

A Web 2.0 consultancy streamlines collaborative proposal writing and document management with IBM Lotus Quickr



“Web 2.0” represents a new era in computing in which the Web is used as a delivery platform to bring people together in interactions that generate value. A recent start-up, Trovus was founded on observations of how the Web is changing in this way and the assumption that what happens in the consumer world usually flows to the business world a short time later.

Having seen the revolution in the consumer space around Web 2.0, the founders considered how the new technologies and behaviors would impact the enterprise. And as they considered related business opportunities, they saw a wide-open field around helping companies address the cultural issues involved in leveraging Web 2.0 capabilities to advance their business objectives. Thus was born this young consulting firm that provides services to companies who want to extract maximum value from the Web for business advantage.

Business relationships can be strengthened via the Web

Jon Mell, sales and marketing director for Trovus, explains: “We see Web 2.0 as being about relationships. Web 1.0 was about putting out lots of information, some of it quite sophisticated and

Overview

■ **Challenge**

Eliminate document management bottlenecks and foster collaboration among staff and with clients while maintaining a virtual office operation to hold down costs

■ **Solution**

IBM® Lotus® Quickr™ supplants e-mail for collaborative document creation and management with version control

■ **Key Benefits**

- *Staff can co-author proposals faster and more effectively while leveraging input from all team members*
- *Clients can be made part of the proposal process while gaining insight into a new way of working*
- *The quality of proposals has improved, and co-development with clients increases likelihood of closing the deal*
- *Integration of Lotus Quickr with popular desktop software allows users to continue working with the tools they know*

supported by clever backend integration, but confined to information available through people/computer interactions. By contrast, Web 2.0 involves people-to-people interactions.”

When Trovus engages with its clients, it asks about the relationships that are important to them and how those relationships might be improved through use of the Web. For example, does the client need to close on a higher percentage of new prospects? Does it need to improve customer satisfaction? Does it need to increase staff retention, or to extract business value out of the alumni network of people who have left the company? “Whereas a concern in the 90s was about the cost of relationship management,” says Mell, “Web 2.0 is about relationship management in its own right.”

Business conducted through documents needs a good way of managing them

As a consulting organization, Trovus does much of its work and communicates with its clients through documents and presentations. In particular, proposals are key for this small, young company that is breaking new ground. Each requires careful preparation involving successive iterations with input from multiple contributors, and everyone is expected to review a proposal before it

goes out. Without a brick-and-mortar office, Trovus needs a way to collaborate and review documents quickly to ensure that each team member’s input is taken into account and that the document meets the company’s high quality standards.

Through experience, the company found that e-mailing attachments was cumbersome, confusing and time-consuming. For example, when an e-mail with a document attached was sent to two people, they would return edits and comments on their own copies, which then had to be aggregated in a new draft before review by anyone else. If two versions of a document were created by different contributors, these had to be merged. There was no way to be sure the team was looking at the most recent iteration because all versions resided only in e-mail attachments shooting back and forth between various contributors. And there was no easy way to roll back just a selected few of the edits to an earlier version based on disagreements.

“Our document management system was our ‘Sent’ folders,” says Mell, “and even at the beginning when there were only a few of us, we ended up

with enormous revision fragmentation.” Further complicating matters, there was no single place where the Trovus team could see all the documents relating to a single client or project.

Being an ambitious organization, Trovus wanted to grow and realized it would be in big trouble as it scaled up its number of employees. Trovus needed to simplify and accelerate internal collaboration within its virtual office environment, be able to collaborate online with clients, and demonstrate to clients a technology it could recommend to them based on shared experience.

Trovus seeks optimal collaboration and document management solution

As it set out to purchase the best solution for its needs, Trovus laid down the key criteria. First, the solution had to be Web-based—most importantly because Trovus wanted to use the Web in the way it was advocating the Web should be used. Being Web-based would also take care of back-ups: if a laptop had to be reformatted, there would be no worry about saving all the documents because they would be on a server. Second, the solution had to integrate easily with Microsoft® Outlook® and Exchange and Microsoft Office without requiring special technical skills. Finally, it had to be easy for the end users to

adopt without requiring them to learn new tools, comfortably embracing current ways of working familiar to everyone.

As part of its search process, Trovus considered MediaWiki, a free, light-weight open source platform, but it felt it needed the full formatting and control functionality of Microsoft Office. It then considered Microsoft SharePoint. Trovus uses Microsoft Exchange hosted by a third party for its messaging solution, and it was being offered Microsoft SharePoint by the third party as well on a hosted basis. "But to our surprise," says Mell, "we found that the IBM Lotus Quickr solution integrated with Microsoft Office much better than did Microsoft's own SharePoint, with better interfacing and ease of use." So Trovus purchased Lotus Quickr and deployed it on-site.

Lotus Quickr changes things for the better

Trovus was able to implement the Lotus Quickr software quickly and easily. "This was important to us," says Mell. "We don't have an IT department, and everything else we do is based on software as a service. We're not used to

having to deal with IT, but apart from one or two configuration changes we really just did a straight departmental out-of-the-box install—we didn't change anything. It's been running now for a year and we haven't touched it."

Simple installation meant that the system was running within a few hours of downloading the software. All documents are now accessed through the Web. Users do not need to install any additional software, and new employees can be brought up to speed quickly as they come on board.

