



TM Forum:  
Driving the roadmap  
to digital success

# About TM Forum

“TM Forum is the global member association for digital business.”

Providing a platform for hundreds of global members across a wide range of industries, TM Forum enables members to collaborate and team up, co-create, deliver, and monetise innovative digital services.

The TM Forum vision is to drive the next wave of digital business growth – the digitalisation of every industry – by providing a common innovation platform to connect businesses, industries, and ecosystems.

## **By members, for members.**

TM Forum’s focus is on getting numerous organisations across industries and ecosystems to work together and agree on common means of transformation into successful digital businesses.

As well as accelerating innovation and providing the blueprint for digital success, TM Forum understands the value of **connecting the right people.**

The collaborative work that TM Forum and its members are doing has a profound impact on members, the marketplace, and society as a whole.

## TM Forum and Collaboration



"TM Forum's collaboration focuses on delivering rapid pragmatic solutions to the top technology challenges that our members face, driven and validated by the business needs of key industry influencers. Working and playing a leadership role provides the opportunity to shape and influence these far-reaching industry best practices and standards.

We do this through highly structured agile collaborative techniques, such as agile workshops, hacks, online collaborative working sessions, continuous validation, and practical demonstrations of solutions at industry events.

When hundreds of global members across a wide range of industries collaborate and partner to co-create, prototype, deliver, and monetise innovative digital services, rapid, and pragmatic solutions are created.

Collaboration offers our members a number of benefits including:

- Accelerated R&D and reduced costs.
- Network and partnering opportunities.
- A channel to market."

"Confluence is being used by our global membership as the platform for collaboration for the co-creation, editing, and publishing of our industry best practices and standards."

- **Richard May** | VP, Technology & Community, TM Forum

# The Collaboration Challenge

As an organisation with collaboration at the centre of its ethos, TM Forum was looking to adopt a tool that would maximise this.

“Member collaboration is at the heart of the Forum and represents the value creation engine that thousands of professionals in hundreds of member companies use around the globe.”

- **Richard May** | VP, Technology & Community, TM Forum

TM Forum's goal was to provide a place for its member organisations to come together to solve problems.

- **Standardisation** of best practices.
- **Leveraging** of new technological opportunities.
- **Frameworks** for end-to-end management.

To achieve this, collaboration between TM Forum members was of vital importance. TM Forum's aim was to create a level playing field among members (including some competing organisations) by providing them with a 'table' to work around. The members themselves then drove collaboration to solve problems.

Before adopting Confluence, TM Forum had experienced several challenges around collaboration.

The Collaboration Challenge cont.

### **Assets were predominantly document-based.**

In order for project team members to collaborate on documents, they needed to work offline and upload new versions.

### **Work took place in multiple locations.**

There was a separation of where the work was done and where the results were published. This disconnect threatened a lack of clarity.

### **Publishing was complex.**

Publishing documents at the end of a cycle to the TM Forum website was a complex affair. The process involved multiple steps, none of which added any real value.

It wasn't a particularly smooth way of working, and it meant that visibility was poor to the wider audience.

TM Forum needed software to allow for streamlined processes, centralisation and, most importantly, real-time collaboration.

# Choosing Confluence

Settling on Confluence was, in itself, a collaborative act for TM Forum.

The teams at TM Forum felt that it was vital for members to be involved in deciding on what tools they'd like to use. There was an extensive consultation program that asked for suggestions on what features and tools they thought would make collaboration effortless.

“TM Forum was able to anticipate some of the challenges of the adoption of a new tool, and solve them before they caused major interruptions to the flow of work.”

- **Richard May** | VP, Technology & Community, TM Forum

## Why Confluence?



Confluence is highly regarded for its flexibility and for enabling collaboration. These were two primary factors in TM Forum's decision.

### With Confluence, TM Forum gets:

- A web platform accessible to members without requiring anything other than standard web browsers.
- Scalability.
- Frictionless collaboration.
- Improved visibility over work in progress.
- A simplified publishing process.
- Interactive documents.
- Flexibility of access security needed to support its IPR policy.
- Hundreds of add-ons and extensions that allow improvements and features to be added without the need for customisations.
- The ability to build customisations when the need arises.

Choosing Confluence cont.

### **Atlassian Marketplace:**

The Atlassian Marketplace is where you can discover and try add-ons to extend your Atlassian products, including Confluence, Jira, Bitbucket, and HipChat.

