



INTERNATIONAL JOURNAL OF
CONTINUOUS BUSINESS IMPROVEMENT

2019

Number 2



INTERNATIONAL JOURNAL OF
CONTINUOUS BUSINESS IMPROVEMENT

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The International Journal of Continuous Business Improvement

2019, Volume 2, Number 2

Table of Contents

The Organic Inbound Marketing Playbook for B2B	P4
9 tactics you are missing in your social media marketing strategy	P20
The Surprisingly Powerful Word You Should Use More Often in 2019	P28
Shelfware Is a Lurking Cybersecurity Risk	P31
KPI IS DEAD! LONG LIVE PBI! And here's a carrot for your efforts.	P35

The Organic Inbound Marketing Playbook for B2B

Jeremy Boudinet & Blake Johnston

The B2B marketing landscape of 2018 is a brave new world for business - one virtually unrecognizable from years past.

Go back to the start of the decade - concepts like content marketing, social media marketing, influencer marketing, and inbound marketing were years away from conception.

Buyer demographic and behavioral data was difficult to find. Marketing campaigns were more expensive to launch and harder to track. Market pulse was tougher to discern.

All that has changed. Replacing the old world of B2B marketing is a new landscape that proves immensely favorable to creative and strategic marketers who prefer guerilla tactics, smaller budgets, and surgical campaigns to grab buyer attention, generate interest, drive demand, and inspire action.

The Organic Inbound Marketing Playbook for B2B Companies

The thrust of this playbook is simple: Launching an inbound B2B marketing strategy does not need to be expensive. It does not require tons of money for Google AdWords and PPC. It does not require that you spend hundreds of thousands of dollars on expensive events and sponsorships.

This playbook is co-written by two veterans of the B2B sales and marketing space: [Boudinet Media's Jeremy Boudinet](#), who used these simple, cost-effective inbound strategies to scale [Ambition](#) from \$50,000 to millions in annual recurring revenue over 4 years, and [Outbound View's Blake Johnston](#).

Quality inbound lead generation can accelerate your sales cycle, create happier sales reps, and bolster revenue growth. The playbook can be reused by any company looking to bolster inbound lead generation, accelerate sales cycle velocity, and retain and expand its existing client base.

Technique #1. Dial Into Your Target Audience

Every great inbound marketing strategy starts with a perfect understanding of your target audience - your ideal client profile.

If your understanding of your target audience or ideal client profile needs work, then use these two powerful, simple tactics to master and understand your ICP:

1. Make a list of your existing client base, enrich their data, and map their buyer journey.
2. Interview your best clients about their experience with your product or service.

Phase I. Account-Level Research

This research starts at the account level, where you need to identify insights about the companies that buy you and start building a list of target accounts.

The Basics – Businesses often overlook tremendous value in determining their ideal customer profile by neglecting to dig deeper. Within this space, you’re only discovering topical information such as employee count, revenue, location, or industry. This is just a starting point, not where your research should end.

Account-Based Research – What are key strategic priorities for the accounts you’re targeting? How does your solution help them achieve their goals? What can the technology stack of your target customer tell you? Account-based research gives you an extra level of targeting above and beyond company size, revenue, and industry.

Buying Triggers – Which activities inside an organization indicate your solution could be a fit for them? For example; at [OutboundView](#), when organizations are hiring inside salespeople, it typically means our services could be a fit. When a new VP of Sales is hired, that is a good time for our team to reach out and discuss their lead generation strategies, because they’re typically reviewing new sales processes. If we can tell a company isn’t getting any inbound traffic, that tells us that the target needs outbound marketing. Identifying the triggers that drive organizations to buy is absolutely critical for top of funnel targeting. Finding target accounts that are showing “buying triggers” for your business should be the highest priority for your top of funnel outreach efforts.

Phase II. Buyer Research

Who's your buyer? Not ideal company target – we're talking the customer writing the checks or using your products. Blake at [OutboundView](#) helps his customers build buyer personas by focusing on two categories: **Decision Makers and Doers**.

Decision Makers are the individuals focused on high-level, strategic outcomes, and are usually writing the check for your product or service.

Doers are your users focused on the day to day tactics supporting your product or service.

Why is this an important distinction? Each requires different strategies to spark interest in your product or service; but most importantly, each requires a different messaging to initiate a discussion.

Buyer personas are the first step in the sales and marketing process. They help businesses clearly define who the key decision makers and influencers are at a prospective company. These personas clearly establish who the targets are for your team. Most importantly, buyer personas outline the specific value proposition, thought-provoking questions, and resources needed to lead efforts toward an opportunity for each type of Doer or Decision Maker.

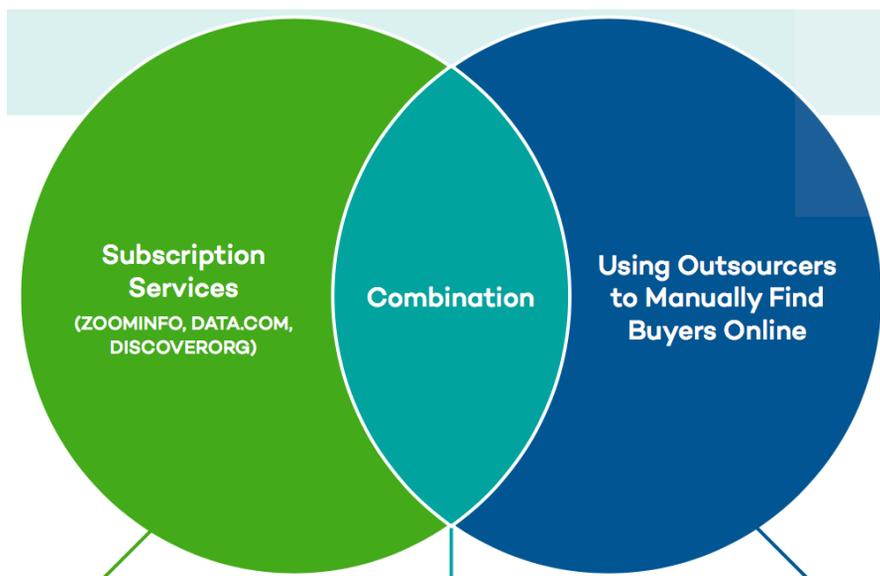
[OutboundView](#) has [created a simple list of steps](#) to follow when building your buyer personas:

