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Editorial

Chris McPhee

The editorial theme for this issue of the OSBR is Sales Strategy. While "marketing" is everything a company does to build interest in its offers, "sales" consists of converting these offers into cash. By "sales strategy," we refer to all sales planning and process development activities leading up to the actual selling of a product or service.

In his recent blog post at MaRS Discovery District (http://marsdd.com/blog/2010/09/20/please-dont-hire-a-sales-professional/), Mark Zimmerman answered a question he is frequently asked by the founders of startups: "How do we find a good sales person?" In short, his answer is "Don't." This is not meant as a slight to sales professionals, but rather, Zimmerman is advocating that companies should not equate having sales professionals to having a sales strategy.

Sales professionals have a critical role to play in a company's success, but they are being given an impossible task if asked to sell something that has not been validated with customers. Zimmerman explains that sales professionals should be hired only once a company has validated that the value proposition resonates with customers and that the sales model will be effective. This lesson also applies to established companies, where existing sales staff require this same foundation to be effective.

So how does a company determine whether its value proposition resonates with customers? The answer, of course, is to talk to customers. In the OSBR and elsewhere, the need for early customer input is a dominant theme in recent discussions of product development, marketing, and now sales strategy. By talking to customers, listening to how they describe their needs, and interpreting how their needs could be met, a value proposition can tested and refined. It is far more efficient and effective to iteratively refine a value proposition before attempting to sell than to attempt a salvage operation in response to slumping sales. Customer input is also a critical ingredient in developing an effective sales strategy.

In this issue of the OSBR, our authors provide a diversity of perspectives on sales strategy development and implementation, including the role of customer input.

Matthew Aslett, Senior Analyst for The 451 Group, and Stephen Walli, Technical Director for the CodePlex Foundation, demonstrate the pitfalls of attempting to convert open source community members into customers. They show how to separate the concepts of community and customer to enable a business to both develop an engaged community and maximize profits.

Stephen Davies, entrepreneur and lecturer at the Sprott School of Business, describes the steps to create a business-to-business sales process and how these steps are used to build a sales funnel. He also provides tips for effective and consistent execution of that process to get initial sales and improve upon them.

Jason Côté and Julian Egelstaff describe how not selling part of the time complements the sales strategy at Freeform Solutions, where Jason is the President and CEO

and Julian is the Technical Architect. By devoting a portion of their time to supporting the open source communities that Freeform Solutions and its clients depend upon, they have created a strong differentiator in the marketplace.

Patrick O'Halloran, Staff Design Engineer with Xilinx Inc., reviews the literature on service-based solutions to show that an effective sales strategy comes from a rounded analysis of both the customers' needs and the opportunity potential for the service provider.

We encourage readers to share articles of interest with their colleagues, and to provide their comments either online or directly to the authors.

The editorial theme for the upcoming November issue of the OSBR is Economic Development and the guest editor will be Saad Bashir from the City of Ottawa. Submissions will be accepted up to October 15th. December's theme is Humanitarian Open Source and submissions are due by November 1st. Please contact me (chris.mcphee@osbr.ca) if you are interested in making a submission.

Chris McPhee

Editor-in-Chief

Chris McPhee is in the Technology Innovation Management program at Carleton University in Ottawa. Chris received his BScH and MSc degrees in Biology from Queen's University in Kingston, following which he worked in a variety of management, design, and content development roles on science education software projects in Canada and Scotland.

Differentiating Community from Customers in an F/LOSS Business

Matthew Aslett and Stephen Walli

"Free and open source software business won't work unless you serve both those who spend time to save money and those who spend money to save time."

Mårten Mickos

When software companies using free/libre open source software (F/LOSS) in their product and service offerings attempt to manage the customer pipeline and develop a community, problems may arise. Project communities and customer pipelines are not the same thing, although some participants belong to both groups. This creates confusion in the business and tension with the community.

F/LOSS communities have been on the rise for the past two decades. Companies began to form around F/LOSS projects in the early 1990s, with some creating their own F/LOSS projects and some wrapping themselves around existing projects. This has created tension between company managers who are trying to earn profits from software that is "available for free," and from developers in communities that do not necessarily want to create software for someone else's corporate gain. This happens regardless of whether the company created the F/LOSS-licensed project itself, or participates in external communities around other projects, or both.

This article demonstrates that separating the concepts of community and customer, and of project and product, allows a business to manage clearly both challenges of developing an engaged community and maximizing profits.

Introduction

Before there was Internet-sized bandwidth on which to collaborate around software, the traditional software business looked something like Figure 1: research and development (R&D) delivered product, marketing delivered messages, sales and marketing managed and qualified leads through a pipeline, and, if the product solved a customer problem properly, a market was made and profits could be measured.

The Internet dramatically removed friction from the process of collaborative software development and delivery. Developers could share the economic cost of software creation (innovation and construction). Large repositories of useful building blocks were created and made available through these project-focused communities. The World Wide Web accelerated this early Internet trend.

Companies began to form around projects. This unfortunately led to the idea of com-

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Figure 1. The Traditional Software Business Pipeline
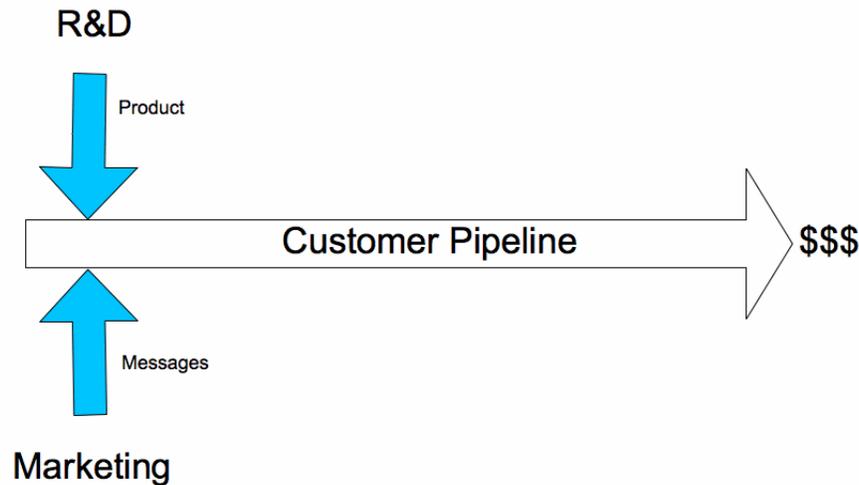
munity and customer interaction akin to Figure 2. The community is jammed into the middle of the customer pipeline. The community gives to R&D, which still delivers product. Marketing now delivers messages to customers and (unfortunately) the community, *and* sales tries to "convert" the community into customers.

The misconception that the community can be converted into customers, or worse that they are a primary source of leads in an F/LOSS-enabled company, causes no end of problems for a company. The company's expectations are incorrectly set as they try to garner sales from a community that is not interested in buying. The company can easily

Figure 2. Misconceptions of How Community and Customers Interact
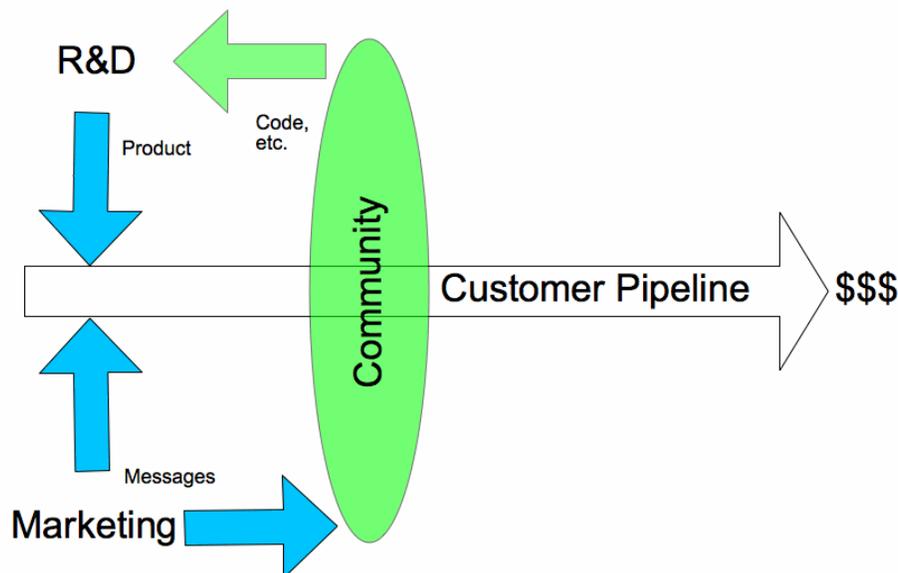
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put off the very community it wants to grow and lose the advantages a strong community brings. Perceived attempts to convert community users into paying customers has long been a source of friction with vendors that offer proprietary extensions. They have being accused of "bait and switch" (http://wikipedia.org/wiki/Bait-and-switch) practices or otherwise undermining the value of the open source software in an attempt to compel community users into becoming paying customers.

