



## D2.1 M1-M18 Dissemination strategy and communication program

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### **Abstract**

The dissemination strategy and communication programme sets out key audiences and dissemination channels for use in the first half of the project, as well as metrics to be measured to track dissemination progress. This document will later be revised for M19-36 based on experiences in the first year of the project.

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## 1. Introduction

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FedSM is a challenging project that seeks to change beliefs and behaviours in the federated e-Infrastructure community. Such an effort requires considerable and targeted dissemination activities, both to raise awareness of the project and its goals, and to build acceptance and support from those whose work will be changed by the project's activities.

As FedSM is a relatively small project, dissemination activities must be carefully targeted and aligned to realistic goals. This will necessitate a mixture of low-cost but wide output dissemination and more focused, high effort dissemination to key groups.

The project will use a mixture of traditional and new media channels. It will also try and leverage the dissemination mechanisms of partner organisations, especially the so-called 'client' partners.

Dissemination activities will be tracked with a small selection of key metrics, allowing their progress to be measured.

## 2. Contribution to project objectives

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The M1-M18 Dissemination strategy and communication program has a supporting role in the project, setting out initial plans for communication of the project's goals and products to a range of communities.

It takes input from D1.1, the Quality assurance plan, and has direct outputs into D2.4, M19-M36 Dissemination strategy and communication program. D2.4 will be an update to this document, revising approaches in light of experience and adding lessons learned from the M1-M18 program.

This document will also act as an input to D2.3, the Plan on ensuring exploitable project results, which will be closely linked to dissemination activities.

Lastly, the overall project dissemination and communication program will support the implementation of ITSM at the 'client' partners, which is a crucial and complex aspect of the project's work. This internal communication role, shared with WP4, is somewhat unusual in a project of this size, but remains key to the project success.

## 3. General approaches

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The goals of FedSM dissemination are to maximize the impact of the project and raise general awareness of the need for ITSM in e-Infrastructures. FedSM dissemination activities will be aligned with these goals.

To achieve this, a realistic view of dissemination must be taken. For instance, while FedSM's work is important and should have a considerable positive impact on European research via e-Infrastructures, the project itself will not be of interest to mainstream media. FedSM is an 'enabling' project, so its successes will be 'downstream,' in the improvement in e-Infrastructure service quality and the improved ability of researchers to do excellent science. However, it is unlikely that FedSM will be able to demonstrate such success in its lifetime.

However, FedSM can demonstrate success in improving the efficacy of the e-Infrastructures it supports. Such successes could be reduced wait times for helpdesks or to simplify the processes of negotiating SLAs with user groups. These will be of interest to members of the e-Infrastructure, IT and ITSM communities, so they will be the audiences that will be concentrated on and targeted.

We also recognise that there is a need for internal as well as external dissemination in FedSM. The commitment and engagement of members of client partner organisations is a critical success factor for the project. This necessitates an internal dissemination programme, which will be more focused than general external dissemination.

## 4. Media and channels

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The following section summarise the different channels available to the project and how there are intended to be used.

### 4.1. Press releases

For FedSM we will be targeting relatively specialist media in the areas of computing and ITSM. We foresee the following as likely topics for press releases with a reasonable chance of success:

- Launch of minimal ITSM requirements for federated infrastructures based on ISO20k
- Launch of certified training backed by TÜV SUD based on minimal requirements (possible co-release with TÜV SUD for added impact)
- Launch of best practice guide for ITSM in e-Infrastructure
- Notable success story based on implementation of FedSM approach.

We will limit ourselves to this magnitude of effort in recognition of the high impact but high effort required to achieve meaningful media relations. Equally, we recognise that FedSM is a 'process story' of interest to specialist media but less to mass media. Hence, releases will be targeted to specialist media in the e-Infrastructure, ITSM and business sectors. The project will also leverage relationships with other projects to distribute press releases via European platforms like AlphaGallileo. The goal will be to receive some coverage based on the releases in larger scale media than e-Infrastructure newsletters etc.

