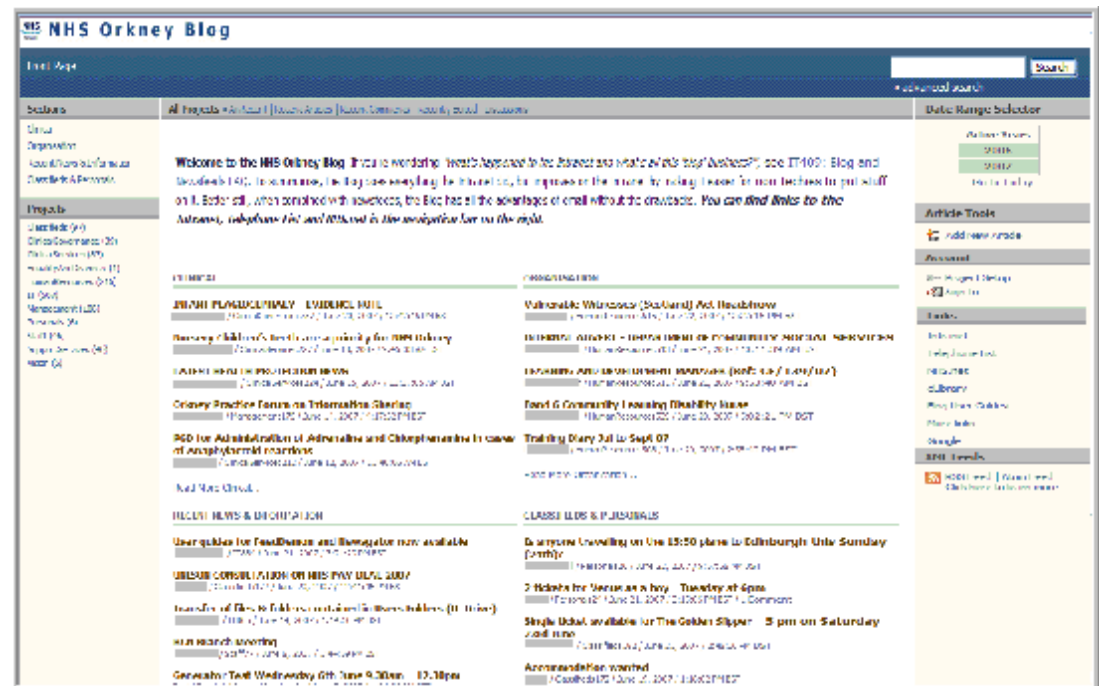
NHS Orkney (UK)

- Job Tracker Wiki Project
  - Post a page for every task
  - Tag with status and manager

- 171 Pages Marked To Do in 5 Months

- Great example of "Micro Project" management, done Wiki style

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IJIS Institute

- Integrated Justice Information System Institute
  - Consortium of government agencies, contractors, and consultants

- Quickly growing institute needed to:
  - Add **syndication** and **search** to their website
  - Enable member **collaboration**
  - Deploy a staff **intranet**

- A tall order for a small (but growing) non profit!

