

IUG Enhancement Forum : Thursday, April 26, 2018 (rev 5/7/2018)

Chaired by Joseph Montibello and Project Lead Mark Eskandar with Beth Juhl and Kathie Brown

Mark provided a Powerpoint presentation which covered the purpose of the Idea Lab, progress with Lab challenges, activity to date, and various insights about the new “Always Open” space in the Idea Lab software.

The purpose of Idea Lab is to implement a solution that III Staff, the IUG Enhancement Committee, and all III customers can use to manage a more effective enhancement and customer driven innovation process.

Idea Lab drives user enhancement and the innovation process on an “ideation” platform, launched in 2017, a partnership between IUG and III; the “ideation” software, from Spigit, allows access for all III users, for any product, region, etc. and uses a “challenge model” to drive user enhancement requests, development, and feedback. New in 2018 is the “always open” space for discussion and collaboration around any type of idea. In addition, Innovative has introduced private invitation-only strategic partner “space” in the tool for early adopters, beta sites, etc. The Idea Lab also supports agile development and frequent prototyping and updating of software features due to many effective crowd-sourcing comments and refinements.

Within the Idea Lab, there are various roles, including communication leads, sponsors, moderators, subject matter experts, product experts, and of course the users, the “crowd”. Communication leads are comprised of III employees and IUG Enhancement Committee members. Sponsors include III Product Leaders. Moderators are selected from IUG Idea Lab team members, subject matter experts, and other influential users. Product “experts” are the III Product Owners, and the “crowd” is everyone!

Idea Lab progress and a rough timeline –

2017 kickoff > June 2017 first innovation challenge, “Leveraging Data” was complete > November 2017 product challenge for “Sierra Public Services” > January 2017 product challenge for Polaris web application > February 2018 the launch of the Always Open space > April 2018 > addition of the Strategic Partner space.

Mark further explained the differences between a “timed” challenge and the “Always Open” space. Timed challenges are sponsored by the Project Leader, and ideas progress through timed phases – collaboration, expert review, pairwise voting, selections, and road map “winners”, i.e., which enhancement or ideas will be added to the roadmap for product development and/or implemented in a future release.

With “Always Open”, the sponsor is the Product Team, part of an ongoing product management process. Does not close after a limited period of time. Ideas can be about any existing product or new solution, and ideas will be classified using specific categories and tags. Ideas will then progress throughout different stages at any time, based on thresholds, moderators, and experts who are engaged throughout. Ideas may be selected for implementation, saved for future consideration, etc.

What is next for Idea Lab? Mark shared both an infographic on the “Always Open” progression, as well as the status of three “winning ideas” from previous challenges. Polaris web application challenge

winners will go into Polaris release 6.1 scheduled for Q3. Sierra Public Services challenge winners will go into Q4 release.

Mark further discussed some of the challenges and ongoing integration needed to get ideas and enhancements into the development or roadmap pipeline. He indicated that III will focus on themes with releases where III needs to solicit user input. The goal is to leverage the “Always Open” space as part of a continual analysis of things that need attention, which III Product Owners will review frequently.

The new “Strategic Partner” community will open this week, Kathryn Harnish is the lead for this group. Further comments can be addressed to Mark.Eskandar@iii.com

Joe Montibello and Beth Juhl led the comments for the second part of the meeting, as co-chairs of the Idea Lab team. They introduced incoming Co-Coordinator Jeremy Goldstein; Kathie Brown, Polaris Liaison; and Kathy Setter and Renee Brumett of the IUG Steering Committee.

The challenges in the past year have registered 1400 users to date. Over 1700 votes and comments were submitted throughout the challenges. As Mark addressed, Joe re-iterated that he hoped to see III feature more prominently the winning ideas in their road maps for releases, as well as a “future map” of timed challenges that will give the user community a sense of upcoming issues. Some thoughts and ideas take a few weeks to mature, so it is often helpful to be “thinking” about things in a comprehensive manner to make best use of the time allocated in a time challenge.

Joe also clarified that questions addressed to idealab@iii.com go to both the IUG Idea Lab Coordinators as well as to III (Mark and others).

Question time – various customers came to microphones for open question time including :

- Enhancements process API for Sierra and Polaris, a possibility? Mark : happy to have the conversation
- Will “always open” ideas automatically “move” into a timed challenge? Mark : there are some issues with Spigit in doing this automatically, we do not have this capability in hand at the moment but it is a good idea.
- How are strategic partners chosen, what is involved, and what is the financial commitment? Mark : there is no financial commitment; Q3 we will be looking for possible beta partners, with meetings, but not necessarily committing your own staff to the process. More a view to what is coming, and using the idea lab software.
- Can one person in a consortia be involved or does the whole consortia have to commit to it? Mark : give us your name! and contact us!
- Mark also indicated that III is now using Idea Lab for other projects – the Strategic Partner work is one, Steering Committee planning, other group processes, so stay tuned as we discover other processes to make good use of it.

