Lotus Roadmap: Enhancing Business Collaboration with Lotus Software

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Executive Summary

IBM is a major player in the collaboration software market. It offers numerous collaboration software products through its Lotus Software division, has a long track record of delivering collaboration software to the market, and is one of the two titans—Microsoft being the other—in the enterprise market for collaboration software. This report looks at the go-forward strategic role of Lotus Notes and other Lotus software by end-user organizations.

The report investigates (and debunks) five common myths about Lotus Notes:

1. Because Lotus Notes is 20 years old, it should be replaced with something more modern. The evidence suggests a different interpretation.

2. IBM is not committed to Lotus Notes. By looking at IBM's historical commitment to Lotus Notes, a different conclusion is reached.

3. IBM lacks a roadmap for Lotus Notes. By considering the role of a technical roadmap from a vendor, IBM actually does have a roadmap for Lotus Notes.

4. SharePoint will "solve all your problems". Governance and the business approach is much more critical than the mere technology used, so switching technology without revisiting the non-technology elements will actually only exacerbate any problems.

5. Notes sucks, and it's all IBM's fault. IBM bears some fault, but a much greater degree of fault is frequently outside of IBM's direct control.

The report outlines the difference between a technical roadmap from IBM for Lotus products, and a business roadmap created by the organization to leverage the technology that's available to deliver enhanced business outcomes. A technical roadmap serves as a communications device to signal upcoming changes that impact on the way an organization uses a specific technology. However, a technical roadmap cannot address how to use the technology within an organization to enhance business operations. For that a business roadmap is required. Essential aspects of a business roadmap include the analysis of technology fit, the development of a governance structure and strategy, engagement with representative business groups, and the development and implementation of strategies to encourage user adoption.

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Introduction

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The first part of this report talks a lot about Lotus Notes, even though Notes is only one of the collaboration products in the wider portfolio from Lotus Software. Why is this? Notes is the best known and most widely implemented offering from Lotus Software, and the decision that an organization makes about the go-forward role of Lotus Notes is a strategic decision point on which numerous follow-on technology decisions pivot from. Will an organization embrace Lotus Sametime for enterprise presence and instant messaging services? That depends in large part on whether Lotus Notes is a go-forward strategic play or not. Ditto for Lotus Quickr for ad hoc team collaboration, Lotus Connections for enterprise social software, and so on. What an organization decides about Lotus Notes largely determines numerous follow-on technology decisions.

The second part of this report tackles the issue of a roadmap with Lotus software. It argues strongly that organizations don't need better technical information from IBM about what IBM is planning to do with Lotus Notes and other Lotus software. Instead, organizations need to create their own business roadmap for using the collaboration software tools available to them to improve the way that business gets done. The technology is important, but it's only a small part of driving overall business success. Other (much) more important parts of the business roadmap are governance, business engagement, and user adoption strategies.

Overall, this report takes the stance that Lotus Notes and other Lotus products are well-suited to business collaboration, but the inherent technology capabilities must be well-managed by IT and business functions within an organization. Toward this end, a business roadmap to drive success is essential!

Independent Research

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The information provided in this research report is by necessity of a general nature, and its applicability to a specific business or organizational context is not guaranteed. Due professional care must be exercised in applying the ideas within this research report. All care has been invested in the preparation of this material, but the author accepts no responsibility for its application.

Strategic Context

Lotus Notes has been around for a long time. Since its release in 1989 it has always been viewed as a "different" piece of technology, loved by some people and reviled by others. It takes a different approach to information management and collaboration tasks, it looks different from the standard Microsoft offering which many people view as being "authoritatively correct", and it offers capability for being used so broadly across an organization that it can be put to use on many tasks, including tasks that it is not well-suited for.

So what do we do with Lotus Notes, and by implication, the other products from Lotus Software? Is there still life left in Lotus? Is it time to move to "greener pastures"? Are the new offerings from other vendors better suited to the information management and collaboration tasks that organizations are using Lotus Notes for? These are the questions addressed in this paper.

This report is not borne of mere academic interest. What to do about Lotus Notes and other software from IBM and Lotus are topics of intense interest to a number of clients of The Michael Sampson Company. Some of our largest clients are Lotus shops—they have made a prior strategic commitment to Lotus software, and have engaged with this author around whether to continue their strategic commitment to Lotus software, or move to something different. Advising these clients is part of the motivation in writing this paper.

