WHITE PAPER

IBM Lotus Symphony: A Step-by-Step Approach to Finding Open Suite Spots in Your Organization

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IDC OPINION

Have you ever had to support a project without the appropriate tools? You probably have, and you and your project team probably found that the project and the support took more time and cost more than they would have had the right tools been available. When faced with the need to support lots of different kinds of projects and work situations, organizations often follow a "one-size-fits-all" or nothing approach and either give all workers the same tools or don't give certain types of workers any tools because there is no money left in the budget. To ensure that your organization is equipping all of its workers with the productivity tools they need without spending more than necessary, you should follow this five-step process:

1. Recognize the diversity that exists in your workforce in terms of specific worker responsibilities and skills.

2. Evaluate your current productivity tools and suites to determine where they fit well and where they fall short of meeting diverse worker needs.

3. Explore the range of productivity tools and suites available on the market to look for those that may offer benefits in terms of specific features, ease of use and support, acquisition and maintenance costs, and interoperability with other tools and systems in use inside and outside your organization.

4. Look for spots in your organization where adding or replacing a productivity tool or suite would benefit your workers and organization.

5. Repeat steps 1–4 every couple of years to take into account changes in the needs of your diverse workforce, new and upgraded versions of productivity tools and suites, and new ways to deliver productivity tools to PCs and mobile devices such as software as a service and enterprise 2.0.

METHODOLOGY

The recommendations and analysis presented in this IDC white paper are based in part on insights gathered during focus groups that IDC conducted in August with 18 IT and line-of-business managers from organizations of at least 100 employees and representing 13 industries. Focus group participants were led in discussions about usage, requirements, evaluation criteria, and other issues relating to productivity tools and suites at their organizations.

IN THIS WHITE PAPER

In this IDC white paper, we take a look at the importance of providing the appropriate set of productivity tools to diverse workforces. We provide a five-step process for ensuring that organizations are equipping workers with the productivity tools they need based on individual job requirements and skills rather than relying solely on a "one-size-fits-all" or nothing approach taken in many organizations.

SITUATION OVERVIEW

It's About the Productivity

When the PC revolution began, we all wondered how far it would go. How many PCs would a typical organization need? Would it be sufficient for each department to have a PC to share? These questions that were valid when asked came to sound a bit silly as PCs appeared on nearly every desk and anyone who didn't get his or her very own PC felt left out of the electronic/digital information age. Today, only certain mobile or deskless workers are left off the PC distribution and upgrade lists at most organizations based on the recognition that nearly every worker needs a PC to participate in and contribute to the constant flow of information and knowledge.

Any benefit of having a PC is dependent entirely on the software that it could either run locally or access over a network. Aside from the operating system needed for PCs to operate, productivity tools have emerged as the most widely used and arguably beneficial category of software for PC users. These tools represent the core, fundamental capabilities needed by anyone involved in creating, editing, and sharing text, numeric, and other information electronically. Suites that combine at least word processing, spreadsheet, and presentation tools make it easier for PC users and their organizations to buy, install, learn, use, and support a set of different types of productivity tools. The close coupling between PCs and productivity suites led to PC makers preinstalling various productivity suites on new PCs and IT departments including suites in installable software images used when deploying new PCs.

The good news is that most workers who need PCs have access to them and nearly every worker with a PC has access to at least some productivity tools. The bad news is that due to high software licensing and support costs most PC users have access only to the productivity tools chosen as the corporate standard for the entire organization, despite the fact that the standard tools may not be the most appropriate ones for certain groups of workers. Another result of high-cost productivity tools is that some workers end up without any tools.

Costs of a "One-Size-Fits-All" or Nothing Approach to Productivity Tools

The IT and business managers in the focus groups conducted by IDC identify various types of costs as the biggest challenges to providing productivity tools to workers at their organizations. The first type of cost relates to the large budget needed to acquire and track software licenses to provide productivity suites to users. Concern about the liability for not having sufficient numbers of licenses forces organizations to spend time tracking the number of users and licenses as well as license expiration dates. When internal or external auditors discover more users than licenses, organizations have had to tell workers that they cannot use the tools that they need to do their jobs until the licensing issues are resolved, sometimes by writing very substantial checks to cover the shortfall.

