



*traction<sup>®</sup> software*

*Beyond blogs and wikis, there's Traction*

*KMWorld 2007 Annual Conference*

*Strategies & Enterprise 2.0 in Action*

Jordan Frank

[www.TractionSoftware.com](http://www.TractionSoftware.com)

[jfrank@tractionsoftware.com](mailto:jfrank@tractionsoftware.com)

(401) 528-1145

*traction<sup>®</sup> software*

# 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](http://www.tractionsoftware.com)



Now Free for 5 Users  
[www.tractionsoftware.com](http://www.tractionsoftware.com)

traction<sup>®</sup> software

# 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”

“@toread and Cool: Tagging for Time, Task, and Emotion”

<http://dlist.sir.arizona.edu/1633/>

Margaret E. Kipp [mkipp@uwo.ca](mailto:mkipp@uwo.ca)

Faculty of Information and Media Studies

University of Western Ontario, Canada

traction<sup>®</sup> software

# 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

*Managing Wikis in Business  
September 2007  
Penny Edwards  
Open University Business School*

# 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 being too unstructured  
and appearing chaotic*

*Managing Wikis in Business  
September 2007  
Penny Edwards  
Open University Business School*

# Go Beyond “Subjects”

- Content type
  - Importance
  - Status
  - Assignment
  - Category
- Bulletin
  - Requirement
  - Meeting
  - Issue
  - Milestone
  - FAQ
  - Process
  - Best Practice
  - Profile

# Go Beyond “Subjects”

- Content type
- Importance
- Status
- Assignment
- Category
- Headline
- Alert
- Priority 1, 2, 3
- Next

# Go Beyond “Subjects”

- Content type
  - Importance
  - **Status**
  - Assignment
  - Category
- To Do
  - Done
  - Stalled
  - Skipped
  - Waiting
  - No



# Go Beyond “Subjects”

- Content type
  - Importance
  - Status
  - Assignment
  - Category
- Alpha, Beta
  - FCS
  - V1, V2
  - Clay, Ashwini
  - Project Manager
  - Finance, Legal, Engineering

# 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

# 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

*E-mail me for full paper on this model*

*jfrank@tractionsoftware.com*

traction<sup>®</sup> software

# The Yin-Yang of E2.0

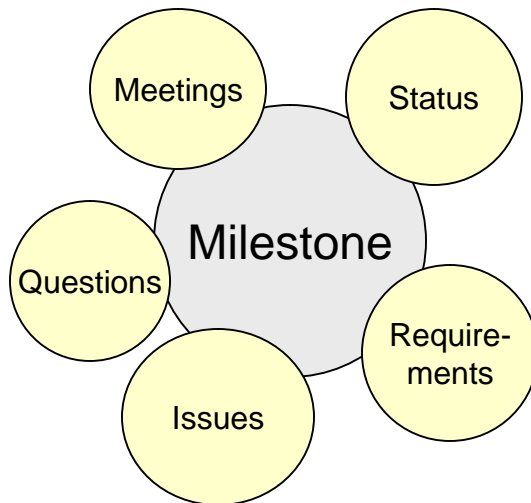


# Traction TeamPage Drives *Milestone Management* at ShoreBank

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  
**KM** KNOWLEDGE  
Management  
**World**  
Blogs & Wikis: Ready for prime time?  
By Judith Lamont, 1 January 2007

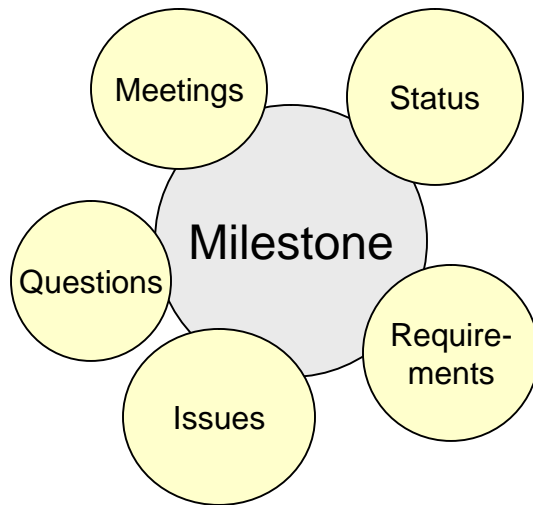


**Project milestones form the nucleus around which the project information and communication are organized**, including the individual responsible, the milestone, the requirements, the issues to be addressed and any open questions.

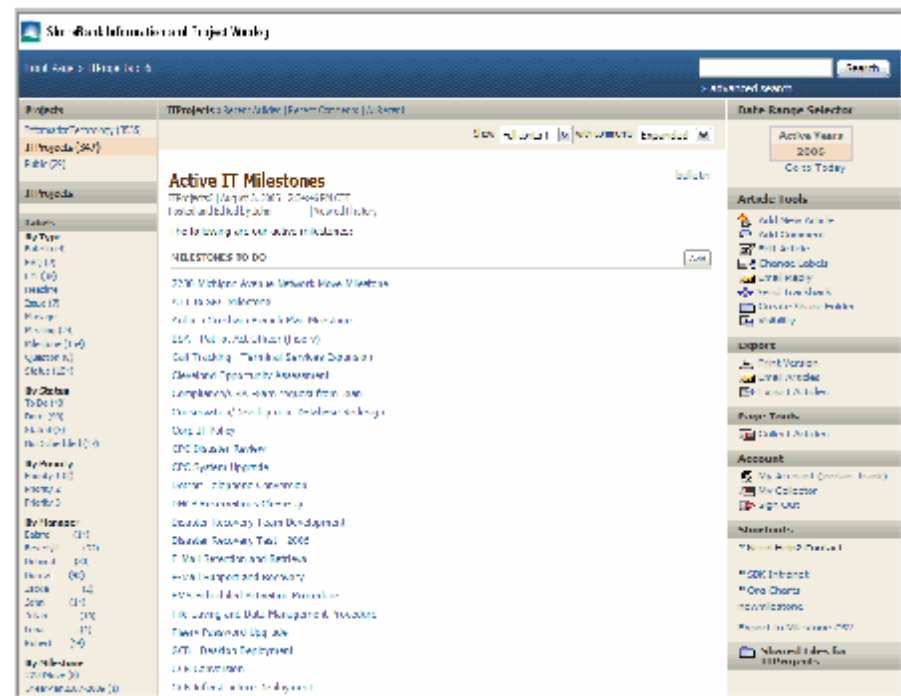
- Author (Judith Lamont) regarding ShoreBank