1. Start small with a goal of 2-3 buyer personas.
2. Think pain points – What makes your customer’s job difficult? Keep in mind these pain points need to be related to their overall job, not just pain points your solution solves for.
3. Perform customer interviews and ask your buyer the tough questions, don’t just make assumptions.
4. Make them tangible! Create bio pages for “Bill the Buyer”, “Sally Seller” and have fun with it!
5. Think “Personally” and “Professionally” – How does your solution help your buyer reach their goals, both personally and professionally?
6. Create a unique value proposition for each type of persona.
7. End with messaging – As the last step in the process, build messaging that aligns with the customer’s pain points and helps differentiate your solution.

To see who is engaging with and responding to your content, create an updated database of people who are following you on social media and subscribed to your email list.

Add calls-to-action for your blog, events, and gated content on your website to passively capture emails over time.

Then, use tools like [Clearbit](#) or [DiscoverOrg](#) to enrich the data you collect with detailed firmographic information about who your audience is and how well they fit your ideal client persona. Or, have someone curate the list for you by hand.



Doing so will enable you to build an audience over time and get maximum return-on-investment for your publishing efforts. This may take a little bit of work, but it will pay huge dividends in the short-term and long-term. You'll learn which topics and personas to lock in on and focus your future efforts appropriately.

Technique #2. Create Epic Content in Two Forms

Content creation is cheaper and easier to produce than ever. But your time and resources are precious - so we recommend fixating content on one of two areas: thought leadership on your philosophy and flywheel storytelling about client success (referring back to your philosophy).

What is thought leadership? You ask. Two things:

- An annoyingly-named and often-abused piece of business terminology.
- Content that explains the philosophy behind the product or service you offer.

Once you find your target audience, you should use [BuzzSumo](#) or [Ahrefs](#) to find topics relevant to your buyer that have high Google search volume and a high volume of social media mentions.

Why use thought leadership? You ask. Because like Simon (Sinek) says, “The best way to inspire action is to ‘start with ‘why.’”

Think back to Mitch and Murray’s favorite acronym: AIDA.

Lastly, recall that people buy products and services (especially expensive B2B solutions) from brands they know, like, and trust. Thought leadership builds trust and awareness and table-sets future action from your buyers.

The second type of content you should create is flywheel storytelling - where you tell client stories in evocative fashion by placing them on the Hero's Journey.

In these stories, your client (note: not your product) is the hero. They are facing a challenge or obstacle to overcome - and that challenge or obstacle reflects a greater injustice in the world.

Here, it's important to build up your client as a subject matter expert in their field. Perhaps they are an integral leader in a Fortune 1000 or high-growth startup. Perhaps they are a visionary consultant or well-known face in their industry. Whatever the case, you should establish their credentials, backstory, philosophy, challenges, and how they discovered your product or service.

From there, you can chart their path to success and use their words to describe your product or service's role in getting them from A to B.

To flesh out best practices for doing so, we strongly advise [watching this great webinar Prezi](#) just did with [Marylou Tyler](#), [Nigel Green](#), and [Stefanie Grossman Eastman](#) on using storytelling to persuade prospects throughout the buyer's journey.

Technique #3. Package Content for Maximum Distribution

To maximize efficiency, we recommend repurposing and repackaging content as much as possible.

For example, you can turn a webinar with a client into a [video interview on YouTube](#), [a podcast episode](#), and [an article](#) that can be shared in various formats across social media.

The idea here is expediency. Rather than churning out a bunch of unique, disjointed pieces of content, you can turn one epic piece of content into a multi-purpose series of articles, videos, and podcasts.

Remember - not everyone consumes content in the same format. The beauty of this method is that you can create content in the format of best-fit for your entire audience.

To gain maximum exposure for your content, focus on the best distribution channels. For B2B, a solid email newsletter featuring valuable thought leadership, industry research, and client-led insights is a great way to connect with buyers and build trust.

We also advise supplementing email with social media posts on LinkedIn, Twitter, Facebook, Instagram, et cetera, depending on how much time your ICP spends on those networks.

Finally, we recommend uploading video, audio, and presentation content to social media networks like [YouTube](#), [SoundCloud](#), and [SlideShare](#). Optimize the content for SEO so that it can be found via search and gain the maximum visibility over time.

Technique #4. Create Trust & Credibility with Consistent Output

James Carbarly [has built a seven-figure business](#) around the concept of “Content-Based Networking.”

We found similar value in the concept of leveraging content to create and enhance authentic relationships with clients and audience.

An important best practice for this method is customer storytelling.

You should foreground your clients in your content as much as possible. Make them the heroes of articles and case studies capturing their success story with your product or service in grand detail. Explain their background, philosophy, challenges, success path, and subsequent gains from choosing you as a vendor.

From there, you should map the distribution of these stories to the audience of best-fit. If the hero in your client success story is a VP of Sales for a SaaS company, then route that story to similarly-situated prospects and clients in your sales, marketing, and client success funnel.

This technique goes to the importance of using data about your buyer and prospect personas to build authentic relationships.

