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IBM Lotus Redefines the User Side of Business Systems

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Management Summary

As technology has accelerated or done away with many old business routines, most of us spend more time dealing with multiple anomalous situations – some minor but all seemingly urgent. What we need is *aplomb* – the ability to seem as if all is going well when you are frantically thinking of how to remedy an unexpected situation. Aplomb is not the same as *bluster*, which can make you just look stupid. It cannot be achieved by *narrowing your focus of interest*, which can make you appear ignorant. If you try to remedy your panic by *delegation*, you seem incompetent, out-of-the-loop and perhaps expendable. If they manufactured aplomb as tablets or in liquid form, we would all have large bottles of it stashed nearby for easy consumption.

Luckily, in many cases, tools, backed up by a *callable pool of expertise*, can foster aplomb. The telephone connected us to experts and the typewriter made correspondence and reports look more polished. Spell-check has made us look still more competent. However, these days, workers need much more. They need a full range of communication, presentation tools, and information. More exactingly, each person needs to be able to customize their use of technology to fit their priorities and working style. Most importantly, they need to access information in the context of the work they have to do – something that changes over time. Therefore, the technology assist must be comprehensively helpful and, at the same time, unobtrusive.

IBM's Lotus Software has launched a broad array of products and services that can support the aplomb that is prerequisite to doing ones job "right." These include a full array of communications – all available on desktop, laptop, PDA, or cell phone. Having the ability to invoke a Web conference to use the camera on your computer or device to show someone how to do something or exactly what you mean can keep discussions productive when they might otherwise flounder. Social software elements have evolved with new social niceties – like an organizational map (in *IBM Atlas for Lotus Connections*) that lets you find an intermediary in one of your communities to introduce you to someone you want to meet. A new *Lotus Mashups* capability gives users a way to create and amalgamate widgets, while a similar but more potent *Composite Applications Editor* lets IT staff do the same kind of amalgamation of more sensitive corporate applications and information. On the *WebSphere Portal* used by Notes, tear-away Portlets can be repositioned at will, letting you work with your desktop as if it were a physical surface.

Because Lotus is now built on the open source *Eclipse* rich client platform, and features open APIs, it is extensible not just by IBM but by a variety of partners, including those supplying industry-specific applications, such as SAP, to expose application functionality on the *Lotus Notes* client. These capabilities are available as on-premises software, via an appliance, or as a service. They can be delivered by IBM, through business partners, or, later this year, through IBM's new *Bluehouse* initiative. All of this Lotus news supports a more interactive culture in large organizations. For more details, read on.

IBM Lotus Collaborative Strategy

Last year, Lotus reorganized and augmented its products into a selection of collaborative capabilities built on *Lotus Expeditor* (see Exhibit 1 at the right). This year, Lotus adds more capabilities and also offers some new ways to acquire the capabilities you need in bundles, via an appliance or as SaaS[1]. All of these actions support many ways to optimize how to do business, both within an organization and with partners and customers. First, let us look at what is new.

Lotus Notes

Lotus Notes is a messaging, calendaring, and collaborative applications solution. That said, what Lotus Notes comprises is considerably flexible. IBM sees the sending and receiving of email as, in many cases, a catalyst of other tasks. It has accessorized the Notes client with the tools needed to get a number of things done without switching to a different application context. In 8.0.1, a *Live Text* capability allows Lotus Notes to be configured to recognize, by underlining, to show elements which are linked to widgets and other enrichments, all invokable by a right click. This adds yet another dimension of capability to the user side of business systems.

The basic offering includes *Lotus Symphony*, *Lotus Domino Server*, and *Sametime* instant messaging and chat.[2] It can be extended, for a fee, with *Lotus Connections*, *Lotus Quickr*[3], and many other Lotus products. Lotus Notes is available on all IBM and many other server platforms and on several Linux distributions, including *Novell* and *Red Hat*. In the second half of 2008, *Ubuntu* and Apple's *Mac* client platforms will be supported.

