Introducing Patterns (or any new idea) into Organizations

** A WORK-IN-PROGRESS **
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The work in using and writing patterns began with Christopher Alexander who wrote A Timeless Way of Building [Alexander79] and A Pattern Language [Alexander+77] in the 1970s. When the software community began studying his ideas, interest in patterns began to spread throughout the software development industry in the 1990s. However, efforts to introduce patterns into organizations have had mixed success. The patterns presented here are the beginning of a pattern language whose focus is the introduction of patterns into an organization, with the long-term goal of developing a patterns culture. The contributors are from organizations all over the world. We have found a close connection between our experiences, which is reflected in the patterns we have written.

The creation of a pattern language should be the work of a community. Many people have contributed, and continue to contribute, to the development of this language. These include the pattern authors, those who have attended the Introducing Patterns into an Organization workshops, and the countless other individuals who are providing feedback and ideas for improving the patterns.

Especially valuable was the effort of all the shepherds who have worked with us along the way: Ken Auer, PLoP ’97, David DeLano, PLoP’99, Jim Coplien, EuroPLoP’00, Brian Marick, PLoP’01. Special thanks also goes out to Alan O’Callaghan for his unwavering support and his invaluable help with many of our workshops.

As Christopher Alexander states, we hope that “many of the people who read, and use this language, will try to improve these patterns—will put their energy to work, in this task of finding more true, more profound invariants—and we hope that gradually these more true patterns, which are slowly discovered, as times goes on, will enter a common language, which all of us can share.” [Alexander77:xv]
The Patterns

* Newest patterns

The patterns in this collection are used when introducing patterns into an organization. The objective is to build a grassroots group of individuals who become interested in patterns and can help with the growing effort in spreading the word throughout the organization.

Although there are relationships between these patterns, thus forming the beginning of a language, an illustration of these relationships is not shown here since this is still a work-in-progress effort. Instead, the patterns are placed in high-level categories, as follows:

**Roles**
- Evangelist
- Dedicated Champion
- Innovator
- Early Adopter
- *Early Majority
- Local Leader
- Corporate Angel
- *Connector
- *Champion Skeptic
- *Respected Techie
- Pattern Mentor

**Events**
- Big Jolt
- Brown Bag
- Do-Food
- Hometown Story
- *Location, Location, Location
- *Royal Audience

**Keeping Patterns Visible**
- e-Forum
- In Your Space
- *Plant the Seeds
- *Stay Close
- *Treasure
- Trinket

**Dealing with Skeptics**
- *Fear Less
- *So What’s New?
- *Adopt a Skeptic

**Early Activities**
- Just Do It
- Gold Mine
- *Test the Waters
Reaching Out
*Ask for Help
*Just Say Thanks
Shoulder to Cry On

Convincing Others
Bread Upon the Waters
*Corridor Politics
Evaluation Phase
Personal Touch
*Pieces of Clay
*The Right Time
*Smell of Success
*Whisper in the General’s Ear

Planning
Beyond the Fire Hose

Writing Patterns
*Ghost Writer
A Pattern of Their Own
*Time For Reflection

Teaching and Learning about Patterns
Hero Story
*Just Enough
My Gold Nugget
Pattern Writing Guided Tour
Play-by-Play Workshop
*Study Group
Workshop as Teacher

Long-run Activities
Involve Everyone
*Small Successes
Sustained Momentum
The Pattern Summaries

**Adopt a Skeptic**

Pair those who have accepted patterns with those who have not.

**Ask for Help**

Ask as many people as you can for help whenever you need it.

**Beyond the Fire Hose**

Take time near the end of a patterns event to plan what to do next with patterns in the organization.

**Big Jolt**

To provide more visibility to the patterns effort, invite a well-known person to do a presentation.

**Bread Upon the Waters**

To gain credibility for patterns inside your organization, present your patterns work in an external publication that is recognized by your colleagues.

**Brown Bag**

Use the time when people normally eat lunch to provide a relaxed atmosphere for learning about patterns.

**Champion Skeptic**

Appoint strong opinion leaders who are skeptical of your new idea the role of ‘official skeptic’ to use their comments to improve your effort, even if you don’t change their minds.

**Connector**

To help you spread the word about patterns, seek help from people in your organization who know and connect with many other people in the organization.

**Corporate Angel**

Get high-level managerial support to help patterns thrive.

**Corridor Politics**

Informally work on the decision makers before the decision point. Make sure they fully understand the problem area and the consequences of the decision.

**Dedicated Champion**

To increase your effectiveness in leading the effort to introduce patterns into your organization, find a way to make your patterns work part of your job description.
**Do Food**

Turn a patterns class or meeting into a more special event by bringing food into the meeting.

**e-Forum**

Set up a bulletin board, distribution list or listserver for those who want to hear more.

**Early Adopter**

Ask For Help from individuals who can serve as opinion leaders early in your efforts to introduce patterns.

**Early Majority**

To begin to realize a commitment to patterns in the organization, seek the support of a majority of individuals.

**Evaluation Phase**

Gather the Respected Techie and other interested individuals in the organization for a close look at your new idea and evaluate it for their managers and other developers.

**Evangelist**

To introduce patterns into your organization, begin by letting your passion for the new idea drive you.

**Fear Less**

Identify resistance to your new idea and turn it to your advantage.

**Ghost Writer**

Capture the knowledge of domain experts who don’t write patterns by writing the pattern for them.

**Gold Mine**

Combine pattern writing with the rest of your work.

**Hero Story**

Before starting to write a pattern, have students list their areas of expertise. These become topic areas for patterns.

**Hometown Story**

Encourage and assist individuals in presenting their patterns experiences to others.

**In Your Space**

Keep the patterns effort visible by placing reminders throughout your organization.
Innovator

When you start to introduce patterns, Ask for Help from the co-workers who are interested in new ideas.

Involve Everyone

For a new idea to be successful across an organization, everyone should have an opportunity to be part of it.

Just Do It

To prepare to spread the word about patterns, find out for yourself what the benefits and limitations are.

Just Enough

To ease individuals into the more difficult concepts behind patterns, provide them with brief exposure to these concepts in the beginning with resources for them to learn more when they are ready to do so.

Just Say Thanks

To make people feel appreciated, say “thanks” in the most sincere way you can to everyone who helps you.

Local Leader

Enlist the support of first-line management. When your boss lets patterns activity become part of your job, you can truly be effective.

Location, Location, Location

To avoid interruptions that disrupt the flow of an event, try to hold significant events off site.

My Gold Nugget

Show students many different patterns to find ones that are most likely to address problems the students have struggled with. Try to find a "gold nugget" for each student.

Pattern Mentor

When a project wants to get started with patterns, have someone around who understands patterns.

A Pattern of Their Own

Help individuals play a role in the patterns effort in your organization by mentoring them through the process of writing a pattern of their own.

Pattern Writing Guided Tour

Teach students the structure of a pattern by directing them in writing a pattern as a group.

Personal Touch
To convince individuals of the value they can gain from patterns, show them how patterns can be personally useful and valuable to them.

**Pieces of Clay**

To convince the organization of the value it can gain from patterns, tailor your message to the needs of the organization.