Sending a case study about a 10,000-person staffing firm using you to solve Problem A to a 50-person SaaS company looking to solve Problem B will have minimal impact and may even adversely your credibility with the prospect.

Sending a case study about a 10,000-person staffing firm using you to solve Problem A to a 50-person SaaS company looking to solve Problem B will have minimal impact and may even adversely your credibility with the prospect.

The reason: your outreach seems inauthentic as it's not relevant to the buyer or his or her problems.

The bottom line is - you should always seek to route content to your audience of best-fit. Use data and well-developed personas to make this happen.

Technique #5. Use Content to Build Authentic Relationships

Once you commit to a content-driven inbound marketing game plan, it's important to know that you're playing the long game. Content publishing pays back exponentially over time. It may take months or years - but you'll see it. Provided you commit to publishing steadily and consistently.

Let's say you publish 3 articles per week - and two out of three posts [feature a client](#) or a [key ally](#) in your industry. You're setting yourself up for success.

Think of it this way - publishing 2 articles each week that cross-promote a client or peer leads to 104 goodwill relationships over the course of a year, possibly more if you publish content that features multiple clients or peers.

Think about content creation as a long-term investment with escalating payoffs in the form of heightened SEO, a strong database, referral-minded channel partners, and powerful press relationships.

These, in turn, lead to increased qualified lead velocity from **content you've already created.**

Technique #6. Build Your Brand - What Others Say About You

An early investment Jeremy made at Ambition was [G2Crowd](#). Why? Because every brand needs to cultivate reviews and testimonials that describe your value. As Daniel Pink and HubSpot CEO Brian Halligan discuss in this [must-listen podcast interview](#), for the first time in history [your buyers have as much access to information about your company as your sellers do.](#)

In other words, your brand is just like your reputation. **It's not what you say it is. It's what others say about you.**

Creating a committed campaign that incentivizes happy customers to review your company is an incredibly powerful, worthwhile investment in this day and age. Whether it's [Google Reviews](#), [Yelp!](#), [G2Crowd](#), or another vendor, it's important to have your clients affirming your value publicly on the internet.

The second component to building your brand is creating clear statements of philosophy, or why you exist. This can be accomplished through published mission statements and consistent thought leadership output that dials into your purpose as a company, which we covered in Technique One.

Technique #7. Serve the Entire Customer Lifecycle

Content should serve the entire customer lifecycle - from first touch to renewal. This ensures maximum value from your publishing efforts and total artillery coverage for sales development, account executives, and customer support.

Again, we look back to Technique One. The goal is to expeditiously content with the breadth and depth to add value across as much of your audience as possible. This includes:

- Cold prospects
- Warm prospects
- Lost prospects
- New clients
- Long-term clients
- Lost clients

The broader the scope of impact a piece of content has, the better it serves your bottom-line. If you are only creating content designed to impact the top-of-funnel, you are vastly under-serving your audience, your company, and yourself.

Redouble the benefits of your hard work and seek to create content that resonates with the six audience categories referenced above and distribute it accordingly.

Technique #8. Track and Analyze the Entire Funnel

This technique is a critical component that should be applied to everything you do. To get the most benefit from your content-driven inbound marketing efforts, you should use technology to analyze what content and channels drive results.

Invest in a marketing automation system - [HubSpot](#), [Marketo](#), and [Pardot](#) (especially if you use [Salesforce](#)) are all great options. Devote a few dollars to a content tracking tool like [Guru](#) to build your internal knowledge base.

Use [Outreach](#), [Cirrus Insight](#), or [SalesLoft](#) to send trackable content at scale and give your sales reps the ability to see what messaging, links, and attachments get prospects to respond.

Keep track of the data-driven insights these tools give you. Then triple down on what is working and fix areas that need improvement.

Technique #9. Emphasize Process, Details, and Fundamentals

The final technique is also a 'must apply' for all aspects of the content-driven inbound marketing playbook.

The key mantras here are to:

- Create transparent, consistent workflows.
- Strike balance between speed and quality control.

To accomplish the former, use a project management tool like [Asana](#) or [Trello](#) to keep your team on the same page. These tools will also help you strike the balance between speed and quality control.

Two points-of-emphasis here are attention to detail and going the extra mile.

Paying attention to detail, for example, could mean optimizing every blog post you publish for SEO as a matter of best-practice.

That means adding alt titles to your images, using the proper text formatting with headers, et cetera, and using an SEO tool (we love [Ahrefs](#)) to discover the best keyword opportunities for high Google rank.

Here's a [high-performing blog post](#) Jeremy wrote at [Ambition](#) whose title was chosen specifically for its high search volume (400 per month) and low keyword difficulty (less than 5 backlinks were needed for a top search ranking).

The image shows a Google search interface. The search bar contains the text "target driven sales environment". Below the search bar, there are tabs for "All", "Images", "News", "Shopping", "Videos", "More", "Settings", and "Tools". The search results show "About 33,600,000 results (0.34 seconds)". The first result is a blog post from Ambition titled "How to Create a Target Driven Sales Environment" with a sub-headline "How to build a target driven sales environment in your sales force. ... They create a target-driven sales environment - where the team is focused, unified and goal-oriented." The date is "Mar 28, 2017". Below the main result, there is a "People also ask" section with four questions: "What is a goal driven sales environment?", "What are target based sales?", "What does customer service excellence mean to you ?*?", and "How will you go the extra smile?". At the bottom, there is a "Feedback" link and a "Describe your experience in working within a sales and target ..." prompt.

Going the extra mile is as simple as emailing a partner or client you feature prominently in a piece of content to:

- Give them a heads up they are being recognized.
- Gently ask if they can share it across their channels.