traction<sup>®</sup> software

# 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)

	A	B	C	D	E	F	G	H	I	J
	Project Name	Milestone Label	Project Manager	Start Date	Delivery Date	Signed Off By	Status	Description		
1	Desktop Program Migration	Desktop Program Migration	David	10/1/2005	12/1/2005	to do	to do	A new migration tool was used		
2	Home Work Home Edition Project	Home Work Home Edition Project	David	10/1/2005	12/1/2005	to do	to do	The project is in the final stages		
3	IBM - Project for Office (Pilot)	IBM - Project for Office (Pilot)	David	11/1/2005	12/1/2005	to do	to do	Application migration, IBM for		
4	IBM - Project for Office (Pilot)	IBM - Project for Office (Pilot)	David	11/1/2005	12/1/2005	to do	to do	Application migration, IBM for		
5	IBM - Project for Office (Pilot)	IBM - Project for Office (Pilot)	David	11/1/2005	12/1/2005	to do	to do	Application migration, IBM for		
6	IBM - Project for Office (Pilot)	IBM - Project for Office (Pilot)	David	11/1/2005	12/1/2005	to do	to do	Application migration, IBM for		
7	IBM - Project for Office (Pilot)	IBM - Project for Office (Pilot)	David	11/1/2005	12/1/2005	to do	to do	Application migration, IBM for		
8	IBM - Project for Office (Pilot)	IBM - Project for Office (Pilot)	David	11/1/2005	12/1/2005	to do	to do	Application migration, IBM for		
9	IBM - Project for Office (Pilot)	IBM - Project for Office (Pilot)	David	11/1/2005	12/1/2005	to do	to do	Application migration, IBM for		
10	IBM - Project for Office (Pilot)	IBM - Project for Office (Pilot)	David	11/1/2005	12/1/2005	to do	to do	Application migration, IBM for		

# Communication Surrounds Milestones

**2230 Michigan Avenue Network Move Milestone**  
ITProjects2 | August 3, 2006 | 2:30:14 PM CDT  
Posted and Edited by John | View edit history

Manager: Beverly  
milestone: 2230Move

to do ☐

done ☒

to do ☐

to do ☐

to do ☐

Movement of SBI's network from 2230 South Michigan to 71st and Jeffrey.

For the move there are a few key tasks:

- Order the T1
- Configure the T1 at both ends
- Move the infrastructure
- Cut over to the infrastructure

Milestone Label: 2230Move  
Manager(s): Beverly  
Status: to do (Other Status Labels Are Present)  
Start Date: 07/17/2006  
Delivery Date: 10/31/2006  
Signed-Off Date: (None Specified)

Other Activity against the 2230Move Milestone:

- Senior Staff Meeting 10/3/06
- Status Update from Beverly 8/30/06
- Senior Staff Meeting 9/5/06
- Beverly answers Cisco router question from John 8/23/06
- Router information from Beverly 8/22/2006
- Status Report on 2230 Michigan move
- T1 at 2230 is configured and up
- 2230 Michigan Avenue Network Move Milestone

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.

The screenshot shows the 'Edit Milestone Task' window. It includes fields for Project (ITProjects), Current Status (To Do), Milestone (2230Move), Manager (Beverly), Start Date (07/17/2006), and Delivery Date (10/31/2006). Below these fields is a list of activities for the milestone, including 'Senior Staff Meeting 10/3/06', 'Status Update from Beverly 8/30/06', and 'Senior Staff Meeting 9/5/06'. The interface also features a rich text editor for the milestone description and a 'Submit' button at the bottom.

Custom  
Milestone  
Editor with  
date fields  
and Label  
selectors

# 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 line from 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.

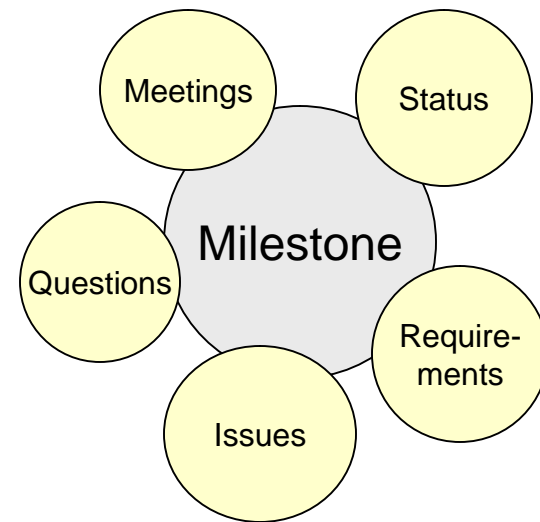
August 23, 2006

**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



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

Shown in “snippets”  
volume



# Communication Surrounds Milestones

ShoreBank Information and Project Weblog

Front Page > ITProjects > milestone:2230Move

Search

» advanced search

**Projects**

- BTC (397)
- ChathamBRP (15)
- InformationTechnology (2953)
- ITProjects (749)**
- Public (38)

**ITProjects**

**Labels**

**By Type**

- Bulletin (4)
- FAQ (2)
- FYI (92)
- Headline
- Issue (8)
- Manager
- Meeting (27)
- Milestone (197)
- ProjectWorksheet (13)
- Question (8)
- Status (360)

**By Status**

- To Do (39)
- Done (136)
- Stalled (3)
- Not Scheduled (19)

**By Priority**

- Priority 1 (2)

**ITProjects > Recent Articles | Recent Comments | All Recent**

**milestone:2230Move >**

By Label | By Label Added | By Label Removed

Show Full content with comments Collapsed

**milestone:2230Move**

Add to This Topic

June 6, 2007

**Senior Staff Meeting 6/5/07** milestone:2230Move status

ITProjects1686 | June 6, 2007 | 2:32:48 PM CDT  
Posted by John L. Evans

Donna reported that the project is complete. The Delivery Date is now 5/24/07 and the Status is "done".

April 25, 2007

**Senior Staff Meeting 4/17/07** milestone:2230Move status

ITProjects1585 | April 25, 2007 | 12:36:12 PM CDT  
Posted by John L. Evans

Still working on final documentation, but the physical move of equipment is completely finished. The Delivery Date is changed to 5/31/07.