The basic Lotus Notes client interface was reworked in 2007. It combines all of the digital elements of the workspace on a portal. It features a Web 2.0 look and a sidebar of clickable icons. User capabilities include drag-and-drop configurability of the layout of tools – not just a choice of background and graphic style – to fit the way a user works. He or she can add what is needed and feature what is important. For mobile use, the Lotus Notes client can be accessed on a

Exhibit 1 – Lotus Expeditor

Lotus Expeditor is now the foundation of all Lotus elements, and the vehicle for proliferation of new capabilities in the future. Based on open source Eclipse's *Rich Client Platform,* Expeditor is the not-so-secret sauce that lets all elements integrate together cleanly. It is the common grounds for creating and aggregating all kinds of functionality. Many IBM business partners are using this framework to integrate applications, industry-specific information feeds, and other accessories that make Lotus Notes into many kinds of a killer business tool.

Blackberry or mobile phone. Users can work offline and resynch on reconnect.

The Notes 8.0.1 client can also link to Industry applications. As an example, recently SAP and IBM collaborated on a project called *Atlantic*, to develop software to integrate *Lotus Notes* and *SAP Business Suite* software. SAP workflows, analytics, and reports are presented in Lotus Notes according to Notes-defined roles. The result is a product that combines collaboration with the management of business processes in a way that leverages the obvious synergies between the two. This is an example of what can be done with the *Composite Application Editor* and Lotus Notes' runtime capabilities to increase business productivity.

A lighter form of composability has been given to the Notes user in the form of the *Lotus Notes Widget* mashup function.[4] Lotus Notes now hosts a library of widgets, to which commercial widgets can be added. Widgets can be emailed. Users can mash these up to create useful information. This capability is familiar to most of us in mashups with *Google Maps*, but there are many other possible ways to use Widgets to enhance workflows.

Lotus Sametime

Sametime is a key component of IBM's Unified Communications platform, also known as UC^2. It integrates with a wide variety of PBXs, and continues to expand and prosper as a popular business platform for instant messaging and chat, going well beyond the installed Lotus customer base. In 2007, almost a third of the new customers for Sametime were *Microsoft Exchange*

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[1] Software as a Service.

[2] Domino and Sametime are also available as standalone commercial products. Lotus Symphony is also available as a standalone **free** version.

[3] The *Entry Edition* of *Lotus Quickr* is included with the Notes 8.0.1 client.

[4] For more on IBM's larger Mashup strategy, see the Lotus Mashups section, later in this report.

shops, not Notes.

Recently, Sametime has added group chat and the ability to broadcast, increasing the dimensions of sharing beyond a linear one-to-one. Later this year, Lotus Sametime will include click-to-call capabilities outside the organizational wall for getter collaboration a customer's partners.

Sametime integration with the Web conferencing, desktop sharing, and event hosting services of *Unyte*[5] is almost complete, and the *Sametime Unyte* product should be available this quarter. Integration of Sametime and Unyte (more details follow) gives business users the ability to text, speak, and share images within the context of their desktop.

New agreements with Ericsson, NEC, and Nortel will expand the capabilities offered on their communications equipment to include Sametime. Later this year, Lotus Sametime will be offered by other vendors.

- Cisco will offer a rebranded Lotus Sametime through its *UC Advanced Specialized* partner channel.
- Nokia will sell Sametime as part of its *Enterprise Unified Communications*.
- Carestream, a medical imaging software vendor, is integrating SameTime into its solution to speed diagnosis.

These are examples of how integrating traditional productivity solutions with operational workflows in the context of devices we carry with us improves, not just the efficiency, but also the effectiveness of business.

Lotus Symphony

Lotus Symphony was launched in the summer of 2007 as a separate free offering of basic office productivity capabilities based on the *Open Document Format (ODF)*. Lotus Symphony is available in 24 languages. There have been over four hundred thousand downloads in the last few months. As a Web based app, *Lotus Symphony* can update functionality on a frequent basis. And, if you need help, Lotus Symphony boot camps are run all over the world.