This report is written with two audiences in mind:

- IT professionals who are tasked with examining the future of Lotus Notes and other Lotus software within their organizations.
- Business managers who are being petitioned for approval to migrate away from Notes.

Please note that the shorthand "Lotus Notes" or just "Notes" is used throughout this report to refer to two products from IBM—Lotus Domino Server (the server back-end) and Lotus Notes (the rich client front-end). When other products from Lotus Software are mentioned, correct product names will be used—eg, Lotus Quickr, Lotus Connections, etc.

Five Myths About Lotus Notes

There are many widely touted positions against Lotus Notes, usually from people who hate the product, or competitors who want organizations to drop kick Lotus Notes into the trash can. Before considering the go-forward role of Lotus Notes in your organization, let's review and evaluate five of these criticisms.

Lotus Notes is 20 Years Old, So Get Rid of It

Lotus Notes has been around for a long time; 2009 marked its 20th year in the market. First released in 1989 by Lotus, it was very expensive to buy, but did things that nothing else on the market could do—it truly was paradigm breaking in 1989. Lotus continued to develop the technology through until the IBM acquisition in 1995, at which point IBM took over. The cumulative number of licenses sold skyrocketed after the acquisition by IBM acquisition, with the current figure pegged at 150 million or so. What remains unknown is the number of these that are currently active; IBM does not publish this figure.

Competitors advocate that a 20-year old technology should be replaced with something more current. Consider the following points of response:

- Vendor stability is a tremendous benefit for organizations using any form of IT, not just collaboration technology. Knowing that your vendor of choice will be around next year, let alone next month, makes it much easier to plan a business strategy around the technology than when your vendor could disappear in an acquisition at any time. IBM isn't going away.

- The technology of Lotus Notes hasn't stood still for 20 years. Lotus and IBM have actively added features and capabilities during its 20-year life. Therefore it is unfair to imply that because Lotus Notes is 20 years old that it has remained unchanged for 20 years. It has been updated and modernized in light of wider events in the IT industry, as have many other products from other vendors.

- If 20-year old technologies should be eliminated merely because they have been around for at least 20 years, then Microsoft Word (1983), Microsoft PowerPoint (1984) and Microsoft Excel (1985) are all on the down-and-out path, along with Windows (1985).

Merely being a technology with a 20-year heritage doesn't mean that it is time to get rid of it.

IBM is Not Committed to Lotus Notes

A second argument against Lotus Notes is that IBM is not committed to supporting the platform. IBM itself fed this argument in 2003-2004, when it proposed a "two-lane highway" that would see the phasing out of Notes and Domino in favor of a new IBM Workplace product. For all its pronouncements however, after hearing the firestorm of criticism that came back from IBM customers combined with very weak market adoption, IBM shot the Workplace strategy. Lotus Notes lives on, and IBM continues to report increased license revenue from the Lotus brand.

Is IBM committed to Lotus Notes? Commitment is recognized more by reviewing past actions, and less by listening to promises of future intent. If we look back at what IBM has done with Lotus Notes, we can ascertain whether it has shown a commitment to the product.

- Lotus Notes has been under IBM's control for about ¾ of its life—about 15 years. During that time IBM has added new features and functions to the product, with a number of major version enhancements. The most recent release is 8.5.1, which extends a number of new fundamental technologies introduced in Version 8.0 with new Web development capabilities, better calendaring support, and more.

- IBM has responded to market threats to the Lotus Notes product, by extending its capability to meet new requirements and ideas. When it was proclaimed that "the web will kill Lotus Notes", IBM transformed Lotus Notes to support Web activities—such as serving content in Notes applications to Web browsers.

- IBM has a demonstrated track record of honoring customer investment in Lotus Notes. Unlike other vendors—and significant competitors such as Microsoft—current editions of Lotus Notes and Domino are backwards compatible, meaning that applications built on earlier versions of Lotus Notes can generally continue to run on newer editions. Equally, the upgrade process is usually "in-place", meaning that a whole new hardware infrastructure doesn't have to be created before upgrading the Notes or Domino software.

It would appear from the evidence cited that IBM is strongly committed to Lotus Notes, and the nature of its commitment bodes well for customers following both traditional and cloud-based deployment strategies.