A company should recognize that, while they cannot sell to their community, this is an enormously helpful group of people who will anchor their business if supported properly. Even if a developer's employer has money to buy the software, internal bureaucracy and the need to persuade management can present a substantial barrier that developers are often keen to avoid. Instead, they may be quite happy to join the community and invest their time. This latter example is often lost on the management of the supplying company because they are convinced that they have a great product that meets the needs of this potential customer, who should be convinced to buy it. Alternatively, sales teams view this individual as a "lead" to improve their pipeline and reach financial decision-makers higher up the food chain. These tactics often alienate a potentially valuable community member.

Community and Customers

The conversion misconception began when MySQL AB (http://wikipedia.org/wiki/MySQL_AB) observed in the early part of the past decade that they had a paying customer for every thousand downloads. This incorrectly set expectations in a fundamental way. People assumed causality between downloads in a community and customer conversions. It created false metrics designed to increase downloads and improve conversion rates.

While CEO at MySQL, Mårten Mickos observed that the early community has more time than money, while the later community has more money than time. He also realized that most of his customers were late community members and therefore have money, but little time. This is the start of a better model for understanding the relationship between community and customers. Using the "time vs. money" tipping point as the dividing line between community and customers forces the separation of the two groups. Treating the community (whose members have more time than money) as a completely separate entity from the customer pipeline (whose members have more money than time) allows a business to engage them differently using well-understood processes for community development and sales channel management to suit each group. Although the underlying time-money continuum suggests that it might be difficult to identify the tipping point, in reality these groups tend to polarize and are relatively easy to spot. For example, a large number of communities members may have time and *no money* and many customers may have money, but *no time.*

Based on this separation of community and customer, we propose a model for managing community and customer pipelines (Figure 3). In this model, the community members engage with R&D over the project. They engage with marketing in a conversation about project direction and ancillary activities, such as translations in other markets. Only customers are qualified through the pipeline based upon the product.

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Figure 3. A Model for Managing Community and Customer Pipelines
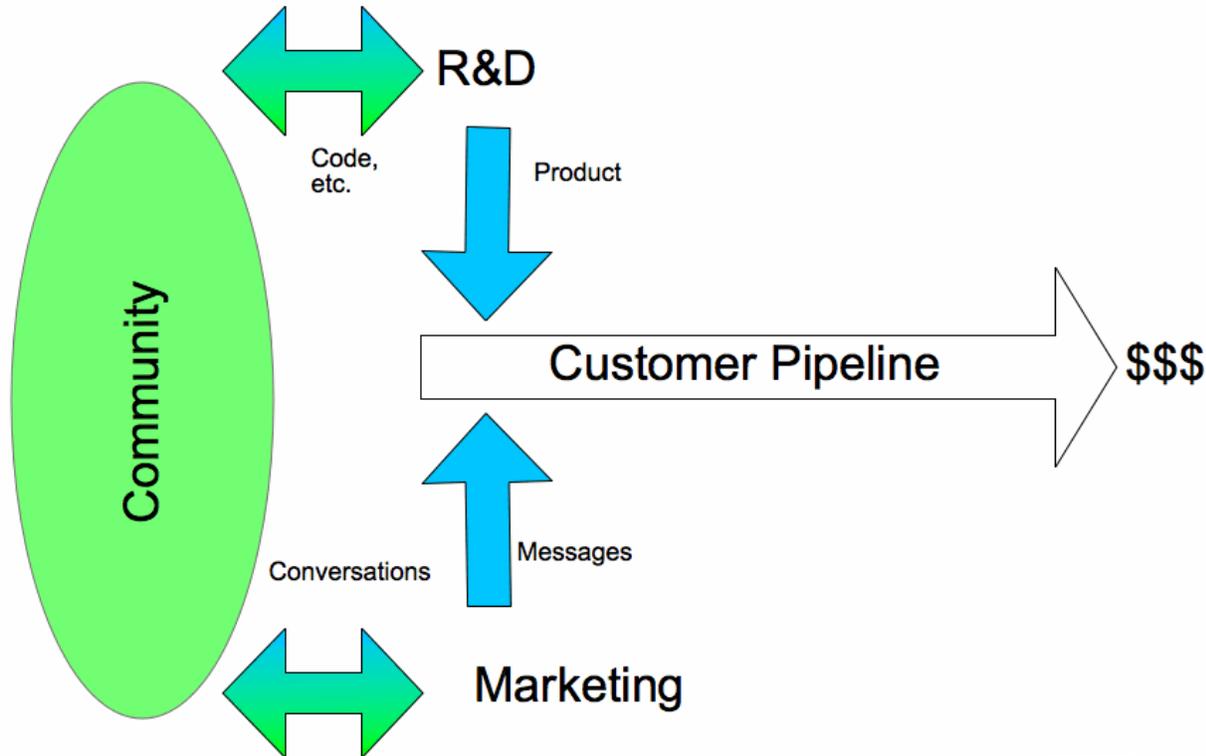
Each group engages with the company according to its own selfish needs. While both groups seek solutions, community members look to the *project* to solve their problems, whereas customers look to the *product* to solve their problems. Community members build awareness, evangelize, provide expertise and trial support, demonstrate solution viability, and give inertia to the solution. Community members cannot be converted, but provide the litmus test of solution viability. On the customer side, leads are managed through the qualification pipeline and conversion process like any other customer-focused sales process. Figure 4 details the processes for managing community and customer pipelines with this model.

Although community members usually do not contribute money, they can contribute time. However, they will not waste time, so the project needs to solve a problem for them before they will invest themselves in it. The project should also consider what it would like community members to do, how to communicate this to the community, and how these contributions can be enabled.

Projects and Products

A useful first step in the process of separating the ideas of a company's customers from a project's community is to separate the idea of a F/LOSS project from the company's product or service.