The biggest driver of content is the willingness to do these two things. By developing a consistent process, practicing good fundamentals, and going the extra miles, you can guarantee a sound return-on-investment in your content marketing efforts to drive inbound leads and give sales and client success the heavy artillery they need to most effectively do their jobs.

About the Author

Jeremy is the Marketing Manager at Nextiva; the world's first unified business cloud communications solution. Previously Jeremy was the principal of Boudinet Media, which specialises in creating impactful content services for growth-minded businesses and entrepreneurs and the Director of Marketing at Ambition Inc. Jeremy has also held the position of President of the Tennessee Chapter of the American Association of Inside Sales Professionals.

9 tactics you are missing in your social media marketing strategy

Shane Barker

According to an estimate by eMarketer, the number of social network users in the world will reach about [2.77 billion in 2019](#). In 2017, it was 2.46 billion.

In addition to the growth in user base, the social media world is constantly evolving. There are new guidelines with advanced features and updates on usage regulations every year. Even small omissions and a little carelessness can negatively affect your results.

Considering its growing importance, social media marketing requires a more focused and vigilant approach to tap its fullest potential for your brand. In this post, we will discuss nine tactics that might be missing in your current social media marketing strategy. Check them out to find out how you can make the most of them:

#1 Suitable Landing Pages

Make sure your social media audience can easily find what they're looking for when they visit your site. This means building suitable landing pages for your social media posts. A social media landing page can be used for various purposes, like email subscriptions and driving sales by redirecting people to offers and deals on your website.

#2 Consistency in Brand Voice

Branding is all about developing a unique voice for your company, and it should be consistent across all communication channels.

People join social media for stories, relations and entertainment, not to buy goods and services. It is very important for your brand to weave a story to connect with people and communicate your mission.

Your story should distinguish you from other brands. Your brand voice needs to be consistent on all social media channels, so that people recognize and remember the story. Consistency should be maintained in logos, colors, and brand messages.

#3 Employees as Advocates

It takes many months and years for a brand to build its presence, credibility and image online. But did you know that [employee advocacy](#) can work wonders in establishing personal connections with your target audience? Posts by company employees get wider exposure, in terms of reaching new connections on social media, than what your marketing team would post.

It is therefore very important to include your employees in all of your social media campaigns. Let them become advocates of such campaigns by posting on their social media accounts. Since they are real people, they are more likely to engage and win the trust of your target audience.

#4 Segmented Content on Social Media Platforms

While it is essential that you have a consistent brand voice, posting the same content on all social media channels is not a good idea. Why? Because every social media platform has a different aura and diverse audiences. Let's take a look at how to segment content on each of the major social media platforms.

Facebook

Facebook is home to people of all ages and genders, and is a favorite among millennials. It provides a perfect opportunity for viral marketing because people spend a lot of time on the platform. It has the potential to drive a lot of traffic. Videos and live videos are the most [popular content](#) on this channel. Blog posts and curated content from third party sites also perform well here.

Twitter

Twitter is a great place for trending topics and general awareness. According to a survey by the [American Press Institute](#), 40% of people use Twitter for discovering breaking news. 39% use it to keep updated with general news.

I encourage you to curate content and retweet it on this platform. When you do so, focus on hot topics and hashtags. It is also a great place for your brand to share blog posts and curated content with images, videos, and Gifs included.

LinkedIn

LinkedIn is a network for professionals, and here you can post articles with industry insights, valuable market data, and company news. Professionals use this platform to seek jobs and career-related information. Here, you can post whitepapers, case studies, interviews, and all kinds of professional content.

Instagram

Instagram is a great platform for brands with a visual aptitude. Creative illustrations, high-quality images, behind-the-scene shots, funny quotes, [hashtags](#), influencer content, contests, and giveaways are things that do well here.

Pinterest

Pinterest is a channel that inspires brands to draw people's attention through imagery and photography. You can leverage this platform to post inspiring and high-quality images and gifs based on your products.

#5 Facebook Targeting

Facebook admin pages provide targeting software that lets you narrow down your audience by behavior, age, gender, demographics, interests, and other detailed Facebook categories.

You can use it to target your campaign at the right audience.

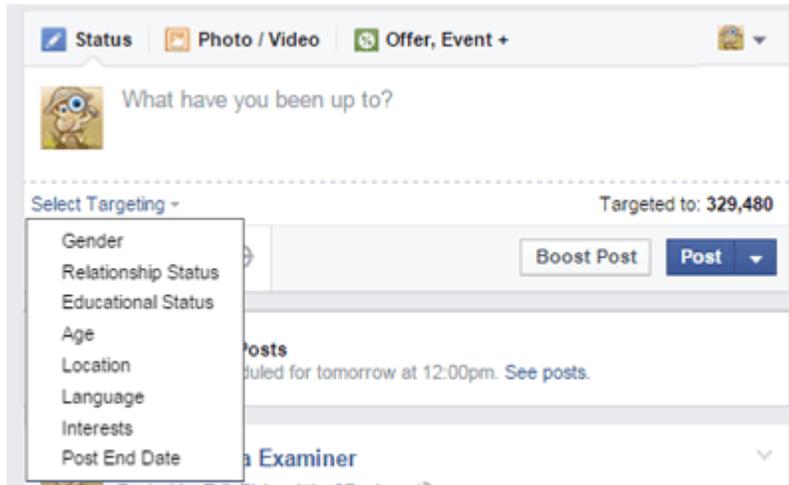


Image from socialmediaexaminer

#6 YouTube Integration

Look at the [facts below](#) to see what you might be missing if you haven't integrated YouTube into your social media marketing yet.

YouTube has more than 1 billion users, with 1 billion hours of video watched everyday.