Traction powered IJIS website: Now easy to edit, also Includes Search, RSS, and member Login
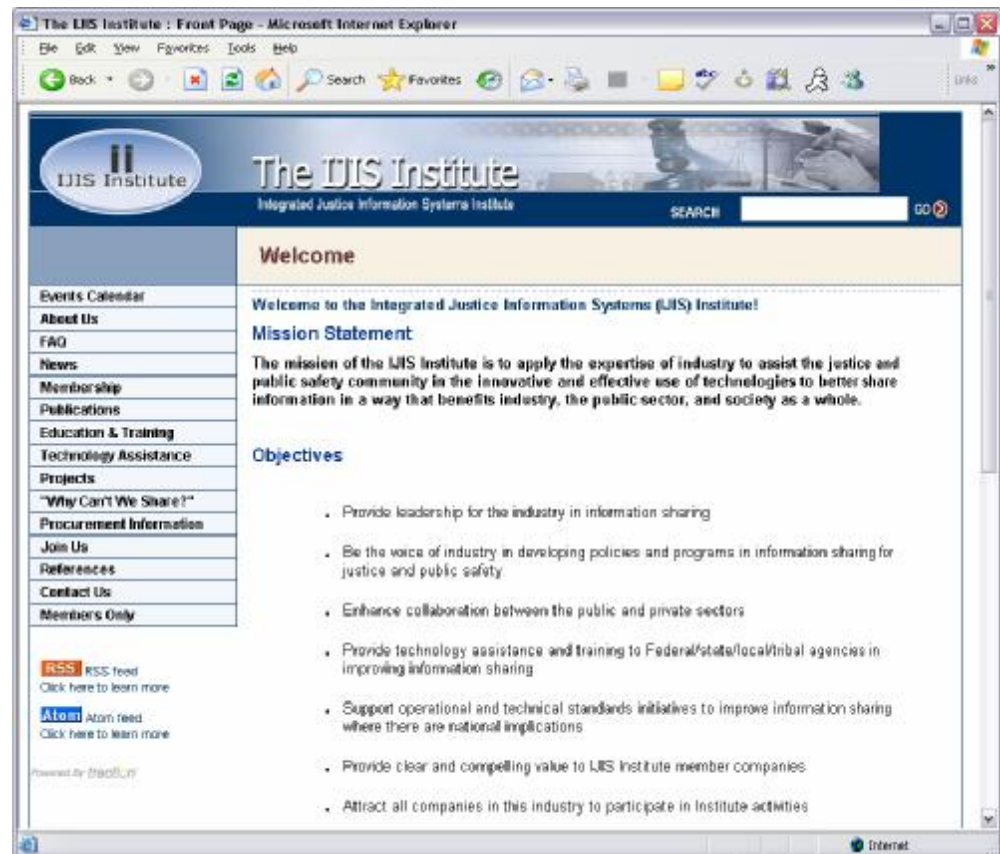
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IJIS Institute

IJIS website – "Mobile" skin: delivered automatically to mobile devices browsers

- The Payoff:
  - Over 400 people working on 17 projects now collaborate virtually.
  - One committee cut phone and in-person meetings by 50%

- Committee Collaboration:
  - Thousands of posts
  - Over 700 comments
  - Over 500 attachments
  - Over 2500 edits

- Business Week

DOD RAI-NC Liberty Project
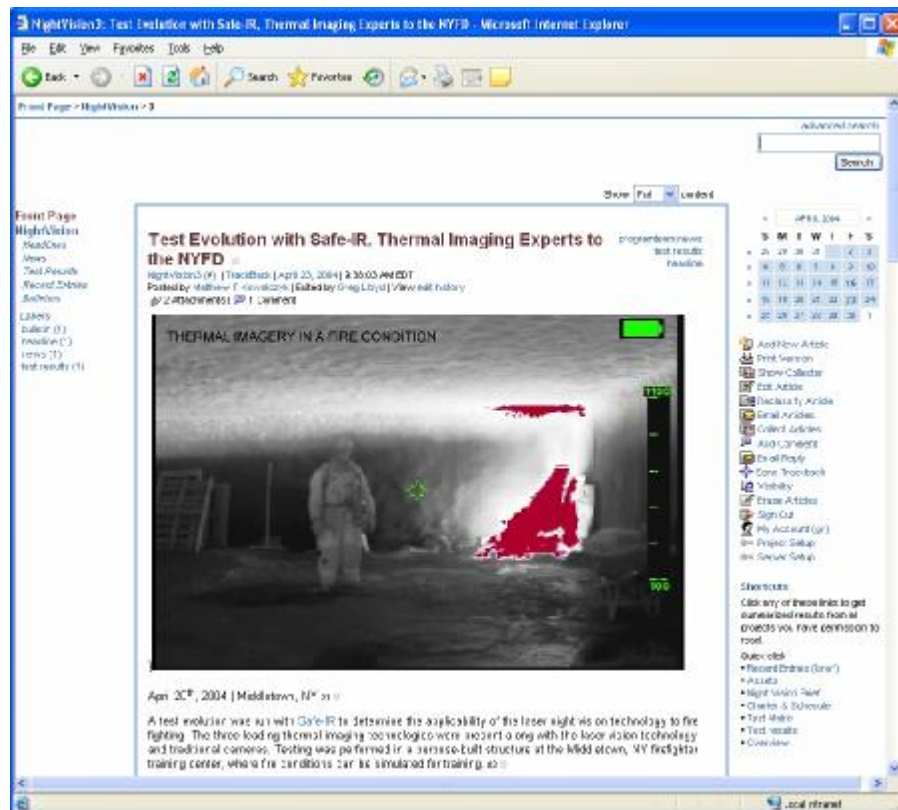
A test result: Post includes image, explanation, and discussion of test result