Figure 4. Detailing the Processes for Community and Pipeline Management
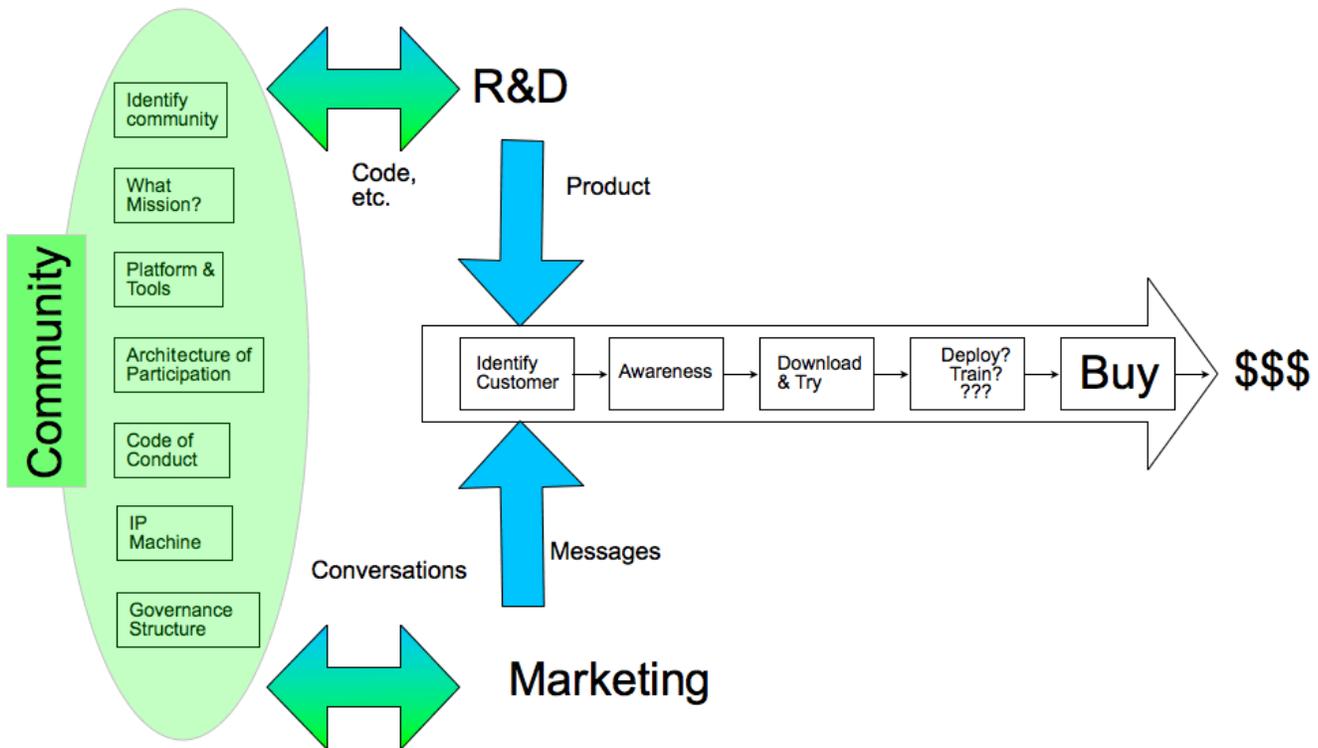
A project, regardless of whether it is run by a company, a foundation, or a collaborative community in the wild, is the keeper of the software. It consists of the software, the people developing it, and the F/LOSS license under which it is developed and distributed. The project solves a particular problem well, but may require a certain investment from its users to solve that problem, whether in its executable or source-code form. These users would rather spend their time than their money to get a solution and indeed they may have no money to spend in the particular circumstance. For developers, using the software in a F/LOSS project as a ready-made building block can provide extraordinary savings in time.

A product is something that is sold by a company to a customer to solve a problem. Money changes hands and, in that transaction, expectations are set. Products are more than simply the software. They may include the ease and convenience of bullet-proof installation, tutorials and documentation, services to install or configure the product, support, maintenance, upgrades, and all the other things in the product's ecosystem. Customers would rather spend money than time for the solution; the time to reach the solution is also an important consideration.

For customers, product is clearly differentiated from project and community. How the product is differentiated depends upon the

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company and the value proposition to customers. At its simplest, the product may be a supported and maintained collection of software, certified to run on specific, supported platforms and with particular applications, and with trivial installation requirements. The product may be the support and maintenance itself. Some companies may add "enterprise-ready" differentiated features or attributes that can be marketed. Others, such as Red Hat (http://redhat.com), JBoss (http://jboss.com), and MySQL (http://mysql.com), developed a valuable network offering that includes support, maintenance, certifications, additional warranties, monitoring, and indemnifications into a single subscription model. Regardless, there is well-defined value that solves a customer's problems.

Many newer companies using F/LOSS are also clear in how they approach the difference between customers and their communities. For example:

1. Basho Technologies (http://basho.com), the company behind Riak, the open source NoSQL database, has stated that it has no intention of trying to up-sell Riak open source users to EnterpriseDS, its value-added subscription product. The company fully expects open source users to be attracted by the additional features and support; it is not trying to qualify them via Riak.

2. Calpont (http://calpont.com) is expecting the open source InfiniDB Community to drive demand for InfiniDB Enterprise, but it has ensured that InfiniDB Community can be used on its own for scalable data-warehouse use cases, albeit without formal support.

3. Neo Technology (http://neotechnology.com) does not offer support services for the open source Neo4J, other than through the community mailing list, and primarily sees the open source model as a means of growing interest in graph databases and its Neo Basic Server, Advanced Server, and Enterprise Server products.

Conversions and Community

Community users are not converted into customers, but there is a correlation between well-run communities and the customer pipeline. Companies like Alfresco (http://alfresco.com), Hyperic (http://hyperic.com), and JBoss (http://jboss.com) all saw conversions in the pipeline because potential customers came to the web site, learned what they needed to learn, downloaded the appropriate things to try, and used the community as a litmus test of the solution before returning, as self-qualified leads, to buy product.

The process shown in Figure 4 can also clear up debate about "open source" and "community" and conversions. Some companies publish their product source code under open source licenses and never try to develop a real community. There is nothing wrong with this approach if they are running a more traditional software business model and do not care specifically about enabling the community to directly engage with the project. Publishing the software is a sign of strength and confidence in their product and their ability as a company to satisfy customers with a valuable solution that is more than just the software.

Some companies also develop large successful communities without ever publishing their product software. This is why community building is so important for a company and why community development is an essential ingredient in any pitch of a solu-

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tion to customers. Communities historically anchor customers:

1. Communities create knowledge, expertise, and experience, which are all necessary to provide a complete solution for a technology pitch to the customer.

2. Communities create advocates and evangelists to spread awareness about the solution.

3. Communities create enormous inertia in the status quo around a company's technology.

The role of communities in anchoring customers explains why companies like Microsoft invested millions in developing the Microsoft Developer Network (MSDN, http://msdn.microsoft.com). It has taken more than a decade for other Internet communities contributing to interesting F/LOSS projects to wear down the inertia inherent in MSDN. Likewise, IBM has invested enormous amounts of money in developerWorks (http://www.ibm.com/developerworks/), incorporating free and open source software to meet their solution needs and value propositions to their customers.

This is the real "conversion." The community enables customers. It is correlative, not causative. Community members that have solved their problems using a company's technology base will carry their excitement, knowledge, and commitment into new places where customers exist. With well-organized and supported F/LOSS communities, the community now brings the technology to new customers and then later anchors those customers. In recent years, the next generation of startups has learned that the best way to encourage a frictionless

relationship between a vendor and its community is not to attempt to convert users at all.

As recently as the past few years, many F/LOSS-related vendors discussed the idea of separating open source users from paying customers, but they still often offered those F/LOSS users paid support. It was almost as if they saw dollar signs instead of download numbers and could not help themselves. In comparison, we see newer vendors being much stricter about not offering paid support to F/LOSS users, while still investing in support forums and other resources that enable the vendor to support users and track the user-profiling statistics that enable them to identify those likely to enter the customer pipeline. Vendors using F/LOSS can enable significant savings in software sales and marketing, but it is often a case of spending differently rather than spending less.

To this point, we have focused on strategies a company needs to consider when delivering product and services around a F/LOSS community that the vendor best controls. There would rightly need to be a difference between the strategies employed to target true external communities compared to vendor-led, captive communities. Vendors targeting members of their own user and developer communities have more flexibility in how they define community. For example, a vendor might develop an active community of users without necessarily encouraging developers around their own F/LOSS-licensed offering depending upon what problems they solve for what customer profile. Developing products and services for externally led, community-developed F/LOSS requires a company to participate deeply in the external community to demonstrate credibility and best differentiate their own offerings.

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Summary

The desire to differentiate between project users and product customers is specific to captive, vendor-led user communities. Vendors attempting to generate revenue from open source software developed by collaborative communities have to be careful to enable would-be customers to be both product users and project contributors at the same time. The last thing they want to do is force users out of that community.

For the reasons noted above, however, vendors attempting to generate revenue from vendor-led open source software have much to gain by actively differentiating between community users and paying customers in order to reduce the friction caused by trying to serve two groups with the same strategy.

If community users have more time than money and customers have more money than time, then a vendor needs very different strategies to address each group's selfish needs. Vendors must ensure that they are not wasting time and resources attempting to convert those users who will happily support themselves and modify the software to save time, while also ensuring that the products and services they offer will appeal to those potential customers that might be prepared to spend money.

Identifying the services, products, and features that will appeal to each group is the essential problem that lies at the heart of attempting to generate revenue from open source software-based solutions.

