INV110:
The Lotus Software Strategy for Team Collaboration and Document Management

The small print

This presentation provides a description of IBM's roadmap for document management and team collaboration.

The material is directional in nature and does not imply any product plan commitment on the part of IBM.

Plans are subject to change at any time without notice.

Lotus

Lotusphere 2007

Agenda

Business and market trends

IBM Lotus® Quickr™ overview

Relationship between Lotus Quickr
and other products in our portfolio

Benefits of Lotus Quickr

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Enterprises need to adapt to a globally connected world

§ Teams span the globe

- 4 Extended enterprises and strategic partnerships
- 4 Mergers and acquisitions
- 4 Outsourcing

§ Teams are fluid

- 4 Changing from project to project
- 4 Crossing organizational boundaries

"WPP...looked at all its employees... as a vast pool of individual specialists who could be **assembled horizontally into collaborative teams**, depending on the unique demands of any given project. And that team would then become **a de facto new company**..."

Thomas L. Friedman, The World is Flat

Management models of the future will need to contend...with how to orchestrate a **complex and changing network** of individuals within and outside the boundaries that previously defined "the enterprise"...

Global Innovation Outlook 2.0 March 2006

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Innovation is critical to compete in the 21st century and collaboration is essential for innovation...

§ Top innovation priorities

- 4 Extend the ability to collaborate inside and outside
- 4 Innovate business models and processes
- 4 Leverage information for business optimization

*87% of CEOs believe fundamental **change** is required in next two-years to drive innovation*

External collaboration is indispensable. CEOs stressed the **overwhelming importance of collaborative innovation** – beyond company walls. Business partners and customers were cited as top sources of innovative ideas ...

Source: 2006 IBM Global CEO Survey

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A workforce in transition provides challenges and opportunities

Older workers (Age 50 +)	Mid- career workers (Age 35 – 50)	New generation (born after 1980)
Growing as % of workforce	Shrinking as % of workforce	Growing as % of workforce
Hold the wisdom and intellectual capital of the organization	Essential source of professionals and middle managers	Critical to long-term viability and innovation
Traditional approach to technology, collaboration, organizational loyalty, and rewards	Tech savvy but not "native speakers"; mixed approach to collaboration, loyalty, and rewards	Technology is 2nd nature; more interested in peer / interest groups than organizational identity; think work should be fun and fulfilling

Capture their knowledge before they retire

Relieve their stress and increase their effectiveness

Attract and retain; harness their collaborative style

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Web 2.0 is the native language of "Millennials" and the new language of collaboration ...

Everyone contributes

By 2009, **wikis** are predicted to become mainstream collaboration tools in at least half of all companies.

Everyone's opinion should be heard

A new **blog** gets created every second.

Communication is constant

Almost three-fourths of teens send **instant messages** more than e-mail.

And <u>every</u> generation wants the applications at work to be *"cool" and attractive as the ones at home ...*

Technorati/ Law Technology News, Dec 1, 2005; Comscore, Aug 8, 2005; America Online /Research Alert, Jan 6, 2006

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A "collaboration gap" looms large in the mind of the CEO

% of CEOs who believe collaboration is "absolutely critical" or "of great importance"

% of CEOs who believe their organization collaborates "to a large extent"

80%

60%

40%

20%

0%

External collaboration is indispensable. CEOs stressed the overwhelming importance of collaborative innovation.

Financial performance: strong collaborators enjoyed healthier revenue growth and average operating margin over their competition...

The gap: although collaboration aspirations were high, actual implementation was dramatically lower...

Source: "Expanding the Innovation Horizon: 2006 IBM Global CEO Survey"

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State of current tools contributes to the gap...

§ **Fragmented:** collaboration tools are fragmented and disjointed

§ **Hard-to-use:** only those with greatest need are willing to tackle the learning curve

§ **Stove-pipe silos:** users are forced to change applications to access needed collaboration services

§ **Lack of integration:** separation between communication and collaboration services leads many users to fall back to the pervasive "reply to all"

§ **Unfamiliar:** current tools don't enable users to stay within their favorite applications

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Transforming the trends into product strategy...

§ **Integration & flexibility:**
- 4 Fits right into the applications you use
- 4 Customizable to meet your needs
- 4 Open

§ **Simplicity:**
- 4 Easy to get started
- 4 Easy to learn
- 4 Simplifies your everyday work

§ **Anytime, anywhere access:**
- 4 Collaborate inside or outside your firewall
- 4 Take your content offline

Relative importance* of attributes to buyers of collaboration software

Integrates easily

Simplify way work

Anywhere/time access

Organization more responsive

Reliable and stable

Adaptable to needs

Employees productive

Excellent service / support
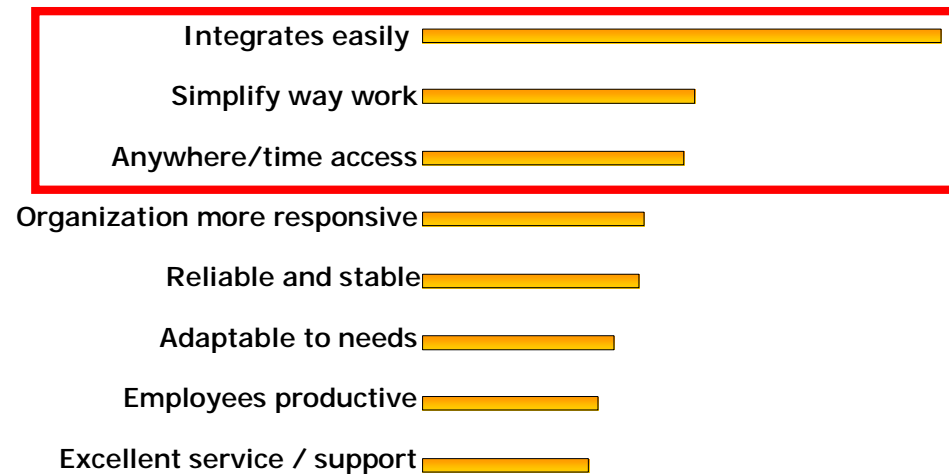
Source: internal IBM market research survey (*Coefficients in Logistic Regression)

