

# BUILDING A USER GROUP FOR A DIGITAL PRESERVATION PRODUCT

## *Lessons from 11 years of User Group History*

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**Abstract – Digital Preservation places a strong emphasis on building communities to share experiences and develop solutions. Traditionally these communities were built on geographic or functional alignment or created through external grant funded research activities. As commercial Digital Preservation products have emerged vendors have created User Groups for their customers that seek to fulfil this function. Using the lessons of the 11-year history of the Preservica User Group, this paper explores how these User Groups function and compares this to studies of User Groups in other domains.**

**Keywords – Community; COTS; User Group;**

**Conference Topics – Collaboration: a Necessity, an Opportunity or a Luxury; Building Capacity, Capability and Community**

### I. INTRODUCTION

The use of commercially supported products is becoming established as one of the main routes for organizations to build digital preservation programs. The products vary – for example some follow an escrow model and others are open source, and some charge a license fee in return for new product features whereas others rely on project based sponsored feature development. Whatever the business model, all of the current products seek to operate User Groups in different forms.

This paper is intended to enable the digital preservation community to learn from Preservica's [1] experience of operating User Group meetings for 11 years. The lessons are equally applicable to other products and groupings. The paper explores academic studies into this type of group and sees how their conclusions can be applied to the digital preservation

world. It also looks at how these groups are likely to evolve in the future.

The authors include the Preservica founder and two long term customers of the system to ensure a balanced and fair view of the User Group is presented.

### II. USER GROUP MOTIVATIONS

#### A. *Contrast to Open Source Communities*

Allen (2016) [2] describes how there has been significant research into how Open Source Communities grown and sustain. Whilst initial contribution is based on fulfilling a specific technology need, continued participation results from a personal identification with the ideology, the chance to grow specific skills, and the building of a professional reputation. This is explored more in Skinner (2018) [3].

The relationship with the User Groups for non-Open Source software products is driven by more complex motivations. Allen explores how the market economics in which a service is delivered for a fee contrasts with commons-based modalities of community exchange. Product User Groups are subject to both models and thus can be considered to be a hybrid-economic software community. This drives not only "hard" issues like licensing and support but also "soft" social contexts defining the rules and norms under which users participate.

#### B. *Product Influence*

There are many motivations to become involved in a User Group based around the roadmap of the product it supports. Lapham (2006) [4] sees it as key to

sustaining software-intensive systems. Users can get visibility of the product roadmap, work together to push vendors to deliver specific functionality, and get early warning of potentially problematic changes to the product or vendor.

### C. *Knowledge Sharing*

Allen (2016) conducted an extensive study of the motivations and dynamics of product User Groups based on SharePoint communities in the US. With no chance to interact on the product roadmap, this showed that the principle drivers were as follows:

1. Learning and gaining access to knowledge, for example "free" consulting
2. Connecting to others, creating personal relationships
3. Commercial opportunities to gain access to services and make contacts that could lead to job opportunities
4. Improvement of personal reputation within the community
5. The duty to reciprocate support to others and to the vendor

Allen also observed that face to face meetings are more able to fulfil the higher priority needs than online communities and more likely to have active participants. Online communities tend to be dominated by a few leaders and contributors as observed by Nielsen (2006) [5].

### D. *Vendor Motivations*

Vendors participate in, and in many cases fund, User Group to help them achieve specific business goals. These can be characterized as product, support and commercial benefits, and encourage the vendor to make considerable investments into the success of the meetings.

On the product side, it is critical for the product managers, designers and developers to understand the specific needs of their user community. As Zemke (1998) [6] described "If employees have not been taught how to identify customers and understand their expectations, it will be all but impossible for them to meet these expectations, far less exceed them". The ability of users of the technology and the people responsible for creating it to interact increases the chances of the system being able to fulfil the user's needs.

The involvement of the vendor's support team can be pragmatic, allowing users to resolve specific issues,

and can be pre-emptive, allowing personal relationships to be built before problems occur.

Commercial motivations include the ability to sell further features to existing customers. The principle benefit however is to create motivated users who express their satisfaction to the wider community and are willing to act as references for future opportunities.

### E. *Digital Preservation Perspective*

The digital preservation community has specific characteristics and context that drive community participation. Some of this is explored in Kwon (2006) [7] looking at collaboration in US State Government. This includes

1. Digital Preservation spans several roles including Archivists, Librarians, Records Managers and Information Technology. The lack of a shared language poses problems and leads to silos of information and battles to support agency "turf" hinder communication.
2. Despite this, practitioners "showed a strong willingness to gather together on a regular basis and network with one another" but more formal partnerships were required to secure ongoing participation.
3. As Digital Preservation is on the boundary between traditional communities it can become a community of practice in its own right.