Matthew Aslett is Senior Analyst, Enterprise Software for The 451 Group and covers the business of free and open source software for The 451 Group's Commercial Adoption of Open Source practice and data management software for the Information Management practice. Prior to joining The 451 Group, Matthew was Deputy Editor of the monthly magazine Computer Business Review *and ComputerWire's daily news service. There he covered Linux and open source software and launched the successful Open Source Weblog in January 2006.*

Stephen R. Walli is Technical Director for the CodePlex Foundation. He has been in the software industry since 1980 as both customer and vendor. Previously as a consultant his clients included Symbian, Microsoft, and the Eclipse and Linux Foundations. In 1995, he was a founder and Vice-President, Research and Development at Softway Systems, a venture-backed startup that developed Interix to migrate UNIX applications to Windows NT based on the POSIX/UNIX standards he helped develop. Interix was Softway developed code, Microsoft licensed code, and a wealth of OSS covered by many licenses. Microsoft acquired Softway in 1999, where Stephen spent five years before joining another open source based start-up, Optaros, as Vice-President, Open Source Development Strategy. He left Optaros in 2006 to pursue his own interests. Stephen organized the first Beijing Open Source Software Forum as part of the Software Innovation Summit 2007, and remains interested in OSS growth in China. He blogs at: http://stephesblog.blogs .com.

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Recommended Reading

1. Community development process:

Jono Bacon, Community Director for Ubuntu Linux, and an employee at Canonical Ltd., wrote The Art of Community, which contains all the processes and policies used in developing the very successful broad-based community around Ubuntu Linux.

http://www.artofcommunityonline.org

2. Sales channel management:

David Skok wrote "Lessons from Leaders: How JBoss Did It" (9 Nov., 2009) describing his time as a board member at JBoss Inc., and the processes used in detail to manage the sales pipeline and grow revenues.

http://www.forentrepreneurs.com/sales-marketing-machine/jboss-example/

3. Sales and marketing:

The 451 Group report, "Closing The Deal With Community," written by Jay Lyman, Open Source Analyst, and published in March 2010, examines how open source software vendors spend and invest in sales and marketing.

http://www.the451group.com/caos/caos_detail.php?icid=1062

Building a Business-to-Business Sales Process

Stephen Davies

"Always be closing...That doesn't mean you're always closing the deal, but it does mean that you need to be always closing on the next step in the process."

<div align="right">Shane Gibson</div>

A sales strategy is not just about closing deals, it is about defining a sales process that accurately reflects an organization, its customers, and the products or solutions that it sells. By truly understanding its customers and by actually solving its customers' problems, a company can define and execute a sales process that will increase the likelihood of reaching its ultimate objective: a closed deal and money in the bank.

This article describes the steps to create a business-to-business (B2B) sales process and shows how these steps are used to build a sales funnel. It also provides tips for effective and consistent execution of that process to get initial sales and improve upon them.

Note that the marketing and sales processes are different. Marketing is about generating qualified leads, sales is about taking those leads and converting them to dollars. It is good business practice to separate the two processes but information from each process will impact the other. Note that this article assumes some marketing and communications activity to get the lead in the first place. The sales process as defined in this article starts with an identified potential customer.

Understanding Customer Demands

The first step in building a sales process is to understand the demands of customers. A customer demand is comprised of two elements: i) the customer's *need or desire* for a product or service; and ii) the customer's *ability to pay* for a product or service.

Verifying both elements of customer demand accomplishes the first two steps in building a sales process. By talking to potential customers, a company can find out what they really need and whether they have the ability to pay. Their ability to pay depends on their budget, of course, but it is also affected by the timeframe within which they could sign off on a deal. It is not inappropriate to ask a potential customer if they have the budget, who would sign off on the deal, and in what timeframe a deal could be closed. These questions allow a company to prioritize potential customers and identify those most willing and likely to buy the company's offering. It is worth knowing which customers have the need, but not the ability to pay, but the initial focus will be on those customers that have both elements of demand.

<div align="center">14</div>

Developing a Solution

Once the customer's demands are understood, the next two steps in the process are to develop a solution that will meet these demands and then propose it to the customer. In some cases, these steps may be reversed so that the proposal is made to the customer before the solution is developed. In other cases, it may be preferable to present a proposal based on an incomplete solution that will be refined based on feedback from the customers

Proposing the solution requires input from the potential customer. This step verifies that the proposed solution fits the customer's requirements. Also, it reconfirms that they have the ability to pay for it. If they cannot reconfirm this, then it is better to move on to a customer that can. By focusing on a customer that has the ability to pay for the solution, the probability of a successful deal increases.

Evaluating the Solution with the Customer

The next step is to evaluate the solution with the customer. If the customer is enthusiastic and initiates contact without prompting, this is a good sign. If constant hounding is required to get a technical or business response to a solution, the sale is likely going nowhere.

Assuming the proposal meets the customer's needs and the price point matches the customer's value point, then this step in the sales process should be limited to a few small areas of refinement. The key is to act decisively on customer feedback. Changes should be implemented (or dismissed with explanation) as quickly as possible to close this step. One effective strategy to close the step is for the supplier company to agree to a set of product changes, but in return, the customer agrees to buy the solution "as is," with or without a discount. This guarantees the sale early in the process, gets the customer using the solution as soon as possible, and provides the opportunity for further feedback and updates in the next version of the solution.

Typically, this is one of the steps where there is a high risk of the customer withdrawing their interest. The main reasons for losing the customer at this step in the process are:

1. Misleading information was provided by one of the parties.

2. The customer no longer sees the fit between the solution and their needs.

3. The supplying company is not able to introduce the required changes to the solution in a timely or cost-effective manner.

Negotiation and Contracts

If the previous steps in the sales process have been completed successfully, there is typically not a lot left to negotiate. The key points to focus on in the negotiation process are:

1. Outstanding product features to be implemented

2. Release date

3. Selling price, including volume discounts

4. Warranties or maintenance costs

The goal of the negotiation step is to resolve all of the *business* issues, not the legal issues, which are covered in the contract step. Introducing legal departments too early will stall the negotiation and jeopardize the sales process. The negotiation team should include the signing authority, a finance representative, and a business line manager.

Once agreement has been reached, the negotiation step is formally closed by issuing a letter of intent outlining all of the business issues. This letter is then forwarded to the legal team and becomes the main content of a formal contract.

Note that sales can be lost even in the contract phase, for example if a legal department finds an issue relating to intellectual property. The contract step in the process does not necessarily represent a won sale and it might initiate a further round of negotiations or even a lost sale.

Deals Lost Along the Way

Failing to pass any step in the process means the sale is lost. If the customer does come back at some point in the future, then the sales process should start again from the beginning because the conditions of the sale are likely to have changed. Although losing a sale is undesirable, it is critical to learn from the loss. If the potential sale was in response to a request for proposal (RFP; http://wikipedia.org/wiki/Request_for_proposal), an official debrief can be requested, especially if the RFP was issued by a government organization. In any case, it is important to follow up with the customer and find out why they did not purchase the solution. From this feedback, the supplier can determine what changes to the solution or process could be made so that the sale will be won if the opportunity presents itself again.

Closing a Deal

This step is a milestone rather than a specific task. When the contract is signed by both parties, this marks the end of the sales process and the beginning of a customer relationship management process. Hopefully, it is also the beginning of a long-term relationship. The supplier should work hard to keep the new customer, since it typically costs 10 times more to attract a new customer than to sell to an existing one.