April 10, 2007

**Senior Staff Meeting - 4/3/07** milestone:2230Move status

**Date Range Selector**

Active Years

- 2006
- 2007

Go to Today

**Article Tools**

- Add New Article

**Export**

- Print Version
- Email Articles
- Export Articles

**Page Tools**

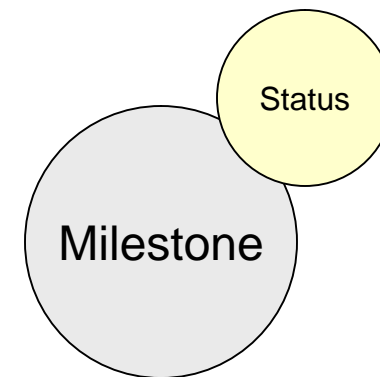
- Collect Articles
- Change Labels
- Erase Articles

**Account**

- Server Setup
- Project Setup
- My Account (robert\_you)
- My Collector
- Sign Out

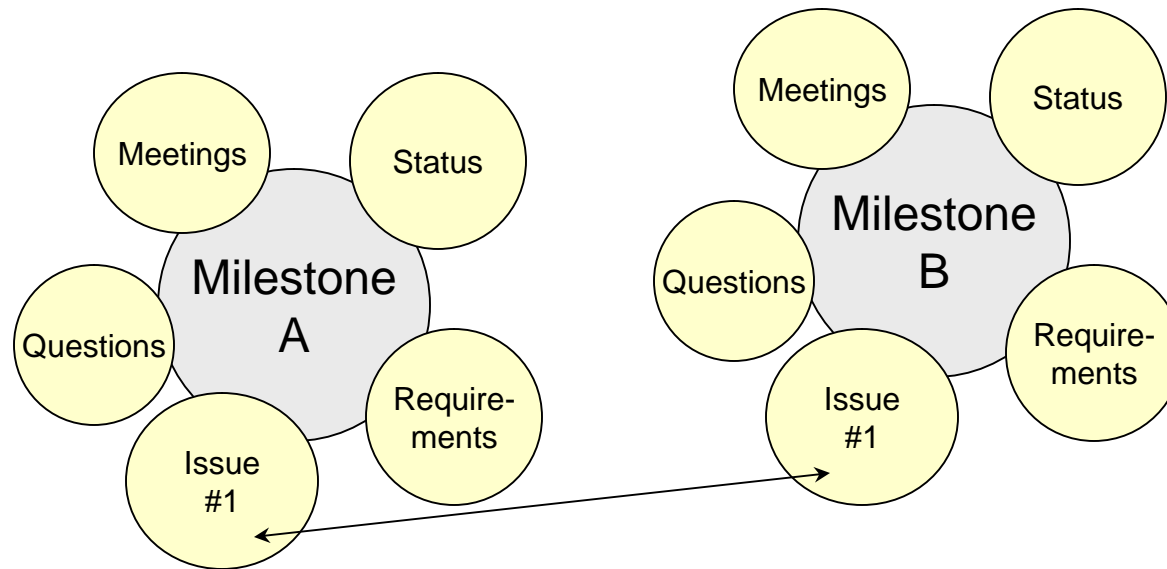
**Shortcuts**

- \* Need Help? Contact



Drill down on "Status" for the 2230Move Milestone

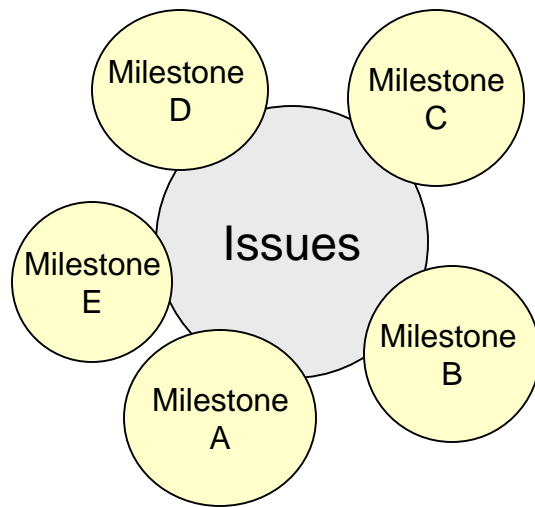
# Issues (or other items) may span milestones



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

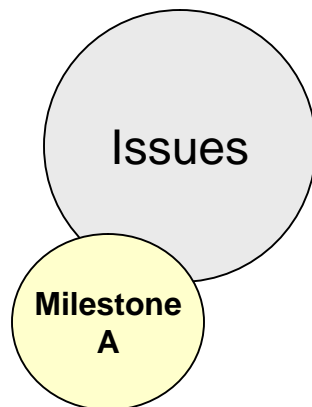
The issue page can be tagged for both.

# Managers may need to change the vector



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

# Managers may need to refine the vector



The screenshot shows a web application interface titled "Issues To Do: For MBD-On-Line" with a date of "August 11, 2006". It lists two issues:

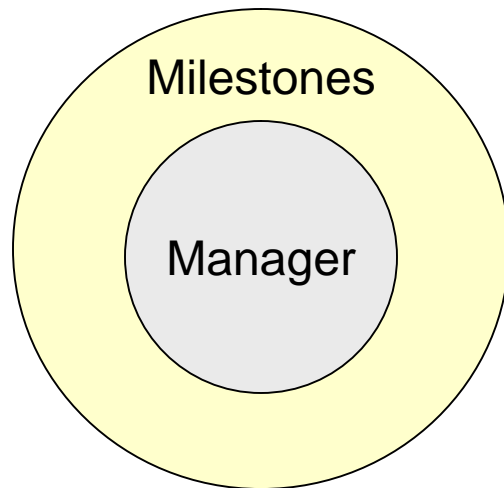
- The Policy exchange between Donna and John**  
8/11/2006  
ITProjects251 | August 11, 2006 | 10:08:58 AM CDT  
Posted by John  
Okay - I will handle the policy reference with that in mind. Thanks, Donna ...
- Question from Donna Pfeil on Internet Banking Policy**  
8/11/06  
ITProjects250 | August 11, 2006 | 10:04:10 AM CDT  
Posted by John  
Kim and I are in the process of updating this policy scheduled to go to the board in September. This section will need some attention based on the new mission-based product we are going to offer. Could we discuss? Thanks - D ...

Each issue entry includes a "to do" checkbox, a yellow warning triangle icon, and the text "issue milestone:MBD-On-Line". Two arrows originate from the "Milestone A" circle in the diagram and point to the "milestone:MBD-On-Line" text in the two issue entries.

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



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

**manager:Beverly**  
Beverly

October 7, 2006

**Plante Moran Remediation Project**  
IT-Project:6805 | October 4, 2006 | 3:02:25 AM CDT  
Posted by: John

This project's goal is the remediation of all findings from the Plante Moran Remediation Project. This includes penetration testing and general controls review.