Opportunity Analysis (From DoD Final Report December 2004 FOUO):

The tool is universal in its applicability and can benefit all DoD components, program offices, and business functional areas through:

– 50% Reduction in Time Expended for User Electronic Communications Management

– 75% Reduction in Status Reporting Process

– 29% Reduction in Total Ownership Costs

– 89% Reduction in Bandwidth Usage

"The (Traction) solution provides a secure, low-cost alternative for centralizing daily communications in a web-based environment."

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Global Bank – Good Ideas

- CIO "Innovation" Project
  - Global effort to collect, evaluate and implement good ideas
  - Build community amongst employees in 50+ countries

- Technical needs
  - Quick Deployment
  - Super simple
  - Invite comments and ratings
  - Flexible search and export to navigate and evaluate results

Idea form: Easy to fill out form with 8 category fields (e.g. urgency, potential, country, idea type…)

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Global Bank – Good Ideas

Idea & Comments: Idea is displayed with category labels. Threaded comments are encouraged
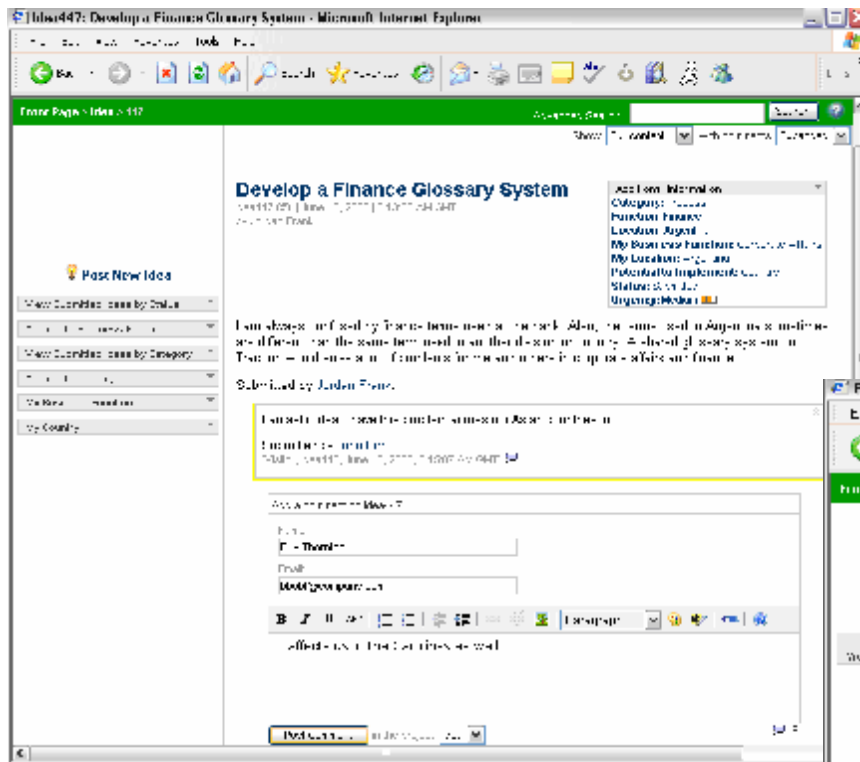
List of Ideas: Ideas display on Front Page with category and status

