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Soft•letter

BUSINESS INSIGHTS FOR SOFTWARE DEVELOPERS & PUBLISHERS

Our last set of excerpts from Catalyst Resources SaaS user interface design report reveals that SaaS companies are suffering sales pain tied to design; our data will help you focus in on a cure. *See pages 4-5.*

Inherited Health: Seeking Development Wellness Overseas

by Lee Essner, Inherited DNA and Rick Chapman, Softletter

When Lee Essner, CEO of Inherited Health, contacted me about profiling his new SaaS firm, I was intrigued by the concept (and found it very relevant to my own personal circumstances). Inherited Health allows people who join its online service to create and archive family health histories with the goal of enabling people to understand, prepare for, and prevent genetically linked diseases and syndromes. Currently, the system tracks over 250 different genetic diseases and provides resources and access to expert advice on how to deal with them.

The idea for the site came to Lee after his marriage. Lee is a carrier of Tay Sachs, an awful degenerative disease of the nervous system that typically appears in infancy; sufferers normally do not live past the age of four or five. Tay Sachs is often associated with people of Jewish Ashkenazy (Eastern Europe) descent, but anyone can be a carrier, as Lee discovered when his wife, of Jewish Sephardic background, also tested positive as a Tay Sachs carrier. An unexpected pregnancy cast the pall of the disease over the couple; luckily, their daughter was born free of Tay Sachs and the inspiration for Inherited Health was born as well.

The site's services also struck a personal note. Last year, at our SaaS University in Dallas, I noted the appearance of lumps in my hands and fingers, lumps that grew rapidly. Their appearance signalled an outbreak of Duputyren's contracture, a genetically linked disease that primarily impacts people of Irish, Gaelic, and Northern European backgrounds. The disease leads to the development of tumors in the hands and, over time, contraction of the fingers. Normally a slow moving affliction, my case progressed rapidly, requiring three successive operations to remove the excess tissue. What made my case interesting (to me, at least) is that I'd suffered my first attack of Duputryen's contracture when an unfortunate encounter with a pane of glass in high school led to severe cuts, trauma in my right hand, and a little finger which over the course of a year's recovery slowly contracted to the point that the tip of the digit faced my palm. Visits to doctors elicited vague diagnoses, talk about scar tissue wrapping around sutures, and the suggestion I leave my bent finger alone. After 40 years of basically being four fingered, the diagnosis of Duputryen's allowed me to release my trapped pinkie. Had I known about the possibility of Duputryen's in my family, I would have dealt with the

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Advisory Board

Online Press Center Best Practices: A Primer for Software Publishers

by Joe Dysart, Softletter

One of the great secrets of the Web is that with a killer press center, you'll be able to attract many more editors and reporters to your software company site, and generate many more stories about your company in the news media. The trick to putting together a full-fledged, digital press presence is knowing how to trigger story ideas, knowing how to relentlessly promote what you're offering, and being sure to post the equivalent of a neon "welcome" sign for the press.

"News publicity costs you nothing," says Thomas Wong, author of "101 Ways To Boost Your Web Traffic." "It often produces better results than advertising, because people trust news articles more than sales ads. Press releases often lead to personal interviews on the phone or TV or radio appearances, which can make you and your Web site very popular."

In fact, there are so many tactics and new Web technologies available for courting the media, building a press center with best practices on your website can become an ever more sophisticated, ever more publicity generating pursuit. For starters, here's what you'll want to do:

- **Offer Web-friendly press releases**. While some text, quotes and contact info is a good start for a press release, you'll get better play if you optimize press releases for the Web. This means embedding a relevant keyword in the press release headline, as well as in the text, if possible, so it can be easily found by the search engines.

  "We use search engine optimization in all press releases, and coordinate with marketing on any paid search words they might have purchased, so we can leverage the right words that will bring people to McAfee.com," says Erica Coleman, McAfee's (http://www.mcafee.com) director of worldwide PR.

Adds Gisèle Seto, PR/Web 2.0 manager at Sagecom (http://www.sagecom.com): "Organizations must take search engine optimization seriously to ensure prominent indexation and ranking on site such as Google, Yahoo and MSN."

It's also a good idea to make it easy for others to spread the word about your press release by adding a social bookmarking tool like Share This (www.addthis.com).