Building a Sales Funnel

The sales process represents the natural evolution of a deal and it is straightforward to follow one deal through the process. In reality, many deals may be in progress at the same time and at different steps. A sales funnel (http://wikipedia.org/wiki/Sales_funnel) is a way to track potential customers through the sales process. It helps assess the health and balance of projected sales by providing information on the following:

• the progress of each customer through the sales process

• the value of the opportunity associated with a customer

• how long customers are taking to move down the funnel

• how many customers are at each step

• projected revenue forecasts for cash flow statements

The funnel metaphor for a sales process is based on the gradual narrowing of potential deals into actual deals. Figure 1 shows a graphical representation of the properties of a sales funnel. As customers progress from

Figure 1. Properties of a Sales Funnel
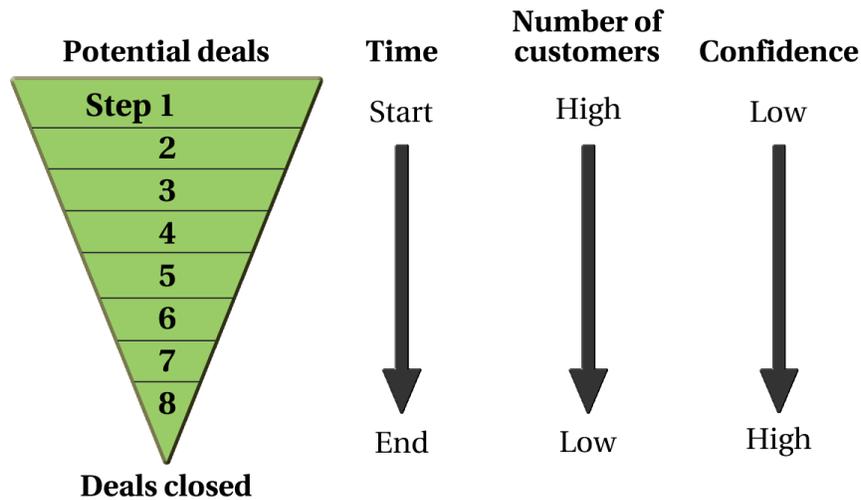
one step in the sales process to another, some potential deals fall through, but the company's confidence in the remaining deals increases.

The first step in setting up a sales funnel is to assign a probability to each step in the sales process. Typically, this is the estimated probability of a customer at that stage in the process, ultimately reaching the final step in the process. In other words, it is the likelihood that a customer at a given stage will eventually buy the solution. Using the sales process steps outlined earlier, hypothetical probabilities can be assigned to each step of the sales process, as follows:

1. Establish that the customer need or desire exists (5%)

2. Establish that the customer has ability to pay for a solution (10%)

3. Develop solution (30%)

4. Propose solution (60%)

5. Evaluate solution (65%)

6. Negotiate deal (70%)

7. Create contracts (90%)

8. Close deal (100%)

Another approach would be to assign a probability of the customer moving to the next step in the process. The calculations are different in this case, but the overall effect is the same.

The next step is to take a potential customer, insert them in the process, and assign a contract value to the opportunity. In this way, a spreadsheet representation of the funnel is built. This spreadsheet is used to track the flow of customers through the sales process. Relevant information about individual deals or the entire sales process can then be extracted.

To illustrate this process, Figure 2 shows a hypothetical spreadsheet for a company's sales funnel. Note that they are proposing a solution to Generic Ltd. This deal is currently at the proposal step in the sales process, which has a 60% probability of leading to a closed deal, at which point it would be worth $100,000. Each deal will either close or not, but the probabilities of closing can be used to calculate a weighted value for each

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Figure 2. A Hypothetical Spreadsheet Representation of a Company's Sales Funnel

Company	Opportunity name	Funnel stage	Stage probability	Contract value	Funnel value	Est Close Date	Days to close
		Totals/Average	52%	$390,000	$202,000	02-Jan-11	127
Generic Ltd	Product A	Propose Solution	60%	$100,000	$60,000	05-Jan-11	130
Alpha Co	Product A and B	Initial Communication	10%	$50,000	$5,000	15-Apr-11	230
Beta Co	Product B	Fact Finding	25%	$40,000	$10,000	01-Dec-10	95
Gamma Corp	Product A	Develop Solution	40%	$30,000	$12,000	16-Dec-10	110
ABC Ltd	Product C	Propose Solution	60%	$50,000	$30,000	15-Dec-10	109
DEF Inc	Product A, B and C	Solution Evaluation	75%	$30,000	$22,500	24-Nov-10	88
Kappa Ltd	Product C	Negotiation	85%	$40,000	$34,000	04-Nov-10	68
Bob Co	Product C	Contract	95%	$10,000	$9,500	30-Sep-10	33
Lambda Ltd	Product A	Propose Solution	60%	$30,000	$18,000	05-Jan-11	130
Epsilon Inc	Product B	Initial Communication	10%	$10,000	$1,000	01-Jun-11	277

potential deal. This provides a reasonable estimate of what actual value is likely to come from the group of deals as a whole. In the case of this particular deal, the weighted value is $60,000 ($100,000 x 60%). The analysis is extended by including an estimated closing date. In the case of Generic Ltd., the closing date is the 15th of January, 2011.

The final step is to add the credit terms, which gives a projection of cash in the bank. Unfortunately, this exercise sometimes can become demoralizing because it is human nature to overestimate: i) the probability of getting a sale, ii) the sale amount, and iii) when the sale is going to close. However, when coupled with honest estimates, these calculations truly show when the "rubber hits the road."

When all potential deals are recorded in the sales funnel, the weighted values can be projected over the next fiscal year or beyond. Over time, as the company's experience with its customers grows, the probabilities will be refined and the funnel estimate of projected revenue will improve.

Conclusions

Developing a relevant and workable sales process is perhaps the most important aspect of a successful sales strategy. Organizations usually develop their sales strategy through trial and error, which involves a lot of wasted time and energy. A well-defined sales process, supported by a sales funnel, forces a company to be realistic about how well their sales tactics work and helps to focus on the areas that require improvement.

Stephen Davies is an entrepreneur and business development professional working in the National Capital Region. He has sales and marketing experience in a number of sectors, notably in online education and training products, clean tech manufacturing, and operations management consulting. Stephen also lectures at the Sprott School of Business in Entrepreneurship-related subjects and is part of the Lead to Win faculty.

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Open Source Contributions as a Complement to Your Sales Strategy

Jason Côté and Julian Egelstaff

> *"In 2010 the global internet-connected population will cross two billion people, and mobile phone accounts already number over three billion. Since there are something like 4.5 billion adults worldwide (roughly 30 percent of the global population is under fifteen), we live, for the first time in history, in a world where being part of a globally interconnected group is the normal case for most citizens."*
>
> Clay Shirky

Freeform Solutions (http://www.freeformsolutions.ca), a not-for-profit IT consultancy, discovered a large portion of its work was being carried out without being paid for directly from consulting fees. This led to an investigation of the nature of such pro bono work, and what value it could provide to Freeform and its clients.

Supporting open source communities was determined to be the most significant use of the time possible. Accordingly, Freeform has taken steps to focus a significant portion of its work on that task, and to integrate this work with its overall orientation to clients.

This commitment to open source provides a strong differentiator in the marketplace. It also enables one kind of prioritization of sales leads. Ultimately, the commitment to the work is considered the most important aspect of the work, rather than the specific kind of activities that are undertaken, or how they are paid for.

Background

Even in the best of times, the non-profit sector relies heavily on volunteer effort and donated goods. Many organizations are currently experiencing a variety of challenges due to current economic conditions, including a decrease in available financial and human resources and a simultaneous increase in demand for their services (http://imaginecanada.ca/sector_monitor). In response, many charities have increased their reliance on volunteers.

Freeform Solutions is a not-for-profit organization, with a mission to help other not-for-profits use technology more effectively to meet their own missions.

The organization's activities are primarily funded through hourly rates charged to partner organizations (clients) in exchange for

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its specialized IT consulting and development expertise. A differential rate structure is used, such that larger organizations (i.e., those with annual budgets more than $1 million) pay a higher rate and smaller organizations (i.e., those with annual budgets less than $100,000) pay a lower rate. For the most part, Freeform's larger clients are subsidizing the time it spends working for its smaller clients. From a financing perspective, unfortunately, there is a large number of small organizations in the non-profit sector.

Generally, Freeform's rates are considered quite low. Fairly basic market research confirms that other organizations are charging higher rates, at least in other market segments. In Freeform's target market, charging "what the market will bear" usually means charging as little as possible. This is a significant tension that has to be carefully managed at all times. While higher rates would enable the organization to make investments that would further improve its efficacy (mission delivery), they might also make its services no longer affordable to those non-profits most in need of them.