The second type of cost relates to decisions by productivity tool vendors to terminate support for older versions of their products in conjunction with the release of new versions. This situation forces organizations to incur the costs associated with upgrading both the software and the PC memory often needed to run the new versions, before the organizations would otherwise have chosen to do so. While the new versions may have features that benefit users, the organizations are resentful of the lack of choice that they feel they have as to when to upgrade their productivity tools.

The third type of cost relates to the maintenance and upgrade fees as well as the staff time required to keep productivity tools up to date and running smoothly. Organizations find that even with paid maintenance contracts, they still have difficulty getting access to vendor support staff to answer questions or resolve problems identified by IT or users without spending time waiting on the phone or paying for a higher level of support.

The fourth type of cost relates to file format interoperability issues. Organizations report the common situation of a worker who receives a document in a format that the corporate standard productivity tool or suite cannot read or write to. This worker often spends a lot of unscheduled time trying to get someone to either send a new version or convert the file into a new file saved in a format that the worker's productivity suite supports. Not only is the worker's time wasted by this all too frequent situation but so is the time of IT staff, peers, and others that the worker reaches out to for help. The problem does not end there if the worker needs to send the document back to the person who may require the file to be converted back to the original format.

Many organizations, including those that attended the focus groups, do not see an alternative to the status quo of overserving their workforces with a high-cost "one-size-fits-all" or nothing approach to productivity suites.

Let's take a look at one alternative to the status quo from a leading software vendor.