- **Trigger coverage with other content.** Editors and reporters are always hungry for story ideas, so you can never offer too much story idea content in your press center. The over-arching guideline here is to clearly state that all—or as much as possible—of the content you post can be directly quoted by editors and reporters.

  The importance of this practice cannot be overstated. Essentially, this type of permission policy permission can save the press days of phone or E-mail tag with company PR personnel, and will mean the difference between being covered, or being skipped over for a more press-friendly company.

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problem decades ago.

In addition to my personal reasons, I was also interested in Inherited Health's development model; the nuts and bolts programming of the system had been outsourced to an Indian firm, CoreObjects (since acquired by another Indian firm, Symphony). Many companies entering the SaaS space have thought about outsourcing their development, but in 2010, only 17% of the respondents to our SaaS survey told us they had picked this option. I wanted to learn more about Lee's experiences with this outsource choice.

Lee, what made you think of the idea of Inherited Health?

My experiences with Tay Sachs introduced me to the world of genetic counseling and it's a small world. In the US, there are about 2500 counselors, with five thousand of them being MDs. The pipeline for directly accessing informed medical advice on genetic diseases is very narrow. Also, since genetic diseases are by definition family affairs, the need for a repository of information about your family history is critical in understanding your risk factors and planning for them. For example, my grandfather died of the complications from juvenile diabetes; as a result, I've been keeping a close eye on my daughter and have had her tested three times since her birth. If caught early, you can do a lot to ameliorate the impact of juvenile diabetes on a child's health.

"Inherited Health exemplifies the concept of a 'community of customers,' SaaS subscribers to a system linked by common interests and goals."

— Lee Essner, Inherited Health

When you visit your family doctor for a checkup, they don't normally ask much about your family history and you often don't have that information available to you.

How many generations does the system go back?

Three, but the system encourages site members to contact their relatives so you build both a "linear" as well as a "horizontal" chain of information. For most genetic diseases, that's enough to build a comprehensive and useful profile.

What is Inherited Health's revenue model?

It's primarily an ad-based model. We're attracting a cadre of advertisers from genetic counseling firms, pharmaceuticals and related industries. Also, we're creating a series of newsletters targeted to people with the same genetic issues; these will contain advertising.

Why did you decide to outsource Inherited Health's development?

The site was first launched as a prototype, Access DNA (we changed the name because it was perceived as cold and impersonal). The first iteration was a very basic system that provided genetic counseling options; at the time, we thought this would be very important. Our initial revenue philosophy was to push subscribers to testing facilities

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Benchmarks

Benchmarks: Key Highlights from Catalyst Resources' UI Design for SaaS Survey, Part II of II

The Catalyst Resources SaaS User Interface and Design Survey opened in June of 2010 and closed in May of 2011. The Poll Daddy survey system was used to process all results. The survey generated 60 responses, with 21% of respondents stating they were the CEO or related title, 65% a VxO or director title, typically VP of Development or Products, and the remainder product and marketing managers. Numbers of particular significance are **bolded**.

Do you believe you have picked the best technical stack and infrastructure to ensure your SaaS system's scalability and security?	%
Severe pain	**20%**
Moderate pain	35%
Minor pain	13%
Valid pain being addressed satisfactorily	10%
Not applicable	22%

Are you confident that you have identified the right mix of features and ease of use that will attract and retain your target customers?	%
Severe pain	**10%**
Moderate pain	37%
Minor pain	25%
Valid pain being addressed satisfactorily	10%
Not applicable	18%

Is your SaaS system capable of attracting new and more profitable customers?	%
Severe pain	**10%**
Moderate pain	**37%**
Minor pain	25%
Valid pain being addressed satisfactorily	10%
Not applicable	18%

Once a sale is completed, new subscribers can be easily added to the system ("on-boarded") and provisioned with required functionality via an easy-to-use interface	%
Severe pain	**17%**
Moderate pain	**12%**
Minor pain	13%
Valid pain being addressed satisfactorily	**15%**
Not applicable	43%

Users of our SaaS System can configure the features and services or our SaaS system via a self service interface	%
Severe pain	**25%**
Moderate pain	17%
Minor pain	8%
Valid pain being addressed satisfactorily	5%
Not applicable	45%

We are not certain how to design our SaaS system to minimize and simply required configuration options when deployed	%
Severe pain	**27%**
Moderate pain	12%
Minor pain	10%
Valid pain being addressed satisfactorily	8%
Not applicable	43%