October 1, 2006

**SBC Proposal Analysis**  
IT-Project:1641 | October 1, 2006 | 12:25:46 PM CDT  
Posted by: John

Analysis of SBC's proposal to upgrade equipment and with all of our business.

September 25, 2006

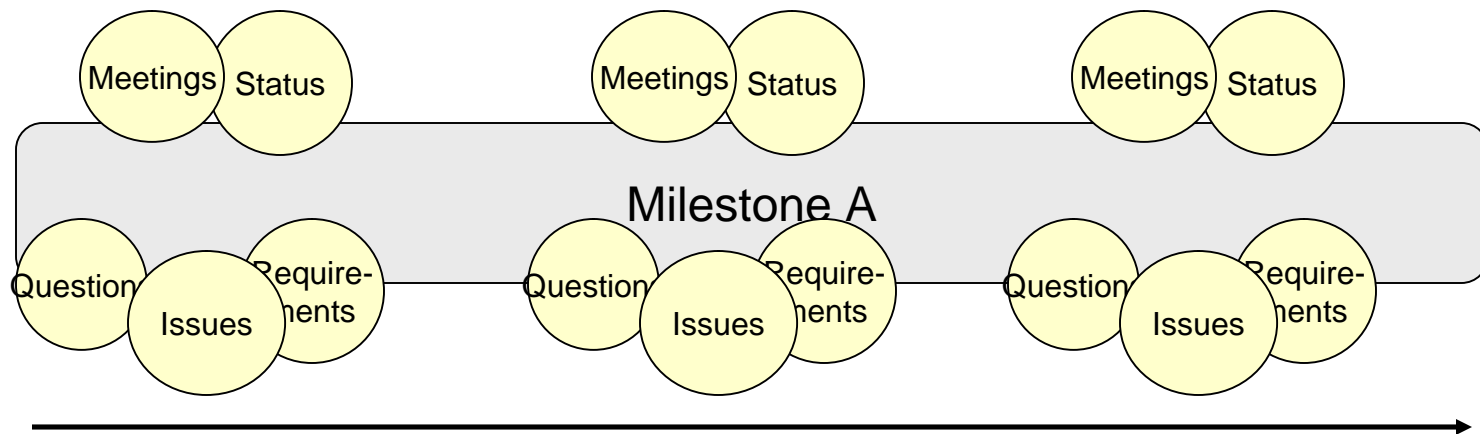
**Network Bulletin Management**  
IT-Project:1606 | September 25, 2006 | 4:27:14 AM CDT  
Posted by: John

Develop an application that allows run-time message management before the login is complete. This will allow us and marketing to send messages to users as they login to the network.

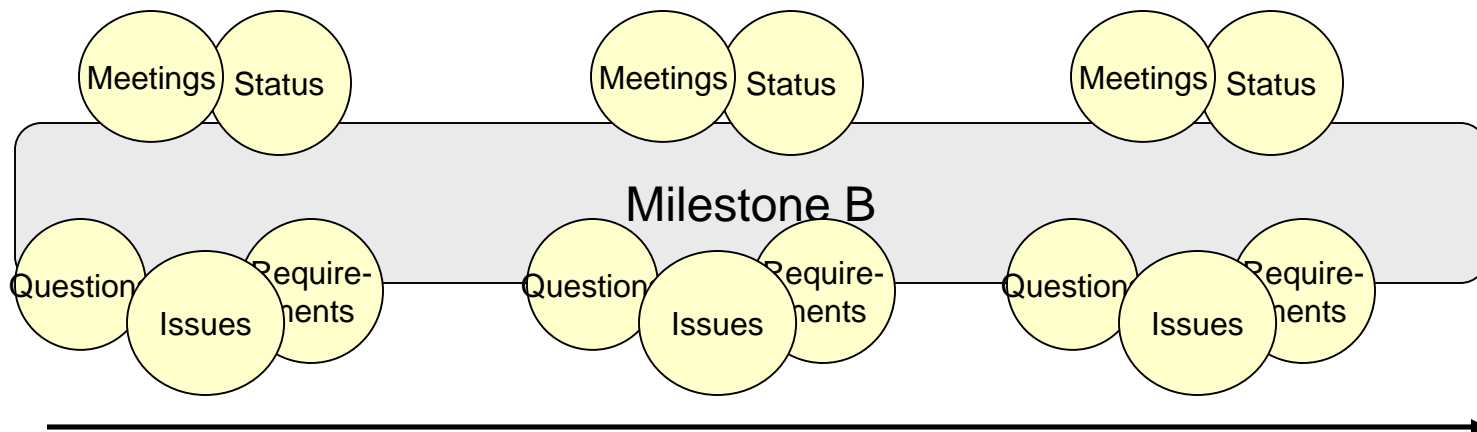
September 21, 2006

**Mission Based Telephone Numbers Relocation**  
IT-Project:610 | September 21, 2006 | 2:05:10 PM CDT  
Posted by: John

Redirected Mission Based numbers to 47th Street branch.



Reporting and communication  
occurs over time



# Reporting and communication occurs over time

The screenshot displays the 'ITProjects' project page in the Traction software. The interface is organized into several sections:

- Top Navigation:** Includes 'HomeBank Information and Project Wikiing', 'Front Page > IT Projects > NewsPage', and a search bar.
- Left Sidebar:** Contains filters for 'Projects' (Information Technology (1517), ITProjects (347), Public (19)), 'Labels' (By Type: Bulk (4), H03 (2), H1 (20), Issue (7), Milestone (24), Question (9), Status (10)), 'By Status' (To Do (18), Done (10), Solved (8), Not Scheduled (1)), 'By Priority' (Priority 1 (2), Priority 2, Priority 3), 'By Manager' (Bosha (1), Beverly (30), Deborah (4), Donna (4), Jodie (2), John (1), Lisa (1), Mark (1), Robert (14)), and 'By Milestone' (Z&C Move (0), GreenPlan2007-2009 (2), ATTSBC (5)).
- Main Content Area:**
  - ITProjects NewsPage:** A header section for IT Department Project Communication and Management.
  - HEADLINES:** A section for recent articles.
  - STATUS REPORT:** A section for project status updates, including 'DoCoMo Specifications update' and 'Meeting Notes 10/3/06 by Toni'.
  - MEETING NOTES:** A section for meeting minutes, including 'Meeting Notes 10/3/06 by Toni Personette' and 'Planta Renovation Kick-Off meeting 10/4/2006'.
  - Don Hollowed's input on the Exam Questionnaire:** A section for exam-related updates.
  - EMC Questionnaire answered by Donna Pfaff 10/6/06:** A section for questionnaire responses.
  - DoCoMo Specification meeting with Devika:** A section for meeting minutes.
  - Meeting Minutes 9/26/06 and Issues Log from Toni:** A section for meeting minutes and issues.
  - Meeting Minutes for 9/19/06 - Toni:** A section for meeting minutes.
- Right Sidebar:** Contains a 'Date Range Selector' (Active Years: 2006, Go to Today), 'Article Tools' (Add New Article), 'Account' (My Groups, My Groups, My Groups, Sign Out), 'Shortcuts' (New Help Center, New Tutorial, New Check, New News), 'Recent Files' (Off First, Also First, Click here to learn more), and 'Shared files for ITProjects'.