[Explore the Marketplace >](#)

### TM Forum's Confluence:

- 10,000 Users.
- 1,000 Power users.
- 12-Month timeline.
- Integrated with WordPress, Telligent community (soon to be replaced with Higher Logic Community platform), a custom-built project approval workflow.
- Single sign-on using Crowd.
- End-to-end primary platform for member collaborative projects.

TM Forum uses Confluence for everything from project charter management, the creation and editing of best practices and standards, management of member contributions (via Jira), and publishing to the TM Forum website.

# Collaboration and Innovation at Scale

In the majority of cases, a Confluence instance operates within a single company. It acts as a collaborative wiki and knowledge base, and when integrated with tools like Jira Service Desk (Jira Service Management), it often includes public-facing pages that external users can search.

As a members organisation, TM Forum is using Confluence in an innovative way. Hundreds of organisations require access - one of the reasons having a web-based platform that required no proprietary software or licensing was key. TM Forum wanted its collaboration platform to be customer-driven.

“To be successful in a global market you have to be able to partner with big and small organisations. You cannot develop alone.”

- **Richard May** | VP, Technology & Community, TM Forum

## Deep dives

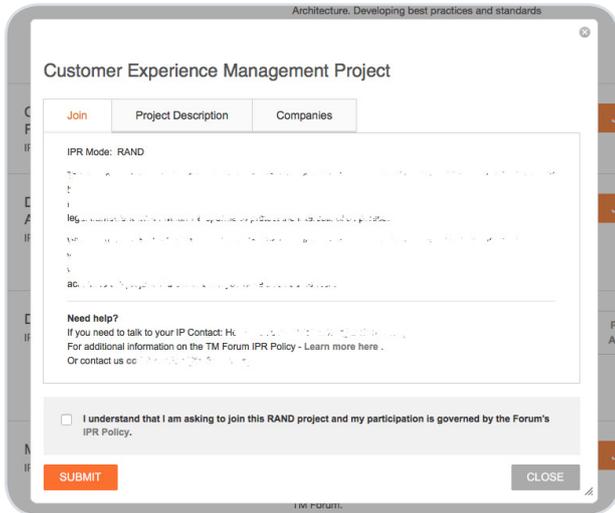
Let's take a closer look at the unique and innovative ways TM Forum is using Confluence to facilitate collaboration between members.

### **Approval workflows**

TM Forum has integrated a custom approval workflow that sits in front of Confluence. This ensures the correct members have the correct permissions - an important area of governance for an organisation with so many members.

## Collaboration and Innovation at Scale cont.

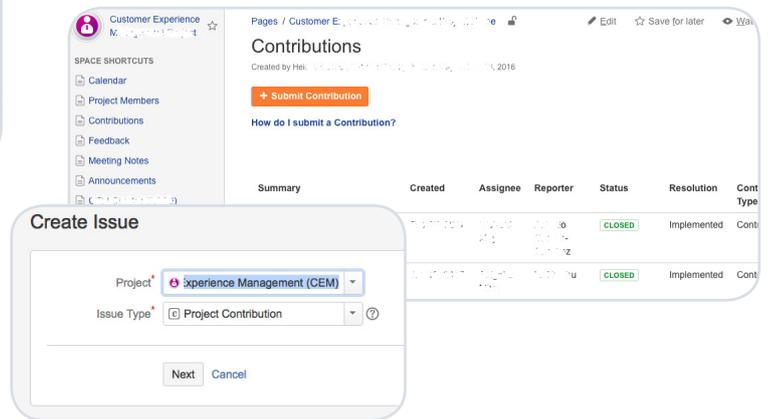
**Step 1:** Request to join a project via TM Forum's website.



**Step 2:** Member company's designated contact grants permission to a space.

**Step 3:** The appropriate permissions are granted via an API call to Atlassian Crowd.

**Step 4:** Access to project space to contribute, feedback, and collaborate.



TM Forum introduced a novel way of reporting on the attendees of meetings. By integrating reporting software with the meeting notes template native to Confluence, TM Forum captures attendees automatically.

This visibility is a vital part of the Forum's data-driven business strategy.

## Publishing workflows

TM Forum further extended the functionality of Confluence with its custom-built publishing workflow. This is at the heart of the work TM Forum does with its members: TM Forum members work together to produce best practice, digital business models, architectures, APIs, metrics, maturity models, and standards that provide the blueprint for effective, efficient business operations.