The length of our sales cycle and/or the cost of our current sales resources are resulting in our sales overhead being higher than acceptable	%
Severe pain	**36%**
Moderate pain	26%
Minor pain	16%
Valid pain being addressed satisfactorily	12%
Not applicable	42%

Increasing development, marketing, sales and support costs and/or declining revenues are seriously impacting the profitability of our current SaaS system	%
Severe pain	**19%**
Moderate pain	19%
Minor pain	23%
Valid pain being addressed satisfactorily	**1%**
Not applicable	37%

An analysis of the above responses demonstrates that SaaS companies transitioning from on premise and/or desktop business models are facing significant challenges in the areas of configuration and design. It's especially interesting to note the 25% who responded they were experiencing **Severe Pain** in terms of their ability to provide easy to configure systems via a self service interface. A contributing factor to this issues is that in a licensed model, configuration is often either handled by the software provider as part of an overall service contract or by a customer's IT group. In SaaS, the traditional hand holding tends to go away; customers expect to either self service easily or be "on-boarded" automatically.

and charge for the leads generated.

In the process of talking to customers, we discovered that they were more interested in risk abatement and asked for tools to collect genetic information. This immediately opened up our prospective market and attracted $1.2m in angel and private investors. We hired a genetic counselor to join the company; she vets all the vendor advice that appears on the site and monitors subscriber community interaction. In January of 2010, we decided to relaunch the site using the new business model but time to market was critical.

At that point, we had two choices—develop in house or outsource. When making the decision to outsource, I considered the following factors:

- **What model would best let me pre-vette my resources?** For example, if we needed a Java programmer, how could I be sure the person was indeed an expert in the language? I'm not a Java programmer and we couldn't know that someone on our staff would have the needed expertise to vett a hire.

- **What choice provided me with the greatest flexibility in deploying my development resources?** For instance, you can't hire an eighth of a person, but you can contract for a external resource to do work equivalent to an eighth of a resource, something I did indeed do.

- **What choice would be the most cost efficient?** In 2010, an Indian programmer with skills equivalent to a US coder cost approximately 30% to 50% of his American counterpart. The practical result was that I could hire four full time resources to develop the new system as opposed to one-and-a-half to two in the US.

- **Was I confident my outsource could execute to my company's needs and specifications?** Because I'd worked in the past with the outsource I picked, I knew what their capabilites were and was comfortable choosing them. This is a critical point. If you haven't worked with an outsource, I strongly recommend you independently contact a company that has worked with the firm and interview them at length on their capabilities and service.

"For a SaaS startup looking to develop a new product, Microsoft's BizSpark is a tremendous value. The program is free to join for three years and provides all the development resources you need to bring up a new SaaS system. The basic requirement is you produce a product within three years using Microsoft technology."

— Lee Essner
Inherited Health

What development platform did you pick?

Our management team was initially a strong proponent of Open Source, but when we compared the various options against Microsoft's offerings, Microsoft won. The BizSpark program was a strong inducement to go with Redmond.

Let's analyze the development effort. How was the US development team structured?

Our US development team consisted of myself, Jordanna Joaquina, director of genetics (and co-founder) and Joe Nuccio, vice president of product marketing. My primary role was team leader and chief liaison with the Core Objects development group in India. Jordanna was our domain expert, and her job was to make sure the site was scientifically and professionally up to snuff; she also contributed heavily to many aspects of the specification development and project management.

Joe's job was to act as the primary product architect. He was responsible for developing the product specification, feature road map, prototype development and wire maps.

What kind of tools did you use to develop the prototype?

We used the following tools:

- For project management, the Indian group used Microsoft Project; in the US we relied on Open Project.
- Wire frame development was done with Open Office; overall prototyping of the site was done using UML.
- For comps of the website, layout work was done with Vizio and Photoshop.
- Bug tracking was done with JIRA; the overall development effort was managed under the SCRUM Agile methodology.