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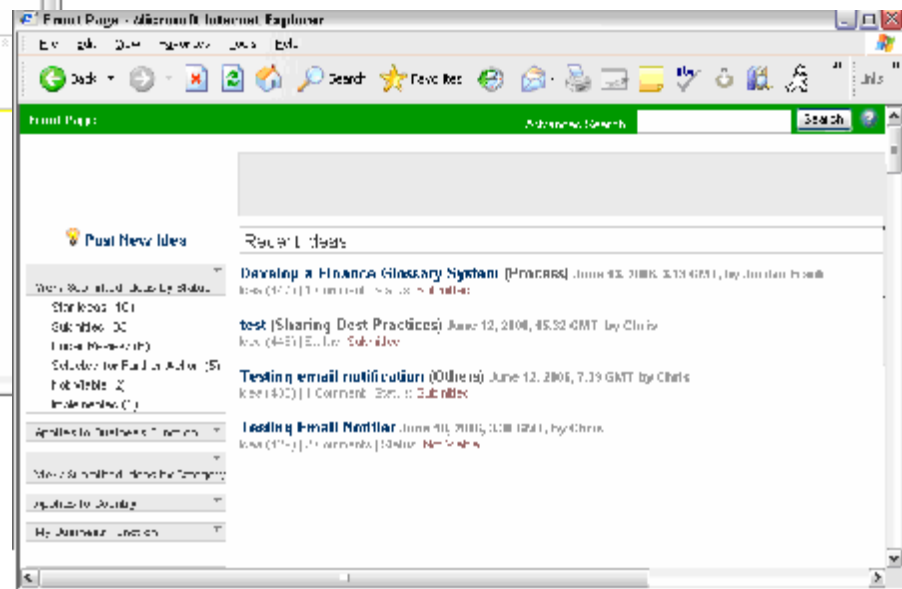
Global Bank – Good Ideas

Outcome: Over 2500 ideas collected in 1 month

Search, drill down discovery, and CSV export functions help find and process the gems