**Plant the Seeds**

Carry pattern materials (seeds) to plant the idea of patterns whenever the opportunity arises.

**Play-by-Play Workshop**

Do a writers’ workshop demo. Give running commentary as students participate.

**Respected Techie**

Enlist the support of senior-level technical people who are esteemed by members of the organization.

**The Right Time**

To increase the possibility that there will be good attendance at patterns events, schedule them when people are not extremely busy.

**Royal Audience**

Arrange for management and members of the organization who have helped with the patterns effort to spend time with a special Big Jolt visitor.

**Shoulder to Cry On**

To avoid becoming too discouraged when the going gets tough, make opportunities to talk with others who are also interested in patterns.

**Small Successes**

When you’re involved in an organizational change effort, celebrate each small success and learn from each small setback.

**Smell of Success**

When your initial efforts result in some visible positive result, people will "come out of the woodwork" to talk to you. Treat this opportunity as a “teaching moment.”

**So What’s New?**

When experts believe that patterns don’t add value because they are so obvious, welcome their comments as validations of a pattern while showing the value of patterns to novices who don’t have the same experience as the experts.
Stay Close

Once you’ve enlisted the support of key individuals, make sure they don’t forget about you.

Study Group

Form a small group of colleagues who are interested in a specific topic as a next step for newcomers to learn about patterns or a good way for those familiar with patterns to continue learning.

Sustained Momentum

Take a pro-active approach to the on-going work of sustaining the interest in patterns in your organization.

Test the Waters

See if there could be some interest in patterns in your organization by using some patterns in the *Introducing Patterns into Organizations* language and evaluating the effect.

Time For Reflection

To learn from the past, take time at significant points to ask what worked well and what should be done differently.

Treasure

To recognize individuals’ special efforts with patterns, give them something they value.

Trinket

Hand out a small token that can be identified with the topic being introduced.

Whisper in the General’s Ear

Managers are sometimes hard to convince in a group setting, so set up a short one-on-one meeting to address their concerns and to offer them the opportunity to announce the new idea as their own.

Workshop as Teacher

After students write their first patterns, have them writers’ workshop each other’s patterns.
The Pattern Summaries

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The Known Uses

The known uses of the patterns are shown in italics. Company names are abbreviated as follows:

A - medium-sized telecommunications company in the southwestern United States
B - research and development division of a large international communications technology company
C - medium-sized IT consulting company with offices throughout the United States
D - large company focusing on product design and data management with offices across the United States
F - organization in Brazil
H - state department of health
I - small company that develops software tools, located in the southwestern United States and Europe
J - large international IT corporation
G - large international company with expertise in seismic acquisition and processing
L - large international communications technology company
M - large international company providing integrated communications solutions and embedded electronic solutions
N - medium-sized university in the southeastern United States
P - research arm of a large international company that focuses on document management
R - small company that provides services and solutions to business and government located in the eastern United States
S - large international engineering and electronics company
T - large international high technology product company
W - research division of a large telecommunications company in the southwestern United States
*Adopt a Skeptic*

As a Dedicated Champion, my cubicle was right next door to a skeptical Respected Techie. I tried Personal Touch without success. Finally I found someone who supported patterns, who was also someone the skeptic respected, someone he had worked with at the company for a long time. I asked for his help in convincing the skeptic. He agreed and now the former skeptic is a supporter.

**Pair those who have accepted patterns with those who have not.**

You are a Dedicated Champion. Progress to introduce patterns has been slowed by skeptics. You have tried using Fear Less but have not been successful in lessening their resistance.

**Some won’t listen to even the most enthusiastic Evangelist, if it’s someone they don’t trust.**

It is not possible to convince everyone of a new idea at once. Some are quicker to adopt new ideas than others. People can be classified as innovators, early adopters, early majority, late majority, or laggards [Rogers95, Moore99]. The decision phase of those in the latter categories is longer and they tend to be more skeptical of new ideas and more traditional in their thinking. Some people are skeptical. It’s just the way they are.

Those who have accepted a new idea can influence those who are slow to accept. Most of the uncertainty about a new idea must be removed before skeptics feel safe enough to get on board [Rogers95].

*Therefore:*

**Ask someone who sees the value in patterns to “adopt” the skeptic.**

Approach an “adopter” with similar values and interests. When two people have things in common, communication is more effective. Individuals who are regarded as down to earth and more thoughtful in their decision making are more successful than someone who is known to be more venturesome [Rogers95].

The “adopter” can use Personal Touch, Fear Less, and So What’s New? A skeptic that cares about the business side may be convinced by Pieces of Clay.

Laggards will only accept a new idea after most or all or their co-workers have accepted it, and even then, may require some pressure to do so. It might be the best use of limited resources to just wait for these individuals to come around, if they ever do, rather than putting a lot of effort into trying to persuade them.

In some cases, the skeptic is simply suspicious of the person with the new idea and not the idea itself. Many hard-boiled veterans will not listen to a newcomer, no matter how knowledgeable that newcomer may be. The veterans need to hear about the new idea from one of their own, someone they trust. If no adopter is available, and a die-hard skeptic is a member of your team, Just Do It. Most experienced people will appreciate anything that makes their jobs easier.

If someone takes on the challenge of adopting a skeptic, remember to Just Say Thanks.

This pattern “builds” a bridge between the growing community and a formerly unreachable skeptic.
One Evangelist has used this pattern many times in political situations when a small majority needs to be convinced of a move forward that the majority is interested in taking, and a straight vote would have created dissension.

Thanks to the students in Mgmt 386 at N who inspired the title for this pattern during a class assignment on introducing innovation into organizations.

**Originator:** Mary Lynn Manns

*Shepherded for PLoP’01 (August 2001).*
Ask for Help

When I started talking about patterns, someone who attended a Brown Bag told me, “No one knows you. If you talk to Jeff or Greg, they know how to get things done and I’m sure they’ll help you.” That made a big difference. They told me how to reach the editor of the online daily newsletter to announce upcoming events. They introduced me to the tech support person who could set up a bulletin board for patterns. They were there whenever I had questions. I felt like I had a chance at it after that.

Since the task of introducing patterns is a big job, look for people and resources to help your efforts.

You’re an Evangelist or Dedicated Champion working to introduce patterns into your organization.

The task of introducing patterns into an organization is too big for one person, especially a newcomer who doesn’t know the ropes.

When you’re trying to get patterns going in an organization, you may initially think it’s easier to do things yourself, but probably sooner than later you will find that one person alone can only do so much.

It takes time to get help but the return can be worth it. Unless you take the time to find out, you won’t even know what resources are available, let alone how to take advantage of them.

As you try to do everything yourself, look around. There are always resources available to help you—with publicity, with presentations, with internal organizational structure, with special printing and graphics capabilities.

Therefore:

Don’t try to do it all alone. Ask as many people as you can for help whenever you need it.

Even before you begin, find a few partners who really share your values and passions. The single biggest failing of many change agents is that they do not look for help. They believe they can do it themselves, or they feel they can’t ask for help—that it would reveal their own inadequacy. Virtually every significant change initiative starts with a genuine partnership among a small number of deeply committed individuals, often as few as two or three [Senge+99]. Don’t do it alone.