Since its launch, customers have asked for a development capability to let them extend the functionality and interactive nature of documents. In the Beta 4 upgrade, Lotus Symphony makes

documents interactive[6] – for instance, inventory information can be pulled into a spreadsheet for automatic currency. Plug-ins are also available for *Sametime Unyte Meeting*, *Sametime Unyte Share,* and *IBM WebSphere Translation Server,* the latter a module that provides on-the-fly translation of Lotus Symphony-generated content. This is an aplomb-builder whose value is obvious to anyone who needs an instant basic facility in a variety of languages.

Lotus Domino

Lotus Domino is an e-mail server – but its scalable engine has been used by many partners to add application functionality that ranges from collaboration, project management, and industry-specific workflows for document management, HR functions, and CRM. The latest release of Lotus Domino features a 30% reduction in I/O, and a 35% reduction in CPU usage. Anti-spam and anti-virus are now included. Saving attachments centrally and automatic de-duping now reduce storage requirements, bringing its costs, according to IBM, to under $4/user/month.

In Lotus Domino 8.0.1, *Lotus Notes Traveler*[7] push email for mobile devices will be available at no extra charge to Lotus Notes users. *Traveler* uses AJAX to support a good user experience. In the second half of 2008, Lotus Domino Designer 8.5 will incorporate AJAX, Cascading Style Sheets (CSS), and RSS and ATOM feeds. An IBM *Lotus Protector for Mail Security* appliance[8], containing anti-virus and anti-spam applications, will also be available.

WebSphere Portal

WebSphere Portal is the foundation for portal applications and services. It offers accelerators for particular industry functions. It is the means by which Lotus Notes is presented, but there are many other customers for WebSphere portal that do not use Lotus Notes. Now WebSphere Portal will feature tear-away (repositionable) portlets, and comes with *Composite Application Editor.*

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[5] Unyte is the new incarnation of the Web conferencing services that IBM acquired with Web Dialog in August 2007.

[6] This is a pull, as contrasted with the *Lotus Notes Live Text* push (click).

[7] Lotus Notes Traveler can also push attachments, calendar, contacts, personal journals, and other productivity artifacts to *Microsoft Windows* mobile devices as desired. Such flexibility is needed where connectivity and bandwidth present challenges.

[8] This was developed by IBM Internet Security Systems.

Lotus Mashups

Mashups are a presentation-side strategy used to deliver the right information in front of the right people at the right time. The bulk of this strategy involves the business user, whose definition of "right" is key to mashup effectiveness. The Lotus Mashups capabilities into the Notes Client lets end users combine widgets and gadgets from many sources[9]. IBM also offers two other elements to accessorize a mashup strategy to meet additional organizational needs for security and control.

InfoSphere Mashup Hub

While even the lightweight *Lotus Notes Widgets* feature authentication and authorization, enterprise information often needs more specific control of who can see what. *InfoSphere Mashup Hub*, now just entering Beta, is a vehicle for accessing feeds of current, reliable corporate information from across the enterprise. It can transform information ad push new feeds, usually to a catalog from which they can be called as a service.

WebSphere sMash

sMash, short for *Secure Mashups*, has been open sourced with IBM as part of its efforts (the development of a widget standard is another) to make mash-ups more suitable for business use. sMash provides a way to encapsulate untrusted widgets in separate runtimes and to access them as services via a proxying mode. It is based on a number of popular dynamic scripting languages (like *PHP*, *DOJO*, and *Groovy*). This protects enterprise systems from yet another opportunistic invasion vector.

Lotus Connections

Lotus Connections[10] was launched last summer as social software targeted strictly at business and its requirements for security and auditability. The capabilities available at launch were not just available in Lotus Notes, but embeddable in other applications, including industry applications and *Microsoft Office*. One third of new social software customers in 2007 were *Microsoft Outlook* shops.