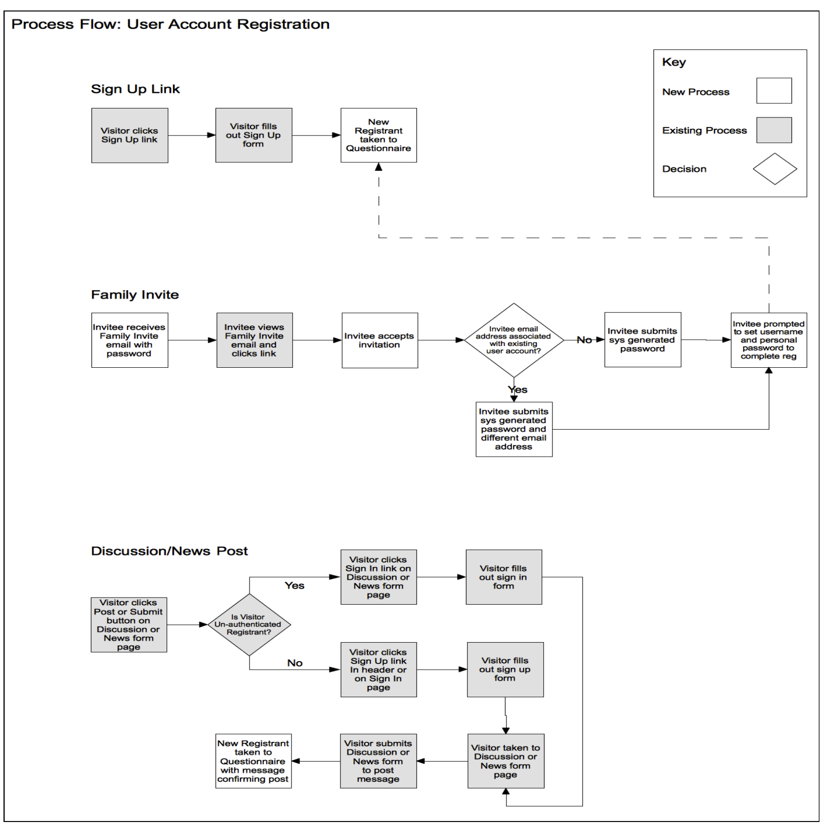

Figure: User Account Registration Wire Frame for Inherited Health Website Specification. Developed in 2010 in Vizio

"The design of the Inherited Health site was based on the idea of community. While the system does deal with medical and health issues, the feel of the site is designed to be open and inviting and not 'resemble' a doctor's office; many people don't like going to the doctor."

— Lee Essner
Inherited Health

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"Approximately 17,000 genetic diseases/disorders have been identified to date. There are no groups or individuals who aren't at risk for some sort of genetic tendency, weakness, or outright disease."

— Lee Essner
Inherited Health

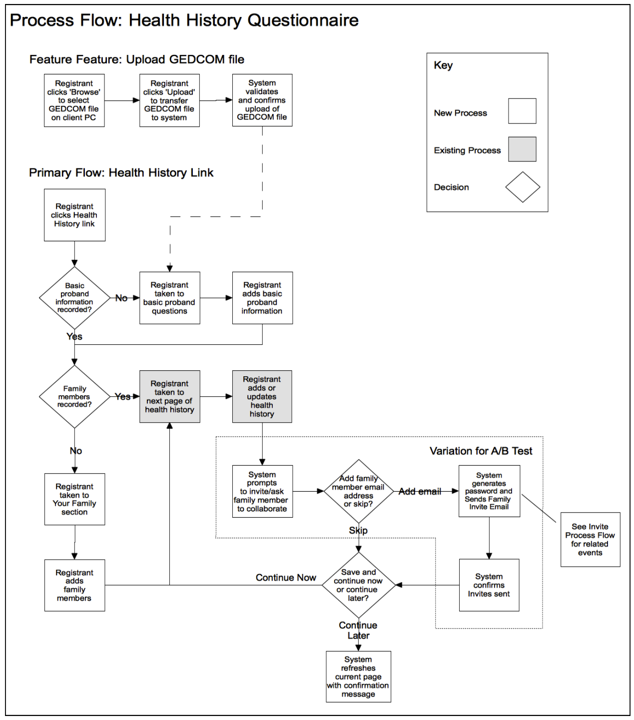

Figure: Health History Wire Frame from Inherited Health Website Specification. Developed in Vizio