Since Kwon (2006) the growth of member organizations such as The Digital Preservation Coalition [8] suggests the growth of Digital Preservation as a community of practice. Higgins (2017) [9] argues it is becoming its own profession rather than an add-on to archives, libraries and records management with its own disciplines and professional bodies. This will drive community participation and exchange of information.

## III. PRESERVICA USER GROUP HISTORY

### A. *Initial meeting (2008)*

The Preservica product started as the "Safety Deposit Box" developed by Tessella as a series of custom projects with an overlapping code base purchased via large government tenders. The foundation User Group meeting in London, UK gathered three organizations together to compare their projects. Whilst interesting, this delivered little practical benefit as there was little overlapping functionality.

This meeting did however establish the willingness for customers to meet and discuss the Digital Preservation space with organizations using broadly similar technology. The discussions provided a template for the topics that would be discussed at later meetings.

#### *B. Project funded development (2009-2014)*

The Safety Deposit Box (SDB) was finally released as a supported product, but development was largely funded by new sales and requirements for specific features were funded by sponsored development.

The first full User Group meeting was in London in 2009. It was attended by 8 different organizations and the agenda covered the vision and roadmap, customer introductions, discussions on how to work as a community, an update on support, and more general discussions. Although not formally recorded, feedback was generally positive, especially for new users who wanted to learn about the system.

In the following years meetings were held in Bern, London, Vienna, Budapest and The Hague. The pattern of the meetings was broadly similar, with the addition of a feedback session to compare what was asked for at the previous meeting compared to what was delivered.

Time was added for users to have a private discussion without the vendor present on the first day to agree their priorities and to ensure they were able to raise their concerns effectively. This was then presented to the vendor team who responded on the second day. These sessions were useful in giving users the freedom to raise any issue they wished but their input was uneven and tended to feature more comments from certain expert individuals.

The challenge during this period was that as much of the development of the Safety Deposit Box technology was conducted as a result of requirements to fulfil new sales or by sponsored development, the development team had little control over the roadmap. Reporting back showed that many of the requirements were being fulfilled but this was not by a managed process.

By the time of the last meeting in this period there were 14 user organizations attending plus 3 partner organizations that provided services to go with the Preservica product. Topics had extended to include operations activities such as whether to trust the cloud and what is backup best practice, and governance of a shared linked data registry.

A series of changes during the period were drivers for changes in the User Group meetings. In 2015 Preservica became an independent company as it left Tessella Group. It also appointed a Product Manager and set up a formal Product Management process with a structured roadmap management system. Most significantly, in 2012 Preservica launched a cloud hosted preservation service with initial customers in the US followed by a small number in the UK. These customers tended to be smaller, to be paying significantly less and to have fewer resources to sponsor new features. The challenge for the User Group was to change to support these new types of user.

#### *C. Oxford User Group (2015-)*

From 2015 the International User Group meeting has taken place at one of the colleges in Oxford, a short distance from the Preservica offices. This allows more of the Preservica team to attend and interact with the users and allows UK users of the cloud hosted version of Preservica to attend without the need for air travel. Users from Europe and Australia have found Oxford to be easy to visit via the London transport hubs. The meetings take place over two days.

Over the four User Group meetings in Oxford there has been gradual formalization of the interactions between Preservica and the group. The main area this has changed is the way the roadmap features are presented and the gathering of feedback from users on their priorities. Initially this was conducted using post-it notes and voting but from April 2019 this will be conducted electronically to allow accurate and immediate feedback to be gathered. These are then reviewed next year to assess how many were delivered.

Another change is the user discussions forums. These have changed from a whole-group discussion into smaller sector-based groups who can discuss issues specific to their situation. These "birds of a feather" groups have allowed much more focused feedback to be generated.

During the meeting there is significant time in lunch, coffee breaks and at the evening social event for users to talk with other attendees to share information and build personal networks. This is one of the most valued aspects of the event.

The first Oxford meeting hosted 17 organizations, growing to 41 in 2018. Each year a customer survey is conducted that explores User Group satisfaction and suggestions for improvements. The most recent meeting in April 2018 had good satisfaction levels with

98% likely to recommend that their organization continues to attend. However, it did also contain several suggestions for improvements, including more workshops and more user project discussions.

It is worth observing that the feedback and roadmap voting is conducted by Preservica and presented back to the User Group. Whilst no one has queried this, there remains the option to move to independent assessment of the feedback in the future either by the community themselves or via a third party.

#### D. *North American User Group (2014-)*

The growth in the number of North America users of Preservica, especially the cloud edition, created the need to host a dedicated US User Group session. This has been run as a side meeting at the Society of American Archivists event. The initial meeting was an end of day presentation and social event attended by a small number of customers. After four years there was a call to run a full day meeting as a pre-conference event. This was first run in 2018 with 52 organizations attending.