It is localized in 88 countries and compatible in 76 different languages, covering 95% of the internet population.

50% of YouTube views come from mobile users.

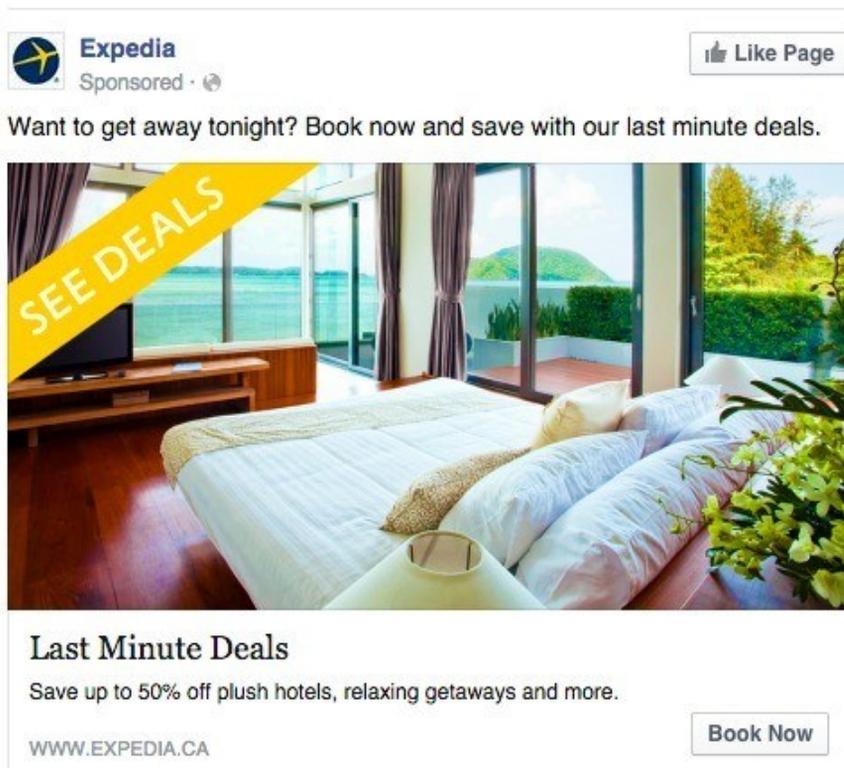
YouTube integration can work wonders for your brand. Just create a channel and make sure you link it to all of your blogs and other social media profiles. Add relevant videos regularly to make your brand more identifiable, valuable, and engaging to users.

#7 Retargeting

Although you put a lot of effort into identifying and targeting the right audience, only a few percentage of them convert into actual customers. So you need to start focusing on retargeting people depending on the level of interest they've displayed towards your brand.

Look for people who have visited your site in the past or who clicked on some of your previous ads. In addition to this, look for people who have abandoned their shopping carts. And then you can retarget them with ads on social media that might compel them to revisit your site.

For example, Expedia uses ads for “last minute deals” on Facebook to retarget people who may have visited the site before in search of deals or last minute tickets.



The image shows a Facebook advertisement for Expedia. At the top left is the Expedia logo with the text "Expedia Sponsored". To the right is a "Like Page" button. Below the header is the text "Want to get away tonight? Book now and save with our last minute deals." The main visual is a photograph of a hotel room with a large bed, a desk, and a view of a lake and hills. A yellow diagonal banner in the top left of the photo says "SEE DEALS". Below the photo is the text "Last Minute Deals" and "Save up to 50% off plush hotels, relaxing getaways and more." At the bottom left is the URL "WWW.EXPEDIA.CA" and at the bottom right is a "Book Now" button.

Image from [wishpond](#)

#8 Video Marketing

Content marketing helps brands filter potential consumers through the conversion funnel towards eventual conversion. However, when developing their content strategy, businesses sometimes ignore video content.

This can negatively affect your marketing efforts because video marketing brings more engagement for brands and is a must-have component of content marketing. In fact, a recent study by [Cisco](#) predicted that digital videos will drive 82% of web traffic by 2020.

Social media is a great landscape for video content. You can create the occasional video content and share it on social media to engage your audience. It will also be able to help you drive site traffic.

#9 Pull Marketing

According to a [PageFair Adblock report](#), 615 million devices use ad blocking, which shows how consumer sentiment is repelled by commercial advertising. Instead of using push marketing, which involves reaching out to consumers to bring them to your brand site, businesses should focus on [pull marketing](#) on social media.

This means your social marketing strategy should compel audiences to come looking for your product. You can achieve this by creating valuable content and sharing it with your audiences to instill trust and create demand for your products.

Discover your customer's needs, interests, and keep up with the trends in the industry to connect with them. Portray your products as delivering the exact value that they are looking for.

Final Thoughts

Using a mix of the above tactics, you can build a solid social media marketing strategy that is sure to succeed. With continuous change in audience demographics and interests, it is essential to keep yourself updated on the latest trends.

About the Author

Shane Barker has been the CEO of Shane Barker Consulting for the last 16 years. This company specializes in influencer marketing, product launches, content marketing, sales funnels, targeted traffic and website conversions. Shane has consulted for Fortune 500 companies, influencers with digital products, and a number of A-List celebrities; and helped companies to build trust with authentic content and to become thought leaders within their industry. He has a proven track record in developing and executing long-term online digital marketing strategies and social media campaigns, and he has a love of business development and has a passion for giving back to the community. You can reach Shane via:

<http://www.shanebarker.com>

The Surprisingly Powerful Word You Should Use More Often in 2019

Patrick Leddin, Ph.D., PMP

Imagine that your organization has been struggling with a problem for a long, long time. Occasionally, the problem goes away; but, it inevitably reappears. People are frustrated with this reoccurring and costly challenge.