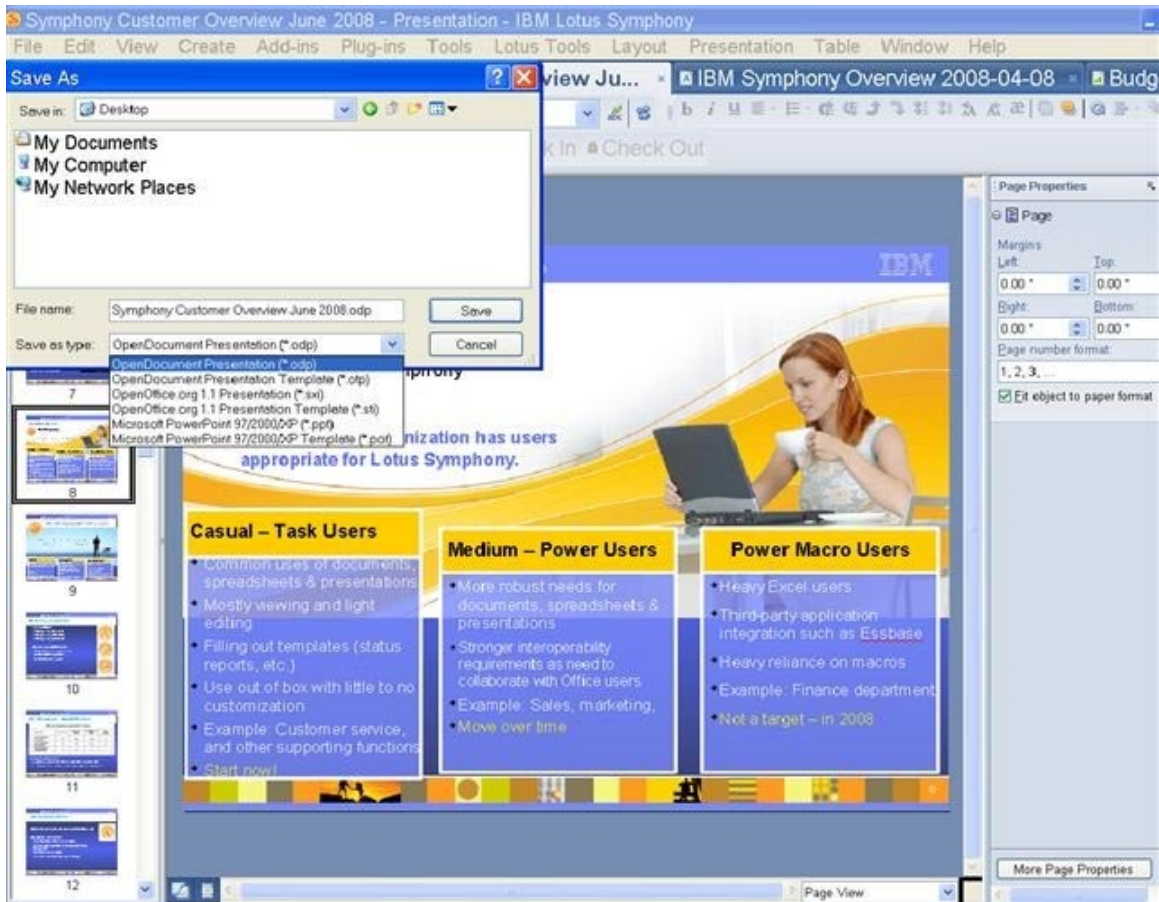# IBM LOTUS SYMPHONY

What Is Symphony?

IBM Lotus Symphony is an integrated suite of productivity tools based on open industry standards and source code. Symphony suite applications consist of IBM Lotus Documents, Lotus Presentations, and Lotus Spreadsheets. Designed for the majority of users, the Symphony software suite makes the process of acquiring a suite and creating and sharing files easy due to the following characteristics:

- Available as a free download and also as a free bundle with Lotus Notes 8, avoiding licensing costs and tracking regardless of how many times Symphony is installed

- Support for OpenDocument format (.odt, .ods, .odp), an XML-based ISO and IEC published standard

- Support for other commonly used file formats including portable document format (.pdf), Microsoft Office (.doc, .xls, .ppt), OpenOffice.org (.sxw, .sxc, .sxi), and others (.rtf, .txt, .csv)

- Support for Eclipse plug-ins, Universal Network Objects (UNO) model, and LotusScript using application programming interfaces (APIs) and developer toolkits for integrating Symphony with other business applications including Lotus Sametime and Lotus Notes

- Similar toolbars with common icons, menu entries, and keyboard shortcuts that are slightly different to fit each of the Symphony applications that are further configurable by users

- Single home page showing all open documents and application tabs for easy navigation

- Support for 28 languages

- Support for Windows and Linux operating environments, and Mac OS support entering public beta shortly