We all have blind spots that limit our credibility. The thing to remember about blind spots is that we cannot see them [Senge+99].

Sometimes it takes digging—you might have to talk to someone who knows someone, and so on, before you get the help you need. Every organization provides some kind of support—web development, graphic design, special printing, free advertising, corporate publications, secretaries, and assistants. Help can be there for the asking. Take advantage of the resources that are available. Sometimes just wandering over to a support area and stopping at someone’s desk can help you discover what’s available. To understand how powerful this technique is, read how it applies in the work of Jim and Michelle McCarthy [McCarthy01]. They show that when team members ask for help, the team becomes increasingly productive.

Connectors, Respected Techies, Innovators, Early Adopters, and your Local Leader are good places to start your search. These people can then help you find other resources such as money to Do Food or to bring in a Big Jolt. They can also help to build the Early Majority with Personal Touch and Adopt a Skeptic, and may
even be interested in leading a Study Group or doing a Hometown Story. Ask for help with the work for In Your Space and e-Forum. Remember to Just Say Thanks.

When in doubt, ask. When not in doubt, ask. If you are not in doubt, you may be kidding yourself.

Most people will help you, particularly if you’re not a threat to them, and if you can read when it’s The Right Time, when they’re not busy or uninterested.

Don’t be discouraged if the help is slow in coming. Even a small start can help you promote your ideas, leading to more resources in the future. Each time you ask for help, you’ll bring in more interested individuals.

Unfortunately, there are many organizations that discourage people from asking for help. Macho cultures discourage it because they foster an image that “I can do it myself.” Many organizations send the message that asking for help is a sign of incompetence. Those who must continually project an air of certainty to be credible find it difficult to acknowledge that they do not have all the answers. All of these create isolation among innovators [Senge+99].

"What separates those who achieve from those who do not is in direct proportion to one's ability to ask others for help." [Keough]

This pattern “builds” relationships with helpful people and awareness that there are times when we all need help.

The Dedicated Champion at A used this extensively. Support for the patterns activity was provided by the training department, the external web developers, graphic artists, administrative assistants, and other managers in addition to the Local Leader and Corporate Angel.

The Evangelist at N used this to jumpstart her patterns effort. She found the person who led the center that could give her resources to advertise and hold patterns workshops and to Do Food at these events.

The Evangelist who started the Multiple Sclerosis International Federation, Sylvia Lawry, began her effort in 1946. She asked the Academy of Medicine to donate a one room, eight-by-ten foot office at its headquarters at Fifth Avenue and 103rd Street in New York, “I had been in the Academy’s building, reading medical books, and saw that there was an empty office.” Sylvia recalled. “I figured it would be a prestigious address for us. So I asked for the office as a donation. It’s amazing how far you can get just by asking.” [Trubo01]

Originators: Jim and Michelle McCarthy

Shepherded for PLoP’01 (August 2001).
**Beyond the Fire Hose**

At the end of a patterns training class, one of the attendees stopped by my desk and said, “I really enjoyed the class today. That’s one of the perks I get working here—the chance to learn the latest but the problem is, I go back to my cube and I don’t know what to do about it. Any ideas?” I realized then that I was saturating students with knowledge but not helping them to apply it.

**Take time near the end of a patterns event to plan what to do next with patterns in the organization.**

You are leading an interactive patterns event in the organization.

**A training class, or another patterns event, can leave attendees uncertain about what to do next, what to do with what they have learned.**

Patterns training classes are useful for sharing a variety of kinds of information about patterns in a short, intensive period of time. However, the experience is often be compared to drinking from a “fire hose” because it can leave participants exhausted, overwhelmed, and discouraged about applying anything they have learned to their real work.

When an innovation is introduced in an organization, it must be redesigned to accommodate the organization’s needs and the organization must be modified to fit the innovation [Rogers95]. You must spend time to consider how to do this.

In his “Make It A Mission” exercise, Norm Kerth notes that a project postmortem can launch a revolution because it can excite people so much that they want to carry their message throughout the organization [Kerth01]. Similarly, a successful patterns event can stimulate the attendees to do more. Use this excitement before the attendees leave the room.

*Therefore:*

**Take time near the end of a patterns event to brainstorm what the participants can do with patterns after the event.**

Topics for discussion include: What can be done to help participants learn more about patterns? What can be done to spread the word about patterns? Where can patterns be put to use in the organization? Should we start a Study Group? Invite a Big Jolt? Begin an e-Forum? Make a list of ideas. Prioritize them and decide what can be done now and what should wait until later. Add some time frames. Get the learners involved. Ask for volunteers to be responsible for each action item. Innovators have lots of enthusiasm initially. Remember to Just Say Thanks.

E-mail the list to everyone as a reminder. Use e-Forum and In Your Space to publicize the plans. Ask for Help from those who attended the event.

You have a captive audience that just learned some new things about patterns. This is the best time to plan the next step, before they leave the room. It is an opportunity for the organization to begin moving beyond a few people who took a patterns class toward building the Early Majority.
If you’re an outsider and have experience in introducing patterns into organizations, you may be tempted to tell the attendees what they should do next. Don’t do this. They know their needs better than you do. Let them brainstorm ideas and create a plan. Making suggestions only when appropriate.

Norm Kerth lists some ways to teach people how to become activists when they are interested in continuing a “mission”[Kerth01].

This pattern “builds” the opportunity for people to plan and to get involved in introducing patterns into their organization.

*When the authors of this book give patterns training class, they use this pattern in the last 30 minutes or so of the training to lead the attendees in a brainstorming session of what they would like to do next with patterns in their organization.*

**Originator:** Mary Lynn Manns

*Shepherded for PLoP'01 (August 2001).*
**Big Jolt**

*I was invited to give a patterns presentation at a company in another city. Afterwards the Evangelist who had invited me said, "You didn't say anything I couldn't have said but more people will listen to you. Your talk will have more impact and then they'll come to me for more information."*

**To provide more visibility to the patterns effort, invite a well-known person to do a presentation.**

You’re an Evangelist or Dedicated Champion working to introduce patterns into your organization.

**Brown Bags and Study Groups give patterns some visibility in your organization, but at some point, you need to attract a lot of attention to the patterns effort.**

Some people are too busy to attend Brown Bags or Study Groups, but would make the time to attend a one-time event with a speaker they perceive as an expert in the field. When a speaker has credibility, people will believe and become intrigued by what they have to say.

When a "big name" speaker is invited, most people will believe them and become intrigued by what they have to say. Even those who have adopted patterns need to have their interest reinforced.

Big names have a significant impact on someone who is new to patterns. Those who are already using patterns also need a “big jolt” to re-energize their interest and strengthen their commitment, otherwise they may simply fall back into old habits or forget the new approach [Rogers95].

*Therefore:*

**Invite a well-known person to do a presentation.**

Be sure the speaker is willing use Just Enough to speak at a level the organization can absorb. “Big name” people may wish to talk about something that individuals in the organization are not prepared to understand.

If funding is not available, entice them by pointing out that this is an opportunity to get publicity for their latest project or book. Their book could serve as a possible topic for a Study Group in your organization. It’s always good policy to Just Say Thanks.

