

Five Secrets to Standards Success



William Cox

Cox Software Architects LLC

wtcox@CoxSoftwareArchitects.com

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Agenda

- Introduction and Preliminaries
- The Secrets
 - #1: Understand the Landscape
 - #2: Understand Why and What
 - #3: Keep Asking Questions
 - #4: Invest in the Work
 - #5: Work Well with Others
- Summary, Questions, References



Introduction

- Who am I?
 - Consulting enterprise architect
 - Elected to OASIS Technical Advisory Board
 - Skilled at building standards and products from ideas to adoption
 - Business, marketing, and technical background



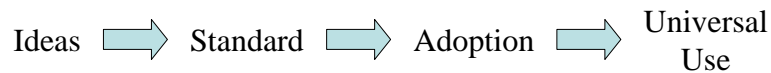
Preliminaries

- Topic is software standards
 - Many suggestions also apply to software projects
- Interoperation and Conformance
 - Usually need interoperation or compatibility
 - Interop tests can help standard and/or products
 - You'll benefit from implementation based on draft standards



What is a Standard?

- Simplistic definition:
 - A standard is a consensus specification used to achieve broad interoperation
- Ideal
 - The strength of the ideas/technical merit drives standards



Reality Intrudes

- Reality is much messier
 - Even the words vary in meaning
- Many inputs, much work hidden in the simplified ideal
- Standards may be *technical* but standards projects are both *technical and social*
- Success takes planning and understanding



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#1: Understand the Landscape

- What is the context for the standards project?
- Answers to these questions are important:
 - Where is the technology in its lifecycle?
 - Who has built a business in the technology?
 - Who will build a business using the standard?
 - What intellectual property issues need to be addressed?
 - What are others doing that will affect the standard?
- Additional questions are in the references



#2: Understand Why and What

- What will the project produce?
 - What is being standardized?
 - Is the standard broad? Narrow? Core? Ancillary?
- Why is the Standard being produced?
 - What are others' motivations? Economic? Technical?
 - What are your reasons?
 - Is it worth the effort?
- How does the project fit in the landscape?
- Bring the project into focus!



#3: Keep Asking Questions

- Don't be afraid to ask others
 - Why they prefer something
 - What they hope to accomplish
 - What their goals are
- Consider inconsistencies
- And understand your own answers!



#4: Invest in the Work

- Be a better contributor (and get your ideas across more effectively) by investing:
 - Offer to edit (if you can afford it)
 - Write position papers and text for drafts
 - Communicate clearly, concisely, & consistently
 - Talk with and understand others in the project
 - Implement and interoperate using draft specs



#5: Work Well with Others

- Always be aware of your and others' needs/goals
- Build coalitions where you can
 - Find common ground, trade support
- Build consensus where you can
 - And lock it down
- Try not to revisit issues
- Socialize ideas informally
 - Informal discussions at meals/breaks useful



Remember...

- Alliances aren't always visible
 - Analyze, consider who benefits and how
 - Alliances may shift as the subject changes
- If you don't succeed, regroup and keep trying
 - Limited goals are easier to reach
- Keep thinking about your product architecture
 - You may be surprised at what you do/don't need



Summary

- Success factors in a standards project are similar to success factors in a software project
- Understand the landscape
- Know what you need and want
- Know the questions to ask and follow up
 - Get the right help when you need it
- Invest in the work
- Social activities build technical standards



Questions

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References

- Information, free newsletter signup at www.CoxSoftwareArchitects.com
- OASIS Committee FAQs linked from docs.oasis-open.org/templates/