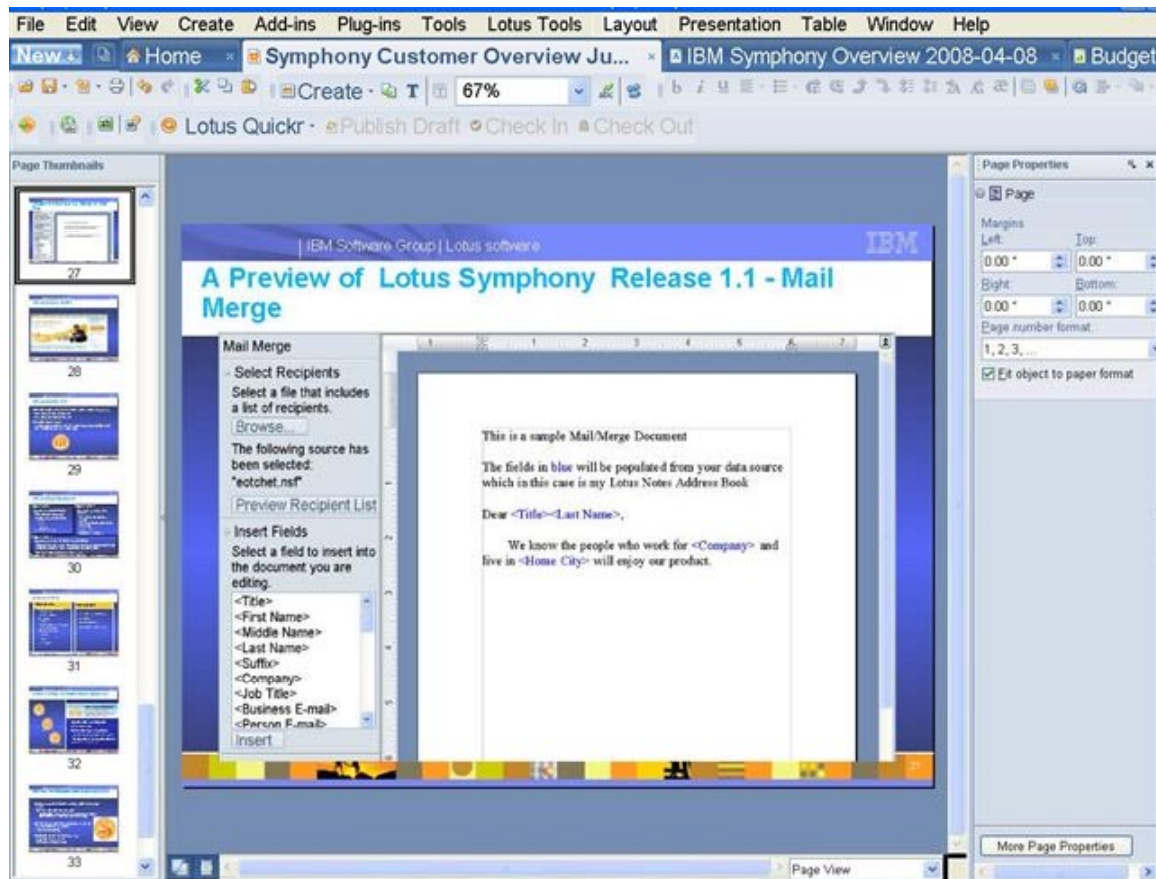See Figures 1 and 2 for IBM Lotus Symphony Presentation and Document screenshots.

IBM Lotus Symphony Presentation User Interface

Source: IBM, 2008

FIGURE 2

IBM Lotus Symphony Document with Mail Merge

Source: IBM, 2008

Uses of Lotus Symphony

Casual Users

Lotus Symphony can be an attractive option for people who are currently either nonusers or casual users of productivity suites. Both suite cost and complexity are responsible for the limited access to productivity tools that these workers have today. Their needs can be comfortably met by the no-cost, easy-to-acquire, and easy-to-use Lotus Symphony suite for word processing, spreadsheet, and/or presentations. Symphony's support for many different file formats means that these casual users will be able to easily share files with users of other productivity suites inside and outside their organization. Essentially anyone with a PC or access to a PC can benefit from the tools available in Symphony.

Examples of workers in this category include task and other workers involved in customer service, manufacturing, transportation, food services, and facilities maintenance; technicians; and production staff. Even though these workers tend to work with their hands or with specific applications for data entry and retrieval, they do have a need for viewing and entering information in documents that are typically sent by managers or human resources staff inside their organizations as well as by customers and suppliers outside their organizations. Since these workers tend not to create documents or use documents requiring advanced features such as macros, they could benefit from a low-cost, easy-to-use productivity suite. For even greater simplicity, Lotus Symphony can be extended and fully customized by an organization to present these casual workers with a specific interface and/or set of templates versus a generic productivity suite.