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Benefits of Lotus Quickr

ID308: QuickPlace Rocks! The Future of Collab Document Management & Team Collab

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Introducing IBM Lotus Quickr

Fastest way to share everyday business content with your teams…

§ Rich collaborative content and team services integrated with entire IBM portfolio

§ Most complete set of connectors to desktop applications and an open connector architecture for developers

§ Out-of-the-box business templates (e.g. Innovation Place) leveraging composite application support

§ Integration with IBM Lotus Domino® and JCR content stores initially, and plans for IBM FileNet P8 support, providing comprehensive, scalable end-to-end content management options

Lotus.

Quickr Connectors

Quickr Services

Shared Content

Team Workspaces

Quickr Content Stores

Wikis Team Blogs

Business templates

Anywhere Anytime

Workflow

| Lotus Domino | IBM JCR | IBM FileNet * | IBM CM * | Other |

* - Requires separate purchase & supported after initial Lotus Quickr release

Lotus QuickPlace and Lotus Quickr

§ **IBM Lotus QuickPlace® customers on active maintenance will be entitled to Lotus Quickr 8.0**

   4 For Lotus QuickPlace 7.0 customers, moving to Lotus Quickr 8.0 will be even easier than previous release upgrades

   4 With so much more: connectors, collaborative document management, etc...

§ **No need to upgrade your entire environment !**

   4 Lotus Quickr 8.0 runs on both Lotus Domino 7.x and Lotus Domino 8.x
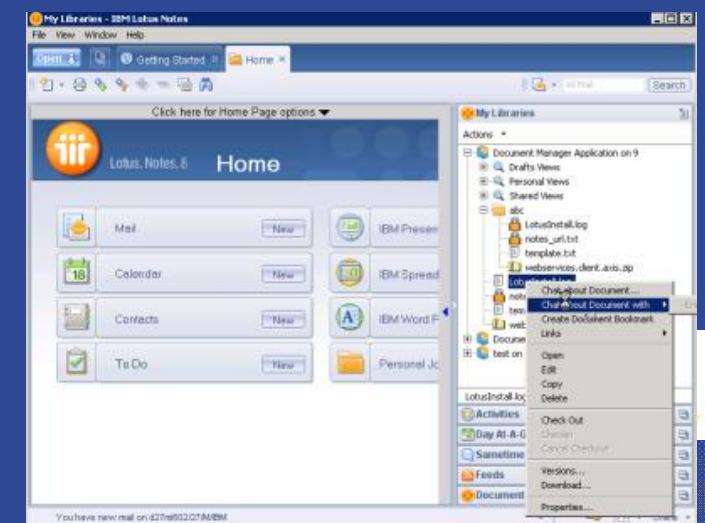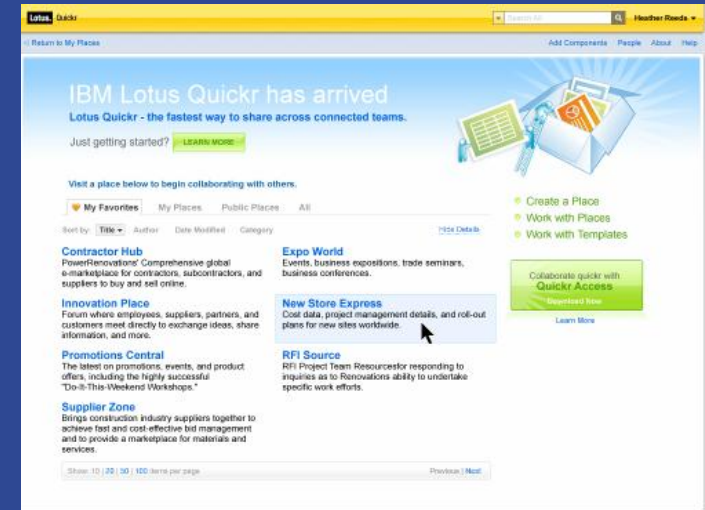
Lotus Quickr will provide a universe of capabilities...

Library management, check in & out, version control, views, security features, custom meta-data for a variety of business content types

A collection of reusable collaborative components (libraries, calendars, tasks, blogs, lists, Web content authoring...) to build powerful applications

Offline services, extranet access, versatile portlets, to expand and facilitate collaboration

Self-service, customizable team sites with an extensible infrastructure (membership mgmt, search capabilities), that support a full team lifecycle

Templates for immediate out-of-the-box value and support of common business processes, including Innovation Place, project & meeting management

Basic workflow for notification and approval

Quickr Connectors

Quickr Services

- Shared Content
- Team Workspaces
- Wikis Team Blogs
- Quickr Content Stores
- Business templates
- Anywhere Anytime
- Workflow

Lotus Domino	IBM JCR	IBM FileNet *	IBM CM *	Other

* - Requires separate purchase & supported after Lotus Quickr release 8.0

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Lotus Quickr will be open and flexible ...

§ **Infrastructure:**

4 Repositories

4 Directories

4 Server operating systems

4 Desktop operating systems

4 Programming models

§ **Industry standards:**

4 Java™

4 Linux®

4 Eclipse

4 RSS / Atom

4 ODF

4 AJAX

4 Web Services

4

Quickr Connectors

Quickr Services

Shared Content

Team Workspaces

Quickr Content Stores

Wikis Team Blogs

Business templates

Anywhere Anytime

Workflow

| Lotus Domino | IBM JCR | IBM FileNet * | IBM CM * | Other |

* - Requires separate purchase & supported after initial "Geneva" release

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Access Lotus Quickr from an inviting, intuitive Web 2.0 interface...

