

# Lotus knows.

Smarter software for a Smarter Planet.

BP306

How to Sell IBM Lotus Notes:  
Make all those users your new 'best friend'

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## Agenda

- Why your users **THINK** they hate Lotus Notes
- Overcome the hurdles – The CONCEPTS behind Lotus Notes
- The TIPS behind the “10 minute Notes presentation”
- Tools and techniques
- The 10 minute Notes Presentation
- How to ENSURE the failure of Lotus Notes within your organisation

# Why your users **THINK** they **HATE** Lotus Notes

- It's not intuitive
- There are better email applications
- Notes is just “different”
- It's NOT Outlook
- Um ... What's Outlook?

You CAN'T force a prospect to change their mind, but you CAN allow them to make a new decision – based on NEW information!

Zig Ziglar

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## Overcoming the Hurdles

- “Personal Productivity” vs “Groupware”
- The power of “One”
- Send vs Share
- The power of “Many”

## Personal Productivity vs Groupware

- The “Illusion” of personal productivity
- How many applications do you have open?
- How much time do you spend searching for information? In how many places?

## The power of ONE

- The CORE concepts behind ITC
  - One can Communicate
  - One can Transact
  - One can Document
- ONE can do all of these things by themselves



## Send vs Share

- Send:
  - The distribution of data into the “black hole” of Personal Productivity,
  - Only involves those addressed in the message
  - Precludes new team members
  - No historical reference.
- Share:
  - The contribution of information into the Collective Knowledge
  - Includes everyone with the appropriate access
  - Allows historical references.

## The Power of MANY

- The COLLABORATIVE environment:
  - MANY can DISCUSS
  - MANY have SHARED HISTORY
  - MANY has COLLECTED KNOWLEDGE
  - MANY will COLLABORATE
- When ONE recognizes their role as part of the MANY:

**users SHARE and collaboration is ENSURED!**

## Overcoming the Hurdles – the Result!

- Users understand Communications, Transactions and Documents
- Users understand the role of Productivity applications
- Users understand why “no man is an island”
- Users prefer to SHARE rather than DISTRIBUTE.

## Why the “Hurdle” in 2010 is easier to leap

- Social Software:
  - Facebook
  - Myspace
  - Linked-in
  - Social-Text
- Discussion and Reference:
  - Forums
  - Wiki's
  - Blogs
  - Micro-blogging (eg: twitter)

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## The Tips

- How to introduce IBM Lotus Notes to your users
- The three basic short-cuts
- Differentiate where the Client ends and an Application starts
- What **does** the Status Bar do?
- Highlight the **consistent** user interface
- Demonstrate the extensibility of IBM Lotus Notes

## How to introduce Lotus Notes to your users

- Notes is a DATABASE application
- Notes is VERY Secure
- The Lotus Notes Client can access information from virtually ANY source

## The 3 basic short-cuts

- Create an Memo/Message/Email
  - Ctrl+M
- Close any screen
  - Escape
- Refresh the display
  - Notes, ALL versions, F9
  - Notes, 8+ standard F9 / F5



## Lotus Notes client vs Notes application

- Where does the Notes client end and an application start?
- Understanding that client features are available to ALL applications.
- The biggest cause of frustration for end-users:
  - Looking for an APPLICATION option with the CLIENT settings