“Big name” people usually expect a big audience, and may even consider it an insult if they don’t get one at your organization. This is especially important if they are not being paid for speaking. Increase the probability of a significant audience with lots of publicity before the event, using In Your Space and e-Forum, and personally inviting and reminding people. Tell Connectors.

If possible, Do Food.

If the speaker permits it, videotape the presentation and schedule video sessions for those who could not attend the real thing. Even those who do not attend the presentation may be impressed by the publicity before the event and the talk about it afterwards.

Arrange a Royal Audience to reward those who have helped with the patterns work in the organization and to make an impression on the Corporate Angel and Local Leader. Stay Close with the managers after the Big Jolt’s visit.
A big name speaker will raise awareness and the credibility of patterns even among busy people. However, the event must be held in the context of a bigger plan. Without appropriate follow-up, the enthusiasm is likely to fizzle and patterns will be seen as just the latest silver bullet when the patterns community prides itself on the avoidance of hype [Rising98].

Dealing with celebrities often involves a lot of extra overhead and expense and celebrity events can divert resources and distract you from higher-priority tasks without necessarily contributing to your long-term community development [Kim00].

This pattern “builds” an event that gives visibility to and provides training for your patterns effort.

*The interest in and inquiries about patterns increased significantly at W after Jim Coplien did a presentation there.*

*A Dedicated Champion at A says they “use this as much as we can. For some reason, people don’t listen to the in-house experts as well as a visiting ’dignitary.’”*

*The Dedicated Champion at G invited a well-known speaker and saw a difference in those who heard him talk and those who did not—most of those who did were willing to hear more while most of those who did not were still skeptical about patterns.*

**Originator:** Mary Lynn Manns

*Shepherded and workshopped at PLoP’99 (August 1999).*
*Shepherded and workshopped at EuroPLoP’00 (July 2000).*
*Shepherded for PLoP’01 (August 2001).*
Bread Upon the Waters

John Steinbeck published a short novel, The Moon is Down, in March 1942. It was a work of fiction intended to be anti-German propaganda. Critics in the United States said the novel was too soft on the Nazis and would demoralize the victims in occupied Europe. The criticism was corrosive, calling into question not only Steinbeck’s artistic instincts but also his political acumen. However, the book was extraordinarily positively received in Western Europe. It was easily the most popular work of propaganda, smuggled across borders at the risk of countless lives. Although most efforts of this kind do not survive the crises that produced them, The Moon is Down is an exception. Few literary works have demonstrated so triumphantly the power of ideas in the face of cold steel and brute force. In the end John Steinbeck’s talent was reaffirmed [Steinbeck42].

To gain credibility for patterns inside your organization, present your patterns work in an external publication that is recognized by your colleagues.

You’re an Evangelist or Dedicated Champion trying to introduce patterns into your organization. You’re allowed to publish externally, after proprietary information has been removed.

Your patterns work doesn’t have the credibility you would like it to have in your organization.

"A prophet has no honor in his own country." Reputation is difficult to establish and easy to lose.

External publications have more credibility than internal technical reports. Internal technical reports are often WODs (write-only documents), sometimes distributed widely but only at a management level.

“Cast thy bread upon the waters, and after many days it will return to thee a hundredfold.” [Ecclesiastes 11]

Therefore:

To gain credibility inside your organization, present your work in an external publication that is recognized by your colleagues. Market your ideas externally so that people inside your organization become aware of them.

To do this, you can:

- Publish in journals read by your internal customers, especially Respected Techies and Connectors.
- Present your work at conferences attended by your internal customers.
- A last but time-consuming option is to write a book and get it published by an external publisher.

People in your organization will learn about your work through trusted channels. Development departments might invite you for in-house presentations, workshops, consulting, etc. If development departments transfer money to your group for these activities, you will have funding for the work.

Advertise the publication in an e-Forum or In Your Space. Give a Brown Bag on the topic or start a Study Group.

Risks involved in external marketing include the following:
- Be sure the publications reflect the facts, as you know them.
- Topics must be relevant and useful or your colleagues might dismiss them as academic.
- Others across the organization might label your group as ‘writing only and not working.’

You can address top-level management by carefully choosing the publication channel. This approach might be useful for finding a Local Leader or Corporate Angel.

A variant to external publication is the use of a Big Jolt visit to bring your ideas into your organization.

This pattern “builds” credibility in your organization for your ideas.

At S, technology transferred this way includes distributed object computing (CORBA etc.), patterns, object orientation, and Java.

A manager at T’s Technology Center wrote a book on object-oriented design that was read by their developers.

This pattern has also been used at F. A paper was submitted to a local conference and was ranked first place among those submitted. The Corporate Angel learned about this honor and spread the word throughout the company. This really helped credibility in other parts of the company.

Several papers and a book were published about patterns at A. These not only were exciting for authors to see their work in print but each publication increased the credibility of the patterns movement in the organization.

At one division within a global Fortune 500 company, Dedicated Champions produced white papers and journal and conference publications based on their work. This visibility within the company and across the industry helped spread the word about the value of their work. [Radler+01]

Five authors working in the same company realized they weren’t having the impact they needed when they tried to introduce patterns into their organization. They decided to write a book on Pattern-Oriented Software Architecture and now they find their credibility has vastly improved!

**Originator:** Peter Sommerlad

Workshopped at the OOPSLA ’96 “Introducing Patterns into the Workplace” workshop (October 1996).
Shepherded and workshopped at PLoP ’97 (September 1997).
Shepherded and workshopped at EuroPLoP ’00 (July 2000).
Shepherded for PLoP ’01 (August 2001).
Brown Bag

One of the engineers stopped by my cube the other day. “You’ve had such great success with patterns. I have an idea but I don’t know how to get started. Any ideas?” I told him that I started by announcing a Brown Bag and talking to people who showed up. It was the beginning but the people who were there were those who were interested in the topic and they were willing to help me take the next steps.

Use the time when people normally eat lunch to provide a relaxed atmosphere for learning about patterns.

You’re an Evangelist or Dedicated Champion who has called a meeting to introduce patterns. Members of the user community are free to attend or not.

People can be too busy to attend optional meetings held during their work hours.

There is always other, more important, work to be done. Even though most people have a natural curiosity about new ideas, it’s hard to find the time to learn. This makes it difficult to find a time when people can attend meetings about patterns. But, since almost everyone eats in the middle of the day, a meeting over lunch will often find more people with available time.

Therefore:

Hold the meeting in the middle of the day and invite attendees to bring their own lunch.

People are often willing to attend a meeting over lunch. This is not viewed as wasting time that could be spent doing “real” work, since the time would be spent eating anyway.

Use this opportunity to Plant the Seeds. Advertise the event in an e-Forum or In Your Space. Talk it up with Connectors and Respected Techies.

Ask for Help, enlist the support of a Local Leader, or spend a little of your own money to Do Food—even cookies help make the event more special.

You may not be able to have a Brown Bag if the corporate culture doesn't accept food in meetings or having meetings over lunch.

This pattern “builds” a community of people interested in your topic. The fact that the participants were willing to bring their own food and volunteer their time shows a willingness to invest a little of themselves that can grow over time.

This technique has been used to increase attendance to information sessions set up to introduce patterns and other new technologies to A.