Lotus Quickr Connectors will integrate right into your favorite applications...

Making sharing & collaboration transparent and natural

IBM Lotus Notes® client
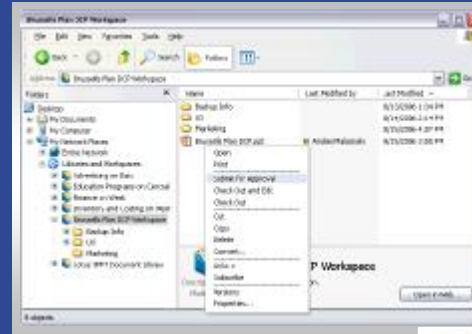
Microsoft® Windows® Explorer / "My Documents"

IBM Lotus Sametime®
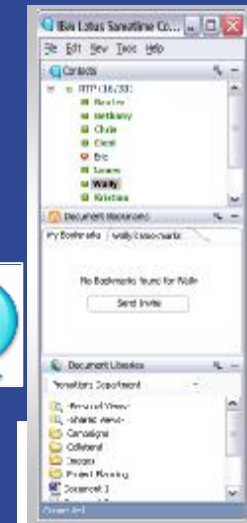
Microsoft Office / IBM Productivity Editors
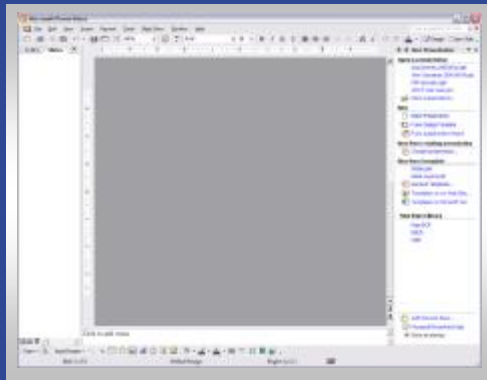
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Lotus Notes Connector

Helps reduce e-mail attachments, content duplication, and "version anxiety"…

§ Open and save attachments into library or team workspace

§ Replace e-mail attachments with shared links

§ Integrated into file menus and "right click"

§ "Reminder" prompt encourages participation

§ Supports Lotus Notes 6.5, 7 and 8!
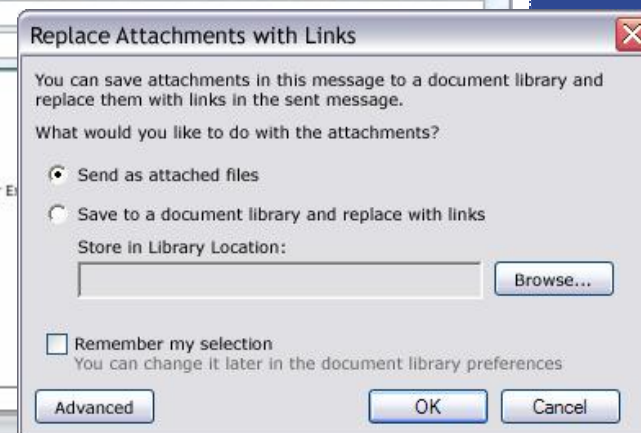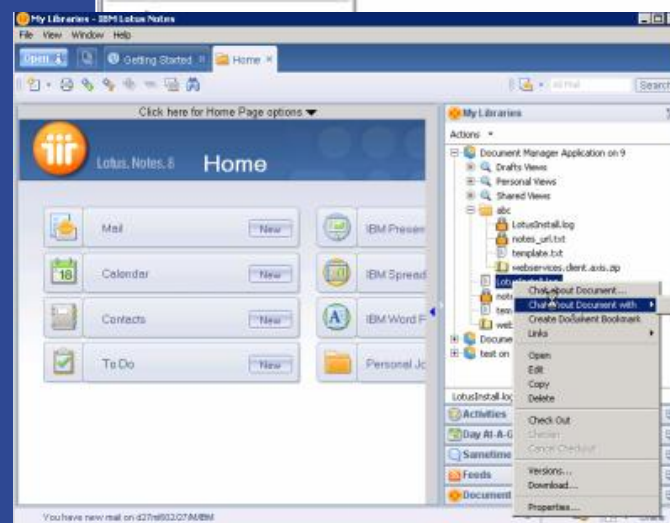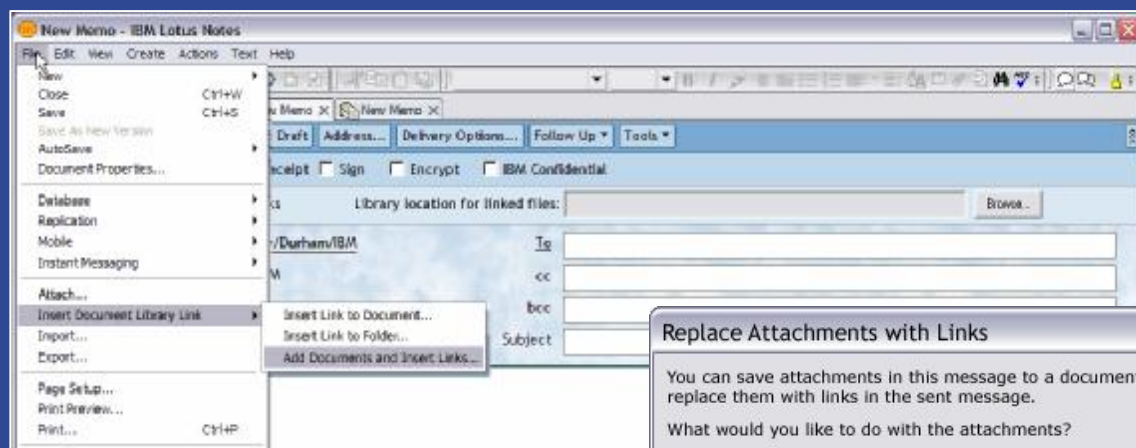
Microsoft Office Connector