IBM Lacks a Roadmap for Lotus Notes

The broader context of a "roadmap" will be discussed later in this paper, but for the purposes of our discussion here, does IBM have a technical roadmap for Lotus Notes? IBM has demonstrated its commitment to Lotus Notes in historical actions; can we expect that commitment to play forward as well?

Let's step back and ask what we mean by a technical roadmap, and then evaluate whether IBM should have such a roadmap for Lotus Notes. In general usage, the phrase "roadmap" when applied to a technology refers to the future intention of the vendor to support and enhance a given technology. If the vendor is planning on making major changes to the technical underpinnings, then roadmap announcements enable them to signal those changes to customers and business partners—the people outside of the vendor who use or support the technology on a day-to-day basis. Hence the point of a roadmap is to provide a communication device that the vendor can use to assure customers and other interested parties that the technical decisions the customer is making based on the technology will be supported by the vendor for a particular period of time. For example, if the vendor is planning on making fundamental architectural changes, then it's really helpful for customers to know this as soon as possible, in order that they can minimize development efforts that hinge off the soon-to-be-the-old-way of doing things.

In line with this explanation of a roadmap, what do we know about IBM's roadmap for Lotus Notes?

- IBM has publicly committed to a Version 10 of Lotus Notes. Given that IBM has generally released .0 (6.0, 7.0 and 8.0) and .5 (6.5 and 8.5) major versions, along with minor upgrades and maintenance releases (7.0.2, 8.0.1, 8.5.1), that means IBM is planning at least a 9.0, a 9.5, and a 10.0 release of Lotus Notes. That represents about 5 years of future commitment, which is a lot more than has been publicly promised by IBM's major competitors.

- IBM has been developing complementary and highly integrated products to Notes over the past decade. Lotus Sametime offers enterprise presence, instant messaging and telephony services. Lotus Quickr offers collaboration tools for ad-hoc team projects and group initiatives. Lotus Connections offers a suite of social software tools for business use— bookmark sharing, community development, editable shared web pages, and more. In some cases—Sametime for example—there is tight integration with Lotus Notes today, while in other cases—Quickr and Connections—there is room for much tighter integration. However, it is normal and natural for this tighter integration to play out over a period of years as multiple products mature side-by-side, and areas of complementariness become more clear.

- IBM has not committed to specific features and functions in upcoming editions of Lotus Notes. Part of this represents legal advice to limit what is publicly promised about specific initiatives so as to minimize legal ramifications if those forward-looking statements are changed for any reason in the future. Part of it also represents a caution about prematurely disclosing your hand to competitors. Note that such an approach is no different to the approach taken by IBM's major competitors.

- If we broaden our view away from IBM, other major competitors take a similar approach to their technical roadmaps. Microsoft only just announced the features and functions for SharePoint 2010, during its October 2009 conference in Las Vegas. What comes after that has not been disclosed; the world assumes that there will be a 2013 or 2014 release, but it hasn't been disclosed. A similar situation exists with Exchange Server too.

It would appear from the evidence cited that IBM does have a roadmap for Lotus Notes, even though specific upcoming features have not been publicly disclosed. And as we will discuss later in this paper, a technical roadmap cannot do the critical work within an organization to make a technology drive business success.

SharePoint Will "Solve All Your Problems"

Microsoft SharePoint is touted as the savior of the Lotus Notes customer. Any problems that you have with Lotus Notes will be resolved by switching vendors and technologies to Microsoft SharePoint!!

This author has written two books on using Microsoft SharePoint for collaboration—one published by Microsoft Press (Seamless Teamwork, seamlessteamwork.com), and one published by The Michael Sampson Company (SharePoint Roadmap for Collaboration, sharepointroadmap.com)—so the following summary statement comes from a position of expertise. If you have Lotus Notes and are experiencing problems with it, it's highly unlikely that shifting to Microsoft SharePoint will solve the problems you are experiencing.

- If you change the technology being used to support collaboration in your organization, without changing the governance strategy and human behaviors, you will merely recreate the same problems within the new technology. While you won't have a "Lotus Notes problem" anymore, you will have a "SharePoint problem".

- The technology of SharePoint is better than Lotus Notes in some areas, and poorer in others. We really can't do a SharePoint versus Lotus Notes comparison; many other products from both Microsoft and IBM have to be brought into the evaluation—Exchange and Office Communications Server from Microsoft, and Sametime, Connections and WebSphere Portal on the Lotus side.