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

# 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



# (more) Enterprise Examples

*real results*

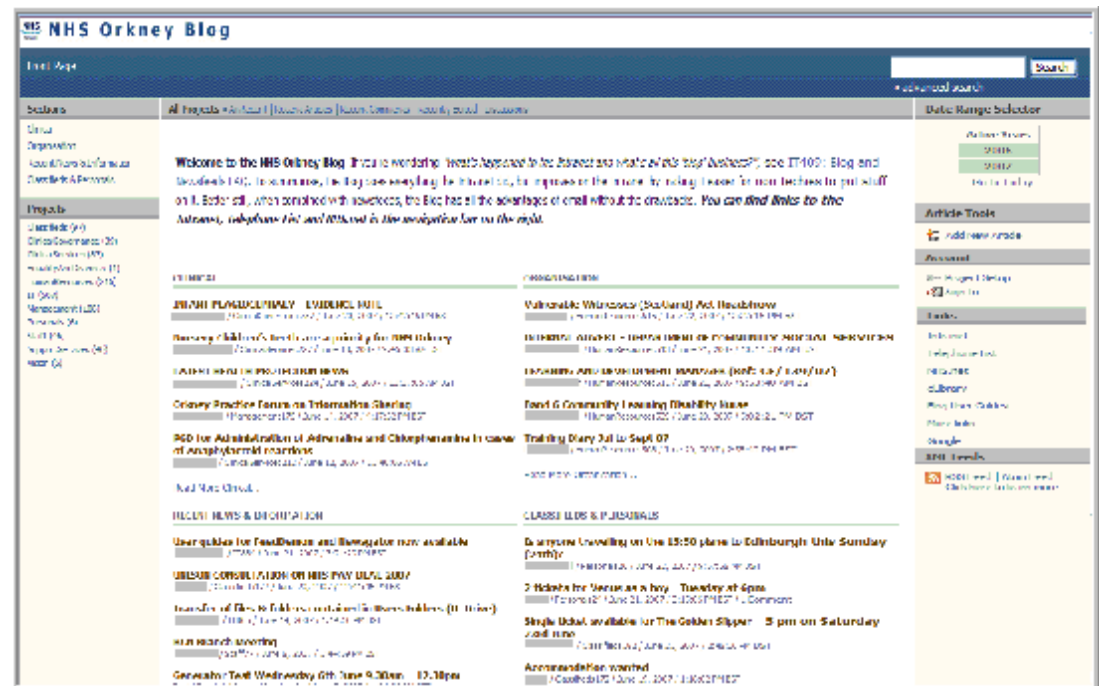
Non Profit Association: IJIS  
DOD: CIO Funded Liberty Project  
Finance: Global Bank  
Pharmaceutical: Ipsen

traction<sup>®</sup> software

# NHS Orkney (UK)

- NHS is worlds 4<sup>th</sup> 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)

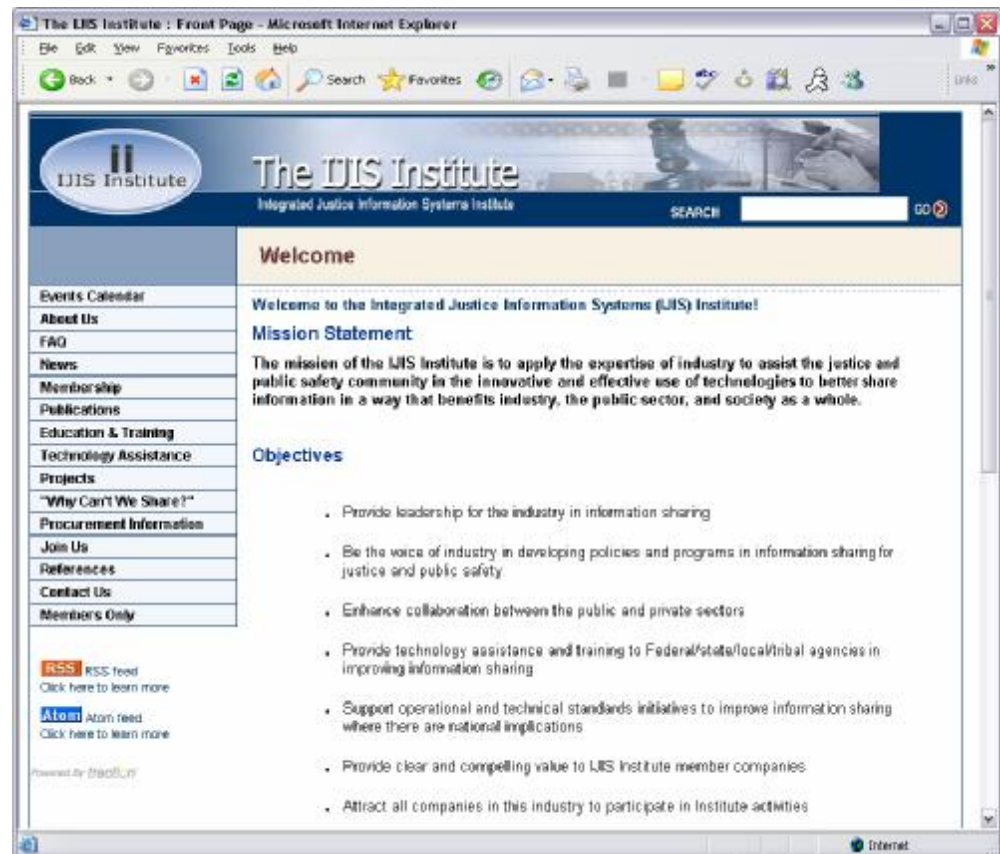
- Job Tracker Wiki Project
  - Post a page for every task
  - Tag with status and manager
- 171 Pages Marked To Do in 5 Months
- Great example of “Micro Project” management, done Wiki style