Facilitates collaborative document authoring and version management…

§ Open and save documents into library or team workspace

§ Assign document properties (meta-tags)

§ Integrate with work flow for approval routing

§ Integrate with "dogear* " for tagging

§ Use your editor of choice (no forced upgrade)

- 4 Microsoft Office XP, 2000, 2003…
- 4 IBM Productivity Editors

* Requires purchase of Lotus Connections

Lotus
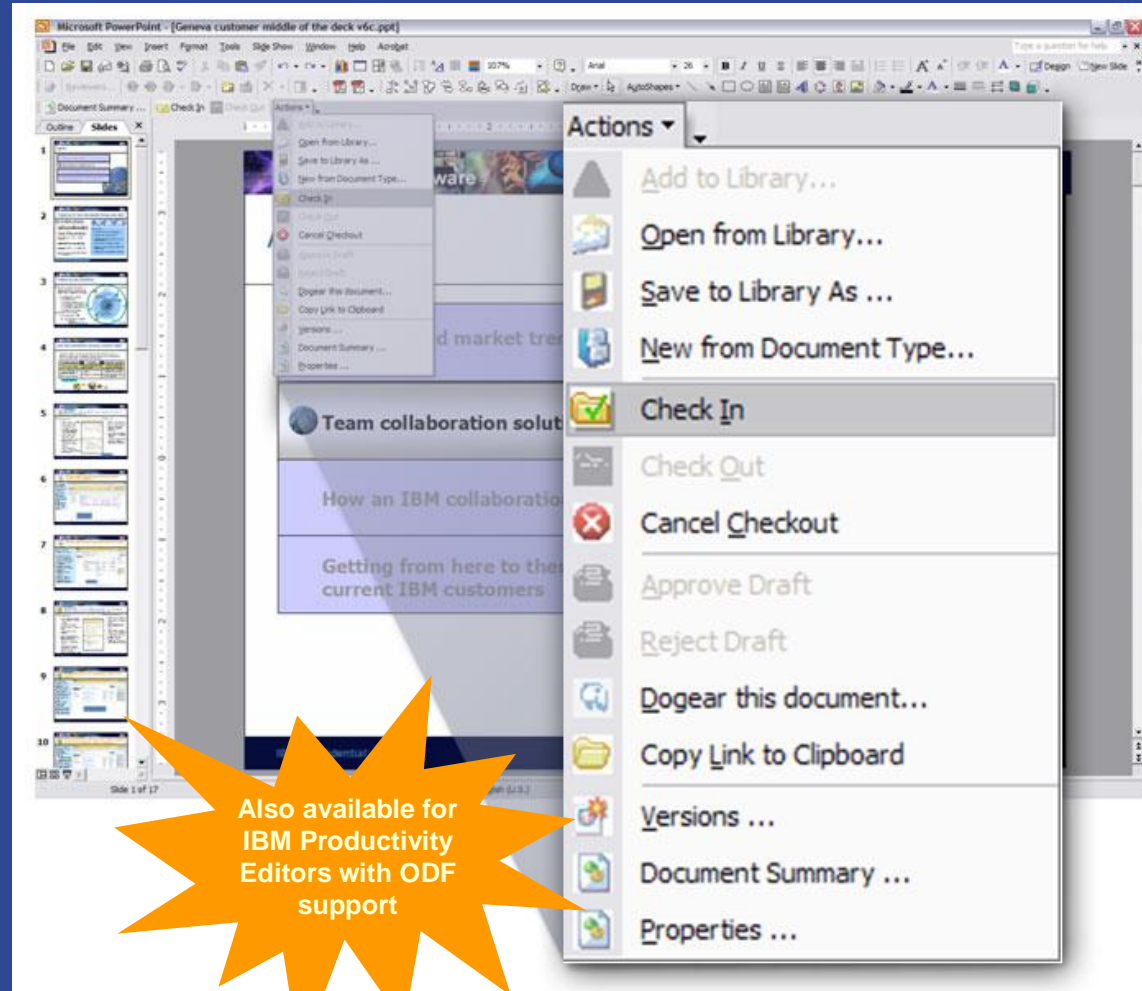
Also available for IBM Productivity Editors with ODF support

Lotus Sametime Connector

Provides easy access to shared content right from real-time client …
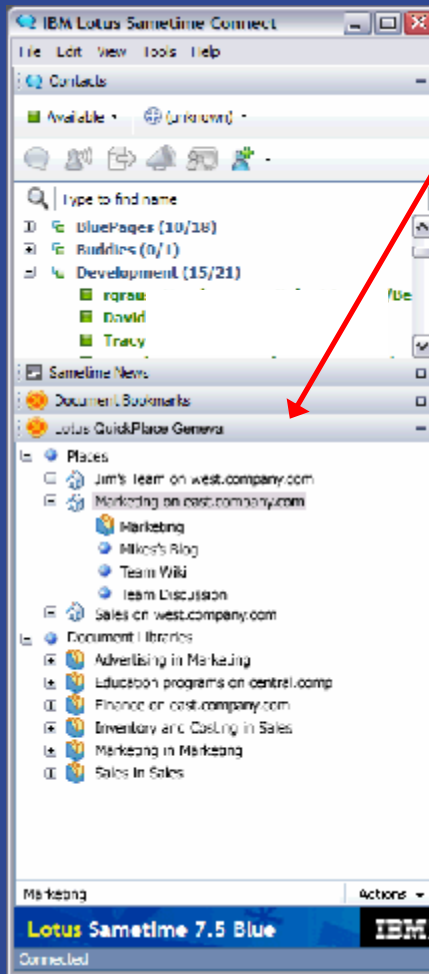
§ Navigate content through a simple tree interface