### 4.2. Website

The project website will act as a hub for the project, both internally and externally. The external project website will be based on a content management system and will include project information, public deliverables reports and online tools supported by the project. It will also include a password-protected area to include documentation for members of client organisations to get reports and guidance documents that are targeted to their organisation but not public.

The site will also syndicate social media output from Twitter as a news channel for updates about the project.

### 4.3. Mailing lists

The project will maintain an internal mailing list for day-to-day coordination of the project. It will also operate an external list for news about the project, and will attract community members to subscribe.

In order to facilitate coordination of ITSM implementation by client partners, lists for these groups will also be developed.

### 4.4. Social media

The project will make extensive use of social media, in particular Twitter, as there is now a sufficient Twitter community around e-Infrastructures to make the effort worthwhile. The project Twitter account can be found at [https://twitter.com/FedSM\\_project](https://twitter.com/FedSM_project) and will be posted to frequently through the project lifetime. A Facebook page has also been set up at <https://www.facebook.com/pages/FedSM-Project/522925534388373> that will republish tweets and be connected to other community members active on Facebook.

The project will also consider other social media opportunities such as LinkedIn discussion groups based on an estimation of effort versus impact. At a minimum the project will seek to get the social media activities it carries out syndicated as widely as possible.

### 4.5. Printed dissemination material

FedSM will produce a basic 2 page flyer that can be provided as a PDF or printed for events as well as two posters on the project, one for branding and one with some basic content on project goals. These will then act as templates for later documents that will be produced at need for specific events or occurrences.

As the project does not have a budget for printing, and because dissemination on ITSM introduction tends to require active engagement, the project will limit itself to providing printed material only when there is a real chance of it having an impact, however PDFs will remain available.

### 4.6. Content documents

The project will attempt to carry out focused dissemination using key documents of broad interest. At the beginning of the project this will include material from the gSLM project, from which FedSM takes a quantity of background content as an input, notably the gSLM strategic roadmap on service management in federated e-Infrastructures.

As the project progresses, the minimum requirements for e-Infrastructure can be used as a dissemination product, as can the best practice guide or case studies based on it.

In all cases we will expend some effort to make these documents attractive, re-skinning the deliverables with covers, diagrams and other design elements to make them more likely to be read.

### 4.7. Conferences & workshops

FedSM does not have any major events organised by the project foreseen in its work plan, but will endeavour to have a high impact at community events through giving talks, organising sessions and

contributing to community events. The consortium plans to address specific events as well as looking for other appropriate venues.

### 1.1.1. Specific events:

#### **EGI technical and community fora**

The European Grid Infrastructure organises two annual events, the Technical Forum in autumn and the Community Forum in spring. These are blends of technical conferences and internal meetings for the EGI community. While FedSM addresses all federated e-Infrastructure, Grids are an obvious audience for the project outputs. FedSM will attend both event series during this period and seek to provide sessions at them, ideally in cooperation with EGI.eu and NCI operations and management tracks. Apart from talks and workshops, FedSM will try and organise training sessions at these events, both on general ITSM topics and later training sessions as part of the FedSM certified training scheme.

#### **Business Driven IT Management (BDIM) workshop series.**

BDIM is a workshop series held at two major global ITSM events from the network and operations management community, IEEE/IFIP NOMS and IEEE/IFIP IM. BDIM has already featured input on the federated e-Infrastructure management problem through the gSLM project, and is a good opportunity to engage with the academic and commercial ITSM community. The upcoming BDIM events will be in Ghent, Belgium in spring 2013 and Krakow, Poland in spring 2014. FedSM intends to participate in both events.

### 1.1.2. General event types

FedSM plans to attend events for a range of federated e-Infrastructure organisations and communities. This will include events related to cloud federation, data infrastructures, research infrastructures and other emerging federated service communities. The consortium will consider participation in computer science research events, though these will be of lower priority as the policy and management based outputs of FedSM are less likely to be of interest to those communities. Examples might be conferences arranged by the major EUDAT data infrastructure project, Cloud events such as Cloudcom and CloudWorldForum. General IT and computing events might include International Supercomputing and Euro-Par.