Freeform also does a certain amount of pro bono work, that is not billed to clients. In any economic climate, this is critical support to non-profit organizations, but even more so now.

Currently, Freeform also benefits from a grant from the Ontario Trillium Foundation (http://trilliumfoundation.org), an agency of the Government of Ontario. The grant is focused on providing support for activities that are of general benefit to all non-profit organizations, rather than enabling work for individual non-profit organizations. For example, one goal of the grant is the promotion of open source software in the non-profit sector, rather than building a new website for one specific organization.

Working Without Being Paid

While preparing the Trillium grant application, Freeform reviewed how staff time was being spent, and discovered that pro bono work constituted 20% of all activities. This statistic was included in the Trillium grant application. Trillium requested that Freeform continue to meet this target for at least the duration of the grant. The grant itself does not directly support Freeform's pro bono activities. It supports other activities which will ultimately improve everything Freeform does, including its pro bono practice. Previously, the pro bono practice was largely sustained by the volunteerism of Freeform's staff. Now, with a specific, ongoing target for pro bono work, it was necessary to carry out this activity in a focused, coordinated way.

Compliance with the "new" Trillium requirement raised several issues internally. First, it was necessary to determine just what activities were making up the 20% pro bono time. The fact it was 20% was known, but the work had not been carried out in an organized way. For example, some of it was additional, unbilled time spent on client projects, because additional features were desired which staff felt were "worth it." Some of it was time spent supporting open source projects directly, which was outside the scope of client projects. And, of course, some of it was specifically planned work, such as time spent doing complete projects for clients for free.

Basically, all of it was time that was never invoiced for, but which was spent working on some aspect of Freeform's mission to sup-

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port non-profits in the use of technology. From this perspective, Freeform is following the traditional Latin meaning "for the public good" and considering all such time is part of a pro bono practice, this holds true regardless of how the time is being paid for. The primary point of contrast would be time spent doing work at the request of a client who is paying directly for the work to be done.

When the time-tracking logs were examined more closely, it turned out that most of the pro bono time up to that point had been spent essentially working for individual clients for free. Those activities definitely provided benefits to the clients, but was it the most effective use of Freeform's time? That was the second thing that had to be determined. What is the best way to measure the relative benefits of all the various activities Freeform could be spending its time on? What provides value?

In the business sector, these kinds of business questions might be settled more easily, by recourse to "the bottom line." Presumably, businesses are able to measure the effectiveness of various strategies by determining which provides the greatest profit. This is a yard stick that generally does not apply directly to the not-for-profit sector. This is true, in part, because funding and revenue are often not so directly tied to the activities the organization carries out. More importantly, this is true because of a growing effort to consider social and environmental outputs in addition to financial ones.

If a business pursuing some form of corporate social responsibility (http://wikipedia.org/wiki/Corporate_social_responsibility) dedicates even 1% of its profits to charitable

activities, that is often viewed as a progressive step. Some companies allow employees to spend up to 1% of their paid time on volunteer efforts. One working day a year, is the standard at other organizations. Freeform wants to dedicate 20% of its total effort towards pro bono activities. Twenty percent is a make-or-break figure for any organization, let alone a not-for-profit organization without access to the financial levers that many businesses have.

Furthermore, a business pursuing the triple bottom line (http://wikipedia.org/wiki/Triple_bottom_line) has a responsibility to be sustainable: people, planet, and profits. If the "resource" that an open source community provides is "exploited," for example through consumption and without replenishment, then it is no longer available for anyone. This phenomenon is often described as the tragedy of the commons (http://wikipedia.org/wiki/Tragedy_of_the_commons). Perhaps the path to sustainability in this case is to include the cost of supporting (replenishing) an open source community by participating in it, into the cost of all of the products and services derived from using (consuming) it.

Prioritizing the 20%

Measuring the relative benefits of the various things Freeform could spend its time on, is a critical step. Accordingly, Freeform has chosen to dedicate as much of its pro bono activities as possible towards support for the open source solutions used most heavily by its clients.

The thinking behind this is that it provides much greater value to all Freeform's clients, and to Freeform's own viability, if the tools Freeform uses are constantly improving as

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much as possible. While some might believe that an army of volunteer developers (http://osbr.ca/ojs/index.php/osbr/article/view/1165/1116) is out there somewhere, making Linux and Firefox and Drupal what they are, the truth is quite different. The overwhelming majority of open source projects have only one developer. At the opposite end of the spectrum, major projects like Linux and Firefox have significant commercial backing. A full three quarters of Linux kernel code is now contributed by developers working for commercial companies (http://apcmag.com/linux-now-75-corporate.htm).

The health of open source depends on the active participation of the community, and the community increasingly includes people and organizations making money from open source, whether they're social enterprises like Freeform Solutions, or for-profit corporations like IBM. In turn, the health of the open source community increasingly depends on the active support of organizations that are making money from open source. It is a virtuous circle.

From a business perspective, this effort is perhaps best understood as the R&D cost of being an open source business. Or it is the marketing cost, or some other expense. Open source communities need help in all things, including marketing and R&D. Organizations that make money from open source software owe it to the community, and to themselves, to give back in some form or other, whether it is code, evangelizing, or something else. The payoff will be in stronger software and communities on which they can build more business.

So, if Freeform is going to spend 20% of its time not being paid directly for its work, the

best course of action would seem to be strengthening this foundation upon which all the rest of Freeform's business is built. It is not only good for Freeform. The well-being of the open source systems that Freeform's clients rely on also rests on the strength of the software and communities. Furthermore, as freely available open source software, all the improvements and benefits Freeform provides will broadly support all the users and future users of the software, whether they are Freeform clients or not. In the case of software like the Drupal content management system, which is heavily used in the not-for-profit sector (among other places), supporting the community and the code will indirectly support many more organizations than Freeform could ever hope to serve directly.

A common measure of success in commercial open source projects, or at least in organizations that sell products and services based on open source software, is the extent to which those organizations contribute to and otherwise support the underlying community and code base. These projects and organizations seek to demonstrate the successful fusion of these oft-described contradictory worlds. In other words, they are seeking to answer the question, "is there a fair exchange of value?" and they want to prove that the answer is "Yes."

At Freeform, giving back was never considered optional. Still, and unfortunately, this is an activity that non-profits struggle to afford, despite the obvious benefits they receive from the fruits of all of the labour that preceded theirs, volunteer or otherwise. The hard reality is, and as one community recently reiterated, someone has to pay for it (http://civicrm.org/blogs/eileen/civi-make-it-happen).

Choosing the Right Work, and the Right Clients

As always, it is challenging to choose the right projects and do the right amount of free work at the right time. The contributions Freeform focuses on in its pro bono practice are a mixture of technical and non-technical. On the technical side, features are added to software to make it generally more useful and effective for the situations Freeform tends to use it in. These improvements are freely shared with the rest of the community. In some cases, Freeform spearheads major releases of software when an architectural evolution is required, which is beyond the scope of any one client project.

On the non-technical side, Freeform actively participates in open source events, particularly conferences and community meetings. These opportunities represent the best way to engage with other actors in the community, as well as stay on top of what the current state of the art is.

Occasionally, Freeform still does small amounts of work directly for clients, unpaid. But that is a slippery slope to be avoided. Freeform could always do more and more free work for more and more non-profits and never, ever, be done, and get very little benefit from it. Instead, the particular kinds of pro bono activities that Freeform focuses on produce more social innovation, and generally have a higher potential contribution to the non-profit sector as a whole, than simply building more Drupal and CiviCRM websites for small non-profits free of charge, as important as that is.

From a sales perspective, Freeform's pro bono work and commitment to the open source communities it relies on, provides a strong differentiator. Freeform's "money is where its mouth is" when explaining the values and benefits of the open source solutions it recommends. This allows, and requires, Freeform to be more than simply a vendor of solutions, and it suggests that fact to Freeform's clients. In turn, clients that are comfortable with that approach can make a confident commitment to work with Freeform, knowing what to expect out of the relationship. This pro bono work is also a good method for developing a profile in the communities Freeform relies on. That act by itself can be an important sales factor, by demonstrating to potential clients the nature and depth of Freeform's knowledge and commitment.