# 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



*traction*<sup>®</sup> software

# IJIS Institute

**IJIS website – “Mobile” skin:** delivered automatically to mobile devices browsers

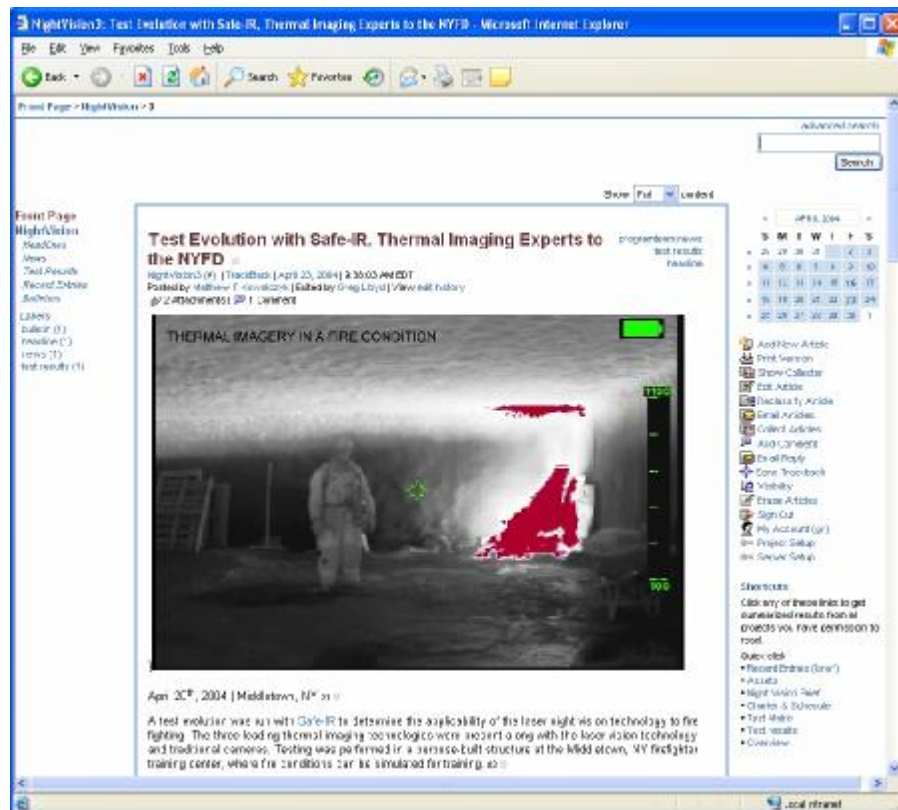


- The Payoff:
  - Over 400 people working on 17 projects now collaborate virtually.
  - One committee cut phone and in-person meetings by 50%
- Committee Collaboration:
  - Thousands of posts
  - Over 700 comments
  - Over 500 attachments
  - Over 2500 edits
- Business Week



*traction*® software

# 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.”*

*traction*® software



# 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...)

**New Idea**

My Name: Jordan Frank  
My Email: jfrank@tractionssoftware.com  
My Country: Argentina  
My Business Function: Corporate Affairs

Idea Title: Develop a Finance Glossary System  
Please limit title to no more than 80 characters.

Idea Description:  
(First paragraph should succinctly summarize the idea.)

I am always confused by finance terms used at the bank. Also, the terms used in Argentina sometimes are different than the same term used in another division or country. A shared glossary system on Traction would solve a lot of problems for me and others in corporate affairs and finance.

**Idea Details**

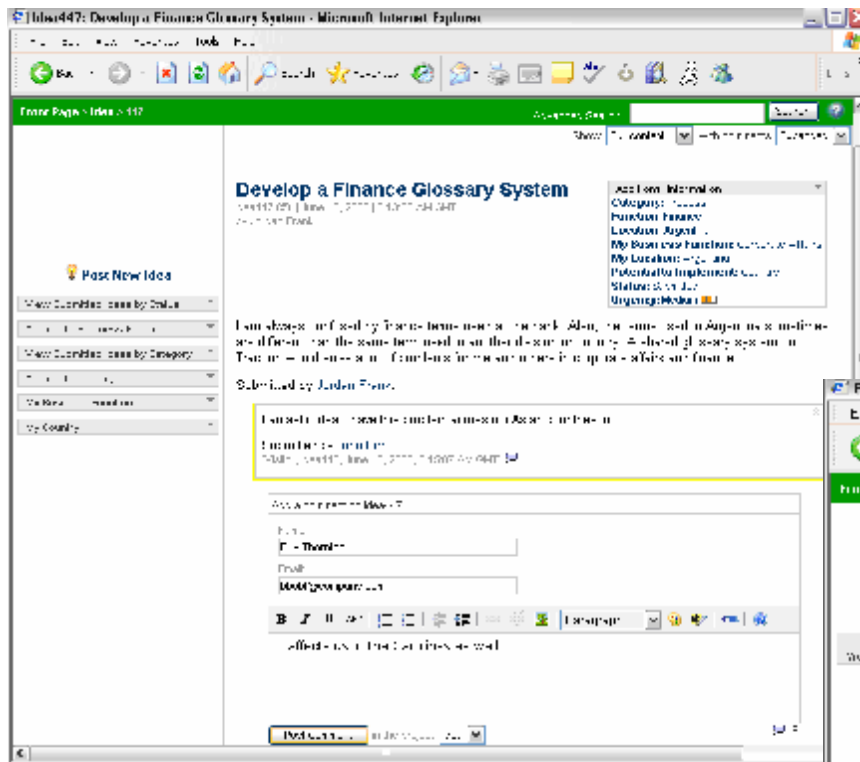
Idea Category (required): Process  
Applies to Country \*: Argentina  
Applies to Business Function \*: Finance  
Potential to Implement \*: Country  
Urgency \*: Medium

Edit Attachments (0)