You return to work after celebrating the new year AND the problem is still there, waiting for you!

Can't think of a problem in your world? Allow me to jog your thinking with a few ideas:

- Perhaps your reoccurring challenge is a technology solution that isn't quite working right. The organization has invested a lot of money, people have spent countless hours, yet it just doesn't work as promised.
- Maybe it is a performance concern that has yet to be resolved. At times, it seems under control and things are going well, then it flares up in unexpected ways.
- It could be a customer complaint that comes and goes. Customer have valid concerns, the problem is that your team can't determine the true source of the issue.

Whatever the problem, it persists. Everyone is frustrated with it.

Now **imagine** that the next time the problem is discussed, you offer a suggestion. Your thought is unique. It causes people to pause. Discussion ensues and everyone agrees that your thought could work. It could change the game.

Imagine that six months later, people are reflecting on the day you made your suggestion and everything changed. What had once seemed impossible, now was a non-issue. In fact, the organization is in a far better place because of your recommendation and you are seen in a completely new light. You are the problem solver. You are the catalyst of the idea that made all the difference. You are destined for amazing things.

Feeling pretty good, eh?

If so, you just felt the power of the one word that **MUST** be in your vocabulary. What's the word? Imagine.

- Author and political commentator, Frank Luntz, called the word **imagine** the most powerful word in the English language.
- John Lennon used it as the title of his 1971 album, *Imagine*, and the lead track from the record.
- Walt Disney famously said, "Laughter is timeless, **imagination** has no age, dreams are forever."
- Nelson Mandela's words echoed the importance of the term. "Those who can't **imagine** change reveal the deficits of their imaginations, not the difficulty of change."

So, how can you add a bit of imagination in 2019? Consider saying things like:

- "**Imagine** if it were illegal for us to not solve this problem; what might we do?"
- "**Imagine** what performance might look like if our team members were fully engaged; how might we create that sort of environment?"
- "**Imagine** if we had our customers' unwavering loyalty; what might we be able to achieve?"

Put the word **imagine** into your daily lexicon and you will likely achieve unexpected results - all stemming from our collective ability to dream of something better.

I wish you all the best in 2019 and beyond!

About the Author

Patrick Leddin is a Professor at Vanderbilt University. Over the last 25 years, Patrick has benefited from both hands-on leadership and management experience coupled with academic rigor and expertise. Patrick can make the rare claim to be a U.S. Army airborne, infantry, ranger-qualified individual, with Big Five consulting experience, who started and grew a successful management consulting firm (named to Inc. 5,000's List of Fastest Growing Companies) and is an associate professor at a top 15 research university.

You can follow Patrick's blog at: www.patrickleddin.com

Shelfware Is a Lurking Cybersecurity Risk

Jon Davis

Are you hoarding software? Do you even know?

[Techopedia](#) calls shelfware “software that has been purchased but never used.” While shelfware could be a piece of discounted software you purchased as an impulse buy, it could also be legacy applications that you’ve simply outgrown because your organization’s needs or technology have changed.

Shelfware can be found collecting dust in both corporations and private homes. But how much of this superfluous software is a security risk to your organization? And how much corporate money is wasted on shelfware? Finally, how can organizations cut back on the waste?

Shelfware makes a good coaster

At one time or another, we’ve all splurged on a software product that ends up as shelfware. Shelfware happens for all kinds of reasons:

- Overaggressive buying can lead to non-deployment of software resources.
- Companies may test software models as part of a proof of concept (POC) that isn’t deployed.
- As part of the POC process, IT teams and product managers may realize they don’t have the internal or external resources necessary for deployment.

- Silos can cause shelfware — when departments fail to communicate around an overarching software strategy, shelfware happens.
- Inadequate vendor support can kill user adoption.

Every company has some level of shelfware. But get ready for a shock: [A 2016 CIO article says](#) U.S. organizations waste about \$7.5 billion on unused digital products per year.

Avoiding shelfware

Making better purchase and use decisions means evaluating software needs across the organization and by department. While “as-a-service” models help take some of the burden off of IT teams, unused software licenses also result in a lot of waste. [One study suggested](#) on average 10% of all software purchased is slated to become shelfware.

Understanding the value and use cases of the software products you purchase is imperative to helping prevent a build-up of shelfware. Another tip for cutting waste is to establish a periodic administrative audit of software licensure. Finally, simply ensuring that employees fully buy in to the latest software deployment will help ensure end-user adoption.

[CIO suggests](#) there is a growing [cybersecurity](#) concern associated with shelfware. When companies purchase security software in a given year to fulfill a corporate requirement or goal, but then fail to get funding for deployment the following year, the overall cybersecurity initiative fails.

The problem compounds because most corporate IT departments lack the time and expertise to properly install and manage cybersecurity software. To avoid creating security risks with unused software, assess two things before buying: Do you have not only the capability to install the software but also the oversight to use it?

Is shelfware about a skills gap?

The level of skills gap between the expertise in our server rooms and our strategic deployment and management of software has an impact on shelfware. Simply put, we have more shelfware because some organizations struggle to find the IT expertise to make the necessary strategic decisions affecting cost centers and overarching organizational goals. Taking the time to ask the right questions about software deployment — while still managing our current digital architectures, cybersecurity, and even simply keeping the lights on — certainly outpaces our ability to achieve these goals.

These challenges introduce real risk to your organization, as well as result in higher operational costs. This is precisely why many companies use a third-party managed services firm. It's highest and best-use staffing: MSPs can handle the myriad operational tasks for a stretched-thin IT team, which allows the in-house tech team to monitor software and use it more effectively.

Shelfware is a waste of resources at a time when every dollar means a potential competitive advantage.