Dynamic Search : by country, function, category, status, title, content and time
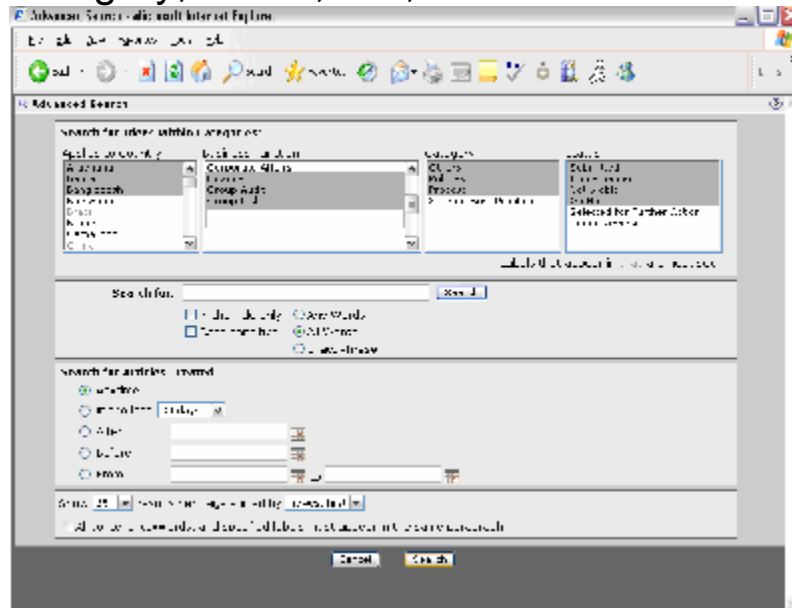
Category Drill Down: expand category groups to select and navigate
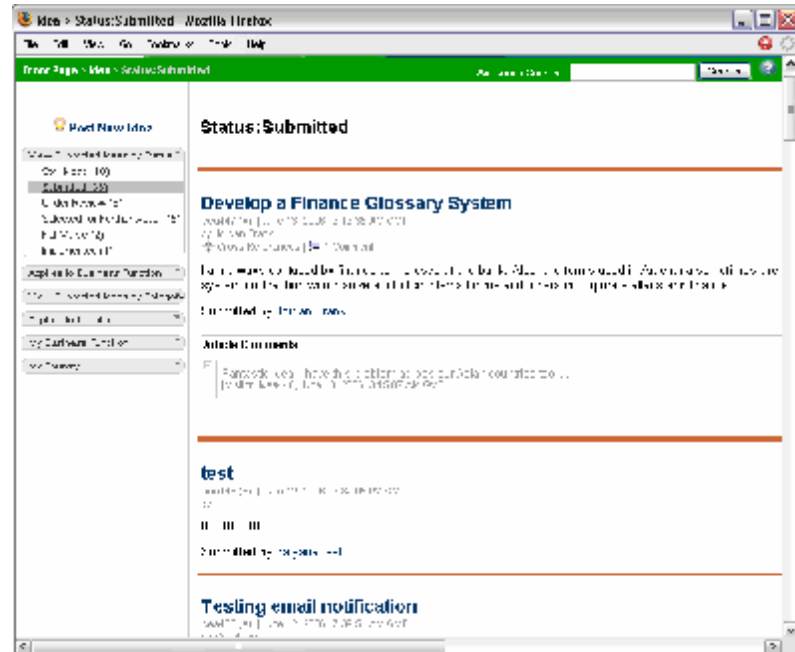
Results: 13 Projects funded, including permanent idea blog

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Ipsen – Competitive Intelligence

Ipsen is a $1B global pharmaceutical firm headquartered in France

CEO mandated effort to build a competitive Intelligence function

From Ipsen's CIO, Thiery Barsalou:

CI is a Knowledge-intensive process with geographically and functionally distributed stakeholders, *with different permissions*, requiring strong communication and collaboration capabilities

Collection

Direction & Planning

Analysis

Dissemination

The Intelligence Cycle

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Ipsen – Competitive Intelligence