An Evangelist for patterns at R organizes Brown Bag conferences. He makes the following recommendations:

- Create a program committee to organize the event.
- Give presentations in the middle of the day and invite attendees to bring their own lunch.
- Have a presentation every day at lunchtime for one to two weeks.
• Draw presenters primarily from inside the organization.
• Invite corporate executives to host the session introduce the speaker.
• Advertise the conference so that it is perceived as an event.
• Track who signs up and attends each session.
• Send reminders to participants who registered.
• Have door prizes and snacks at each session.
• Measure attendee satisfaction after each session.

Charles Schwab uses brown bag training sessions to provide on-the-job training for Java developers. http://www.zdnet.comeweek/stories/general/0,11011,2601709,00.html

**Originator:** David E. DeLano

**Workshopped at the OOPSLA’96 “Introducing Patterns into the Workplace” workshop (October 1996).**
**Shepherded and workshopped at PLoP’97 (September 1997).**
**Shepherded and workshopped at EuroPLoP’00 (July 2000).**
**Shepherded for PLoP’01 (August 2001).**
**Champion Skeptic**

Appoint strong opinion leaders who are skeptical of your new idea the role of ‘official skeptic’ to use their comments to improve your effort, even if you don’t change their minds.

You’re an Evangelist or Dedicated Champion trying to Involve Everyone.

You are using Fear Less, trying to turn resistance to patterns to your advantage. But some of the resistors are strong opinion leaders in your organization.

Skeptics that are also Connectors know and talk with many people in the organization. If they are vocal about their reluctance to accept patterns, this will stifle your efforts unless you find a way to change their mind, limit their impact, or make use of them. The first option may not be possible – you may not be able to bring them to your side. You have tried Fear Less and Adopt A Skeptic, but they aren’t convinced. You realize that this skepticism must be used or it will be used against you.

If you assign them a role in the patterns effort, they will change from a skeptical outsider to an insider that can make a positive contribution.

Therefore:

Give a skeptical opinion leader the role of ‘official skeptic’ or ‘official realist.’ This person’s role is to keep tabs on whether the implementation of patterns is delivering real value (as measured through benefits minus costs). This person should be invited to all meetings and presentations and should be encouraged to express the downside of the topic at hand.

The invitation to become a Champion Skeptic will encourage vocal skeptics to become involved and make a difference because their presence can ensure that other people do not get too caught up in the hype. If this person is known to have a large ego, assigning this role can feed this ego.

A Champion Skeptic can help set goals for patterns that can deliver real value. Their role also gives them the opportunity to learn more about patterns.

If there is more than one skeptic who should be involved, you might consider creating a ‘Greek Chorus,’ a forum where all skepticism is a positive thing. This could be a one-time workshop, a regular event, or simply a group of people at a specified meeting.

The presence of Champion Skeptics is not without risk. If they are a strong influence in the organization, amplifying their objections could result in the non-adoption of patterns.

This builds a relationship with skeptics who can’t be included in any other way.

*I was working on a change program in which I saw the evolution of the avowed cynic to the best pragmatist. He was a shift worker who (thanks to automation) was no longer going to receive shift bonuses due to the changes the organization was making. His buy-in was sought at the same time as his skeptical opinions. This allowed him to realize that he could either get involved proactively, or be a “victim” (he was going to lose his bonuses either way). I used similar principles on a requirements engineering assignment where there was a person very dubious about the benefits. I asked him to, help me knock down the problems one by one.*
I never used this pattern but as I look back, I can identify several people who would have liked to play this role—some of them would have been more serious about it than others but they all would have sincerely enjoyed the attention of the official role and I’m sure they would have produced some valuable suggestions.

**Originator:** Jon Collins
**Connector**

The people who were the most helpful to me when I started introducing patterns—were the secretaries. They know everybody and everything. They are the power behind the managers who make the most important decisions. They know who to talk to about any issue. They became my most powerful resource.

To help you spread the word about patterns, seek help from people in your organization who know and connect with many other people in the organization.

You are an Evangelist or Dedicated Champion trying to introduce patterns into your organization.

Most organizations are too big for one person to reach everyone.

You are doing Brown Bags and Big Jolt to give exposure to patterns, but you know that many people still need more of a Personal Touch. However, it is difficult, or even impossible in large organizations, for you to reach everyone.

People decide to adopt a new idea as a result of talking to people who give them the information they need and help remove uncertainty [Rogers95].

“Word-of-mouth epidemics” are caused by Connectors and their involvement with other people. Connectors have a special gift for bringing the world together. Connectors see possibilities in everyone they meet. As a result, they know many types of people in different social circles. “The closer an idea or a product comes to a Connector, the more opportunity it has.” [Gladwell00]

Therefore:

Find the Connectors—those individuals who know and communicate with many other people in your organization.

These people are easy to find because they know so many people, including you! People who are networked into various subcultures can help bring new ideas in. Use Personal Touch to convince them of the value of patterns. If they are Innovators, it should be easy to convince them. If not, it will be well worth your effort to take the extra time with them because once they become interested, their connection to others will decrease the time you will need to spend in spreading the word.

Once Connectors are convinced of the value in patterns, they will help you convince others. Since they have the special social ability to connect with others, encourage them to use Personal Touch and Adopt a Skeptic. Remember to Just Say Thanks.

If a Connector is a Respected Techie, he can help you reach the technical staff and management.

Since Connectors have their feet in many different circles, they can help you find a Local Leader and/or Corporate Angel.

Although they are good at talking with people one-on-one, you may also want to ask them to do a Hometown Story when they acquire some experience with patterns.
Connectors are not close friends with all the people they know. Friends (strong ties) typically share interests or proximity but acquaintances are links to other social circles. Since Connectors have many “weak ties” they can spread the world in a variety of circles [Gladwell00].

Connectors are effective because they are members of many “communities of practice.” Studies have consistently pointed to the importance of these informal networks. This is how people learn about new ideas, coach one another in trying them out, and share practical tips and lessons over time. The information that passes through them has credibility. When people we know and rely on talk about something new, we naturally pay attention. We all need help as we experiment with new ideas [Senge99].

Many times you will have a good idea but fail to introduce real change because you are unable to play the Connector role. This will be the case for someone who is new to an organization or for someone who is naturally an introvert or not a convincing speaker. Three roles are critical for introducing real change: Salesman, Connector, and Maven. Many times a technical idea is proposed by a Maven—someone who has knowledge and the respect of his peers—but unless he can reach the right people and unless he can sell his idea outside his immediate circle, no real change will occur [Gladwell00].

Early Adopters are more social and more likely to be members of communities of practice, and as a result, be exposed to new ideas. Late Adopters are less involved in their communities [Rogers95].

This pattern “builds” connections that you might not otherwise reach on your own.

There were many Connectors at A because it was such a social company. The company funded organizations that encouraged these communities -- the music club, the flying club, the golf club, etc. Those people in some cases had known each other for years -- it was a way to know people outside work -- but they talked about work, of course. To use this pattern you have to be aware of the existence of these communities and make sure you have someone in each who knows what patterns are all about and can get the word to the other members. There were also people who played bridge at lunch—who went out for lunch every other Friday (pay day), and so on.