## 1. Capture specifications

This was often previously done in Word, with only one person able to edit at a time. With Confluence, members can capture specifications online, in real-time. Confluence's new inline commenting brings context to collaboration.

Work is published in Confluence, available to members of that project only, and can be exported as a PDF for those who prefer to download documents.



## 3. Checked over by staff

This is a final review process before the content is made available to the wider TM Forum membership.

## 4. "Published deliverables" and TM Forum site

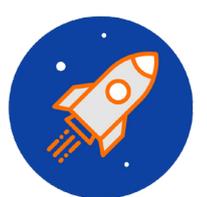
After content is checked by TM Forum staff, it is moved into the 'Published Deliverables' area of Confluence. This is accessible to all TM Forum members.

When a page is moved into the 'Published Deliverables' space, it is automatically pushed to the TM Forum website (running on WordPress), where it can be viewed online, taking the user to the Confluence space, or downloaded.



## 2. Ready for team to review / team approval

A key stage in any collaborative process, the rest of the project team will review the current version of the page. After any feedback and changes, it will move to the "team approved" stage of the workflow.



## 5. Feedback

Each published page features a feedback button integrated with TM Forum's Jira instance, where relevant tickets are created to incorporate approved feedback in the next iteration of work.

TM Forum's Confluence also includes a discussion space for elevated levels of collaboration between members. With thousands of plugins available for Confluence, TM Forum was able to implement a discussion area for the community to come together to help, support, and learn.

Collaboration and Innovation at Scale cont.

Published on Confluence:

The screenshot shows a Confluence page with the following elements:

- Breadcrumbs:** Pages / TM Forum Published Deliverables Home Page / Framework 16.5 Release
- Actions:** Edit, Save for later, Watch, Feedback, Share
- Status:** Member Evaluated, Published on: 2016-11-28 23:00
- Title:** GB962 Customer Experience Management: Introduction and Fundamentals R16.5.0
- Author:** Created by Alicja Kaweckki on Nov 28, 2016
- On this page:**
  - Notice
  - Executive Summary
  - 1. Introduction
- Latest Update:** Framework Release 16.5
- Member Evaluation:** IPR Mode: RAND
- Version:** 4.0.1
- In this deliverable:**
  - Why is Customer Experience Important R16.5.0
  - Differentiating CEM R16.5.0
  - CEM & Social Media R16.5.0
  - Lifecycle of Customer Experience R16.5.0
  - Customer Experience Maturity Model R16.5.0
  - Measuring Customer Experience R16.5.0
  - Omni channel R16.5.0
  - Implementation Guide R16.5.0
  - Relationship with Framework R16.5.0
  - Summary R16.5.0
  - List of TM Forum CEM Specific Documents R16.5

Delivered on website:

The screenshot shows the TM Forum website page with the following elements:

- TM Forum Logo:** tmforum
- Navigation:** Solutions, Collaborative R&D, Standards & Adoption, Research
- Breadcrumbs:** Home / Resources / Standard / Best Practice / GB962 Customer Experience Management: Introduction and Fundamentals R16.5.0
- Header:** GB962 Customer Experience Management: Introduction and Fundamentals R16.5.0 Best Practice
- Standard:** Best Practices
- Maturity level:** Level 3 - Team Approved
- Created By:** Customer Centric
- Tags:** Customer Experience Management
- Actions:** Download, View Online, Submit Feedback
- Call to Action:** Get involved in our project

Collaboration and Innovation at Scale cont.

## Confluence and Jira.

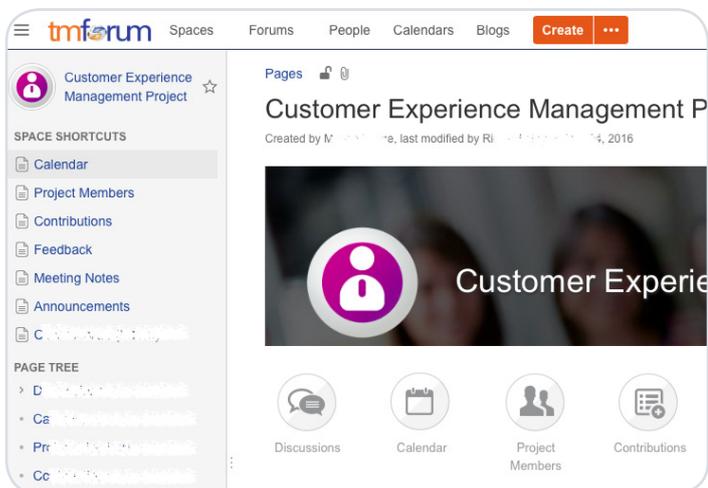
TM Forum uses Jira Software internally. Confluence and Jira are integrated. Jira is used for formal contributions, feedback, and managing collaboration.