§ Drag and drop from local system to libraries and team workspaces

§ Integrated action menu

§ Quick contextual access to shared documents

§ Send links in chats

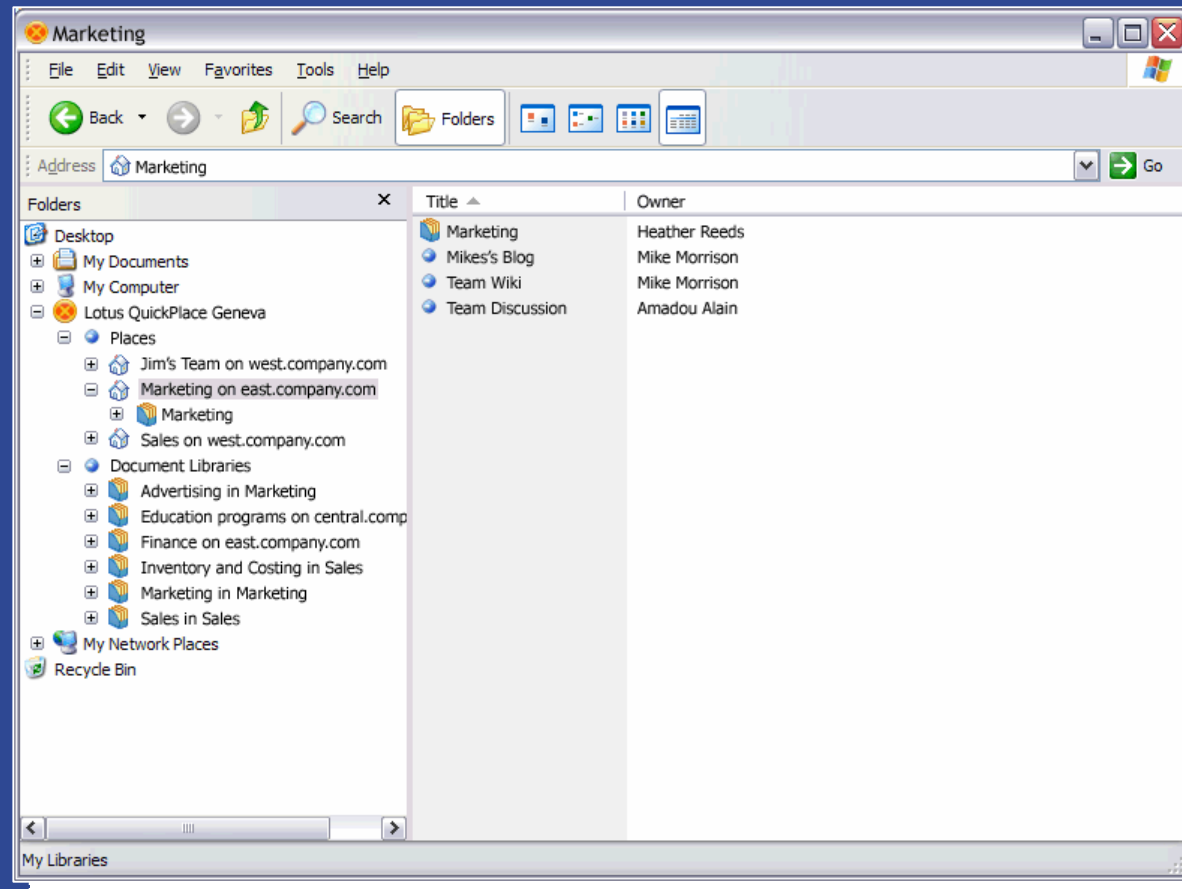§ Invite colleagues to download the connectors
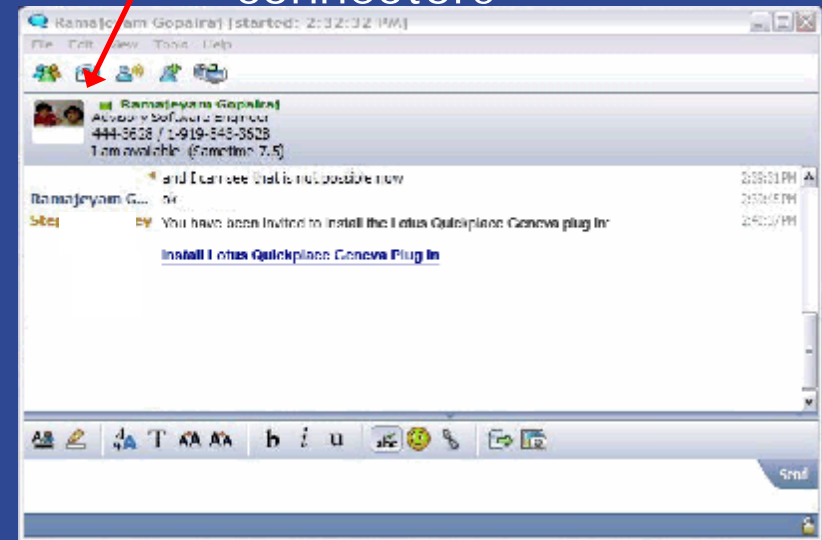
Microsoft Windows Explorer Connector

Makes it easy and natural to move content to collaborative environment…

- § Navigate content through familiar tree interface

- § Drag and drop content from local system to libraries and team workspaces

- § Integrated action menu

End users can create custom team workspaces using flexible Lotus Quickr templates and components