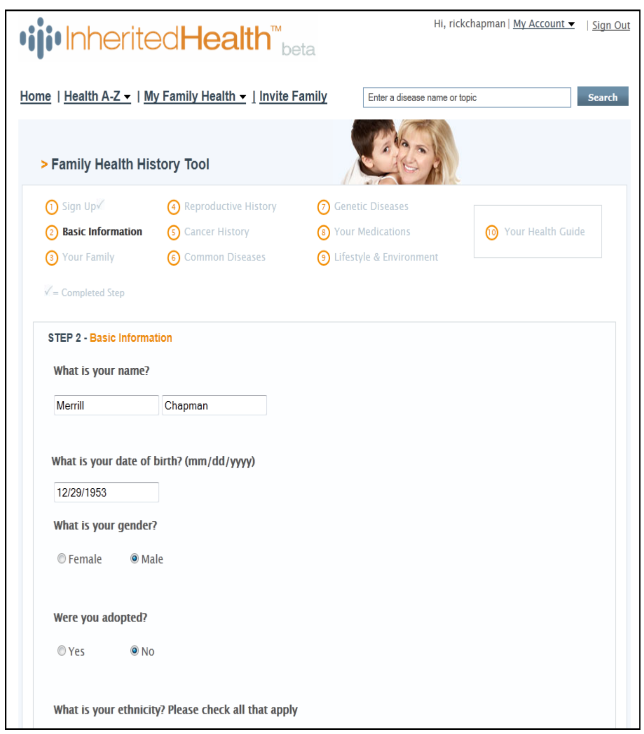

Figure: Inherited Health Questionnaire Screen Developed from Wire Frame. Note the light, "airy" feel of the design

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Specific content ideal for launching press coverage includes company white papers, as well as executive quotes on recent industry news, legislation or studies. The press also loves transcripts of executive speeches they can quote (always include a name and title with each speech), transcripts of recent company Webcasts, company case studies, industry survey results, and customer/client testimonials. (Always include a name, title and company for the testimonial.)

No matter what your content, basic information must be easy to find and should be cleansed of the marketese and excessive verbiage that smother the facts on many sites, according to Jakob Nielsen, author of ***Designing Websites to Maximize Press Relations***, (www.nngroup.com/reports/pr/).