Readership spans the globe…

14%

9%

44%

5%

4%

24%

USA   Spain   Germany   Italy   UK   France

43%

20%

2%

10%

12%

13%

R&D   Manufacturing   Marketing   Operations   Management   Bus Dev
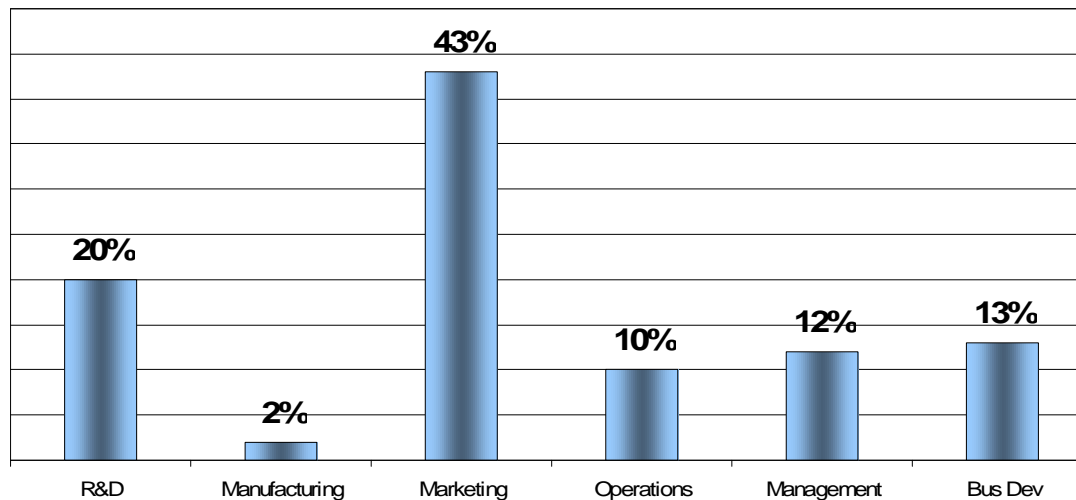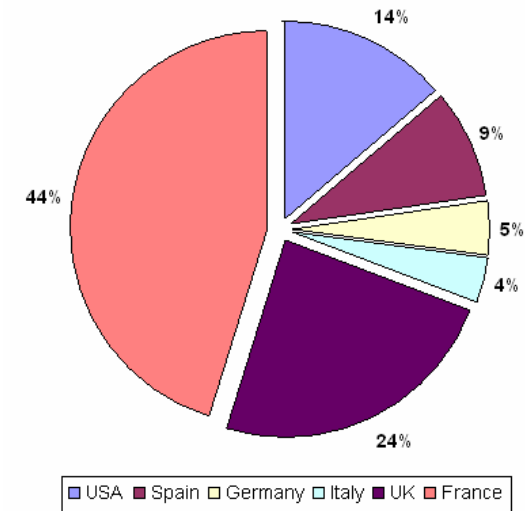
…and the business functions

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Ipsen – Competitive Intelligence
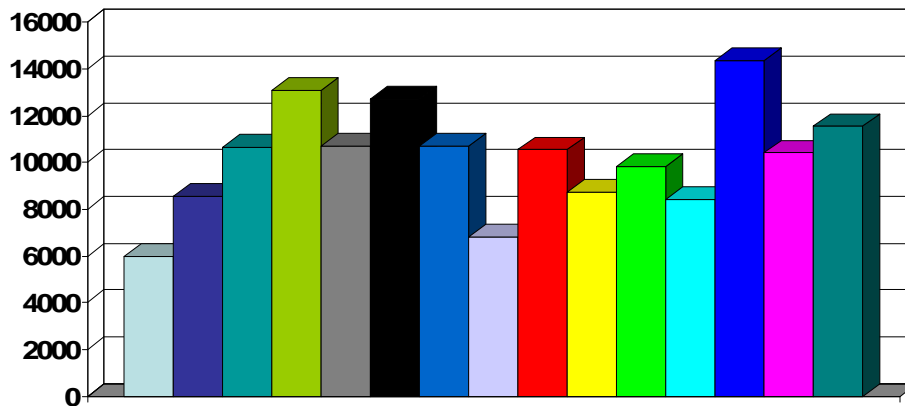
Readership is consistent at 8,000 to 14,000 page views per month

Results by the end of Year 1

- Federated collection of 6 blogs hold over 3700 articles 640 comments
- A community and repository for knowledge of the business environment
- Deployed to 250 named accounts (Intranet, Extranet, email…),
- Available to 3,500 employees (Intranet)
- Dialogue around information is increasing (within the blog, and in meetings)
- Contributed to making CI important to business decision making
- Market-relevant communication is moving *from* email *to* the blogs
- Best practice model for knowledge management and collaboration at Ipsen