The North American User Group has experimented with allowing users to attend online. This has had some success, with users able to vote for features using online polls. However, it has also presented significant technical challenges, especially as it is often hosted by a conference venue that struggles with this type of remote participation.

The topics covered at the North American User Group have been largely the same as at the Oxford event, covering new features, voting on the roadmap and user stories. Electronic voting on the roadmap was introduced in August 2018 and proved successful.

Feedback from the latest one-day event mirrored the Oxford meeting with 87% saying they were very likely to recommend attendance next year. As in Oxford the users asked for more time in future meetings on User Projects and Workshops.

#### E. *Online user interactions*

Preservica users are also able to contribute to the user portal, and online forum. There are also monthly webinars and the possibility to participate in special interest groups on specific product features. These interactions can be seen to follow the participation model observed by Neilson (2006).

### IV. USER GROUP PARTICIPATION OBSERVATIONS

#### A. *Type and range of active participation*

Left unmoderated, participation at the talks of the User Group meetings will follow the observations of Neilson (2006) with input dominated by a few leaders, with some active contributors and a large number of passive participants. However, the organizers can intervene, encouraging specific users to present to ensure a wider range of contributors are heard.

The workshop sessions in smaller groups of around twenty participants also require careful moderation to encourage contribution from all attendees. These sessions are better at getting feedback for a wider range of participants but can be dominated by vocal contributors if left unmanaged.

The participation levels in networking time are much more evenly spread. It appears that all attendees participate in network building, maybe driven by the personal benefit they gain and the large number of attendees with highly aligned motivations.

#### B. *Alignment with SharePoint studies*

At the April 2019 meeting attendees were asked to score the observations of Allen (2016) out of 10 and the results were as follows:

Question	Allen Position	Attendee score
Find out about roadmap	N/A	9.1
Influence roadmap	N/A	8.9
Product learning	1	8.0
Connecting to others	2	8.3
Commercial opportunities	3	6.8
Personal reputation	4	5.0
Sharing my experience	5	6.9

Users want more roadmap information and influence, product knowledge and the opportunity to grow their personal networks but are less interested in sharing their own personal experience or gaining personal recognition. This shows very good alignment with alignment with the observations of Allen (2016) and is being used to guide future User Group priorities.

### V. FUTURE DIRECTIONS

#### A. *User Participation in Organization*

The User Group has been organized by Preservica staff that also request and analyze the feedback. The involvements of user representatives in these activities would be welcomed by both Preservica and the users

but requires volunteers to step forward. This was initiated in April 2019 with volunteers identified to help organize the 2020 meetings.

### B. *Independent User Groups*

As product usage grows, totally independent User Groups are formed. These are often driven by geographical or functional groupings and vendor involvement can be minimal or absent. Preservica has already seen such groupings in New England and BENELUX. These meet annually to compare experiences and align their input to the User Group.

The development of such independent groups is expected to grow and may follow the more formal pattern of the Independent Oracle User Group observed by Malcher (2016) [10]. As these groups grow, they require more formal governance, active leadership, and variety of volunteers. They can be delivered online or face to face and can facilitate a wide variety of interactions, for example conferences, workshops, social events, lunches and other meet ups. Membership can be individual or corporate and may be free or paid, as can the events.

One of the main strengths of these groups is that they can provide a united voice to the vendor. This is beneficial for the users as their voice has more strength and beneficial to the vendor as the input is analyzed and prioritized.

### C. *Tiered User Groups*

Currently the User Groups in Oxford and the US are paid for by Preservica, reflecting the level of subscriptions provided by all organizations that use the system. It is possible that in the future lower price subscriptions are offered for a lower specification system without free User Group participation.

As the user base becomes more geographically dispersed it is likely to be more necessary to add more remote participation via video streams and remote voting. This will also fulfil the needs of customers with restricted travel budgets.

Lastly, as users outside of cultural heritage and academic sectors start to use Digital Preservation, it is likely they will not want to invest the time in attending a User Group for something that is less core to their mission. It may be that online participation via forums is sufficient for this community.

### D. *Cross-product groups*

The Preservation Action Registries initiative described at iPres 2018 by Addis et al (2018) [11] shows how vendors may also cooperate with their

competitors, exchanging information in order to better support their user communities. As users become involved in these activities, cross product user communities will establish themselves. The governance of these communities presents an interesting challenge as participation grows that could be informed by Preservica's User Group experience.

## VI. CONCLUSIONS

Digital Preservation Product User Groups offer an valuable addition to established user communities. They can help users benefit from the technology more effectively and create an effective dialogue between users and vendors. The patterns they follow are common with other software industries.

The Preservica User Community has matured over many years but still has areas it can improve, specifically increasing the opportunity for knowledge sharing and increasing user involvement with its execution. In the future new approaches will have to be explored as the characteristics of the user community change.

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