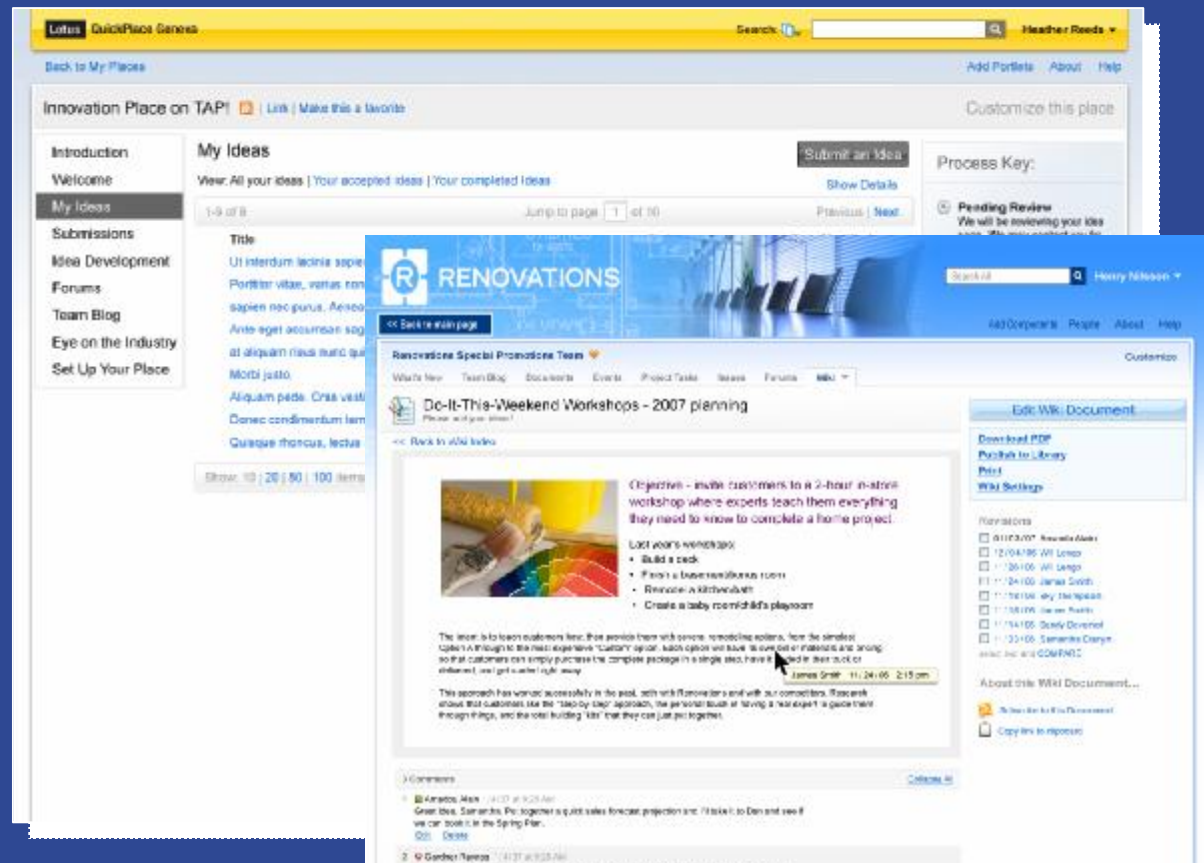- Team blog

- Wiki

- Project dashboard

- Many more...
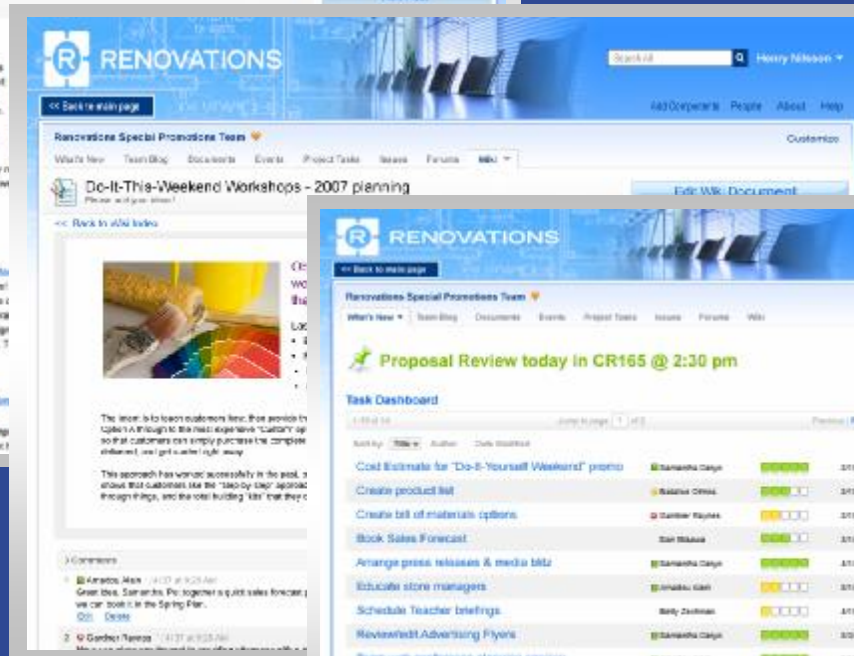
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You do not need to reinvent the wheel

Use Lotus Quickr application templates designed for specific business needs...