- If you have a lot of Lotus Notes applications, it will cost your organization a huge amount of money to recreate those applications on the Microsoft stack. If you are merely recreating what you had previously, you have just at least doubled the cost and effort of doing what you are doing today, not to mention losing months (or years!) of time that could have been dedicated to more business relevant projects.

- SharePoint is often used only as a glorified file server, with check-in, check-out, and document versioning. Those are helpful capabilities, but if you have been using Lotus Notes for collaborative application development, it is a big come down.

- Recent research says that about half of SharePoint projects are failing. It is still very early days for this technology in organizations, and the awareness of how to use SharePoint well for business success is thinly understood and not widely dispersed when it is.

It would appear from the evidence that switching technologies to SharePoint will not necessarily make your organization any better off.

Notes Sucks, And It's All IBM's Fault

We have already stated that some people love Lotus Notes, and others hate it with a passion. How does one reconcile such polarized positions—and particularly who at fault for the hate?

Is IBM at fault? It would be IBM's fault if the product didn't do what it claimed to do, which is messaging and collaboration, or more fully email, task management, calendaring, discussion

Improving the Performance of Distributed Teams

databases, an application development environment for collaborative applications, workflow routing, and more. IBM releases patches and bug fixes, as do other vendors, as well as ongoing updates to add new and enhanced functionality, again as do other vendors. Since an appropriately trained individual can install and configure Lotus Notes to achieve "messaging and collaboration" outcomes, then generally speaking it is not IBM's fault when Lotus Notes fails within an organization.

Having said that, there are two areas where IBM is at fault.

1. The user interface of Lotus Notes is "different", and many users have been put off by that difference. IBM is at fault for not making a much bigger effort at explaining the benefits of the difference for end users. With the release of Version 8.0, Notes received a long overdue user interface upgrade, and is a significant improvement over earlier versions.

2. IBM is at fault for not doing enough to drive interest in Lotus Notes and its other products directly within the end user community. Most of the effort has been on selling to enterprise IT, with little corporate effort put towards engaging end users. As one example, you will be hard pressed to find an end user oriented book on Lotus Notes. IBM's recently conceived and orchestrated "Lotus Knows" campaign is an effort to kindle engagement with the end user community.

Is the IBM Business Partner at fault? IBM engages with some organizations directly, but most Lotus Notes business is carried out through the IBM Business Partner channel—that being third-party business partners who offer Notes and Domino consulting services. It is normally the business partner who holds the relationship with the customer, sells them on the concept of Notes and Domino, and installs, configures, and manages the servers and clients on an ongoing basis. They may also provide training services, to help the organization's people learn the product and how to use it effectively. If the business partner is skilled in what they do, Notes and Domino should technically operate to specification. It will route, receive and deliver email. It will enable people and resource scheduling. It will support threaded discussions. It will do replication of databases for offline access. So, it is probably not the business partner's fault, although it could be if Lotus Notes is put to uses that it is not optimized for. Which brings us to application developers.

Is the application developer at fault—whether they are from the customer organization or from a business partner firm? Being a collaborative applications development platform, Lotus Notes enable a software developer—or power user, depending on organizational governance choices—to build specific custom applications that meet the collaborative mandates of a team or division. There are Domino Servers all over the world filled with custom work routing applications, expense reporting applications, customer relationship management applications, product literature applications, and many more. People offering services in this area have to be well trained and experienced ... because the product is so flexible, and there are different ways of doing things, you can make a great job or a right royal stuff-up. But that's no different than with any other software development environment; if a developer gets the constructs and underlying logic wrong in a C++ project, it won't work to specification and the users will be most unhappy. Due to the rapid application development environment, Notes does have some redeeming factors over say C++, but nonetheless, if the underlying data model is wrong from the word go, it is expensive and time consuming to find redemption. Thus if developers throw together an application without appropriate care and attention to the data model, to data consistency, to user interface design, to system documentation, and to user documentation, yes, they are to blame for failed projects. If all of those items have been taken care of, and they have built a system that meets the expressed needs of the user, it is more difficult to lay blame on them.