Originator: Mary Lynn Manns

Shepherded for PLoP’01 (August 2001).
**Corporate Angel**

I remember when my boss stopped by my cube and said, “Linda, I hear you’ve been giving brown bags on this patterns stuff. I think you should give a presentation to the vice-president. His staff meeting is in a couple of weeks.” I agreed but I really didn’t understand why the high-level managers needed to hear about design patterns. I thought these were good ideas for developers but that was it. I was so wrong. That presentation brought the purchase of cases of books and training and, eventually, a new position within the company. My good ideas wouldn’t have gotten very far without buy-in from upper management.

Get high-level managerial support to help patterns thrive.

You’re an Evangelist or a Dedicated Champion trying to introduce patterns into your organization.

**Big-ticket items**—training, books, conferences, and visiting gurus—need the backing of higher levels than your own boss.

**Brown Bags** and enthusiasm can only go so far. Training, books, conferences, and visiting gurus, such as a **Big Jolt** or **Pattern Mentor**, will be needed if patterns are to grow. However, resources are limited, since each level of management has authority to spend only in a certain area, whereas very high-level support can make many inroads easier.

For patterns to be successful, very high-level managerial support must be involved, someone who believes in the importance of patterns and will lend appropriate coaching and direction. This high-level supporter must be respected across his organization; otherwise the support could possibly hurt your cause.

Even if everyone subscribes to patterns (unlikely in all but the smallest organizations), the support of high-level management is essential for tools, training, and other support activities.

An analysis of the best technology-transfer practices of a broad cross section of government agencies, research institutions, and national and industrial laboratories identified the importance of the role of angels, high-level executives who protect start-up projects until they mature [Souder90].

*Therefore:*

**Enlist the support of a high-level manager who has a special interest in patterns and will provide resources and direction to implement company strategies by supporting your idea.**

Talk about your ideas with executives as early as possible. Use **Pieces of Clay**. You don’t need full-blown corporate support. That would make it another “freight train,” but you need to start building a relationship [Senge+99].

If a high-level manager is especially enthusiastic and knowledgeable, the whole process of introducing patterns is eased, since lower-level managers will be more open to directives from the top, especially if a **Respected Techie** is on your side.

The role of **Corporate Angel** is similar to Senge's Executive Leader, who is a protector, mentor, and thinking partner [Senge96].

The **Corporate Angel** can make it possible to invite a **Big Jolt**, have training, and buy **Treasures**.
The role of Corporate Angel is not an authoritarian one. The upper-level management position should not be used to dictate behavior. Cultural change takes place slowly and depends on Innovators, Early Adopters and the Early Majority.

The efforts of the Dedicated Champion, the Corporate Angel and the Local Leader must be aligned. When interests at all levels are in harmony, a paradigm shift can be made with minimal upheaval and disruption.

To keep the Corporate Angel interested, Stay Close and offer the chance for a Royal Audience when an appropriate Big Jolt visitor is planned. Just Say Thanks.

Coplien's Patron pattern [Coplien95] describes the role of a high-level manager who is a development project champion and decision-maker.

This pattern “builds” high-level management support for patterns in the organization.

This pattern was applied successfully in the introduction of patterns at A. The Corporate Angel was the vice-president of product development. He has been a consistent supporter of all patterns activities. His influence has made it easier to bring in trainers and consultants, buy books, and attend conferences.

This pattern has also been used at F. The Corporate Angel has a special interest in patterns and has worked to develop one of the standards as well as setting organization-wide goals.

Originator: Linda Rising

Workshopped at the OOPSLA’96 “Introducing Patterns into the Workplace” workshop (October 1996).
Shepherded and workshopped at PLoP’97 (September 1997).
Shepherded and workshopped at EuroPLoP’00 (July 2000).
Shepherded for PLoP’01 (August 2001).
*Corridor Politics*

Alias: Prepare Your Victory

The Frenchman Maurice de Talleyrand-Perigord was one of the most important diplomats in Europe during the late 18th and early 19th century. “In May of each year, one of the five Directors—whose name was chosen by lot—vacated his seat. Talleyrand spoke privately with four of the Directors, pointing out to each one how much more secure his seat would be if all five tokens in the lot bore the name of Citizen Director Reubell. … Talleyrand made a public ceremony of the drawing… When a child pulled a token from the jar and read the name of Reubell, the chosen Director could not object.” [Kemske97]

Informally work on the decision makers before the decision point. Make sure they fully understand the problem area and the consequences of the decision.

You’re an Evangelist or Dedicated Champion facing an upcoming decision that you really care about.

You’re unsure of the attitude of all the decision makers. Some of them may not know or understand the problem area. Some may be biased by experience or old ideas.

It’s hard to change the decision of a group once it is made. The best strategy is to approach individuals before they make the decision.

Therefore:

Informally work on the decision makers before the decision point. Make sure they fully understand the problem area and the consequences of the decision. Try to get the approval of anyone who can kill it.

This is known as “lobbying.” The fence-sitters, those who are uncommitted on the issue—potentially able to vote either way, are your key targets.

Be clear about what you want. Tell a story or example to make the issue real. Tell the truth. Don't distort the facts just to win the vote. It will come back to haunt you later.

Don't be a fanatic—know when to compromise—it may be the best way to get what you want.

Your goal is to build a relationship with the decision maker, so if you win support for your issue, remember to Just Say Thanks and pay your debts. If someone helps you, remember to help him in the future.

If the decision doesn’t go your way, remember, ”No permanent friends, no permanent enemies.” Some day, on some other issue of importance to you, the decision maker may come through. In the meantime, don’t allow a decision maker to become an active opponent. Even if your argument isn’t convincing, you may help to turn down the heat on the other side. Use Fear Less or Adopt A Skeptic.

Originator: Lise Hvatum
Dedicated Champion

To increase your effectiveness in leading the effort to introduce patterns into your organization, find a way to make your patterns work part of your job description.

You’re an Evangelist who has successfully enlisted a Local Leader or Corporate Angel.

You need more time to devote to introducing patterns into your organization.

Without the pro-active effort of someone whose job description includes championing the new idea, it can wither and die on the vine. A single, dedicated individual can bring a focus to the activities necessary to maintain a sufficient level of interest in patterns to keep the idea alive.

A change agent promotes a change in beliefs, attitudes, and, eventually, behavior in regard to new ideas and innovations. The change agent, his attributes, and how he conducts himself, are critical for the acceptance or rejection of an innovation [Mackie+88]. Change agents are people who ‘walk ahead’ and are genuinely committed to deep change in themselves and in their organizations. They lead through developing new skills, capabilities, and understandings [Senge96].

Therefore:

Ask for Help from a Local Leader to expand your role of Evangelist to one of Dedicated Champion.

Dedication means: (1) devotion to the cause and (2) time dedicated to the task of ‘championing’ patterns — in other words, this is part of your job description.

You can start with a small percentage of your time dedicated to working on patterns and expand if there are compelling business reasons. Don’t neglect any of your current Evangelist activities. Keeping your enthusiasm, using Personal Touch, monitoring the e-Forum, having Brown Bags—all these are still important. If you are hired for this position, understand the role of the Evangelist, to get the new idea going.

Change accelerates when they accept and like you—the Early Majority are quick to get their information from people they like and can relate to [Rogers95].