In response to customer feedback, Lotus Connections has added a home page to bring together the connections elements that previously had appeared as separate tabs. A new element, called *IBM Atlas for Lotus Connections,* visualizes the communities, profiles, and connections. Atlas visualizes a path between you and the stranger you might want to talk to – something that, by its nature, identifies go-betweens who can make the introduction. Ratings and comments can now be added to *Dogears* and to the documents posted in *Community* and *Activity* spaces. The ability to tag objectionable content has also been added. The nature of these changes reflects how Lotus Connections customers have used it to support business culture. A more explicit example of this is the IBM Beta of *Lotus Notes Beehive*.

Beehive, an expansion of Lotus Connections Profiles, is an opt-in opportunity to enrich your profile with photos, recipes and other forms of personalization that make people more approachable. "We've seen that Beehive enhances social capital in ways that we couldn't have predicted a year ago", says Sandra Kogan, User Experience Professional at Lotus Software, IBM Software Group. She added, "Because we're a large company and work with colleagues, customers and partners around the globe, we need a way to get to know our co-workers in more personal ways. We can't invite them for coffee, take a walk, shoot a few hoops because, in some cases, people are non-colocated. With Beehive, we know enough about each other in order to have an emotional sense of who we can approach, who we can pose questions to and who's most willing to answer questions. This is not so unlike decorating your office or cube with personal photos, favorite artwork, awards, toys, gadgets, workout gear on the floor – when someone enters your office they get a sense of who you are from seeing your office."

One senior exec said that he's a "walk the hall" type of guy who likes to chit chat with people so he likes to "walk the halls" of Beehive to get a sense of the what's going on in the company – "what's the pulse of the org?" He can see firsthand what people are talking about, what their concerns are. It's highly beneficial for corporate culture and helps build the IBM Global team. People report feeling more connected to their teams. In the long run, the data may show that this results in better efficiency – teams that know each other better can do better work together."

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[9] IBM's partnership with Google gives full access to Google gadgets and will drive development in this area).

[10] For more information about Lotus Connections, see *The Clipper Group Captain's Log* entitled *Lotus Connections Reinvigorates the Community of Business*, dated June 8, 2007, and available at http://www.clipper.com/research/TCG2007268R.pdf.

How Lotus Elements Enhance Corporate Culture

The blizzard of capabilities described above nets out to a few interesting trends that change the basics of how business can and probably should be done.

Deft Use of Synchronous and Asynchronous Communications

Business people can choose wisely from many more forms of connectivity that include both one-to-one and one-to-many capabilities. For the negotiation of ongoing relationships where beginnings need to be done right, asynchronous modes, like Instant Messaging and e-mail, work well. These are useful for discussions where each party wants to think before they speak, without communicating pauses that may or may not be meaningful. The text nature of these forms also mitigates regional and foreign accents.

By contrast, the synchroneity of mobile telephones and Web conferencing supports more freewheeling discussion and a quicker close of deals and business. They support closer relationships with customers and, when the resources are properly in place, better support. The addition of one-to-many communications, and the social vehicles provided by Lotus Connections' *Communities* and *Activities* let all stakeholders participate more fully in the organization in very targeted ways. The integration of presence and the ability to set levels of engagement allow larger organizations to support a greater degree of familiarity without wasting people's time. In short, Lotus supports effective and opportunistic communication.

Moving Beyond the Trees of Hierarchy to a Mesh of Connectivity

Research has shown that trees, through their roots, "collaborate" with each other as well as with the bacteria that surround them. Nature is not as entirely predatory as it has been described. The same is true of organizations. Businesses are moving from a focus of highly-prescribed groupings (called *departments* and *business units*) to a more opportunistic flexible grouping of whatever is needed to support a customer or initiative. Due in part to an aversion to the risk posed by casual organizational expansion, projects more and more often include external partners, more components, and more hand-offs to be negotiated successfully. This frequent crossing of institutional boundaries requires technology platforms that have security

and access controls[11] that make these multi-territorial efforts safe for all parties.

Leveraging Expertise More Widely

User-generated content may not be just a consumer phenomenon. Broadcasting and multi-way chat not only foster group collaboration, but also make informal training – and sharable training elements – much less costly to deliver. Perhaps granular ad-hoc training can become a part of normal business life to be accessed as time becomes available, and not an intrusive event. Of course, this must be done in a controlled manner. Ms. Kogan says that between IBM's Business Conduct Guidelines and the informal self-governance of the community, there have been no issues with user-generated content reported.