Is the Lotus Notes IT administrator at fault? They could be. For example, if IT administrators do any of the following actions, then they are directly engendering hatred for Lotus Notes, even though these actions are not in actuality technology issues with Lotus Notes:

- Application updates are pushed out to users without any prior communication, notification, or revised training materials. The user is left to notice that something has changed—sometimes drastically—and has to figure out the new way for themselves.

- Older versions of the Lotus Notes client are kept around for years after their "best before" date. Organizations with Lotus Notes R5 are now 5 major versions behind the state of play; that's comparable to running Microsoft Office 98 as the standard office productivity suite and then having users complaining that "Office sucks" when later versions offer so much more capability.

- Taking an inflexible approach to hearing business user requirements, being unapproachable in demeanor and attitude, and refusing to engage with departments and users about how and where Lotus Notes can improve current work practices.

Is the customer organization at fault? Some organizations have had great success with Lotus Notes, in terms of developing applications to meet business opportunities. They have built a collection of custom databases that work well together, enable business teams to coordinate action, and provide the information and reporting that drives business results. These organizations prove that Notes and Domino can work well, and that therefore it is not "IBM's fault". All praise should go to the organization; it has been clear about the results it wanted, engaged appropriate people to make it happen, and then can reap the benefits.

And then there are others.

- They dabble in custom applications.

- They fund the original development of a collaboration application on Lotus Notes, but then are unwilling to pay for ongoing maintenance and upgrades. The application lanquishes.

- They don't demand documentation or show a willingness to pay for it.

- They are unclear about the results the want.

- They don't train people how to use Notes effectively.

- They don't understand the design intent of Notes and Domino and so try to put it to inappropriate uses. And they get a mess.

In such cases it is clearly the organization's fault ... and they will not achieve better outcomes with a migration to another collaboration platform without a corresponding change in the way they approach development projects. And if they do change their approach, they may not get any better outcomes with the new platform compared to re-starting with Lotus Notes.

Finally, is the user at fault? It could be. They may have experienced Lotus Notes in a previous organization, may have had a bad experience with it, and so may set their mind to make it not work in the new place. Or they may feel no involvement in the process of scoping out applications, when they actually have really good ideas that should be included. Finally, they may be offered no training or documentation and be expected to "pick it up" themselves. Under such circumstances, it is not surprising that they feel less than love toward the product. Other users love what it can do, have a good relationship with the IT people who are making it work, and see the results they are gaining.

It would appear from this discussion that hatred of Lotus Notes is most likely to be derived from poor governance decisions and usage of it by organizations. As such, there are some major implications:

- Choose your application developers carefully. Competence matters. A history of success is important. If you skimp to save a few dollars here and there, you are more likely to reap a disaster downstream.

- Use standard templates whenever possible. This minimizes the user adoption challenges faced by organizations, but more importantly on the development front, allows more resources to be focused on fewer standardized elements, thus improving consistency, design robustness, and lowering the maintenance costs of Lotus Notes.

- Before you ditch one product in favor of another, ensure you know why the current product failed. Unless you have a clear understanding of why and where it failed, you will repeat the same mistakes the next time.

- The required software development disciplines are no different from other development environments. Ensure you gain a clear understanding of the desired outcome and business results. Do the requirements definition and collection correctly. Look for similarities to other projects and leverage existing code. Scour the market for off-the-shelf alternatives. Document, document, document. Train, train, train.

- IBM needs to make a bigger deal calling out the customers that are experiencing outstanding success with Lotus Notes, and why. Sharing of customer success stories at conferences, in articles, in books, and through online web seminars is essential to setting a baseline of competence to encourage the replication of those success stories in other organizations.

Where a Technical Roadmap Fails: Driving Business Success

Technically oriented roadmaps from vendors can confirm technical choices and proposed courses of action by customers, but they cannot drive business success. No roadmap from IBM—or a roadmap from any other vendor for that matter—can become a magic wand to wave and have everything immediately right. That's the stuff that fairy tales are made of, not what happens in the real world.

We need to ask a fundamental question about the use of collaboration technology in our organizations: "What percentage of the success equation is the vendor's responsibility, and what percentage is our responsibility?" Or phrased another way: to what degree is our success in using the product that forms the basis of our collaboration initiatives able to be traced to the features and functions of the product, versus what we have used it for?