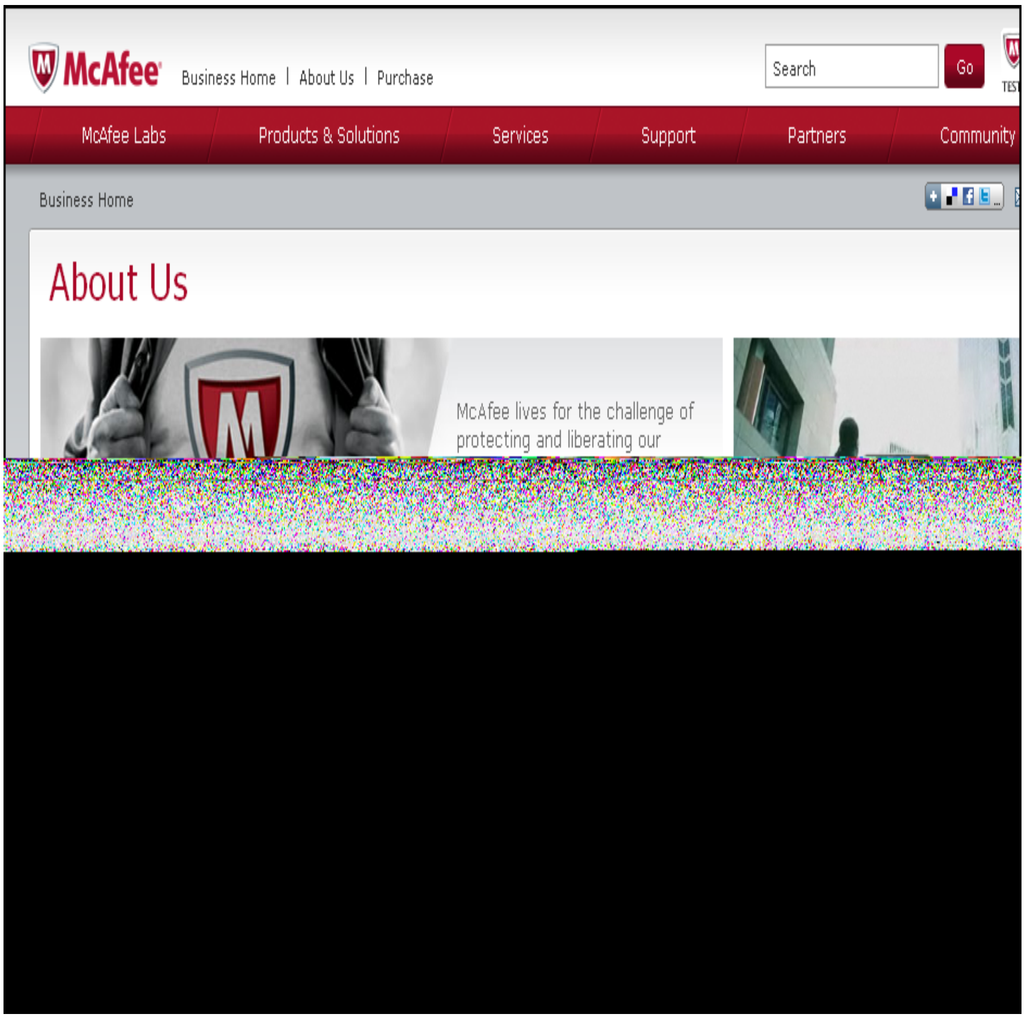

Figure: McAfee Online Press Center. Note the links to research and reports, awards stories and quick clicks to in-house blogs

In addition, if you're lucky enough to have already been covered by the news media, offer links to these previous stories; the press will often use older stories for research and quotes.

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Key to making this development effort work was to have a very well written specification and comprehensive wire frames; the specification itself was over 250 pages. We also, from day one, created an environment that encouraged the offshore group to not make assumptions but to ask questions. This is very important when dealing with offshore development. I've learned that many outsourcing firms regard asking questions as a sign of weakness or loss of "face." This is a very dangerous syndrome and needs to be prevented immediately in the development cycle.

Can you describe the day to day management process of working with the outsourcing team?

We relied on a combination of a project wiki, E-mail and phone calls; we had a standing call with the development group every Wednesday that typically ran from 45 minutes to two hours; more calls took place on an as needed basis. In most cases, we interfaced with the development groups project manager (he was a 50% resource) and the lead developer. The project kicked off in January of 2010 and the Inherited Health website went live at the end of September.

"When working with an outsource development group their willingness to identify problems, own them and not charge you for problems they've created is critical."

— Lee Essner
Inherited Health

What was the cost of the development effort?

It came in at $75k; we were billed on the basis of a fixed number of resources (development personnel) for which we negotiated a per person monthly rate. As I've noted, when necessary, we were able to bring on resources on a fractional basis.

Any major problems during the coding cycle?

Only one. We had a breakdown when a resource was brought in who wasn't expert enough on preparing a very gating piece of the project; when we found out, that entire part of the system had to be redone. We were impressed that when CoreObjects discovered the problem they proactively reached out, put extra resources into fixing the code, and stopped billing us until the code was fixed. Of course, ideally, you never want to have this sort of problem, but the reality is that things are going to go wrong during a development cycle; reacting to them quickly and fixing them is a skill set your company must possess.

After the site was launched, how did you handle system maintenance and upgrades?

We kept a reduced work force of two people from CoreObjects under contract to help with maintenance and new features. This was out of contract, but was significantly less than the original effort. This exemplifies another example of ramping resources up or down on a very granular basis as needed.

(Editor's Note: Shortly after this interview was concluded, (Inherited Health was purchased by Informed Medical Decisions, Inc. Lee is now on Informed's board of directors.)

Lee Essner, Founder, Inherited Health, 360 Central Ave., Suite 1230, St. Petersburg, FL, 33701; 310/251.7754. E-mail: lee.essner@gmail.com.

- **Add dimension with rich media and still images.** Once you've implemented the essential elements of your press center, mixing in rich media such as Web video, podcasts and even virtual reality can bolster your message in an extremely compelling way.

  "I think video will continue to play a key role in online press centers, particularly with user-generated content such as video testimonials, vlogs and spontaneous citizen footage," says Sagecom's Seto.

Of course, you'll also want to include bread-and-butter, still photos in the multimedia domain of your press center, for the thousands of print and Web journalists looking for images to support the stories they write about your software firm. Images should be available in .png, .jpg and .tif formats (.tif is very important for printing purposes and is often overlooked; don't make this mistake).

