



traction[®] software
Beyond blogs and wikis, there's Traction

ASIS 2007 Annual Conference
 Planning Strategies for the Enterprise &
 Milestone Management at ShoreBank

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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
 - 7 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



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”

“@toread and Cool: Tagging for Time, Task, and Emotion”
Margaret E. Kipp mkipp@uwo.ca
Faculty of Information and Media Studies
University of Western Ontario, Canada

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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

*Managing 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 being too unstructured
and appearing chaotic*

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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

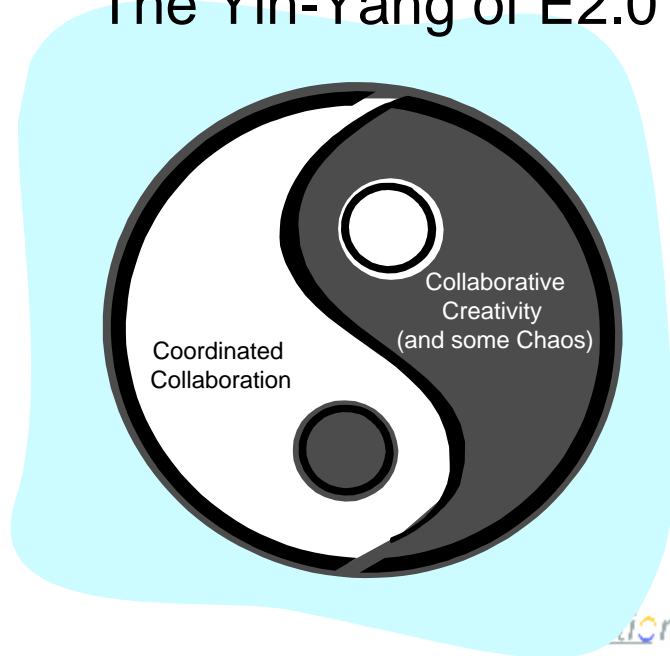
- Content type —————> Requirement
- Priority —————> Priority 2, Next
- Status —————> To Do
- Assignment —————> Manager:Stanley, FCS
- Category —————> Security

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

E-mail me for full paper on this model
jfrank@tractionsoftware.com

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The Yin-Yang of E2.0



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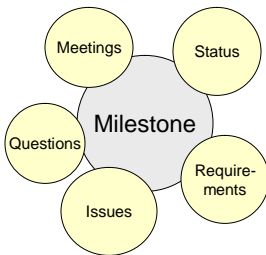
Traction TeamPage Drives *Milestone Management* at ShoreBank

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."



Blogs & Wikis: Ready for prime time?
By Judith Lamont, 1 January 2007

- John Evans, ShoreBank Senior VP and IT Director

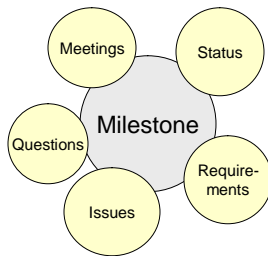


Project milestones form the nucleus around which the project information and communication are organized, including the individual responsible, the milestone, the requirements, the issues to be addressed and any open questions.

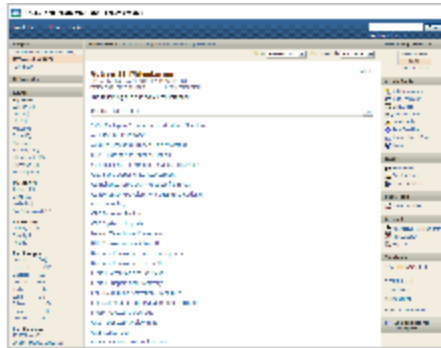
- Author (Judith Lamont) regarding ShoreBank



Project Communication Surrounds Milestones



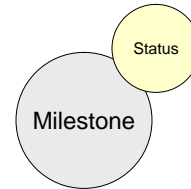
- Milestones are definitions of objectives you pursue
- Issues are show stoppers
- Questions are knowledge manager process accelerators



List of *open Milestones* in Alpha order (above) and in exported spreadsheet (below)



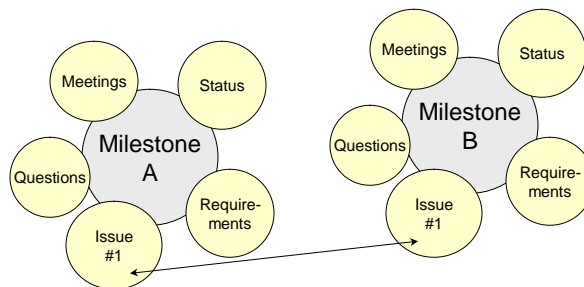
Communication Surrounds Milestones



Drill down on "Status" for the 2230Move Milestone

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Issues (or other items) may span milestones

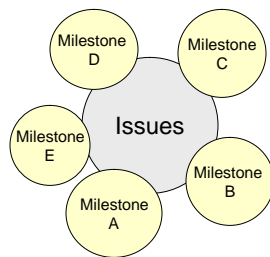


The same issue "Issue #1" may span "Milestone A" as well as "Milestone B."