## What DOES the Status Bar do?

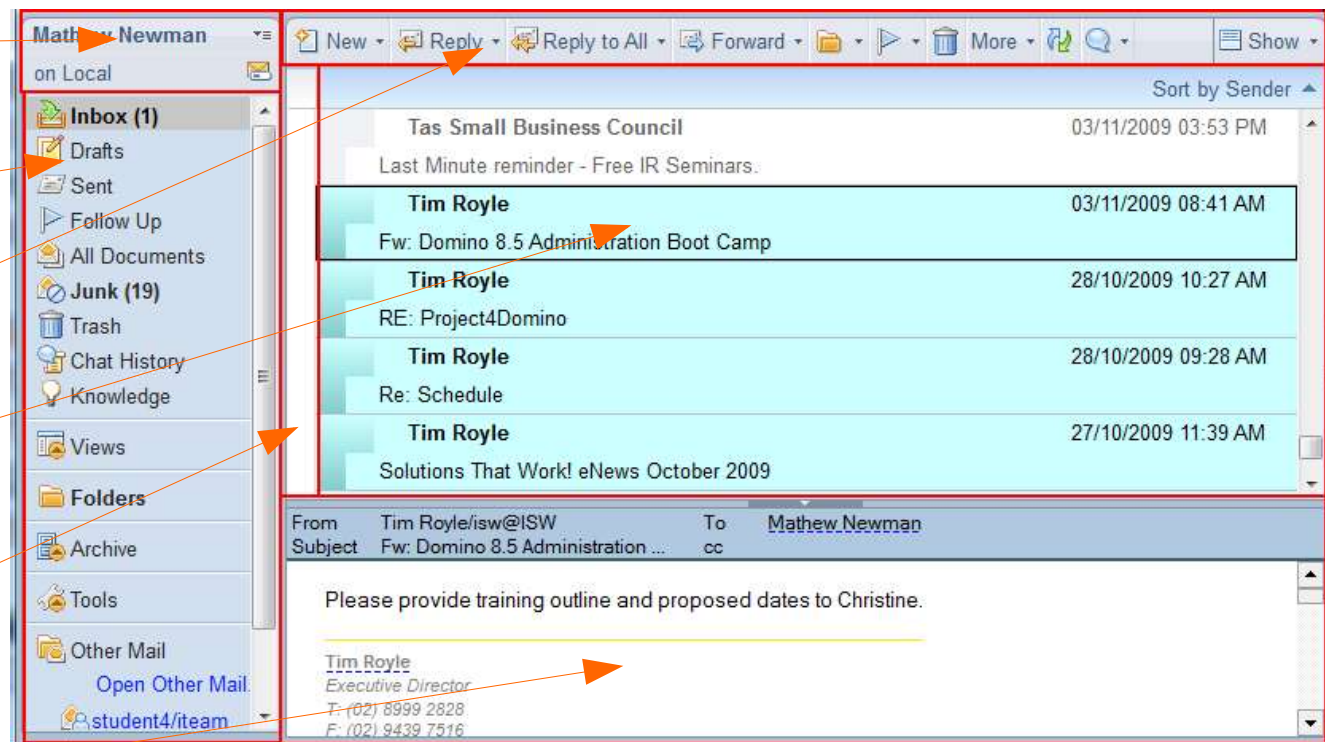
- Provides feedback
- Gives access to detailed processes
- Provides security overview
- Allows location switching

## Highlight the CONSISTENT user interface

- The only difference between Notes Applications is:
  - Content,
  - Embedded Features, and
  - (maybe) Visual Appearance
- **Every** database has the SAME layout
- **Every** database uses the same SHORT-CUTS
- **Every** database can be SEARCHED the same way

## Database Layout: Core Application

- Title
- Navigator
- Actions
- View
- Selection
- Preview



## Database Layout: Custom Application

- Title
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The screenshot displays the ANP-TL Web Site interface. The sidebar on the left contains a logo, the text "ANP-TL Web Site on: Local", and a "Pages" section with links for "All Content By Title", "Pages by Section", and "Resources". The main content area features a table titled "Web Page" with columns: "T", "P", "M", "Created", "Modified", and "Title". The table lists several records, including "Home", "HSE", "Image-Bayu Undan Production Platforms", "Image-Oil Rig Sunset", "Image-Timor Satellite", "Image-TimorArea", "IT Officer - Network Administrator", and several "JPDA" entries. Below the table is a "Preview" section showing text about the "Autoridade Nacional do Petróleo" (ANP) and its role in Timor-Leste.

T	P	M	Created	Modified	Title
			28/09/2009	04/12/2009	Home
			07/10/2009	07/10/2009	HSE
			07/10/2009	08/10/2009	Image-Bayu Undan Production Platforms
			07/10/2009	08/10/2009	Image-Oil Rig Sunset
			07/10/2009	08/10/2009	Image-Timor Satellite
			07/10/2009	08/10/2009	Image-TimorArea
			08/10/2009	10/12/2009	IT Officer - Network Administrator
			07/10/2009	07/10/2009	JPDA
			07/10/2009	07/10/2009	JPDA 03-12
			07/10/2009	07/10/2009	JPDA 03-12 and JPDA 03-13
			07/10/2009	07/10/2009	JPDA 03-19 and JPDA 03-20
			07/10/2009	07/10/2009	JPDA 06-101A

**Preview**

Autoridade Nacional do Petróleo was established on the 1st of July 2008 after [The Decree Law](#) passed on the 19th of June 2008.