§ We will provide extensible business application templates

§ Plus, we will provide a place for a <u>community</u> of contributors to exchange ideas and share business templates

Lotus Quickr is designed to be extensible

§ Easily build dynamic and contextual Web applications using the palette of collaborative components from Lotus Quickr

§ Bring collaboration into all your desktop applications by building custom connectors that access the Lotus Quickr public Web services

§ Provide end-users with seamless access to multiple content repositories using the existing Lotus Quickr connectors
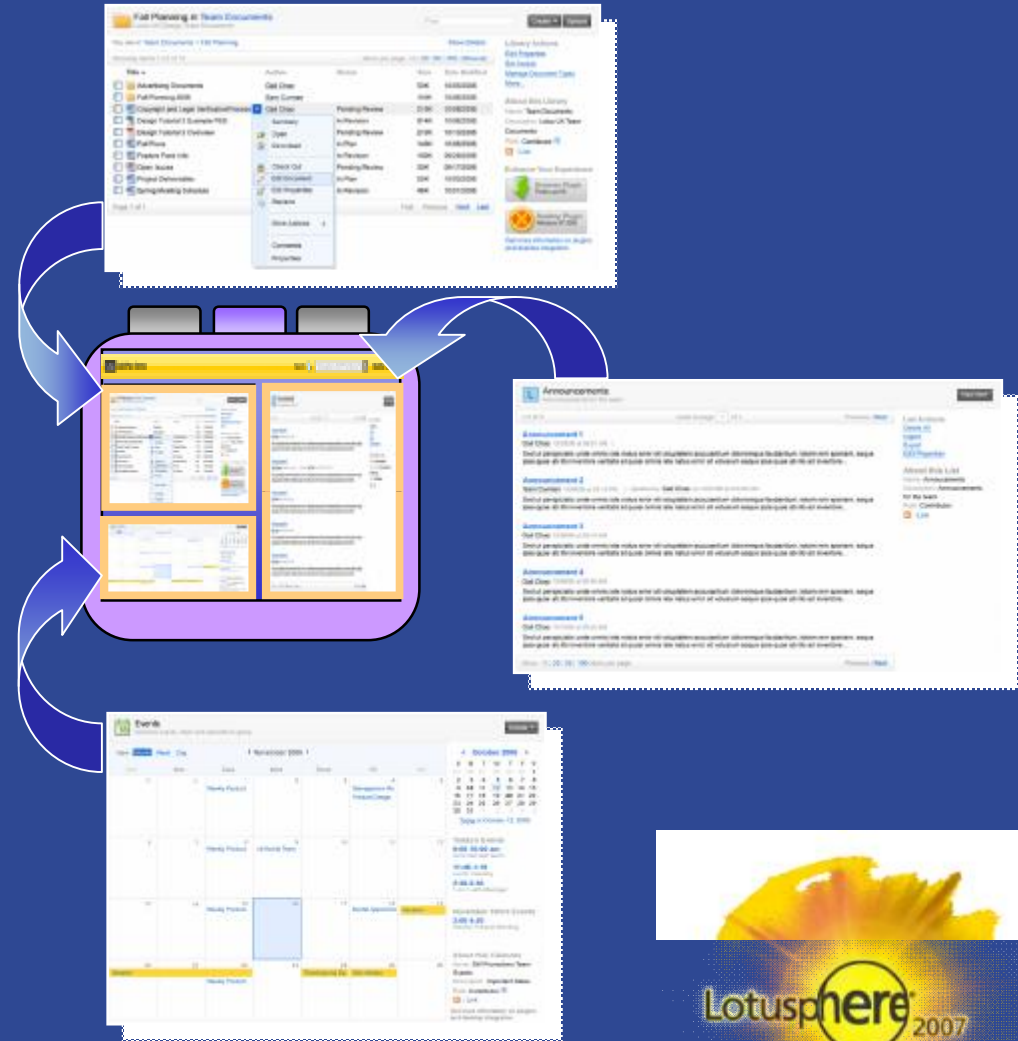
Lotus Quickr 8 -- Personal Edition

Personal Edition will provide a "starter set" of Lotus Quickr capabilities

§ Fast and easy on-line personal content library

§ Familiar folder metaphor

  4 Easily move content to secure, managed servers

  4 Private content

  4 Shared content

§ Getting started is just an e-mail click away

§ Includes Lotus Quickr connectors

§ Planned availability 2H '07

Free to Lotus currently licensed Notes users!!

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Lotus QuickPlace and Lotus Quickr Roadmap

'06	2Q '07	4Q '07 – Q2 '08

Lotus Quickr personal edition

Lotus Quickr - Futures

Lotus Quickr 8

QuickPlace 7

From IBM Workplace™ & IBM WebSphere® Portal offerings

§ **Modern intuitive UI with Web 2.0**
§ **Business templates, blogs, wikis...**
§ **Connectors for Lotus Notes, Sametime, Microsoft**
§ **Collaborative content management**
§ **Ease of administration**

§ **Continued focus on user interface**
§ **Continued focus on connectors**
  § **New Microsoft Outlook connector**
§ **Continued focus on integration**
  § **In-context sharing & web conferencing**
  § **Profiles, dogear, activities, communities, etc.**
§ **Extended tools support**
  § **Lotus Component Designer**
§ **Integration with IBM FileNet**
  § **Records management, etc.**
§ **Integration with IBM Domino.Doc®**

Lotus Domino Document Manager 7

Lotus Domino Document Manager 8

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Lotus Quickr 8 is the evolution of Lotus QuickPlace 7 but with many new capabilities and an entire array of new connectors… thus a new product instead of just a new QuickPlace release number.
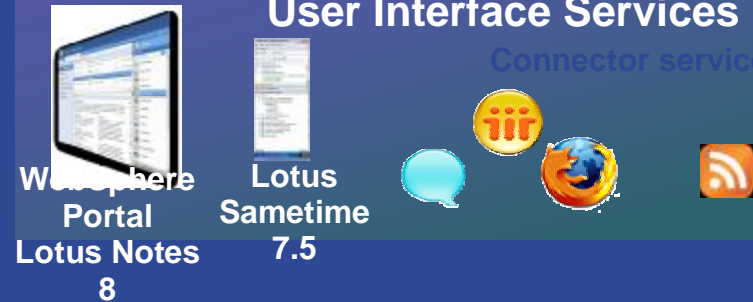
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Lotus Quickr and composite applications

- **Lotus Quickr will provide quick out-of-the-box value**
  - A set of extensible services for end-users to quickly create rich business applications - with no programming skills required