Your organization has to answer that question for your own internal initiatives and then act accordingly, but here's three independent perspectives:

- Jessica Lipnack and Jeffrey Stamps from NetAge (www.netage.com) pegged the vendor percentage at 10%, and the people and business factors at 90%. See their books from the mid-1990s for greater context, or Chapter 2 of SharePoint Roadmap for Collaboration (sharepointroadmap.com) for a breakdown of the 90% side of the equation.

- Todd Stephens states that the most a perfect implementation of a technology can do is to avoid failure. To drive success, many non-technology oriented activities will have to be

undertaken—such as business engagement, training, and developing communities of practice.

- IT academics used to trace a direct relationship between the use of a technology and the impact of that technology on a team, group or organization. Such direct relationship models are now widely discredited, with many intermediate variables—such as appropriate usage—coming into play between the technology and its outcomes.

Therefore, in light of the role of a technical roadmap, and in consideration of what a technical roadmap cannot achieve within an organization, what is your business roadmap with Lotus Notes and related Lotus products? Let's now turn our attention to this question.

Your Business Roadmap with Lotus

This report has argued that the technology of Lotus Notes is well supported by a vendor who is not going away. IBM has demonstrated its commitment to the technology for almost 15 years, and has publicly committed to support it through until at least a Version 10. Regardless of its pronouncements about future action with the technology, however, the real question that you have to answer is how you will use what's offered by IBM to support and enhance the work of your organization. The actual technology is but a very small part of the success equation with collaboration technology.

There are four aspects to developing a business roadmap for your organization with Lotus technology (see Figure 1):

1. **Technology Fit** … How well do the technology offerings from IBM support the current and anticipated information management and collaboration tasks of your organization?

2. **Governance** … How will your organization govern or steer the effective use of Lotus technologies? There are key people-related decisions that have to be made in this area.

3. **Business Engagement** … How do you understand the opportunities for leveraging Lotus technology to improve the way work gets done at your organization?

4. **User Adoption Strategies** … How will you encourage users to embrace new and more effective ways of working?

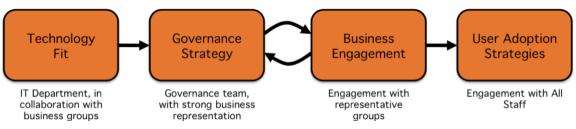*Figure 1. Your Business Roadmap with Lotus*

Let's look at each of these four parts in turn.

Technology Fit

As part of your wider information management strategy, the role for Lotus technologies should be clear. You will need to analyze how well various Lotus products support the processes and activities that are going on within your organization. Let's be clear that this is much more than being about Lotus Notes. IBM has developed some pretty innovative products that complement and enhance the core Notes and Domino offering:

- Lotus Quickr, for ad hoc team collaboration spaces.
- Lotus Connections, for social networking in business.
- Lotus Sametime, for presence, instant messaging and real-time communications.
- Lotus Symphony, a suite of office productivity applications.
- Various hosted and cloud-based services to provide an alternative or complement to in-house infrastructure.

This portfolio of Lotus products, combined with IBM WebSphere for portal and intranet applications, have strong technical credentials. You have to decide whether they are good enough for your requirements, and if not, whether migrating to another product or platform will make any difference.

When Does It Make Sense to Migrate?

This report has taken the view that Lotus Notes still offers strong opportunities for enhancing organizational collaboration. However, there are other products and platforms on the market. When does it make sense to migrate away from Lotus Notes, or any technology for that matter?

- When the technology is unreliable and unstable—and these problems can not be resolved by internal or external people—that's a strong signal that something else may be required.
- When the vendor stops supporting the technology through maintenance releases and major upgrades, or announces plans to do so.
- When you cannot find qualified people to run and support the technology for you, either as employees or via the business partner channel.
- When the ideal zone of applicability for a given technology is so diminished to be largely irrelevant as a consequence of carving off particular applications and addressing those through dedicated products. For example, shifting from a Notes-based customer relationship management (CRM) system to a CRM system from Microsoft, Salesforce or another vendor.
- When the cost to maintain the technology is greater than the cost to migrate to something else.
- When an alternative technology is demonstrably better able to support flexibility and agility in business operations, with a lower cost of ownership, an improved productivity profile for staff, and better integration with the rest of the business application stack being used within the organization.