About the Author

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Jon has also been a board member of ISACA BR for 10 years and has helped to grow his local chapter and improve on the cyber security events they host.

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KPI IS DEAD! LONG LIVE PBI!

And here's a carrot for your efforts.

David Du Toit

Somewhere near the end of 2017 Shaun Cromie and I were having a discussion about measuring people's growth in a corporate organisation. The topic came about after the final KPI rounds for the year had been completed, and everyone in the Development department complained about it, again.

Like the various individuals in our department, most knowledge workers within software development feel that the common usage of key performance indicator(s) (KPI) do not adequately describe the effort and value they put in and add. Trying to explain what a bunch of developers and testers do in a room to add value to the company can be a very abstract thing, at best.

Shaun and I started talking about what we could possibly do to rectify this industry-wide problem, if that was at all possible.

Before we can try to change something, however, we should try to understand it better.

*A **Key Performance Indicator (KPI)** is a measurable value that demonstrates how effectively a company is achieving key business objectives. Organizations use key performance indicators at multiple levels to evaluate their success at reaching targets. High-level KPIs may focus on the overall performance of the enterprise, while low-level KPIs may focus on processes or employees in departments such as sales, marketing or a call center. -
klipfolio.com*

The part that got our attention was where a KPI is used to determine 'how effectively a company is achieving key business objectives'. For the common member of our dev-department that translated to how close we got to achieving objectives set for us, in our department to assist the business in achieving its objectives.

Shaun's experience as a tester brought with it an opinion on how a KPI can focus an individual's efforts on the wrong activities. If a tester's KPI is that they should run (for example) ten test cases in one day, then that is what they will do. They won't do more than ten, because only ten are expected to meet expectations. If something else comes up that could add value, but would prevent them from completing their ten test cases, then they would probably not deal with that something.

It frustrated me so much, because it drives the wrong behaviour. - Shaun

And that was about when the penny dropped for us. The standard KPI is intended to measure performance of individuals, but intrinsically also then drives certain *behaviours*. These behaviours end up conflicting with many attempts to improve the department, for example by incorporating Agile methodology (in our case) and associated managerial frameworks (like Scrum or Kanban).

We thus had the beginning of our plan, namely, the 'what' we could do to change things. We needed to find a way to change the use of the 'KPI' to shift from measuring performance to driving better behaviours. An intrinsically motivated individual is more likely to achieve goals, be honest and add value than an individual who is motivated by checking boxes on a list. Thus we believed if we could find a way to drive proper behaviours then performance improvements would be a value-added consequence.

How does one go about fundamentally changing a deeply entrenched process and document, which is probably loathed in many ways, into something developers and testers would willingly participate in with the intent to learn and grow from it?

Before we could start with any grand plan we had to find out from HR if we would be allowed to change the format of the KPI document, because like all mythological document no one really knew where it came from or who made it.

Our manager at the time found that all HR needs from the KPI sessions is a final score out of 5 and some signed proof that the employee agrees with the outcome. So what it was called and what it looked like was in our control to change.

(*NOTE:* the following steps are not necessarily what needs to happen to try this yourself, but more what we went through to get to our initial, usable prototype)

Step 1. Change its name. Words carry power and influence, which is given to them through a shared experience of similar events and outcomes. We may have never met before, but we can regale one another about similar horror stories of trying to defend the score you gave yourself so you can hopefully get that bonus or salary increase. We thus had to change 'KPI' to something else which would hopefully set people's mind in the right gear for what was to come.

We aimed for another three letter acronym, because too much change also scares the folk. 'Indicator' is not a very malevolent word, so we kept it. In our case the 'KPI' was for the individual and their personal participation in the department. Behaviour should be an obvious choice, given the earlier discussions. We ended up with Personal Behaviour Indicators or 'PBI' for short.

Step 2. With an idea of what the new document should achieve and a sporty new acronym to add in the subject of emails we realised we were not entirely sure what behaviours our department would actually want or need? And so began the Great Debate.

There was no way we could suddenly yank behaviours from a magical hat, so we talked a lot. In the beginning we at least agreed to make note of the skills / expertise areas we believe would have behaviours we want to guide. On a high level that was divided into Agile, Technical and Company. Within our Agile environment we implement Scrum and Kanban which became Agile sub-areas. The technical section was split between developer- and tester sections; and the developer section was further split into our core development skill sets: PHP and ORACLE. The company section was somewhat of a remainder from the original KPI document and was intended to remind employees of the company values, mission and vision. We added another section called 'attitude' which would put extra-curriculum behaviours we thought may add additional flavour to what we have. For example: whether people attended Meetups or internal community of practice sessions.

Step 3. How does one describe a behaviour in a question? The original KPI document simply bullet-listed your responsibilities in a spreadsheet, which was not very helpful. We wanted the 'questions' to make more sense and to illicit more appropriate discussions. After some more discussions we decided to take a page from the Kanban handbook and work backwards, starting with asking what the answer(s) should be?. After even more discussions (*see a trend here?*) we came upon the idea that answers should be short and easy, preferably being either YES or NO. We started building questions we thought would trigger the right conversations about behaviours.

It is important to mention that even though the two of us ‘ran’ with the KPI-PBI process we were not the sole influences or participants. The other Agile facilitators, Minca Bouwer and Ignatia Themba, played as much a role in helping to define what behaviours we should be looking for, in our department, especially in the Agile scope.

*My task, which I am trying to achieve is,
by the power of the written word, to
make you hear, to make you feel — it is,
before all, to make you see. - Joseph
Conrad*

Step 4. The hardest lesson we learned was that words are very, very, very powerful and a simple statement can have immense influence on opinions, in different ways, for different people.

