

# Marketing Open Source Solutions

## Appendices

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# Appendix #1: Methods of Marketing Research

- **Surveys**
- **Focus Groups**
- **Observations**
- **Trial marketing campaign**
- **Marketing research conducted...**
  - **before a product is developed,**
  - **before a product “Offer” is crafted**

# Appendix #2: Turning Features into Benefits

- **Find...**
  - **high-impact benefits associated with features**
- **List benefits...**
  - **as bullet points**
  - **in descending order of impact**
- **Features can be used...**
  - **as support to prove a benefit**

# Appendix #3: Telling a Compelling Story

- **Marketing materials come alive with human interest**
- **Make the story about...**
  - **“People like me”**
- **Show...**
  - **the benefits of the product**
  - **the ease of use of the product**

# Appendix #4: Wants First, Needs Maybe?

- **Never...**
  - **Develop products that Customers/ Clients “need”**
- **Only develop...**
  - **What they “want”**
  - **First, find out what they want**
- **Assume that you DO NOT KNOW...**
  - **What is “best” for them**
- **Guess, then...**
  - **Test your hypotheses**

# Appendix #4: Wants First, Needs Maybe? (2)

- **Never trust what “they say”**
  - **Test, Test, Test**
  - **Set up your tests...**
    - **to require money or effort**
  - **Require a “vote,” not an answer, that...**
    - **Costs them money**
    - **Requires their time or commitment**
    - **Requires completing the vote with some difficulty**

# Appendix #5: “Never Fall in Love” with your Product

- **The “Offer” is more important than the product**
- **Don’t try to build a market for a product...**
  - **First, find the market**
  - **Create the product that the market wants**
- **Know who your Customers/ Clients are...**

## **Appendix #5: “Never Fall in Love” with your Product (2)**

- **If the product falters and loses market share...**
  - **Improve it**
  - **Replace it**
  - **Dump it**
- **Don't try to “make it work” at all costs**

# **Appendix #5: “Never Fall in Love” with your Product (3)**

- **Price is almost never the issue. The real issues are...**
  - **Trust**
  - **Confidence in the Solution Provider**
  - **Relationship with the Solution Provide**
  - **Mutual Respect**
  - **Partnership**

# **Appendix #5: “Never Fall in Love” with your Product (4)**

- **Open Source Advocates...**
  - **Make these mistakes in promoting to schools**
- **Falling in Love with the Product...**
  - **Explains the failure of Advocates in promoting Open Source Solutions**
- **Teachers are not...**
  - **An crowd that is “hungry” for free software**
- **Open Source Solutions are not “Software” Solutions**

# **Appendix #5: “Never Fall in Love” with your Product (5)**

- **Open Source Solutions must be...**
  - **Educational and Instructional Solutions**
  - **Targeting Teaching and Learning**
  - **Desired by Teachers and Students**
- **Open Source Solutions must...**
  - **Solve Problems important to Teachers and Students**
  - **Remove pain**
  - **Make life better, easier**

# **Appendix #6: Eliminating (Removing) Risk**

- **Open Source Track record:  
Extremely Poor**
- **No Guarantees Delivered**
- **No Compensation for Wasted...**
  - **Professional Development**
  - **Hardware and Infrastructure Costs**
  - **Teachers' and Students' Time**

# **Appendix #6: Eliminating (Removing) Risk (2)**

- **No Guarantee means no Incentive to...**
  - **Build Risk Management Plan into Project**
  - **“Cost the Project” at its Real Implementation Cost**
- **Results in...**
  - **Unrealistic budgets**
  - **Underestimating Professional Development Costs**
  - **Under Funding**
  - **Blaming Teachers for Mediocre Results**

## Appendix #6: Eliminating (Removing) Risk (3)

- **All Open Source Solution Project should be Built as if...**
  - **The Open Source sponsor offers a "Double your Money Back" Guarantee**
  - **This would...**
    - **ensure that the project was "Teaching and Learning" Focused**
    - **Get Teachers involve in the Project Planning**
    - **Get Teachers involved as "Full Project Partners"**

# **Appendix #7: The “Marketing Problems” with Open Source**

- **The Product is Created First, before identifying the...**
  - **Customer/ Client**
  - **Customers’/ Clients’ greatest pain, problem, challenge, issue**
- **Before Determining if...**
  - **There are enough Customers/ Clients to make promotion viable**
  - **The Customers/ Clients can be reached in an economical manner**
  - **The product can actually solve the Customers’/ Clients’ problems**

# Appendix #7: The “Marketing Problems” with Open Source (2)

- **Mistake that Backfires...**
  - **“Badmouthing the Competition”**
  - **Especially the market leader**
- **Teachers**
  - **Turned of by “mean spirited” attacks**
  - **Dislike the “language of envy and hate”**
- **Features and Specifications...**
  - **Don’t impress teachers**
- **Technical nuances...**
  - **Who cares?**
  - **Teachers are too busy to bother with this “trivia”**