Now that your job allows time for patterns activities, use A Pattern of Their Own, Ghost Writer, Hometown Story, Pattern Mentor, Big Jolt, Bread Upon the Waters, Do Food, and Sustained Momentum. Give Trinkets and Treasures, Involve Everyone and always remember to Just Say Thanks.

To increase your effectiveness, get support from a Corporate Angel.

People may play more than one role. In some organizations, the Dedicated Champion could be a Local Leader or even a Corporate Angel.

The Dedicated Champion can play the role of Coplien’s Gatekeeper (someone who funnels information in and sends information out) [Coplien95].

This pattern “builds” a role dedicated to leading the patterns effort in the organization.
This pattern has been successfully applied at A. The Evangelist was able to convince her Local Leader that the patterns initiative was worth supporting. While patterns activity was never her full-time job, there was enough flexibility in her job description to accomplish a lot more than she had been able to do on her own time.

There was a great deal of effort in attempting to get patterns going at W. This would not have been possible without the Local Leader appropriating time for Dedicated Champion.

What allowed us to depart from our normal manner business? For us, the most important element ...was a successful champion who engenders interest in process change. A champion should be a respected developer who is part of the team, known for getting work done and respected for desiring practical improvements. ...I can't stress this enough: when management determines that process must be followed, the pressure comes from outside the group. It is foreign, and team members will likely reject it. If the enthusiasm, however, comes from respected members of the group, developers feel compelled to listen. After all, these people actually know what it's like in the trenches. Once the other team members see real benefits, they'll jump on the bandwagon as well, and the revolution will be well underway [Roberts00].

**Originator:** Linda Rising

Workshopped at the OOPSLA '96 “Introducing Patterns into the Workplace” workshop (October 1996).
Shepherded and workshopped at PLoP’97 (September 1997).
Shepherded and workshopped at EuroPLoP’00 (July 2000).
Shepherded for PLop’01 (August 2001).
Do Food

I was part of a small team that had to prepare status reports every week for management. It was a job we hated and the hour we spent each week was painful. One week, I heard that meeting day was our team lead’s birthday, so I bought chocolate chip cookies and took them to the meeting. As we gathered in the meeting room I said, “I heard it’s Tim’s birthday today, so I brought cookies!” It was as though we’d been living in a cave and someone turned on the lights. People smiled and began telling stories from their childhood. The meeting was fun. We joked about the report and the task we all hated. We finished early but shared a few minutes of “favorite cookie” stories. All this for a few cookies—I learned a lot at that meeting.

Turn a patterns class or meeting into a more special event by bringing food into the meeting.

You’re an Evangelist or Dedicated Champion who has called a meeting to introduce patterns. Members of the user community are free to attend or not.

A patterns event can be seen as just another ordinary, impersonal meeting or class.

In Alexander’s pattern Communal Eating (147), “communal eating plays a vital role in almost all human societies as a way of binding people together and increasing the extent to which they feel like ‘members’ of a group.” [Alexander77] Food turns a meeting into an event. Alexander quotes Thomas Merton who said, “The mere act of eating together…is by its very nature a sign of friendship….” [Merton56]

Having food at a gathering helps people feel that it is more than just another meeting—it is a special event.

Therefore:

Help to turn a patterns class or other meeting into a special event by making food available.

Have donuts and bagels with coffee, tea, and juice in the morning, and cookies and soda in the afternoon. Lunch is good at noon.

Ask for Help from the Local Leader or even the Corporate Angel to provide the resources. Funding for the food is an important sign to the attendees that the organization supports the patterns effort.

If corporate funding is not available, especially in the beginning of your efforts, you may wish to buy a few cookies—both your colleagues and management will be impressed that you believe in the idea enough to put your money where your mouth is.

Be sure you have done your homework to understand the role of food in the culture. When doughnuts were provided at W in the health conscious city of Boulder, Colorado, no one ate them!

Food puts people in a better mood. If offered in the beginning, it starts the meeting on a positive note. Because everyone likes free food, it can draw people in. It may even help to put people in a more relaxed mood if the topic gets controversial—they can get a cup of tea or grab a cookie. It can also help to hold people’s attention if the meeting gets slow—caffeine and sugar won’t hurt!

Apply this pattern sparingly or expectations will become too high and when there is no food, people will be disappointed. The food should be seen as a special treat.
Advertise on e-Forum or In Your Space. Tell the Connectors.

You may not be able to Do Food if the corporate culture doesn't accept food in meetings.

While the prospect of free food is nice, Brown Bag can be used when funding is not available.

This pattern “builds” a special event from an ordinary meeting.

This technique has been used to draw attendance to information sessions set up to introduce patterns at A.

It was also used at W. After the experience with leftover donuts, bagels became the food of choice at patterns events.

A research tradition at B is “Food Place.” One department has its own kitchen. Another has the famous espresso room. A food place is a strong addition to this pattern.

Originator: David E. DeLano

Workshopped at the OOPSLA’96 “Introducing Patterns into the Workplace” workshop (October 1996).
Shepherded and workshopped at PLoP’97 (September 1997).
Shepherded and workshopped at EuroPLoP’00 (July 2000).
Shepherded for PLoP’01 (August 2001).
The first patterns Brown Bag meetings were well attended but a few very busy people stopped by and said, “I was caught in a meeting and couldn’t make the Brown Bag. Do you have any hand-outs?” “Sure!” I replied, “I’ll send them to you!” While I was at it, I sent notes to others I knew were interested. That’s how it started. The list grew as others heard I was sending out notices for meetings and other events. It was the beginning of our patterns community.

Set up a bulletin board, distribution list, or listserver for those who want to hear more.

You’re an Evangelist or Dedicated Champion trying to introduce patterns into your organization.

You need to initiate and maintain regular contact with people who might be interested in patterns.

It’s hard to get information to everyone. We’re overwhelmed by too many ideas and everyone is so busy. People might not have time to attend every Brown Bag or other patterns event but they like to know what’s going on. So they might like to read a few e-mail announcements before deciding to become more active in the community.

When you set up a mailing list for your founding members, early adopters, enthusiasts, or devotees, you’ll get to know some of your most potentially valuable members and let them meet each other [Kim00].

Therefore:

Create a publicly accessible electronic, interactive forum. Advertise its existence. Keep it active and growing.

Consider having separate “announce” and “discussion” lists, since some want to actively participate and others want to passively hear what’s going on.

This virtual community will help you establish a real one. It will provide a way to identify expectations and goals for your organization and create a consistent definition of your new activity.

If you monitor the medium, you can use this information to convince management that there is sufficient interest to take the next step—management support and the identification of a Local Leader or Corporate Angel.

An e-Forum is one way to Stay Close to individuals, but it should not be the only way. You will also want to use more personal contact with individuals who are key to your efforts.

This pattern “builds” a place to electronically share information about patterns.

The Evangelist at A used a growing e-mail distribution to draw attention to patterns activities. The initial list came from Brown Bag attendees. Later, when training courses were offered, attendees were added to the list. The distribution list was used to advertise pattern news, especially Big Jolt visits. The list made the recipients feel special because they heard about an event before the general population.