With a good-enough basic skeleton structure in place we started having more discussions with various groups within our department - those would be using the new PBI. Our depart is a flat structure and if someone is going to be influenced by something they have a right to be part of determining what that something will be. So we had discussions with PHP and ORACLE developers, TESTERS and even architects about the various skill sections; in both Scrum and Kanban orientated teams.

With everyone's help we changed the words, added and removed questions and even added behaviours we originally did not consider.

This went on for a couple of rounds before we got to a state where the behaviours and related questions were described well enough; and all involved parties felt that that they understood the draft of the document.

(*NOTE*: If you do want to start this kind of process know that it takes time. It took us almost a year to get our new PBI good enough to use — not perfect, just good enough)

Step 5. With the behaviours and questions defined we turned our attention to the rating (scoring) mechanism of the old KPI document(s).

The KPI expected people to choose between a score of 1–5 for each of the question sets. There was no clear indication WHAT each of the scores represented except that 1 was *bad* and 5 was *good* etc. The mathematics in the final score was such that all of the question sets had similar affects on the final outcome. For the PBI we changed the scoring in two ways:

- Instead of expecting reviewers to type 1–5 as answers to the questions we added 5 columns with a descriptions of what each represents within the work space. Example: To rate a 1, make a mark in the “not at all” column and for a 5 rating a mark was made in the “world class!” column. Each columns has examples of what we mean by “not at all” or “word class!”.

- We gave weighting to both sections as well as questions within sections, in order to add direction to behaviours. A section would be a percentage of the total; and a question would be a percentage of a section. We hoped that this would add focus to various behaviours. Example: A senior developer that codes well may have lower weightings in their technical questions or section than a junior, because we want the junior to focus more on their technical skill improvements. The senior may then have higher weightings in knowledge sharing behaviours.

Step 6. With the individual behaviour indicators done we thought we finally got to the end, but alas it was not so! An individual's behaviours and performance are important, but only while it influences a team to do better. Within our application of Agile we place a lot of value in team work and team self-organisation, which meant we also had to cater for team performance in our new PBI document.

Learning from everything we did for the personal indicators we repeated what worked within the team behaviours. We based the questions on our department's self-imposed purpose of "Deploying working software, that adds business value, daily"; and we decided that the team indicators should be treated as another section in the calculation. The team performance counts for 40% of your final score, which means an individual can score themselves highly, as a wonderful person, but if the team as a whole scores itself low then everyone will be affected. We hoped this would drive the behaviour where everyone in a team works together, as a team, and not think they can just promote themselves as a superstar.

A snippet to show what the original KPI looked like (from a Demo document)

Objective	KPI	Measures	Weighting
Scrum Team Membership	Scrum Team Membership	Key measures: - I share my understanding of [REDACTED] infrastructure, knowledge about stakeholders and processes with new team members to help them become productive in the shortest possible time. - I commit to work in the Sprint Backlog - I ask for help and do not spend too much time with a problem on my own. - I apply and promote the values and principles of scrum within the team.	40%
Departmental Membership	Business Knowledge Development	Key measures: - I understand the key drivers in the business area [REDACTED] I am working in, they are... - I understand the the business value of each story that we do and how it contributes [REDACTED]	10%
	Software Practitioner Knowledge	Key measures: - I understand the following team roles and how to support them: * Software Quality Assurance * Scrum Master	

Snippets to show what our first usable version of the PBI looked like (from a Demo document)

Objectives	Indicators	Weight	Achieved
AGILE	GENERAL	5%	0%
	KANBAN	10%	1%
TECHNICAL SKILLS	DEVELOPER	30%	5%
BUSINESS KNOWLEDGE	[REDACTED]	5%	0%
PERSONAL	GENERAL	10%	0%
TEAM	Deliver working software that adds business value, regularly.	40%	12.80%
		100%	

Behaviour Objective	Indicator(s)	Weighting	Rating				
			Not at all	Somewhat	Yes	Very well	World class!
Agile	General	Do you actively attempt to limit work in progress, personally and within your team?			x		
		Do you highlight interruptions and impediments experienced by yourself or your team?			x		
			5.0%				
	Kanban	Do you always visualise your work on the board, even if you break work limits?				x	
		Do you use other teams' boards to understand what they are busy with?				x	
		Do you stick to agreed work limits on the board, most of the time?				x	
		Do you adhere to the policies on the board?				x	
		Do you actively participate in, and also facilitate, our department's Kanban ceremonies?				x	
		Do you properly elaborate on, or plan work before starting on it?				x	
		Do you focus on finishing work instead of starting it?				x	

Team Objective		Delivering working software, that adds value, regularly.					
Behaviour	Indicator	Weighting	Rating				
			We don't know	Trying to	Yes	Very well	Always
"Ensure that the work deployed is functional and does not break/disrupt production any time after deployment"	Does the team maintain stable deployments to production which do not negatively impact production in any way?	10%					x
"The team should be aware on how to track that the value they expected to add was actually added. This should also drive the team asking 'why' more so they better understand the 'so that' of user stories"	Is the team able to track/measure the success or failure of work deployed to production?	10%			x		
"SCRUM teams should at least deploy their committed work at the end of every sprint & KANBAN teams should deploy at least once a week"	Do you deploy to production regularly?	20%				x	
		40%					

Thus, almost a full year later, after 8 different revisions and countless discussion sessions (with the whole department) we had a document we could use in the review sessions. Now we had to wait and see what would happen.....and what would the feedback be after we actually start using it?

About the Author

David Du Toit is a South Africa based Agile Coach/Facilitator, specialising in creative and innovative agile approaches.

Through his coaching, David aims to add value to the experiences and environments of the world that developers live in. Previously David was a Senior PHP Software Developer, and a Software Developer and Server Manager.

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