# Appendix #7: The “Marketing Problems” with Open Source (3)

- **Seducing ‘cash-strapped’ school district decision-makers with the promise of “free and cheap” solutions**
  - Deprecates the value of Open Source software in everyone’s eyes
- **Fails to communicate...**
  - The need for 30% of project’s cost in professional development
  - Increased technical staff, technical support and infrastructure costs
  - Software licensing costs...
    - Small (sometimes only a trivial portion) of the true cost of an educational initiative
- **Distracts from a Focus on Instructional Goals!**

# Appendix #7: The “Marketing Problems” with Open Source (4)

- **Mistakes...**
- **Lumping all Open Source software together and “calling them good”**
  - Not all OS is “ready for prime time”
  - Not all users’ needs solved by Open Source
  - Some users (**Teachers**) require “professional grade,” high-end software,
- **Lumping all software types together, for example...**
  - Server software
  - Web software
  - Desktop software
  - Operating system software
  - Application software
  - Middleware
  - Database software

# Appendix #7: The “Marketing Problems” with Open Source (5)

- **Blaming teachers for the failure of Open Source projects**
- **The Reality...**
- **Failures caused by...**
  - Building the project **without** teacher input, advice and consent
  - Implementing **without** research and a connection to increased, measurable student outcomes
- **Failed Projects didn't Focus on Instructional Goals & Educational Objectives**

# Appendix #8: Beware the “Free and Cheap” Mentality

- **Instead, Focus on...**
  - “Best of Breed”
  - Quality
  - Ease of Use
  - Service Level Agreements (SLAs)
- **Understand...**
  - “Real Costs”
  - Project Planning (Plan with the “End in Mind”)
  - “User Experience”
  - “Opportunity Cost”
- **Service Delivery is never “Free”**
- **Understand...**
  - The Risk to the Customer/ Client of “Free”

# Appendix #9: Open Thinking

- **Brainstorm**
- **Keep an Open Mind**
- **Eliminate preconceived “notions”**
- **Beware of “competition-thinking”**
- **Develop partnerships, joint ventures and strategic alliances**
- **Trust...**
  - **Creative Thinking**
  - **Incubation**
  - **Intuition**
  - **Problem-Solving Skills of All Stakeholders**
  - **The Dialog Process**

# **Appendix #10: Avoid the “Technology Integration Model”**

- **Teachers have been “burned” for years with the burden of “Technology Integration”**
- **Instead...**
  - **Provide a package of everything that teachers need**
  - **Make the learning curve “tiny”**
  - **Make the payoffs “huge”**
  - **Make the “Tell a Friend” aspects “viral”**

## **Appendix #10: Avoid the “Technology Integration Model” (2)**

- **Understand that Technology Integration initiatives have been under funded**
  - **Professional development -- at least 30% of project budget**
  - **Training periods -- systematic over three years**
  - **All training and professional development -- “on the district’s dime”**

# Appendix #10: Avoid the “Technology Integration Model” (3)

- **No project should have been undertaken without...**
  - **A research-base**
  - **Measurable Instructional Goals**
  - **Testable Student Outcomes**
- **Technology needs a Direct (and Measurable) Connection to improved content-based learning outcomes**

# **Appendix #10: Avoid the “Technology Integration Model” (3)**

- **Every Technology Project requires...**
  - **Adequate funding...**
    - **20% for overlooked and unexpected items**
    - **30% for professional development**
  - **A Contingency Plan**
    - **Additional contingency funding (Perhaps 10%)**
  - **Independent evaluation, control groups and research-base for the project design**
  - **A Risk Management Plan**

# **Appendix #10: Avoid the “Technology Integration Model” (4)**

- **Every Technology Project Requires...**
  - **Teacher Input & Involvement**
    - **Project Design**
    - **Buy-in**
  - **Teachers as “GateKeepers”**
  - **Communication – Must be “Transparent”**
  - **Every objection that teachers make should be treated as a “gift”**

# **Appendix #10: Avoid the “Technology Integration Model” (5)**

- **Training and professional development...**
  - **Compensation for teachers -- for every minute**
- **Trainers who have taught the subject to actual students before beginning the training**
  - **Realistic goals for content integration**
  - **Realistic timeframes for teachers to re-tool their...**
  - **Habits of instructional delivery**
  - **Management and logistics for classroom management**
  - **Management and logistics for instructional delivery**
- **Follow-up support**
  - **Online and In-Classroom**

## **Appendix #10: Avoid the “Technology Integration Model” (6)**

- **All tools should be provided for in school and at home use...**
  - **At district expense**

**For additional information...**

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