Since deploying Lotus Quickr, many things at Trovus have changed for the better. For example, "If you look at my inbox now compared to before, the size has shrunk dramatically," says Mell. "We don't send documents around in e-mail anymore so I don't have to sit waiting for a 10 megabyte document to download. I know where it is, and I've already got a copy of it." Additionally, version control issues have gone away.

Trovus makes heavy use of the Lotus Quickr document libraries, with multiple libraries for client documents, all-hands documents that educate staff, meeting

minutes, and financial spreadsheets. Because they are able to store rich media, the libraries can house PowerPoint presentations, spreadsheets and other document types. Users also take advantage of the Lotus Quickr Wiki feature to kick ideas around before putting them into a document.

The ease-of-use of Lotus Quickr facilitates ready adoption. Trovus has been able to say to its users: "Your documents are in Quickr, don't e-mail them to each other," and by and large everyone has come on board. Ever attuned to the cultural issues, Mell observes about user behavior in general that: "Half the people will ignore such mandates and continue to e-mail attachments to each other if they want to, so you have to make it as easy as possible for them to actually use the tools you put in front of them. The fact that you don't have to download any other software with Lotus Quickr really helps with getting people to use it," as does being able to post and access content in Quickr from favorite applications like Microsoft Outlook and Office, Internet

Explorer or Firefox. These advantages are especially important when extending access to an array of external users such as Trovus clients.

Faster, better proposals may even involve client co-authors

The ability to write proposals faster and better while leveraging input from all contributors has had by far the most value for Trovus. The iterations happen in Lotus Quickr where all contributors can see them, focus on the latest version, and pool their edits efficiently to reach the final draft in record time. And now Trovus has begun taking the innovative next step of involving clients in helping to create their own proposals.

Mell explains, "We were doing a proposal to help a client make its Web site more valuable and improve its Google rankings. As we were writing it, we said to ourselves, 'Why should we e-mail a proposal to this client? Why don't we just provide a login to our Lotus Quickr server and ask the client to join us in drafting the proposal.'"

Mell is quick to point out that this arrangement wouldn't be suitable in all cases and is only for clients that already enjoy a close working relationship with Trovus. But the company has been quite successful with this approach to date. Instead of sending a proposal to a client via e-mail and waiting for an e-mail response to come back saying things like: "... on page 3, I don't like this, on page 7 I don't like that, on page 10 can you do this...", the client is invited to change or augment the draft to its liking. This way of interacting is far more efficient, resulting in fewer iterations to arrive at a proposal that pleases the client. Because there is version control, Trovus can see the changes and easily roll back any it can't agree to.

This approach has yielded three important results. First, the client tends to be very impressed with how open Trovus is in partnering with them. Second, the client is much more likely to approve a proposal that it has had a hand in

writing. And finally, a client has so appreciated the convenience of working this way in Lotus Quickr that it wanted to buy Lotus Quickr for itself, resulting in a product sale. Additionally, co-authoring the proposal strengthens the consultant/client relationship while demonstrating the way of relating that Trovus seeks to promote. "By using tools such as Lotus Quickr internally and with our clients," says Mell, "Trovus lives and breathes the strategies it was founded on to demonstrate a concrete example of the business benefits possible with Web 2.0."

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Second-generation Web application gives multiple benefits

Lotus Quickr is a second-generation Web application based on several attributes, not the least of which is that, as Mell observes, "The more people who use it, the better it gets." The more information and content people put into a shared Lotus Quickr team space, the more valuable it becomes as a resource. Moreover, because it delivers content via the Web, users can access the documents they are authorized to see at any time, from anywhere. Documents don't get lost in people's mail files, and they are protected from local hard drive failures. Also important is the natural way of working Lotus Quickr supports by enabling users to keep working within their familiar content creation tools and bringing content and collaboration together in one place.

In addition to the efficiency gains due to document version control and speedier reviews, Mell feels the increased clarity around document versions and their

edits has improved the quality of Trovus proposals. Though it is too soon to generalize, it is hoped that proposals jointly developed with clients will help close more business as well as open minds about new ways of collaborating. Lotus Quickr helps make Trovus a more appealing environment for the younger workers the company is keen to recruit, who are pleasantly surprised to learn Trovus uses Web 2.0 technology to manage its documents. And as Trovus expands, this Web-based tool that requires virtually no training will make it easy to bring new people onboard and get them contributing quickly.

Social computing applied to strategic relationships will win big

Going forward, Trovus has just started to evaluate the Activities component of IBM Lotus Connections as a tool for managing its projects and sales. Based on its impressions as a beta participant for Lotus Connections 2 plus the

responses of analysts and the market, Trovus considers Lotus Connections the dominant contender for enterprise social software and of potential interest to many of its clients.

Looking at the future of social computing in business environments, Mell forecasts a typical pendulum effect as initial skepticism swings towards overly inflated expectations and then settles in the middle with a realistic view. He sees social computing as making businesses more agile as they are able to ramp up partnerships quickly for skills needed to meet fluctuating customer demand.

"Companies that can tie social computing to traditional corporate objectives such as generating more sales leads or winning more business or securing customer loyalty will be the big winners," says Mell. "The key to extracting the most business value will be in focusing on particular relationships and how social computing can enhance and leverage these relationships to achieve business goals."



For more information

For more information on IBM Lotus Quickr and IBM Lotus Connections, please contact your IBM sales representative or IBM Business Partner, or visit: ibm.com/software/lotus/

For more information on Trovus, visit: www.trovus.co.uk

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