The National Petroleum Authority/Autoridade Nacional do Petróleo (ANP) is a Timor-Leste's body responsible of managing and regulating petroleum activities in the Timor-Leste's exclusive jurisdictional areas and in the JPDA in accordance with the Decree Law on the establishment of the ANP, the Timor-Leste Petroleum Activities Law, and the Timor Sea Treaty. The ANP is to establish and supervise compliance with the enacted rules and regulations covering the exploration, development, production, transportation and distribution of petroleum and natural gas resources. It is also tasked to develop a strong petroleum management institution in Timor-Leste.

Our vision is to be a leading petroleum regulatory authority in the region and a model for institutional development in Timor-Leste.

## Database short-cuts

- Top of the screen.....Ctrl+Home
- Bottom of the screen.....Ctrl+End
- Open document/Next document..... ENTER
- Previous Document..... Backspace
- Next UNREAD document..... Tab
- Mark document Read/Unread.....Insert
- Expand/Collapse..... + - (Extend Shift+) \*
- Find.....Ctrl+F

## Searching

- Quick-search
  - Navigate within a column in a view
- Find
  - Anywhere within a view or document
- View Search
  - The content of any document (record) summarized within a view
- Database Search
  - The content of any document (record) stored within the database

## Database “containers”

- A View
  - Is automatically populated when a document matches a criterial, eg:
    - The “Sent” VIEW contains all messages you SEND, or
    - The “Completed” VIEW contains all documents marked as **Complete**
- A Folder
  - Contains ONLY the documents PLACED there by the user, eg:
    - A “personal” folder in the Mail application, or
    - A “My Favorites” folder in a productivity application



## Lotus Notes Client Extensibility

- Review content from Productivity documents
  - Word processor, Spreadsheet, Presentation, images, sounds, video
- Browse the Internet
- Recognize Content
  - Through “live-text” within documents
- Integrated Applications:
  - Lotus Sametime, Quickr, Connections, Activities, Symphony
- Extended Applications
  - Side-bar plug-ins, Widgets, data stored within other sources and accessed inside Notes
- “Wired” Applications
  - Linking applications together within a contextual framework

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## Tools and Techniques

- We use Notes because...
- Welcome to “Notes”!
- What's on your “Home” screen?
- What is a Journal/Notebook?
- Do you have any “Social” applications?
- Can your users easily access information personally relevant to them?

## We use Lotus Notes because...

- It's NOT just another email application,
- It's easy to use
- It provides a consistent user experience
- It's easy to find information
- It's easy to integrate with virtually anything

## Welcome to Lotus Notes

- What is the first thing you show your users?
- **NEVER Start with Mail/Calendar/To-Do's**

## The “HOME” screen

- What is the FIRST screen your users see when they open Notes?
  - Standard or Customized?
- Can users access corporate data without being shown how?
- Benefits of a custom Home screen:
  - Once implemented it is easily managed
  - It personalizes Lotus Notes
  - It can reflect who you are, your values and attitudes
  - It provides users with central access to corporate data
  - It doesn't HAVE to be complex

## The importance of the Journal/Notebook

- YOUR Lotus Notes Database!
- Use the Word processor/Notepad; files on disk, analogy
- Never loose personal reference information again
- Easily access (share?) information (it is a Notes application, after all)

## “Social” Applications

- Enable users to interact socially within the corporate frame-work
- Provide a holistic perception of Lotus Notes
  - Blurs the lines between “Personal” and “Corporate”
  - Reinforces the “we use Notes” paradigm
- Could be anything:
  - “Social Club” discussion forum
  - “What am I up to” (twitter inside Notes)
  - Competitions (eg: Fantasy Football)



## “Personal” Links

- Bookmarks are Personal, rather than Corporate
- Can be used to control:
  - Which Tabs launch with Notes
  - Easy access to frequently used documents
  - Where have I been?

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## The “10 minute” Notes presentation

- Be mindful of the “hurdles”
- Relate **ALL** of the concepts within the “tips and techniques”
- Put it all together with the “10 minute” Notes presentation

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## How to ENSURE the failure of Lotus Notes within your organisation

- DO NOT train your users
- DO NOT allow everyone to “speak the same language”
- ALLOW everyone to believe that Notes is “JUST” e-mail
- Even in a “Mail-only” environment, DO NOT give your users access to a shared Calendar, shared Contacts, Discussion or Journal/Notebook applications.

## Ignore everything on the previous slide and...

- Your users will understand how EASY Notes is to use
- Your users will understand how POWERFUL Notes is
- Your users will understand the TOOLS available to them
- Your users will be able to demonstrate Notes to anyone in 10 minutes
- YOUR USERS (WILL POSSIBLY) LOVE NOTES!

## Conclusion

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Questions?



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