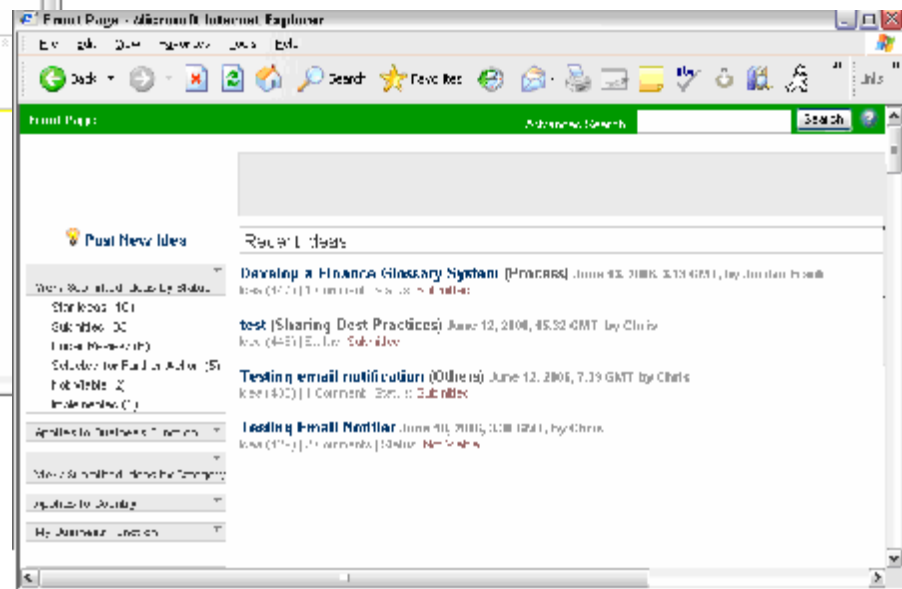
Cancel Submit

# 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



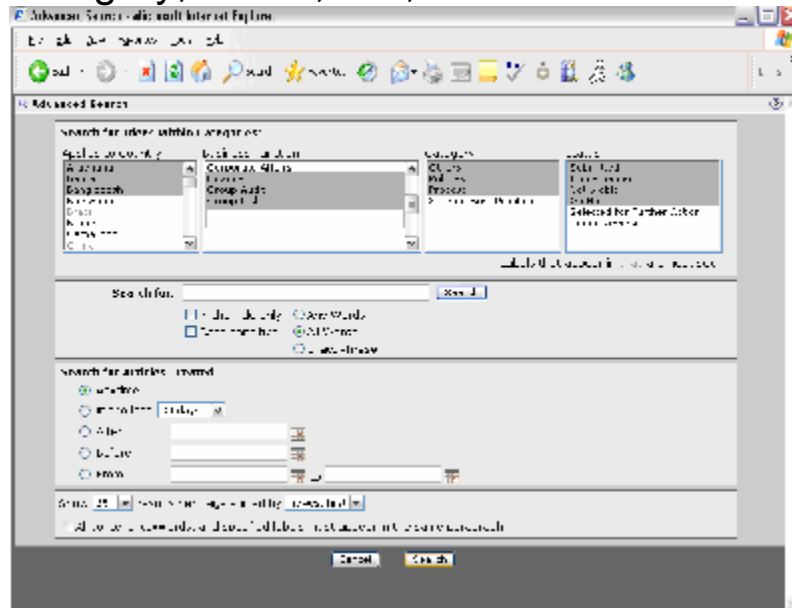


# Global Bank – Good Ideas

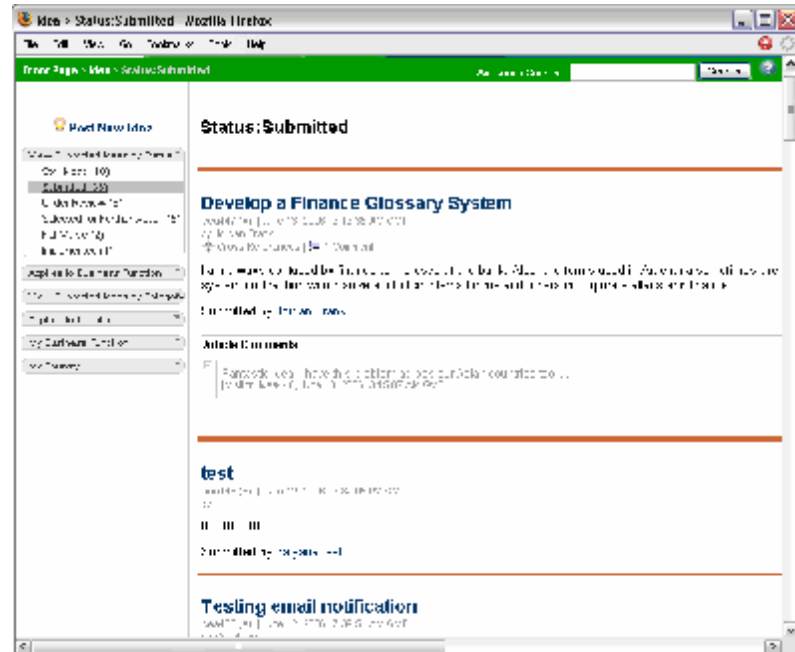
**Outcome:** Over 2500 ideas collected in 1 month

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

*traction*® software

# Ipsen – Competitive Intelligence

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

**CEO mandated effort to build a competitive Intelligence function**



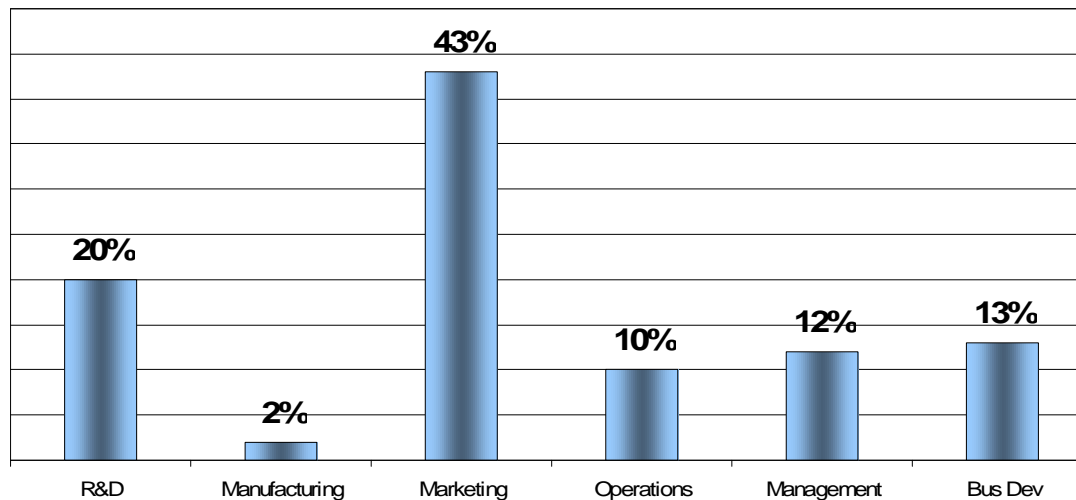
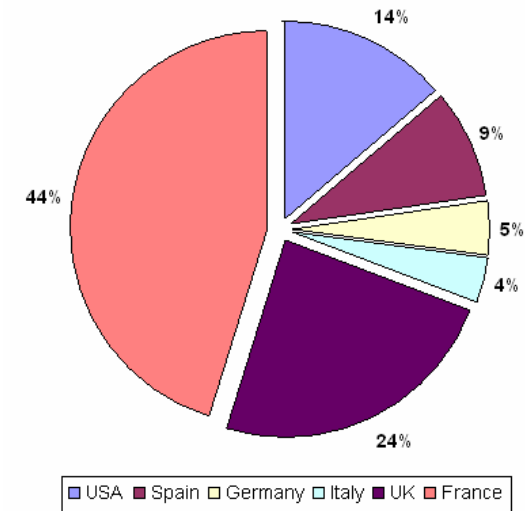
The Intelligence Cycle