Ipsen - Glossary

Glossary for R&D and Ops

– Need for common, accessible vocabulary used in submissions
– Common language set supports global collaboration
– External reference definitions stored with internal applied definition
– French and English terms are related
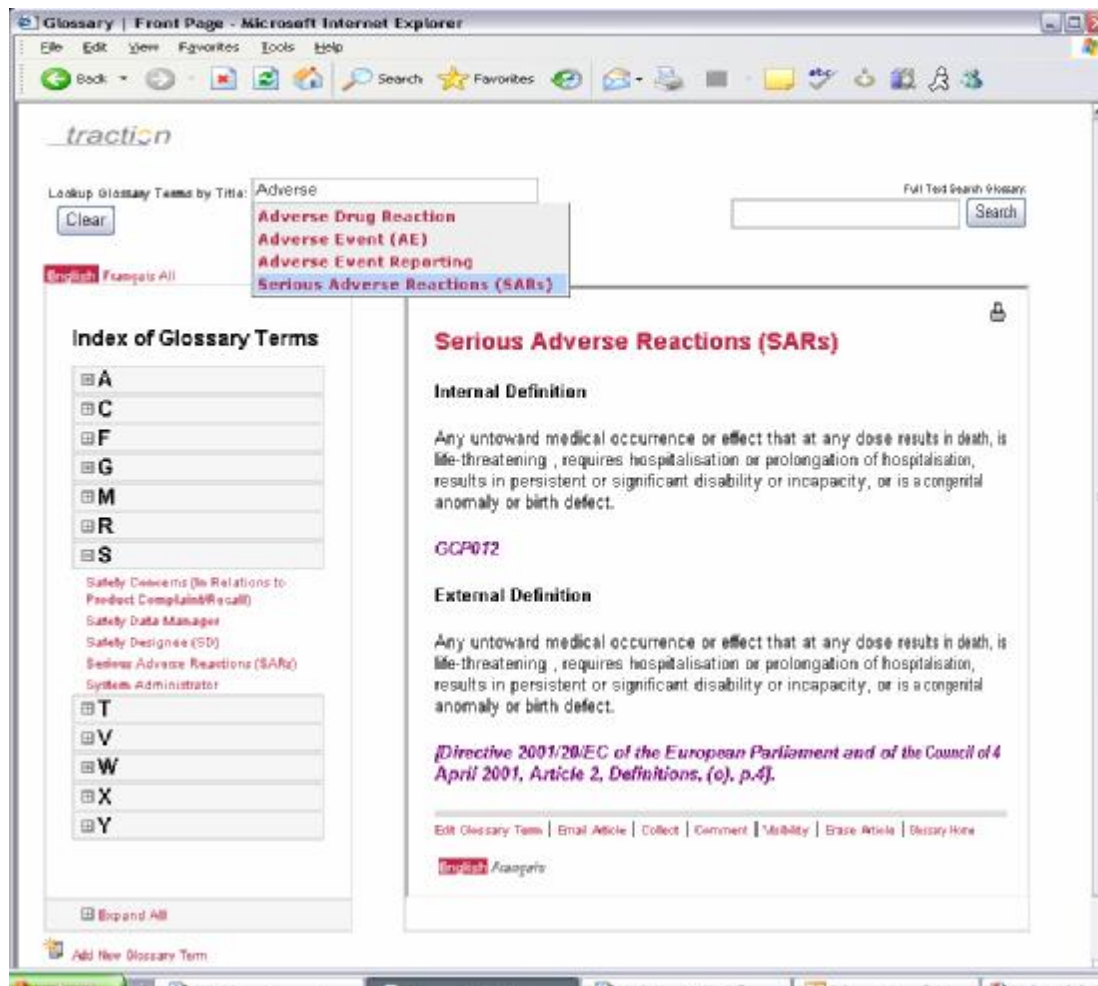
Front End: Dynamic title driven look up (e.g. "Adverse"), Full text search, Letter inde, Formatted view of definition, Comments, Print view, email out and export functions.

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Ipsen - Glossary

Term Add Edit Form:
With 4 fields for structure and formatting consistency

Benefits:

- More accessible than former PDF based glossary docs
- Interface fit to the application, makes life easy for readers and admins
- Consistent presentation of terms
- Journaling backend provides rich audit trail

Audit Trail:
Including additions, edits, erasures, emails sent, and more

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KMWorld 2007

Tagging Strategies & E2.0 In Action

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2007
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