# 12

## Scoping and Successful Adoption

“Confluence is intuitive. We’ve been able to set up simple navigation and have seen a focus on results, rather than users trying to get to grips with the tools.”

- **Richard May** | VP, Technology & Community, TM Forum



### Step 1

TM Forum began its adoption of Confluence with a pilot on one collaboration project. Those involved in the project were keen to adopt Confluence and see how it could be used.

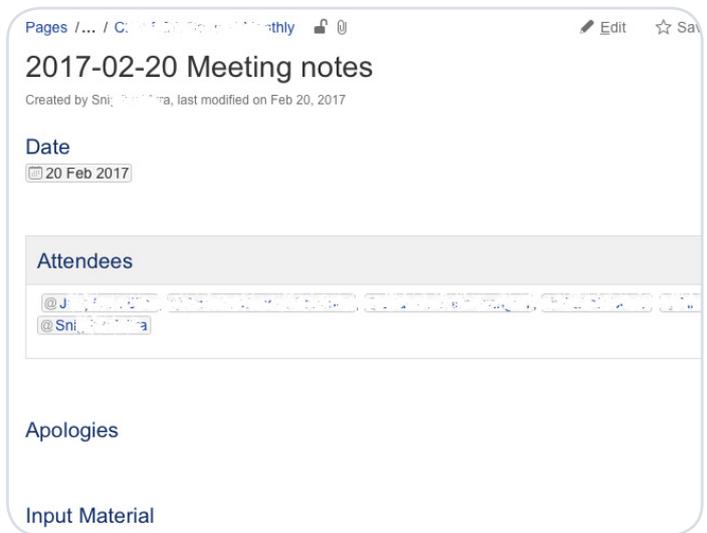
By using a pilot project, TM Forum gained valuable insight of best practices on how documents could be adapted to the Confluence format - a major step in solving one of the company's key collaboration challenges.

## Scoping and Successful Adoption cont.

### Step 2

TM Forum took an innovative approach to rolling out Confluence.

Project teams at Action Week, one of its face-to-face collaboration events, highlighted the nature of Confluence, and meant that after the pilot team, TM Forum's project teams were all adopting the new technology together.



### Tackling adoption challenges.

Because of the pilot project, TM Forum anticipated the challenges that the adoption of a new tool could cause, and solved them before any major interruptions to the flow of work could arise.

**There was confusion about where people should be working and what format teams should be creating documents in.**

- To combat this, TM Forum developed best practices and templates, providing teams with online help, videos, playbooks, and more.

**Many teams had existing Word documents as part of their latest project cycle.**

- To solve this, TM Forum helped convert existing Word and PDF documents into Confluence native formats. This provided a 'baseline' in Confluence for project teams to adopt and iterate on.

Consolidating TM Forum's previous collaboration environments into one platform allowed Confluence to be the primary app for all project teams.

# Project Overview

- TM Forum needed a solution that would enable teams to collaborate and that would bring visibility and agility to processes.
- TM Forum made decision-making collaborative, sourcing opinions from those who would be using the platform.

“Confluence emerged as the clear leader. It’s the bedrock of our collaboration programs.”

- **Richard May** | VP, Technology & Community, TM Forum

- TM Forum encouraged adoption by first operating a pilot project and implementing best practice workflows influenced by r results.
- Confluence is helping to facilitate collaboration f or TM Forum’s member organisations, not just within one business.
- Confluence has allowed TM Forum to create custom publishing and approval workflows by integrating with Jira.

# About Clearvision

Clearvision is an award-winning Atlassian Platinum Solution Partner. If you're interested in adopting Jira and/or Confluence, [contact](#) the experts.

“I want to thank Clearvision for the support before, during, and after the Confluence, Jira, and Crowd upgrade. It went extremely smoothly and the feedback from our users has been positive. This is a mission-critical platform for us, so smooth running was essential.

We're looking forward to the next upgrade, which I'm sure will be even better!”

- **Richard May** | VP, Technology & Community, TM Forum