- **Become a media authority.** You'll get even more coverage if you establish one or more executives at your company as a media authority. Blogs are one of the quickest ways for an exec to loom large before the press—but only if the blog is interesting and insightful. One of the easiest ways to guarantee this is to simply hire a good ghost blogger.

- **Be charming.** Most software companies "get" that offering a name, voice and email contact info for all key public relations personnel in your press center is a good start. But the same contact info for key executives who are open to being interviewed is even better. A promise—and practice—to turn around all press requests within 24 hours will go even further towards winning you instant friendships in the press.

- **Tweak under the hood.** During the past few years, Google has released a number of free tools designed to help your press center appears as high as possible on Google search engine returns. Sign up for a free Google Webmaster's account (http://www.google.com/webmasters/ and all these tools are yours to use. Plus, once your press center is search-friendly for Google, the center will also be optimized for most of the other major search engines.

- **Promote relentlessly.** One of the great equalizers of the Web is that a tiny, nimble online software maker can leap ahead of even the largest goliath in the news media with the right promotion. Offering press releases and a company e-newsletter gets the process started.But you can also offer the same information via RSS (Really Simple Syndication) feeds, for reporters who like their news delivered via that technology. (IceRocket (http://rss.icerocket.com/) will make your page RSS-friendly for free.)

- **Other tactics that work.** Offer a news alerts sign-up list for journalists. Post a "send-this-page-to-a-friend" button on every page of your press center, and Web site. Leverage the social networks. "Facebook and Twitter have become a blessing, and well-entrenched in our daily routines," says Sagecom's Seto.

  "They are easy and accessible vehicles for garnering the attention of a highly qualified audience that has opted into receiving our news." In short, the two new mediums have been able to disseminate news for Sagecom "beyond expectations," Seto adds.

SaaS

Best Practices in SaaS Customer Service, Part III of III

by the Softletter Staff

Leverage Social Networks

SaaS support organizations are typically staffed by people in their 20 and 30s, age brackets that have embraced social networks with great enthusiasm. Count on their wanting to continue using these systems and build your customer service organizations out to encompass the appropriate social networks for your market. Social networks are best at providing level one type support, so information about new release and training webinars, updates to your system, new training resources and guides and similar material can be effectively placed and highlighted on these systems.

The Customer Success Life Cycle

Once your company welcomes a new subscriber, the entire process of customer interaction through out the subscription period should be managed carefully. This interaction can be broken into three stages.

- **The on-boarding process.** Elements of this stage, include a welcome E-mail sent to the new subscriber within 48 hours of their subscription confirmation, information about training resources, and an invitation to attend training, either on line or in person at a training facility. This is the most critical part of this stage because subscription retention rates of 90%+ cannot be achieved if a majority of your subscribers aren't comfortable using your application; for more complex systems, training is the best way to insure this comfort.

- **The mid-life subscription period.** This stage includes a customer satisfaction survey sent 90 to 120 days into the subscription period (a sample survey will be posted on the website). This survey both allows you to measure subscriber satisfaction with your system and also serves as a lead generation mechanism for cross and up-sells, depending on what you learn about your subscriber's needs and wants. If it possesses the capability, the survey responses should be read back into your CRM. At six months into the subscription, be prepared to conduct a customer health check, which includes an analysis of customer usage, training participation and communications with your company. Often, SaaS companies discover that customers are not aware of their product's full functionality and capabilities.

- Other programs companies such as DreamFactory execute during this phase are called "decision maker demos," "customer coffee breaks", and so forth. These are outreach programs designed to build on our contacts with your subscribers to extend awareness and use of your product in their company.

The Customer Renewal Phase. During this stage, a series of E-mail, phone calls, and other appropriate contact activities are launched to help ensure the customer resubscribes. During this phase, any outstanding training and customer usage issues should be resolved.

Measuring Customer Satisfaction with Your Service

Most SaaS customer service departments focus on measuring a basket of metrics. These include typical help desk metrics such as call abandonment rates, number of calls handled per representative over X period of time, and so forth.

Customer Churn Rates

Customer churn is one of the most popular means by which to rank customer satisfaction; the problem is it's a lagging indicator. By the time you learn that your customer service organization has not met expectations, you've lost the customer.