## 4.8. Case studies

The project will look for success stories that can be converted to compelling case studies about the project's outputs and impact. These will be put together as web pages and short printed documents that include visible successes based on FedSM and endorsements from those implementing FedSM approaches. These would be very strong dissemination products that could be used alone or alongside other dissemination material to show the efficacy of the FedSM approach, promote uptake of project outputs and recruit new groups to the FedSM approach.

## 4.9. Tools

While FedSM is a policy implementation rather than a technology project, it is possible the project will generate some tools that assist in introducing ITSM. The project will take on a tool from the previous gSLM project, an online maturity assessment system that assists federated e-Infrastructures in assessing their current service management maturity and planning for improvements. FedSM may update this tool to fit FedSM purposes and simplify its use.

Any such tool will be a very useful dissemination channel, as it will make complex information accessible to potential audiences. It will be promoted strongly as a way to carry out self-assessment and also as a basis for consultancy and more engaged support.

## 5. Audiences and expected impact

### 5.1. Federated Infrastructure organisations (internal)

The most important initial audience for FedSM are the members of the client partners within the project who have committed to implementing approaches from FedSM. The broader impacts of the project, in terms of best practice information and guidance, will be based on experience with the client partners, so dissemination in support of successful implementation in these organisations is key.

This is supported by ITSM project experience in the commercial and public sectors, where convincing staff is seen as perhaps *the* key issue in whether an ITSM introduction succeeds or fails.

Key messages to this community will be that change is realistically achievable and can be incremental rather than necessitating wholesale change. By showing realistic steps that can be taken, and showing how ITSM more often involves description and fine-tuning of current activities rather than radical change, it will be easier to get community members on side.

The project will also promote the FedSM certified training scheme to these communities, as it will provide not only knowledge but also recognised qualifications that are of personal benefit to participants.

It will be important not to oversell the benefits of ITSM, which will lead to more work in the short term in order to reap longer term improvements. It will also be important to demonstrate the commitment of top management to the process, such that operational staff are convinced that they are not wasting their time.

Channel	Impact
Press releases	Low
Website	Medium
Mailing lists	High
Social media	Medium
Printed dissemination material	Low
Content documents	High
Conferences & workshops	High
Case studies	High
Tools	High

Table 1: Use of communication channels for (project client partner) Federated Infrastructure organizations

### 5.2. Federated Infrastructure organisations (external)

This second audience is equally important, but its importance increases later in the project, when there are meaningful outputs of interest to federators outside of the client partners.

Initial efforts will concentrate on the need for ITSM in federated e-Infrastructures based on documents and outputs from the prior gSLM project as well as new material from FedSM. The goal

will be to highlight how ITSM addresses real and current problems experienced in e-Infrastructures. While the effort and outlay in terms of time and budget should not be minimised, the messages should focus on long-term benefits.

The minimum standards for e-Infrastructure ITSM can be promoted to these groups, though their impact may be limited without supporting effort. Rather, towards the project end when the best practice guide based on initial implementations is available it will be more effective to target federated e-Infrastructure organisations. At this stage it will possible to offer them the minimum standards accompanied by the best practice guide and certified training, forming a pack that can be taken up and used with or without support from project members. This is positive as it means the products can be realistically used beyond the end of the project.

Channel	Impact
Press releases	Low
Website	High
Mailing lists	Medium
Social media	Medium
Printed dissemination material	Medium
Content documents	High
Conferences & workshops	High
Case studies	High
Tools	High

Table 2: Use of communication channels for external federated infrastructures

### 5.3. User organisations

User organisations such as Virtual Organisations, Virtual Research Communities and Research Infrastructures are not the primary customers of the products of FedSM. However, they are important in the overall process of improving service management and introducing ITSM.