In earlier parts of this paper, we have talked about how many of these points do not apply to Lotus Notes. As with any IT migration decision, you will need to do the due diligence work to

ensure that whatever technology you are contemplating migrating to is sufficiently capable to handle your current requirements, and sufficiently flexible to permit growth and change.

Coming Clean with Your Past

If your organization has been using Lotus Notes for a number of years—or maybe 10-15 years— then coming clean with past decisions about the use of the Notes technology is important to creating a go-forward business roadmap.

- If applications have been developed that have proven to be costly to maintain, then look for alternative ways of delivering that application today.
- If there has been a duplication of data across many applications and there are no authoritative lists for things like customers, products and employees, do the work now to resolve this poor usage.
- If you have a plethora of old databases lying around, that no one uses anymore and no one knows what they're even for, go through and archive old databases off the production environment.
- If poor architectural decisions are hampering the robustness and reliability of your Notes infrastructure, then develop a plan to overcome these historical decisions.
- If users have been turned off Lotus Notes through brusque Notes administrators and developers, then go back to the drawing board and map out how the interactions with business people could be improved.
- If documentation is lacking on key applications, write or develop it.

Coming clean with how your organization has used Lotus Notes in the past is essential to positioning it for greater and more effective use in the future, along with creating a foundation for effective use of related Lotus products.

Governance

Governance is focused on how you and your organization steer the technology you have embraced to effective use. It applies much more broadly than to Lotus Notes, but it does apply specifically to the use of Lotus Notes and other Lotus products as well. For example, if people are rebelling against the use of Lotus Notes, you have to separate out what are inherent technology limitations, and what portion of that is a reaction against governance and usage decisions. In other words, is it the technology's fault, or is it the way that it's being used in your organization?

- If the technology is at fault, perhaps a third-party tool will alleviate the problem.
- If the technology is at fault, and there is no third-party tool that will alleviate the problem, it's time to go back to the vendor and ask for input and direction.
- If it's a governance and usage decision, then you need to understand whether that's an explicit decision or an implicit one. If the decision is explicit, if your organization changes to a new technology platform, how likely is it that you will change the governance decision?

There are various governance stances that can result in an ineffective approach to using Lotus Notes. For example, if it's too hard to create a new database to carry out team work, that's a

governance decision—implicit or explicit—that could be holding the technology back and giving the technology a bad name. It's a people and process decision, not an inherent technology limitation.

There are a number of these governance themes that have to be decided in relation to Lotus Notes. In essence, these have nothing to do with the technology of Notes itself, but rather how your organization is going to embrace and use it. The following are five examples of key governance themes—and these are examples, not a definitive list:

- **Database Creation Rights** ... Who is permitted to create a new Notes database, for what reason, and with what approval method?

- **Database Closure Policy** ... What happens to Notes databases when the team has finished its project, or when the group has completed their discussion?

- **Template Development and Standardization** ... Will standard templates be used for creating new Notes databases, and who has a say into the design and development of these? What level of business engagement will be sought in relation to new database designs?

- **Third-Party Product Usage** ... Under what circumstances—if any—is it okay to use third-party products to enhance the technology of Lotus Notes? There are many third-party off-the-shelf products available; can they be used within your organization?

- **Ideal Usage of Lotus Notes** ... If your organization embraces Lotus Quickr and Lotus Connections in parallel with Lotus Notes, what is the ideal profile of usage for each of these tools? For a team wanting to run a new project, should they use a Notes database, a Quickr place, or one of the options in Connections? For a business unit wanting to enhance a business process, is Lotus Notes the place to look, or perhaps is Lotus Forms required? Getting clear on the demarcations between these products and their usage is essential to effective governance of the technology.

There is much more that should be said about the governance of Lotus Notes, but for the purposes of this paper, just know that the use of Lotus Notes can not be effective without effective governance.

Business Engagement

Business engagement is the process of discovering opportunities within your organization to help people do their work in better and enhanced ways. It's an unstructured or structured process where two different groups exchange insights and information about where there are opportunities for doing things better. A more formal definition is "*a journey of discovery where two or more different parties learn from each other as they work towards defining an outcome that is jointly meaningful to them both, or until they conclude that continuing the journey offers no value*" (from SharePoint Roadmap, p.119). Basically, the business groups will talk about how they do their work today, and where the opportunities for enhancement and improvement lies. The technology group will talk about the features and capabilities of Lotus Notes and related offerings, and how these can enable the seizing of current opportunities.