It is also possible to rank potential clients by the level of understanding they have of these concepts. Freeform knows from experience that organizations that do not understand the rationale and purpose of Freeform's pro bono work, tend to make poor clients. Even in Freeform's work that is paid for directly by clients, the technical artifacts are usually freely shared with the communities that would benefit from them. Clients that do not recognize the value of this have a more difficult time engaging with Freeform. This knowledge helps Freeform prioritize sales leads.

That is not to say that Freeform only works with other rabidly open-source-friendly organizations. Many of Freeform's clients are still trying to get past regarding Freeform as a vendor of products and services. That is okay, and there is still much good work Freeform can do for those organizations, while simultaneously trying to help them knowingly, wilfully, and intentionally participate in this approach based on its merits.

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Conclusion

Calling it a "cognitive surplus," Clay Shirky (http://www.shirky.com) illuminates how enormous humanity's potential capacity for change really is: people spend over one trillion hours watching television every year. Many good works have been proposed as alternative uses of at least some of this "free" time. Freeform believes that volunteering is important, and knows first hand that non-profits are counting on it to sustain a healthy civil society.

It has been a challenging and invigorating process, to first discover an unfocused resource of time, and then to put it to good use supporting the organization, and Freeform's clients as well. Freeform chose to spend this resource on the open source communities Freeform participates in, as a demonstration of commitment to a "triple bottom line." Freeform's own efforts are focused on a range of technical and non-technical support for specific open source software projects and their communities.

However, the specific kind of contribution is not a very important part of this story, and really neither is whether the effort comes as part of an employer-sponsored volunteer program, or as part of focused strategic efforts by an organization. What counts is that the contributions are made. The growing portion of the not-for-profit sector using open source software will be thankful for the effort. It can be a key ingredient in a sales and outreach program that can uniquely position an organization in its market.

Jason Côté is the President and CEO of Freeform Solutions. He has held senior positions at CANARIE, as well as chief executive positions at Actua, and CanadaHelps, all three of them leading national not-for-profits that excel in the use of information technology. Today, Jason oversees all operations at Freeform, and works with clients and staff to build the IT capacity of the not-for-profit sector. He holds a Bachelor's degree in Computer Systems Engineering and an Executive MBA in Leadership.

Julian Egelstaff has been working in the software and IT industries for over 13 years. In 2003, he co-founded Freeform Solutions, a not-for-profit organization with a mission to help other not-for-profits use technology more effectively. The idea for Freeform Solutions came from seeing how not-for-profit and public sector organizations have many IT challenges in common, but they experience them and approach them differently from commercial organizations. Maybe a for-the-sector, by-the-sector, approach could help everyone do better? These days Julian puts all his experience to use planning systems with Freeform's partners. He is also the lead programmer of the open source project Formulize, which is a web form and data management system that is designed to provide non-programmers with the ability to create database systems on the web. Before working with technology, Julian spent a lot of time writing and thinking his way towards a Bachelor's degree in Journalism and Philosophy.

Strategies for Selling Services

Patrick O'Halloran

"A business absolutely devoted to service will have only one worry about profits. They will be embarrassingly large."

Henry Ford

With the service economy on the ascension, companies are yearning for mechanisms to connect their service solutions to their customer's problems, and have the customer acknowledge that their solution is the best. In order to meet these requirements, the foundations of the model used to deploy such solutions need to be concrete. The solution must capture the fundamental nature of the target markets and embody all of the customers' expectations. This article reviews literature that will inform the development of these models and identifies relevant strategies to enable growth options around service-based solutions.

Introduction

With developed economies requiring a migration away from the traditional manufacturing mindset, it has been acknowledged that these economies need to move up the value chain. This leads to the "servitization" of manufacturing and products (Neely, 2007: http://tinyurl.com/2vped48; Frei, 2008: http://tinyurl.com/32an5yl). With these changes, the rise of the service-based economy is evident, and it requires those who wish to operate in the services arena to understand the principles around which they should position their offering.

Background

Before exploring these principles, it is worthwhile reviewing the common attributes shared by all services, as described by Axel Johne and Chris Storey (1998; http://tinyurl.com/2b4eo73):

1. Intangibility: Services are usually processes, not physical things.

2. Heterogeneity: Service quality varies from provider to provider and over time.

3. Simultaneity: Services are produced and consumed simultaneously; they cannot be held in stock.

These attributes require a company to develop a sales strategy that is unique to the service model. Frances Frei (2008; http://tinyurl.com/32an5yl) identified four essential ingredients for a successful service-based company or solution. By focusing on these four elements, a company can develop a robust business that is capable of respond-

ing appropriately to the unique opportunities and risks that develop when selling services:

1. The offering: The service must meet the needs of the target customers, but also the company should provide differentiated excellence in areas where it will be valued by its customers.

2. The funding mechanism: The company must identify how the costs of delivering an excellent service will be covered.

3. The employee management system: High-quality services require a high-quality workforce for their delivery. Effective management of employee motivation and their ownership of service engagements will be reflected in the reputation of a service business (Heskett, Sasser, and Schlesinger, 1997; http://tinyurl.com/33m4qqd).

4. The Customer management system: The customer is part of the value-creation process in service engagements. Accordingly, service companies must develop techniques to manage customers so that their services can be delivered effectively.

Service-Based Strategies

Three service-based strategies can be used to create new services or migrate an existing product to a service offering. They are the "net promoter" strategy, the "hidden assets" strategy, and the "applicable processes" strategy. Each requires specific tools to develop the key element of service-oriented arena: customer focus. These strategies encourage customer loyalty, develop customer willingness to promote a company's service, and provide a method for analyzing customer needs.

Net Promoter Scoring

In his book, *The Ultimate Question*, Fred Reichheld (2006; http://www.theultimate question.com) developed the concept of the "net promoter score," which he described as the key metric that can help determine a path to growth. This metric is directly associated with customer loyalty, which Reichheld defines as "the willingness of someone – a customer, an employee, a friend – to make an investment or personal sacrifice in order to strengthen a relationship." The premise is that customer loyalty drives top-line growth and that customer retention, or repeat business, can be linked to profitability.

The best indicator of loyalty is what a customer tells others about a particular service or product offering. Accordingly, Reichheld's research showed that the most important question on a customer satisfaction survey is: "Would you recommend us to a friend or colleague?". This "ultimate question" can then be used to take the percentage of customers who are "promoters" and substract the percentage of customers who are "detractors." The result is the company's net promoter score. The key to growth is to develop a strategy that will maximize a company's net promoter score.

A recent blog post on the *Customer Think* website (http://tinyurl.com/2b3dt43) compared the results of a standard "customer satisfaction" score with the net promoter score and found that the net promotor score was a better predictor of revenue growth. For further details on the net promoter score, see: http://www.netpromoter.com/.

Hidden Assets

The "hidden assets" strategy was proposed by Adrian Slywotzky and Richard Wise

(2002; http://tinyurl.com/27aumm4) to help incumbent firms that are experiencing stagnation in their traditional product-centric growth. Growth stagnation can be masked by activities that are not sustainable in the long-term, such as international growth, acquisitions, and price increases. Once these sources of growth are removed, the company may discover that their core growth is not sufficient for the company to remain competitive. Firms must focus on higher-order needs of their customers in order to identify new growth or new service opportunities. These "reflect customer's need to improve their overall economics, in which the product plays just one role."

Slywotzky and Wise contend that the solution lies in leveraging the company's "hidden assets." These may be a combination of the company's relationships, market position, networks, and information – strengths that the company may take for granted. By recognizing and leveraging these assets, the company can create value for their customers and growth for their investors.