- **Lotus Quickr will leverage the strengths of the core IBM application platforms – Lotus Domino, WebSphere Portal, Eclipse**
  - Programmers familiar with any of these platforms can integrate and extend Lotus Quickr services and components to create advanced custom applications
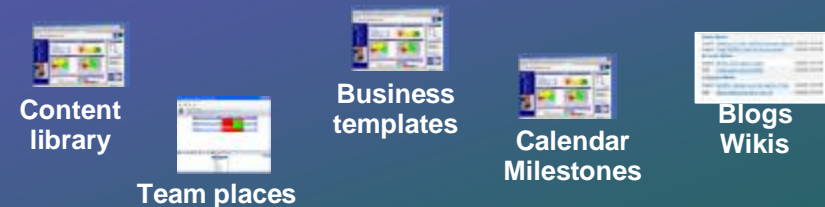
User Interface Services

Connector services

WebSphere Portal
Lotus Notes 8

Lotus Sametime 7.5

Content and Collaboration Services

Content library

Team places

Business templates

Calendar Milestones

Blogs Wikis

Deployment Services
Multiple repositories, devices, directories…

Domino, Portal, FileNet…

Extranet Offline

Browser

Rich Clients

Lotus Quickr and Lotus Connections: a perfect combination

Profiles

v Connect team members to their profiles for expert location

Communities

v Connect places and communities to support rich collaboration

Bookmarks

v Tag content, events, wiki pages, tasks, etc... for more accurate searching and retrieval

Activities

v Add place content to an activity
v Grow an activity to a place
v Spawn-off activities from a place

Blogs

v Complement Lotus Quickr contextual team blogs with personal blogs

Quickr Connectors

Quickr Services

- Shared Content
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Lotus Quickr will solve key customer needs

To maintain competitive position, innovate, and grow revenue, organizations require solutions to enable them to collaborate across the enterprise and beyond—to more effectively manage their information and projects

Let me...	Work the way I want	Get control of my content and information	Better collaborate with partners and customers
I want to...	§ Be more productive § Work more effectively with my colleagues	§ Stop using my inbox to dump content § Reduce the duplication and inconsistencies of content	§ Quickly set-up places to share content with anyone I want § Manage projects with robust security features
Lotus Quickr will let me...	§ Access and manage content naturally from within the applications I use everyday § Collaborate anywhere and anytime § Take my content and projects offline	§ Integrate my mail client with my shared places and libraries § Organize my files in a secured environment § Share simply and easily § Reuse and expose content across applications	§ Add users to my spaces myself § Provide tools to track and manage my team activities

Lotus Quickr will integrate easily & provide flexibility

§ **For end users, Lotus Quickr connectors integrate into desktop applications**

- 4 Increases adoption of collaborative tools
- 4 Simplifies collaboration among users with different styles and preferences
- 4 Improves effectiveness

§ **For IT, Lotus Quickr leverages current software and hardware investment**

- 4 Works with multiple versions of Lotus Notes clients, Lotus Domino and Microsoft Office (no forced upgrades)
- 4 Supports open standards

§ **Roadmap: Support for additional repositories and clients**

- 4 Designed for a heterogeneous environment; doesn't force adoption of a sing...

Lotus Quickr will provide anytime, anywhere access

§ For end users:

- 4 Take an entire team workspace offline to work wherever you are
- 4 Access team workspaces from outside the firewall to collaborate with strategic partners
- 4 Access the same content from multiple applications

§ For IT:

- 4 RSS / ATOM feeds provide an easy way to post Lotus Quickr content to other applications
- 4 Use Lotus Domino replication to move Lotus Quickr content to the edges of your network for better performance

Lotus Quickr = simplicity

§ For end users:

- 4 Personal edition of Lotus Quickr lets you get started easily
- 4 Lotus Quickr connectors let you collaborate with minimal disruption to your normal work patterns
- 4 Setting up intranet or extranet team workspaces takes a few simple steps
- 4 Templates make it easy to create business-specific team workspaces
- 4 Use of Web 2.0 technologies makes UI more compelling and more similar to what they use at home

§ For IT:

- 4 Leverages your current skills
- 4 Provides self-service options for end users

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More sessions on content mgmt & team collaboration

Sunday 1/21	12:30 pm	HND110	End-to-End Web Content Publishing with IBM Workplace Web Content Management
	4:45pm	BDD105	Collaborative Document Management Product Futures
Monday 1/22	2:15 pm	BP310	QuickPlace Integration and Application Development - Thinking Outside the Box
	2:15 pm	ID405	Document Management Strategy: From Lotus Software Collaborative Document Management to Enterprise Document Management
	3:45pm	ID217	Out of the Box Integration of Portal and Domino: The Domino and Extended Products Portlets
	6:15 pm	BOF106	Meet the QuickPlace Product Team
Tuesday 1/23	10:00 am	ID502	Introducing Portal Express 6: New Portal & Collaboration Solutions for SMB
	11:15 am	**INV110** 🔶	**The Lotus Software Strategy for Team Collaboration and Document Management** **è Jelan Heidelberg & Marc Pagnier**
	1:30 pm	ID308	QuickPlace Rocks! The Future of Collaborative Document Management & Team Collaboration
Wednesday 1/24	7:00 am	BOF502	Best Practices with Domino Document Manager
	8:00 am	HND204	QuickPlace Preview
	1:30 pm	AD215	Web Content Management 6 - Technical Deep Dive
	1:30 pm	INV114	IBM's Content Management Strategy
	3:00 pm	BP206	Integrating Domino, Sametime and QuickPlace with WebSphere Portal Server ... for Dummies
	3:00 pm	ID406	Web Content Management: What's New and What's Coming
	3:00 pm	ID507	Best Practices for Document Based Collaboration in WebSphere Portal 6
	4:15 pm	BP303	Best Practices with WebSphere Portal, Web Content Management, and Portlet Factory

Thank you!!

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