User organisations need to see the potential (and later real) benefits of ITSM introduction, and need to see the input required from them and the reciprocal responsibilities ITSM will have on them. The broad message will be that for simply stating their requirements more clearly they will receive a better-managed, more predictable service. Unlike the situation for federated infrastructures, the work required of them is not considerable, though the same lead-time will be seen as that seen for federated e-Infrastructures.

We would hope that the best marketing material for this user group would be case studies on successful implementation, but this depends whether there are metrics of interest to users within the project lifetimes. If things are clearly easier for federators but not easier for users in an easy to understand manner the case studies will have limited impact.

For this area we may also consider surveys, though care must be taken as many community members experience ‘survey fatigue’ and response rates are typically very low.

Channel	Impact
Press releases	Medium
Website	High
Mailing lists	Medium
Social media	Medium



<b>Printed dissemination material</b>	Medium
<b>Content documents</b>	Low
<b>Conferences &amp; workshops</b>	Medium
<b>Case studies</b>	Medium
<b>Tools</b>	High

Table 3: Use of communication channels for user organisations.

#### 5.4. Policy makers and funding bodies

Policy makers and funding bodies will not be directly involved in the implementation of ITSM, but they are a crucial stakeholder group in driving adoption.

At present, funding bodies are the major financial supporters of federated e-Infrastructures, mostly through funding to support the research community. While there are moves to fund e-Infrastructures in different ways, they remain the main group paying for services, and even without financial contracts related directly to services consumed, they will have interests such as understanding usage levels and the impact that their funding has on research.

The main goal of dissemination to policy makers and funding bodies is to encourage them to require that members of the e-Infrastructure community consider ITSM concerns. This would add a strong impetus to ITSM implementation, as at present a major barrier is convincing federated e-Infrastructures that ITSM is necessary and achievable, though the problems it can face are well recognised.

Material to convince policy makers is already available in the roadmap produced by the previous gSLM project, in particular the context and policy level recommendations.

<b>Channel</b>	<b>Impact</b>
<b>Press releases</b>	High
<b>Website</b>	Medium
<b>Mailing lists</b>	Low
<b>Social media</b>	High
<b>Printed dissemination material</b>	Medium
<b>Content documents</b>	High
<b>Conferences &amp; workshops</b>	Medium
<b>Case studies</b>	High
<b>Tools</b>	Low

Table 4: Use of communication channels for policy makers and funding bodies

#### 5.5. ITSM community

The ITSM community is a mature field with experience in the public and commercial sectors around managing IT services. It is both a practical and academic field, with academic conferences such as the IEEE/IFIP NOMS and IM series, and with commercial consultancy on frameworks like ITIL or standards such as ISO/IEC 20000.

Engagement with the ITSM community will focus on showing that the federated e-Infrastructure community have an unusual and complex situation with regard to ITSM introduction. We would hope to get input on how ITSM standards and frameworks can be applied, and seek other similar areas where federation makes standard ITSM approaches difficult or impossible to implement.

The minimum requirements, certified training and best practice guide will all be of interest to this community though with a lower impact than in the e-Infrastructure community, as they are less unusual in traditional ITSM.

The main point of contact to this audience will be through the BDIM workshop series.

Channel	Impact
Press releases	Medium
Website	Medium
Mailing lists	Low
Social media	Medium
Printed dissemination material	Medium
Content documents	High
Conferences & workshops	High
Case studies	High
Tools	Low

Table 5: Use of communication channels for the ITSM community.

### 5.6. Commercial computing providers

The commercial computing sector may have an interest in the work of the project, as their resources may form part of federations, for instance cloud resources in hybrid clouds or virtualised Grid sites in commercial datacentres.

The main topics for dissemination would be ensuring commercial SLAs and other agreements support realistic federation with other resources. This will be of interest if commercial providers wish to compete for the funding previously given to academic centres to purchase computers.