Engagement with business groups is an activity to become very good at! It's the primary activity that holds the secret for improving the way that your organization operates, leveraging the most appropriate technology available. Regardless of the specific technology your organization uses, engagement provides a process for combining technology capabilities with current business opportunities.

Changing the technology—getting rid of Lotus Notes for example, and putting something different in—will not eliminate the need to carry out business engagement activities. Consider: Your organization decides to get rid of Lotus Notes and replace it with Microsoft Exchange and SharePoint. Steps to accomplish this include:

- Deploying Exchange Server for email, calendaring, task and contact management. This means that people will be able to send emails, schedule meetings, plan and execute on tasks, and manage their contacts—just as they could with Lotus Notes. Apart from the underlying technology, a large hole in your bank account, and many months of technical work to go from one to the other, what's changed? Not much.

- Deploying SharePoint for team and organizational collaboration. But because SharePoint is a "platform" offering, rather than an out-of-the-box product, you will have to build collaborative applications to support the work of your organization. This will require months of planning, months of development, and loads of migration and training. Again, you've changed the underlying technology, but what's different? That depends on what you do with SharePoint in comparison to what you did with Lotus Notes.

- Some people will be delighted with the changes, and shake your hand vigorously. Other people—probably the majority—will bemoan the transition, say it's a waste of time, and tell you that "It's no wonder that IT doesn't matter if this is the best you can spend your time on".

In summary, even if you change the technology, you'll still have to do the business engagement activities with various groups of people at your organization. A change in the technology will not eliminate the need to do it. In fact, a change in the technology is likely to make the job even more overwhelming and complex, because so much will have to change. And finally, a technology change will make some engagement aspects extremely difficult, due to the fact that the new technology will lack support for some software capabilities that people have become so accustomed to that they are invisible in their importance, until they are taken away!

User Adoption Strategies

The final part of creating your business roadmap with Lotus is to develop your user adoption strategy. Whereas business engagement seeks to work with representative people and groups from across your organization, the development of user adoption strategies involves addressing how every person in your organization will be encouraged to change the way they work with the technology that is provided to them.

There are numerous user adoption strategies that can be applied to the effective use of Lotus Notes: narrative scenarios, stop doing-start doing patterns, easy first steps, training, "zero other options", and more. The key is to have a clear picture of how the change will benefit the end user, not just the organization.

For more on user adoption strategies for Lotus technologies, particularly Lotus Connections, see resources.michaelsampson.net/2009/05/lotusconnections-adoption.html.

Conclusion and Next Actions

Lotus Notes is not dead. IBM has actively supported it for the past 15 years, and has expressed public commitment for at least another 5 years of development efforts. However, regardless of what IBM announces about specific technical capabilities that will be delivered up to and beyond Version 10, organizations embracing Lotus technologies have a business roadmap to follow:

- **Technology Fit** ... Developing a clear understanding of where and how Lotus technologies support organizational work.

- **Governance** ... Making effective decisions about the use of the technology within business operations, so as to set the framework in which employees can use Lotus technologies.

- **Business Engagement** ... The process of understanding how business is carried out today, and where and how Lotus technologies can be applied to enhance these.

- **User Adoption Strategies** ... Helping end users improve the way they work, by switching from ineffective ways of working towards more effective approaches.

In conclusion, perhaps the greatest need that any organization using Lotus Notes requires going forward is a strong internal leader to champion the effective use of the technology throughout business operations. Most people don't care what they use, but a vocal minority will argue against whatever is put in place. For this reason, a strong leader to counteract this undercurrent is essential if the technology is going to be used effectively. If such a leader cannot be found within your organization, then regardless of the historical prowess of the technology and the future plans from IBM, Lotus Notes will be left to die a slow and painful death.

About The Michael Sampson Company Limited

The Michael Sampson Company is a Collaboration Strategy firm focused on improving the performance of distributed teams. We advise end-user organizations on collaboration strategies. Part of our mandate is to prepare vendor-independent research reports for our organizational clients. All of our research is internally funded, which means that no vendor has requested the authoring of our reports, nor underwritten the research. The analysis is impartial, and not influenced by vendor agendas. These reports have been prepared to assist organizations in making wise decisions about improving the performance of distributed teams.

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