Moderate Users

Lotus Symphony can also be an attractive option for people who are already using productivity tools but are not power users requiring lots of advanced features. These users rely on productivity tools to get work done and may find that their current tools require too much cost and effort to ensure that they are licensed and operating smoothly. Unlike power users who wait anxiously for the latest upgrades to their productivity suites, moderate users may find that upgrade cycles tied to budget and IT availability can be very disruptive in terms of file interoperability issues and PC processor and memory upgrades. Yet, they feel pressure to keep up with the latest versions of their suites. Lotus Symphony provides a free alternative that supports the latest versions of both commercial and open source file formats.

Examples of workers in this category include sales, product development, human resources, legal research and support, financial (possibly for applications other than spreadsheets), and task worker management staff. These workers do require a full-featured productivity suite for creating and sharing documents on a daily basis. However, these workers could do without the cost and complexity of suites with lots of advanced functionality designed for power users.

The key for this category of worker is support for leading file formats so that these workers can ensure that their documents can be viewed and edited by coworkers, partners, and customers. This is why Lotus Symphony provides rich support for a wide variety of file formats, including Microsoft Office and OpenDocument.

CHOOSING PRODUCTIVITY SUITES

When evaluating which productivity tools and suites to provide to particular groups or types of workers at your organization, ask yourself whether they need to do the following:

☑ Create their own documents using advanced productivity tool features such as macros and mail merge?

☑ Create or edit documents in collaboration with other people who are in a different role, department, or organization?

- ☑ Read the contents of documents created by people in a different role, department, or organization?

- ☑ Create or receive files based on open document standards?

- ☑ Create or receive files based on specific proprietary document standards?

- ☑ Use productivity suite documents in conjunction with other business applications and processes that support only particular proprietary document standards or suites?

- ☑ Use productivity suites very frequently (daily) to get their primary work done, which would characterize them as heavy users?

- ☑ Use productivity suites somewhat infrequently (not more than once a week) to get their primary work done, which would characterize them as moderate users?

- ☑ Use productivity suites very infrequently (not more than once a month) to get nonprimary work done, which would characterize them as casual users?

After answering these questions, evaluate your current productivity suites as well as alternatives on the market to see which provide the best fit based on their functionality, ease of use, support for open and proprietary file formats, and costs of acquisition and ongoing maintenance and support. Also look at alternatives to traditional desktop software such as software as a service and enterprise 2.0 offerings that organizations are just starting to explore for delivering productivity suites to their workers.

CHALLENGES/OPPORTUNITIES

There are three key challenges to organizations and vendors looking to change the productivity tool status quo. The first challenge is the limited awareness that exists among IT and business users about the growing range of productivity tools and suites that are available for business use. This creates a chicken-and-egg situation where users wait for these lesser-known products to become popular before considering using them, which limits the pace at which these products can gain popularity. Not surprisingly, business users, rather than IT, often feel the pain and try finding relief through free downloadable software and hosted services.

The second challenge is the notion that it is better to stick with the status quo because any change poses risks that are best avoided. This is a very common idea that applies beyond productivity tools to just about any decision inside and outside the workplace. The fallacy of this way of thinking is that maintaining the status quo actively perpetuates a past decision that may have been right when made but due to changing circumstances no longer represents the best option for today. Being blindly stuck to the status quo continues to disenfranchise workers who were not given access to productivity tools in the past but who could benefit from such tools today.

The third challenge is the notion that continuing to use the most popular commercial productivity suites avoids file interoperability issues. The fallacy of this approach is that interoperability problems may still exist due to the use of different versions of those products. In addition, the degree to which common proprietary and open file formats are supported varies between productivity tools. Only by evaluating the file format support in different productivity tools and suites will organizations be able to determine which tools are best for their workers, taking into consideration file interoperability as well as other important criteria.

CONCLUSION

To live up to their names, productivity tools and suites must help make workers more productive. Organizations should invest the time and effort to ensure that the particular tools and suites provided to workers are the most appropriate ones available. Fitting productivity tools to a diverse workforce requires that organizations provide a good suite fit for each worker rather than take a "one-size-fits-all" or nothing approach.