Customer Engagement Measurement

To deal with the lagging indicator problem of customer churn, SaaS companies are discovering that the best way to measure customer satisfaction is to track customer engagement and interaction with the SaaS system. Companies such as HubSpot, a provider of marketing software targeted towards SMBs, have found that measuring subscriber usage is an excellent forward predictor of future churn. The company turned to using this methodology to measure customer satisfaction after discovering that conventional means of judging customer happiness via customer service satisfaction surveys and analyses was not a reliable predictor of renewal rates. (To implement this approach, you need to have in place an integrated analytics system capable of precisely measuring customer usage of your system.)

The HubSpot CHI Process

To help measure customer satisfaction with their marketing system, HubSpot has created their CHI (customer happiness index) metric. The process consists of:

- Breaking out key usage metrics to be analyzed. The metrics you choose to measure will depend highly on your software's functionality. In HubSpot's case, interaction with modules of the product that enabled blogging, SEO, E-mail, and customization were chosen as part of 19 individual aspects of product interaction put under the microscope.

- A/B analyses of churn rates of each interaction were conducted and correlated with high/low churn.

- Applying regression analysis to the entire set of measured interactions. Regression analyis allows you to model the interaction between a range of variables and allow these variables to be assigned a weighting relative to each other. For example, HubSpot wanted to know such things as whether decreased use of the blogging module was a better measure of churn as opposed to limited use of the system's SEO features. (If you're not familiar with developing this type of spreadsheet, statistical analysis packages can help with the process; a shout out to your local university's math department may also help.)

- Creating a blended average (a customer's CHI score) of the entire set of measured interactions.

The result has been a single CHI score that can be easily understood and circulated throughout HubSpot. The metric has proved highly accurate in predicting subscription churn and is constantly being tweaked and refined.

Cardfile

Online PR Center Resources

- **eReleases** (www.ereleases.com): Decent online PR release service that provides somewhat more reach than the typical "free" PR release services; good choice for a company rolling its own online press room.
- **iPressroom** (www.ipressroom). SaaS-based online PR system; offers media management, PR release distribution, dashboard system for system admins.
- **Keyword Intent** (www.keywordintent.com): Australian market oriented service that does the research work of finding useful SEO and media links; you do the work of contacting the company and setting up the link exchange.
- **PitchEngine** (www.pitchengine.com). Service for creating social media press releases (SMPR).

ZDNET BLOGGER MATTHEW MILLER ON THE HP TOUCHPAD TABLET: "In today's tough economy, I have to wonder how many more tablet devices will be released that launch with known issues, readily apparent UI problems, and lack of apps." (Quoted on http://www.zdnet.com/blog/mobile-gadgeteer/should-we-now-expect-to-pay-500-to-be-tablet-beta-testers/4871?tag=nl.e539, 06/27/2011)

CREATOR NASAHN SHEPPARD ON CISCO'S KILLING THE FLIP: "It (Flip) fundamentally reshaped the video capturing market. Most importantly, it did exactly (and only) what it promised it would do; its fun, approachable, mode-specific design allowed people to capture and share the in-between moments in their lives. As a parent, the moments of life I want to capture are fleeting. Pulling out my smartphone, launching an app, and waiting for video-capture to start will, without fail, lead me to miss the moment... Cisco may have had reasons to kill Flip, but the smartphone was not one of them." (Quoted in ***The New York Times***, 07/07, 2011)

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SOCIAL MEDIA MAVEN JAY BAER ON WHETHER TWITTER IS OVER HYPED: "Last year, 7% of Americans surveyed used Twitter (and ExactTarget (client) research found 5% follow a brand on Twitter). This year, 8% of Americans use it. That's not exactly hockey stick growth rates." (Quoted on http://www.convinceandconvert.com/social-media-marketing/is-twitter-massively-overrated/, 04/18/2011)

TECHREPUBLIC ON TABLET BRAND ADOPTION RATES: "According to Good's four-month tally of recent mobile device activations for its large stable of enterprise customers, tablets are taking a growing chunk of the activation pie, but among those tablet adopters the Apple iPad is grabbing 95% of all activations, while very few Android tablets are showing up in large companies." (Quoted on http://www.techrepublic.com/blog/hiner/enterprise-95-percent-are-choosing-ipad-over-android-tablets/8725?tag=nl.e019, 04/18/2011)