*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

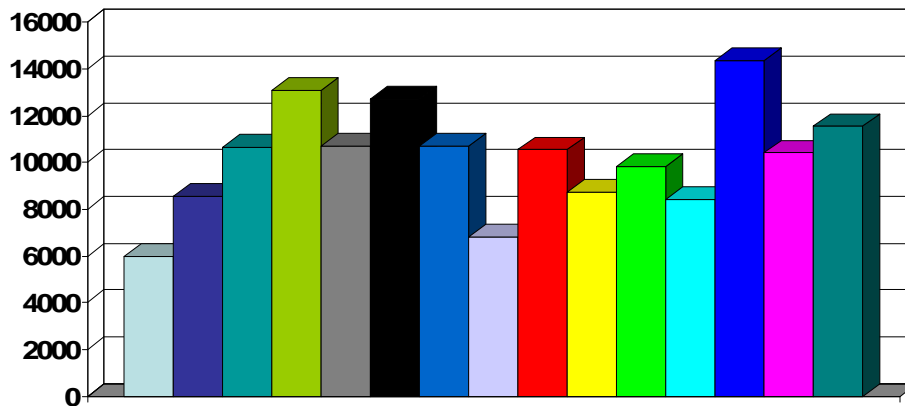
# Ipsen – Competitive Intelligence

Readership spans the globe...



...and the business functions

# Ipsen – Competitive Intelligence



**Readership is consistent at 8,000 to 14,000 page views per month**

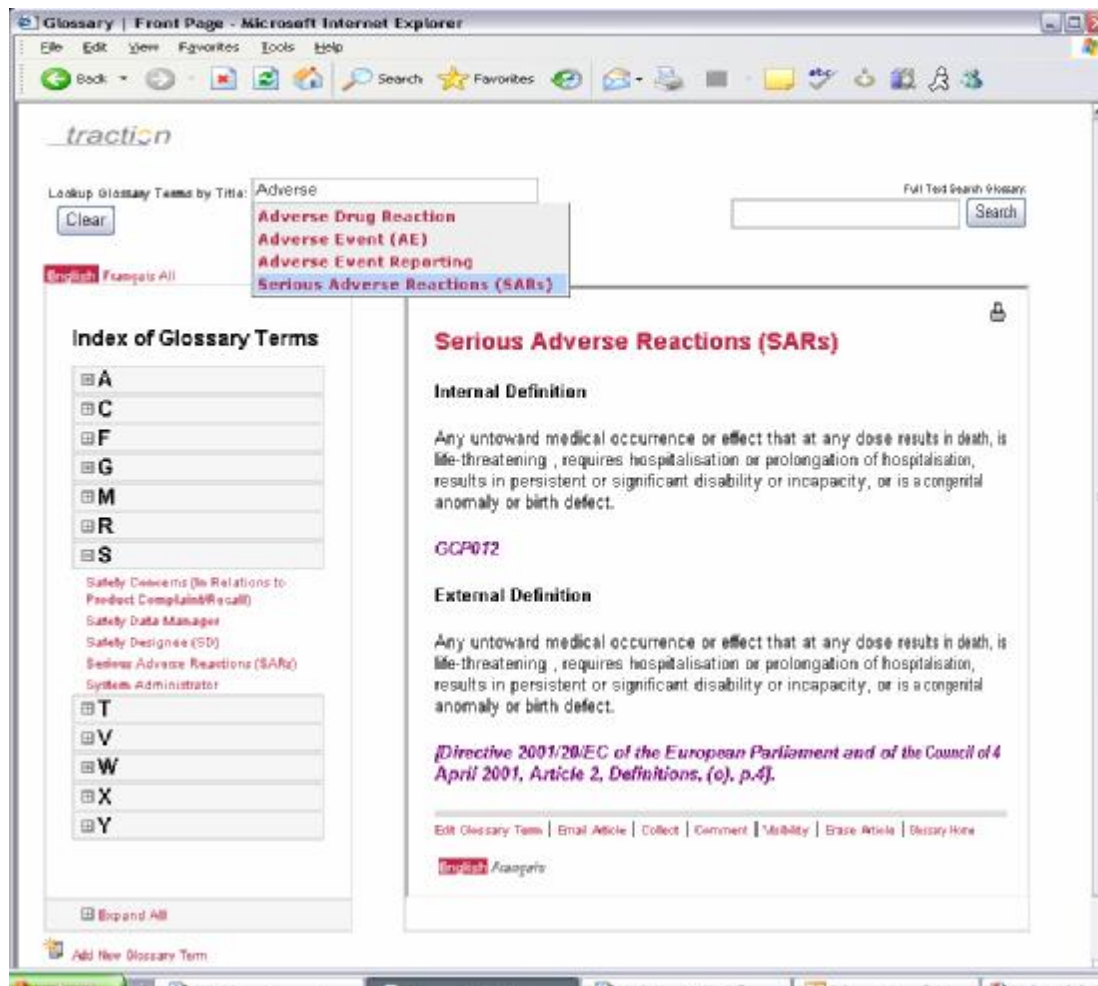
## Results by the end of Year 1

- 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.

# 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

*KMWorld 2007*

*Tagging Strategies & E2.0 In Action*

Jordan Frank

[www.TractionSoftware.com](http://www.TractionSoftware.com)

[jfrank@tractionsoftware.com](mailto:jfrank@tractionsoftware.com)

(401) 528-1145



Now Free for 5 Users  
[www.tractionsoftware.com](http://www.tractionsoftware.com)

*traction<sup>®</sup> software*