The Power of an Employee to Redefine His or Her Value Increases

The employee as an anchored cog ignorant of the greater organizational whole has never been a useful paradigm. Mashups and social software allow all employees, not only to do their jobs better, but to be better informed about the organization in which they work – and of how and where they can seek to add value. Business controls on incoming and outgoing process streams, management dashboards, and the many forms of communication now available may reduce the need for overt command-and-control meetings. Kogan articulates it this way: "In terms of building loyalty, the suite of social software tools crosses distance, hierarchies and makes available to an employee a lot of options for collaboration, learning, growth and friendship. Employees therefore can play many different roles in the organization starting with their 'day job' and the group that they report to, but with the availability of these new tools, they can join communities of interest, create their own, share their special skills and talents in new ways. This helps build loyalty and improves the governance. People are not only accountable to 'the company' but to their peers and communities as well."

Politeness Is Even More Important

The need for politeness in business operations will only increase as we work with more and more people we do not know. The *Lotus Notes ATLAS* support of arbitrated introductions, and the inclusion of presence in all communication modes makes this highly-connected mode of

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[11] In some industries, auditability is a base-line requirement.

business operations both less and more intrusive than it otherwise would be. Lotus Connections customers have been quick to seek more support for forms of politeness that can make the productivity of this new business intimacy more bearable, particularly for those for whom it is a reach.

Like the smearing of flour and butter that is the basis of a good sauce, Lotus Notes offerings have now reached a completeness and integration that can support a new level of business effectiveness. The components of this new completeness are delivered in three different ways.

Delivery modes

Traditional Installed Software

This is the cheapest form for large-scale computing. While direct sales are focused on very large enterprises, the gamut of businesses from large to small is also served by thousands of business partners around the world who stand ready to offer Lotus Notes elements as services, often integrated with their own or industry-specific applications.

Lotus Foundations Family

This entirely new product line accessorized Lotus software with an appliance to deliver it – but not just any appliance. The *Nitix* appliance comes to IBM with the recent acquisition of Net Integration Technologies, a company firmly focused on the small end of the SMB market. Its infrastructure is purpose-built for small businesses with no IT skills. The Nitix product takes just half an hour to install, and adding more applications is similarly swift. The *Nano* server is so compact it can fit in a 15" x 18" manila envelope, and the larger version is a small, under-desk-sized tower. Both include an autonomic engine that automates both backup and recovery, as well as an automated response to viruses and other degradations of the system.

The initial components of Lotus Foundation will include:

- Lotus Mail and Domino Collaboration platform
- File Management
- Directory Services
- Firewall
- Back-up and Recovery capabilities
- Lotus Symphony
- Add-on Business Applications

- More servers can be added to support more users, as needed.
- More Lotus offerings will be added to the Foundation offering, in response to customer demands.

Software as a Service

Lotus Symphony was IBM's first entry into software as a service (SaaS). Now *Bluehouse*, newly in Beta, looks to expand Lotus' SaaS offering beyond the classic office productivity elements. While it would be premature to evaluate such an early offering, it is a step in a very interesting direction. More information about the rapidly-evolving offering is available on the IBM Website.

Conclusion

Earlier this year at *Lotusphere*, Lotus Software launched new development that support and further several workplace trends. Between their comprehensive nature and the extensibility provided by the Expeditor platform, they permit a business to optimize more fully how and where business is done, and how the communities and ecosystems of business are supported.

These Lotus developments are more than just a matter of better tools. They let you think more flexibly about how your business could operate with a specificity that makes such thought actionable, while at the same time giving the capabilities needed to build a more supportive business culture. The tools are needed to support the volume of business in the good times, but it is the quality of business culture that keeps a business viable in difficult times. Now is the time to leverage all your capabilities – and IBM Lotus gives you many ways to do so.

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