The issue page can be tagged for both.

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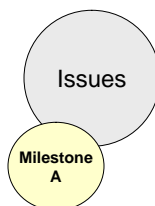
Managers may need to change the vector



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

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Managers may need to refine the vector

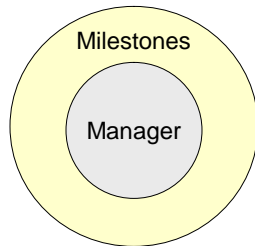


to examine all *open issues* for one milestone.

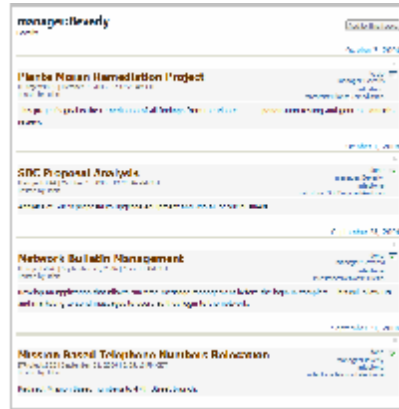
- The issues are tagged To Do, and are checked Done when closed.

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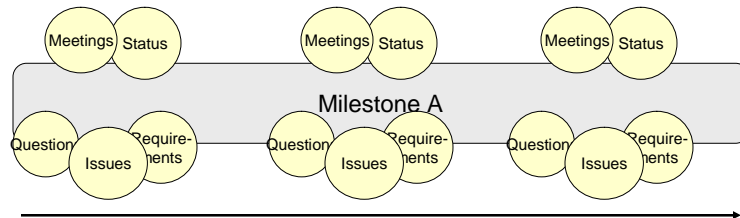
Managers may need to change the vector



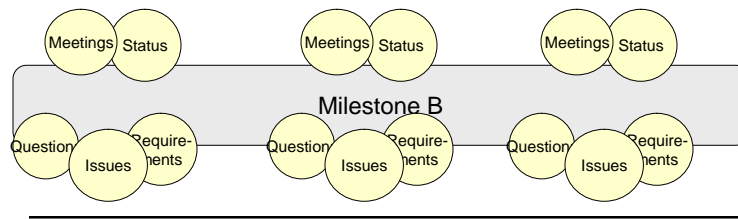
For example, to examine *all milestones for one manager*



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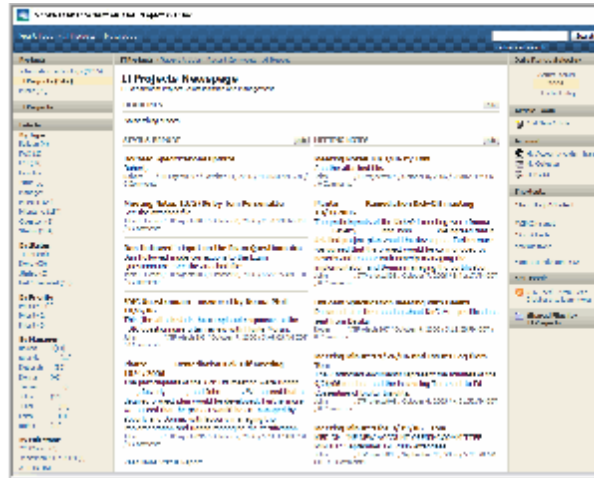


Reporting and communication occurs over time



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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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**Wiki Driven Milestone
Management at ShoreBank**

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Front Page

The screenshot shows a web page titled 'Wiki Driven Milestone Management and Project Wikiing'. The main content area displays several news items under the heading 'HEADLINES'. The first item is '2007 Project Considerations', followed by 'Top Thirty Projects By Cost', 'R&D 2006: Renovation and Irony in Vegas', and 'Progress Report from Beverly Hills 11/23/06'. A sidebar on the right contains navigation links and a search box.

What's Happening?
 What's Important?
 Front Page view of top
*Headlines, All Recent
 Entries and Bulletins* –
 across all 4 wiki spaces I
 can read:

- BTC
- InformationTechnology
- ITProjects
- Public

Also available via RSS,
 E-Mail Newsletter, Mobile
 Devices

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Threaded Discussion



Paragraph and page level discussion threading supports collaboration in context.

Collapse parts of the thread, Expand others

"Stack" or "Nest" comments

WYSIWYG commenting with full set of image, attachment, widget controls



Document Management



Attach 1 or more files to any page to distribute or discuss the document.

The author raised several (blacked-out) discussion points.

Display images, quick time movies and other attachments in-line with Widgets.

Optional "Edit" button launches the document in Word, Excel or PowerPoint.