Channel	Impact
Press releases	High
Website	Medium
Mailing lists	Low
Social media	Medium
Printed dissemination material	Medium
Content documents	Medium
Conferences & workshops	Medium
Case studies	High
Tools	Low

Table 6: Use of communication channels for commercial computing providers.

### 5.7. Academic computer science research community

The computer science research community may be an obvious audience, but quite a difficult one to access as the results of FedSM are policy rather than research-based. In general this community will be interested largely in academic references and quantitative research – which was difficult to achieve in the previous gSLM policy development project. In FedSM this may be more achievable, with quantitative data potentially available from helpdesks and other tools that can show quantitative measures of improvement. However, lack of referenced material may limit impact (though traditional ITSM references may be more useful here).

The major goal of engagement with this community would be to show how management change could improve the efficacy and efficiency of services as an adjunct to technical change. This would

show how FedSM complements previous technical developments in areas such as automated SLA negotiation.

Addressing this community will likely be through events, though the project will not be running any dedicated workshops. Instead, we would foresee submitting to relevant workshops at event series such as Euro-Par (where the previous gSLM project ran and attended workshops). Contributions to BDIM will also have an impact on one area of this community.

Channel	Impact
Press releases	Low
Website	Medium
Mailing lists	Low
Social media	Medium
Printed dissemination material	Medium
Content documents	Medium
Conferences & workshops	High
Case studies	High
Tools	Low

Table 7: Use of communication channels for the academic computer science community.

## 6. Measurement

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In order to track the success of project dissemination, the following metrics will be tracked. Initial goals will be set though they will be revised in the M19-36 plan in light of experiences in the first project period.

### 6.1. Web site visits and other statistics

While FedSM will not be a project attracting mass public attention, web visits will show engagement from the community. We will track various metrics such as visits and average time spent on the project site.

### 6.2. Press releases produced and republished/used

We do not foresee frequent press releases, as they are high-effort and only worthwhile when there is realistic chance of generating interest in some media sector. However, we plan a small number of releases, which will be tracked.

### 6.3. Mailing list membership and updates

For external mailing lists, we will track membership numbers of those we send updates about project progress. We will also track the number of updates sent, though we will keep the number relatively low to avoid being seen as spamming.

### 6.4. Tweets

We will track twitter activity, as the area most likely to generate impact. This will involve counting tweets. We will not make large efforts with Facebook, as it is less used in the professional world, though all tweets will be syndicated there.

## 6.5. Downloads of content documents

We will try to track downloads of key project documents, both those taken up from the prior gSLM project and new ones produced by FedSM. We will also track downloads of case studies in the same way.

## 6.6. Initial metric goals

Metric	Goal Yr1	Goal Yr2	Estimated Goal Yr 3
Web site visits	1000	1000	2000
Press releases published	1	1	2
Average republications/uses of press releases	5	5	5
Mailing list members added	100	100	100
Updates sent to list	3	5	6
Tweets	100	100	100
Document downloads	50	50	100

## 7. Conclusions

For FedSM we must address a wide range of audiences who do not necessarily want to adopt our products, though there seems to be an increasing awareness ITSM is at least a ‘necessary evil’ if not a crucial set of capacities. Our communication program must be realistic in its goals, and accept, for instance, that public interest is unlikely, and even in marketing to members of client partners, it will be a difficult task.

We will address these challenges through targeting material to the audiences where its impact will be highest, and partnering traditional dissemination with direct engagement with audiences, from all project members.

Plans and goals will be revised in the middle of the project based on experience in the first phase, to ensure the communication program remains current and can react to new situations.

## 8. Version History

Version	Date	Author	Change record
0.1	12.10.2012	O. Appleton	First draft
0.6	17.10.2012	O. Appleton	Updated, put on FedSM initial doc format
0.9	24.10.2012	O. Appleton	Integrate comments and changes following internal reviews
1.0	30.10.2012	O. Appleton	Final version
1.1	10.02.2014	O. Appleton	Update and fix of errors