Applicable Processes

Werner Reinartz and Wolfgang Ulaga (2008; http://tinyurl.com/3622p4n) have identified the key steps of a strategy to sell services more profitably. The first step is for product-based companies to realize that many of them are already delivering services. Once this fact is acknowledged, a strategy to expand their service capability can be developed. For example, the company can identify services that are delivered around their product, but which are currently included in the product price, such as shipping costs. In many cases, a transition from "free to fee" is possible by explicitly charging for these services. In the second step, the company should evaluate its business pro-

cesses to ensure it has the correct processes in place to:

1. Build flexible service platforms with common delivery processes.

2. Monitor the costs of processes to identify profit drain.

3. Exploit technical process innovations.

The third step is a common key point of failure; the task is to identify the applicability of the sales team to the offering they are providing. Compared to selling products, services typically require longer sales cycles and a more strategic and complex sales process, with key decisions being made higher up the customer food chain. A service-savvy sales force is required and they must be supported with appropriate incentives and tools. The fourth and final step is to focus on the customers' processes, incentives, and structures and ensure they are aligned with the company's offerings. This enables the company to deliver holistic solutions: a service package that fully meet the customers needs and provides opportunities to improve future service delivery based on a better understanding of the customer's world.

Key Takeaways

A service solution does not sprout from an infertile idea, it is constructed from a rounded analysis of the needs of customers and the opportunity potential for a provider. For many companies, this analysis may require internal reflection to identify and address areas of complacency and neglect before repositioning their current solutions.

As a provider of a service, a company must focus on loyalty and the associated "sacrifice" that a customer (and potential pro-

moter) invests in demonstrating such loyalty. This is a means of gauging the quality and long-term feasibility of a particular service offering.

Service providers also must be seen as convincing leaders in their field. Their existing and prospective customers must share the conviction that they can effectively deliver the defined service solution. Front-line staff must be nurtured to position and promote the service in the most credible and knowledgeable manner as possible.

Finally, in one way or another, all companies are providers in the service domain, and they all need to ensure that their service provides the best fit for all stakeholders involved.

Conclusion

With the increase in the number of service opportunities and competition, companies must ensure that the model on which their opportunities are based is multi-focused. It should encompass more than just the offer itself, and include an understanding of the customer's needs, how the service costs will be covered, and how employees and customers will be managed to best deliver an effective service. Companies must also recognize their own service-delivery capability, whether they are a product-based or service-based company. Finally, by using appropriate tools and strategies that can be used to better understand the needs of customers, companies can develop targeted service offerings that will resonate with their customers and lead to more profitable and sustainable solutions.

Patrick O'Halloran is a graduate of the Computer Engineering Program from the University of Limerick in Ireland and has just completed the Technology Innovation Management program at Carleton University. He is a Staff Design Engineer with Xilinx Inc., within the Xilinx Design Services group, and has been working on varied consultancy projects in this role for the past 10 years. These projects have centered around Xilinx's FPGA technologies and their application to many industry verticals. He has varied interests which range from consultancy services, technology innovation, real-time systems and IPR in the technology domain.

Upcoming Events

October 18–24

Open Access Week

Global

Open Access Week, a global event now entering its fourth year, is an opportunity for the academic and research community to continue to learn about the potential benefits of Open Access, to share what they've learned with colleagues, and to help inspire wider participation in helping to make Open Access a new norm in scholarship and research.

http://www.openaccessweek.org

October 23

CANCELLED:
Ontario GNU/Linux Fest Conference

Toronto, ON

Unfortunately, there will not be an Ontario GNU/Linux Fest Conference in 2010. This year's event has been cancelled.

http://www.onlinux.ca

October 28-29

FSOSS

Toronto, ON

The annual Free Software and Open Source Symposium provides a venue to share the latest trends in open source. It is an event aimed at bringing together industry, developers, educators and other interested parties to discuss open source, open web, and academic/industry partnerships. This dynamic two day event offers presentations, panel discussions and hands on workshops allowing you an opportunity to collaborate with your peers and learn from your mentors. Join the wave of the future and see how open source software is used in classrooms, labs and industry.

http://fsoss.senecac.on.ca/2010/

November 5-6

Hackfest

Québec, QC

Hackfest 2010 will interest everyone that is passionate about technology and security. Friday is about pragmatic security with an holistic approach. Saturday is about more technical topics, understanding the true security, and hacking. Hackfest includes competitions intended for a broad public; beginners, intermediates, students, professionals, and hardcore hackers are all welcome.

http://www.hackfest.ca

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Technology Innovation Management (TIM)
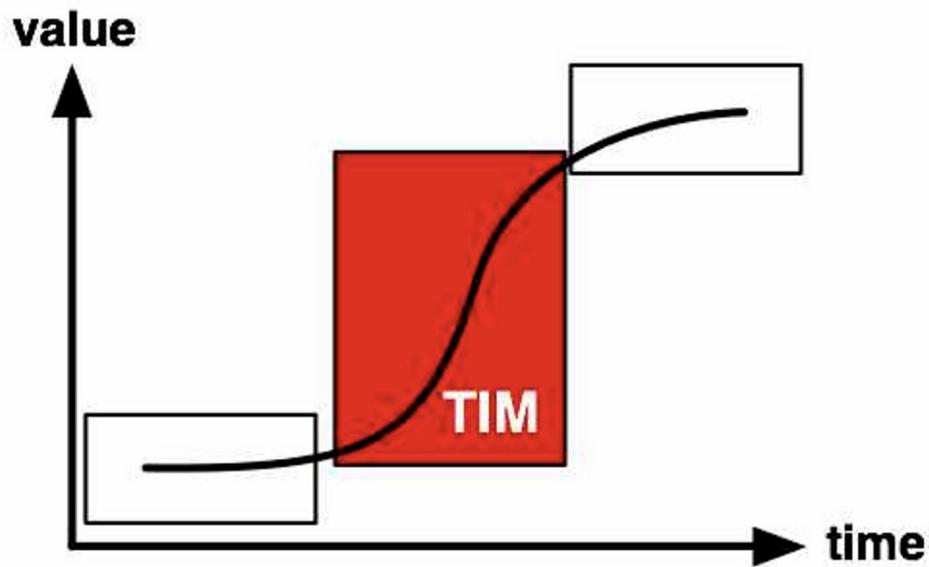
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Contribute

The goal of the Open Source Business Resource is to provide quality and insightful content regarding the issues relevant to the development and commercialization of open source assets. We believe the best way to achieve this goal is through the contributions and feedback from experts within the business and open source communities.

OSBR readers are looking for practical ideas they can apply within their own organizations. They also appreciate a thorough exploration of the issues and emerging trends surrounding the business of open source. If you are considering contributing an article, start by asking yourself:

1. Does my research or experience provide any new insights or perspectives?

2. Do I often find myself having to explain this topic when I meet people as they are unaware of its relevance?

3. Do I believe that I could have saved myself time, money, and frustration if someone had explained to me the issues surrounding this topic?

4. Am I constantly correcting misconceptions regarding this topic?

5. Am I considered to be an expert in this field? For example, do I present my research or experience at conferences?

If your answer is "yes" to any of these questions, your topic is probably of interest to OSBR readers.

When writing your article, keep the following points in mind:

1. Thoroughly examine the topic; don't leave the reader wishing for more.

2. Know your central theme and stick to it.

3. Demonstrate your depth of understanding for the topic, and that you have considered its benefits, possible outcomes, and applicability.

4. Write in third-person formal style.

These guidelines should assist in the process of translating your expertise into a focused article which adds to the knowledgable resources available through the OSBR.

<div>

Upcoming Editorial Themes

November 2010: Economic Development

December 2010: Humanitarian Open Source

January 2011: The Business of Open Source

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Formatting Guidelines:

All contributions are to be submitted in .txt or .rtf format.

Indicate if your submission has been previously published elsewhere.

Do not send articles shorter than 1500 words or longer than 3000 words.

Begin with a thought-provoking quotation that matches the spirit of the article. Research the source of your quotation in order to provide proper attribution.

Include a 2-3 paragraph abstract that provides the key messages you will be presenting in the article.

Any quotations or references within the article text need attribution. The URL to an online reference is preferred; where no online reference exists, include the name of the person and the full title of the article or book containing the referenced text. If the reference is from a personal communication, ensure that you have permission to use the quote and include a comment to that effect.

Provide a 2-3 paragraph conclusion that summarizes the article's main points and leaves the reader with the most important messages.

If this is your first article, include a 75-150 word biography.

If there are any additional texts that would be of interest to readers, include their full title and location URL.

Include 5 keywords for the article's metadata to assist search engines in finding your article.

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