- How can III encourage a particular area of interest > how do we offer preliminary suggestions for which a challenge might be warranted but might not be a big crowd favorite? Mark : that is exactly why we wanted to create the “Always Open” space – there is value in continuous feedback, and project leads will review the “Always Open” space for ideas and suggestions. Beth described “Always Open” as the “Challenge of Challenges”.
- The Public Services challenge had many ideas, yet only 2 out of 150 ideas, possibly 2 more as “honorable mention” were selected. This has not been communicated well back to the IUG community, and a member library that was heavily involved in leaving comments and working in the challenge, expected that a much higher return of ideas might be incorporated. “A lot of energy and enthusiasm were put into this challenge by my staff. We felt let down, not worth the amount of time we invested in it.” Mark : we will do the best that we can to make those upcoming releases reflective of this
- Renee indicated that this is a new process. Previously we have never had a development commitment, and there is room for improvement. One area to refine the process is in the number of feedback and internal comment thresholds. She indicated that the process was a new one for both III and IUG, but we are on the right track.
- Can we resubmit ones that didn’t make the top cut in another challenge? Joe – Yes – and we need to keep these re-occurring concerns at the forefront from review to review. Some older enhancements previous to Idea Lab that were voted on and were never implemented might also be reviewed; however many are representative of older releases and/or may be incorporated already into the software or no longer needed due to newer releases. The older enhancements could use one last review to see if they should be carried forward or are obsolete. They would probably need to be re-submitted with proper context if they are still relevant.
- Small tweaks to custom programming or accelerated development > how to get those requests in there? Mark : reach out to your sales person for this accelerated development request
- Consortium member input and suggestions for involvement for staff – Jeremy asked attendees to comment on how they engaged their consortium members (outside the systems office). Several indicated that while they provided access to their local users, they did vet their requests to make sure their “idea” was not a training issue or local workflow setup or permission problem first. Others indicated it was worth it to have the ideas come out, even if there were not enough clear answers as to how to solve things. Managers still need to concentrate on their local users and flow of questions and then interpret it for the submission process. Another attendee indicated that the ideas were managed locally, but when it was time to vote, his staff were on the job! Send your people in to vote! Joe also noted that staff reviewed the ideas and comments and actually learned how to do stuff when a comment was made that something was already in the software and was possible already. Another suggestion was to let staff users vote, but formulate ideas through the coordinator > this also kept staff from being intimidated by not using the right terminology, etc.
- Another question, in Sierra release updates, how do we document when we’re using a bug as a “feature” and how can we preserve more of these? Mark : Go to support first, then see what they say. We all agreed that bugs are bugs, and ideas are ideas, and we all agreed that it is a very good idea to fix bugs!

- A “sad trombone” comment expressed frustration with the letdown > all these ideas > no way to implement them. Has III considered actually doing one whole quarterly release of nothing but user-suggested ideas to bolster the troops!?
- How does III decide what can absolutely not be done? Mark : back to the only three ideas making it “over the wall”, Mark apologized for the lack of communication. Discussion on whether it is useful to actually have III say, “this is not technically possible” so we know a “no” answer with a reason. Beth : I would like an answer. If it is important enough we should be, as a user group, bringing it back to the company and advocating for it. Joe indicated that we know we can’t turn “the ship” around on a dime, but we have to start. A question whether there was actually a field in Spigit to indicate a no/yes/maybe answer that stays with the idea so users can see it.
- A question from a user indicating they may have to look (and presumably migrate) to another platform if III cannot achieve Section 508 compliance, as a business that cannot meet federal regulations. Mark : we are looking at way to meet those compliance standards with the new Encore, Polaris Powerpac, and even the Webopac to some extent. This is not rocket science, and certainly is not new. Customers carry a heavy weight of non-compliance and risk if this regulation is not met with the software they use.
- Another customer asked for additional clarification on “how many resources are you committing to implementing the new Ideas”? Mark : no real tension, or team overlap or competitiveness of one product team against another. Capacity to add the ideas is tied to the original product team. A followup question asked, how can you transparently demonstrate that you are (or will be) successful? We’re looking for “measurable outcomes”. Mark : Yes we will try to do this, and we will look forward to having your user feedback as to how we did.