The Dedicated Champion at W used a growing e-mail distribution list to send the latest news on patterns events and useful examples of patterns.
Originators: The EuroPLoP 2000 Focus Group on Introducing Patterns into Organizations: Gerhard Ackermann, Frances Evans, Peter Gassmann, Jan de Groot, Pavel Hruby, Klaus Marquardt, Amir Raveh, Linda Rising, Maks Romih, Didi Schuetz, Alberto Silva, Amy Strucko, and Oliver Vogel, with special thanks to Amir Raveh for the idea and capturing the initial version of the pattern.

Workshopped at EuroPLoP’00 (July 2000).
Shepherded for PLoP’01 (August 2001).
**Early Adopter**

*Ask For Help* from co-workers who can serve as opinion leaders early in your efforts to introduce patterns.

You are an Evangelist or Dedicated Champion trying to introduce patterns into your organization. You have a small group of Innovators who support the new idea.

**To have more impact in an organization, interest in patterns must extend beyond a small group of Innovators who are excellent gatekeepers for a new idea, but have limited impact as opinion leaders.**

One of the worst ways to introduce a new idea is for it to be dictated by management. People don't like to be told what to do. But, by stirring up interest bottom-up, pattern users will push to get them as a part of the organization more quickly. But you’ll need more than just a few innovative outliers to get something significant going.

The Innovator’s role as gatekeeper in launching a new idea like patterns is helpful, but they can serve as opinion leaders only in highly innovative organizations [Rogers95]. Usually, you need support from those who are open to new ideas, but make a decision to apply the innovation only after serious consideration. Their more conservative reputation makes them the ones the rest of the organization looks to before adopting a new idea [Rogers95].

Early Adopters follow Innovators on the normal curve of adopter categories. However, unlike Innovators, their opinion leadership is a key factor in the diffusion process. They are just ahead of the Early Majority in their level of innovativeness and risk-taking, and serve as role models for this group. Innovators, Early Adopters, and Early Majority combined produce a critical mass in an organization [Rogers95].

Early Adopters are also called “visionaries,” and unlike the more enthusiastic Innovators who derive value from the new idea itself, Early Adopters consider the strategic opportunity it can provide. They can apply an innovation to a business goal and have earned the respect that allows them to be influential in helping the rest buy into the new idea [Moore99].

*Therefore:*

**Expand the initial group of Innovators into a larger group of people who have the qualities to be opinion leaders for patterns in the organization.**

The people you need are highly motivated and see patterns as a strategic opportunity. They are open to fundamental breakthroughs rather than simply improvements [Moore99]. Early Adopters have more social connections than later adopters and may be some of those you have identified as Connectors [Rogers95].

Give them as much information and training as possible to convince them of the value in patterns. Use Personal Touch and Pieces of Clay. Encourage them to look to Innovators for information about experiences and the value in patterns.

*Just Do It* to evaluate the usefulness to the organization.
Once they are convinced, Ask For Help in gaining the support of the Early Majority, and possibly a Local Leader and Corporate Angel. Encourage Early Adopters to do a Hometown Story, lead a Study Group, and help with Personal Touch and Adopt a Skeptic.

While Early Adopters are open to new ideas, their decision to adopt does not come as quickly as with Innovators. You have to come down to earth and make patterns real if Early Adopters are going to be interested. This can be hard work.

Gaining the support of this group helps to decrease uncertainty in others [Rogers95]. It calls attention to the benefits of patterns and can lead to high-level management interest. In this way, patterns are introduced from the bottom up.

This pattern “builds” a group of individuals who can help serve as opinion leaders for patterns in the organization.

*Even though the patterns movement at A used the management support of a Local Leader and a Corporate Angel, the focus of the work targeted the development community with the long-term goal of a sustained bottom-up movement*

**Originator:** David E. DeLano

Workshopped as Grass Roots at the OOPSLA’96 “Introducing Patterns into the Workplace” workshop (October 1996).
Shepherded and workshopped as Grass Roots at PLoP’97 (September 1997).
Shepherded and workshopped as Grass Roots at EuroPLoP’00 (July 2000).
Shepherded as Grass Roots for PLoP’01 (August 2001).
Early Majority

How do you know that you really have a patterns culture? I think I knew that we had passed a significant point when a high-level manager stopped by late one evening. He sat down heavily and began to talk about some problems he was having and then asked, "So, can you think of any patterns to help me?" This was a manager of a large legacy system. Patterns had never really been "pitched" to his department and although anyone could take the patterns training, most of the interest came from the new OO projects. If this manager was asking for patterns, clearly the majority was being won over.

To begin to realize a commitment to patterns in the organization, seek the support of a majority of individuals.

You are an Evangelist or Dedicated Champion trying to introduce patterns into your organization. You have gained the support of Innovators and Early Adopters.

Gathering the support of Innovators and Early Adopters will spark patterns in the organization, but for patterns to truly have impact, you must obtain the support of a majority.

The Early Majority represents about one-third of the population. Gaining their support is not as easy as the previous two groups. The significant gap between this group and the previous two is referred to as the "chasm." You must cross this chasm to get a new idea into the mainstream [Moore99].

Unlike the Innovators, this group will not become intrigued with an idea just because it is new and, unlike Early Adopters, they are not visionaries that look at the strategic opportunity an idea offers. Instead, the Early Majority is deliberate in adopting innovations, and they want the innovation to work properly and to integrate well with the way things are currently done [Moore99, Rogers95].

The Early Majority is made up of practical people who want incremental, measurable, predictable progress. They view risk as a waste of time and money rather than a chance for opportunity or excitement. Before they commit to a new idea, they want to know how other people have succeeded with it [Moore99].

It takes considerable effort to win over the Early Majority, but once won, they are loyal and often enforce organization standards that are needed to help the innovation succeed. They provide the link between the very early to adopt and the relatively late adopters.

Therefore:

Expand the group of individuals that have adopted rather rapidly to include the more deliberate majority that will allow patterns to gain a strong foothold in your organization.

Spark their interest by showing the visible improvements that can be obtained with patterns. Encourage them to attend a Hometown Story. Use Personal Touch to show them that the risk is low while the value to their immediate needs is great. This group is more deliberate and so it takes more time to convince them than Innovators and Early Adopters. Be patient.

Because they are the link to the later majority, Ask For Help with Adopt a Skeptic to help convince this next group of individuals. Remember to Just Say Thanks.
Gaining the support of the **Early Majority** will accelerate the acceptance of patterns in the organization because the ‘chasm’ has been crossed and the new idea is in the mainstream. In addition, unlike **Innovators** who usually move from one new idea to the next and **Early Adopters** who often see themselves on the fast track, can offer more stability in the effort to introduce patterns into an organization [Moore99].

This pattern begins to “build” the majority acceptance of patterns in the organization.

**Originator:** Mary Lynn Manns
**Evaluation Phase**

Gather the Respected Techies and other interested individuals in the organization for a close look at your new idea and evaluate it for their managers and other developers.

You’re an Evangelist or Dedicated Champion, working to introduce a new idea into your organization.

Some managers and developers are supportive but others are reluctant to join in until they have some assurance from a Respected Techie and other respected individuals, that this is really a worthwhile idea.

Managers and developers are overwhelmed by information. They can’t take the time to keep up with the latest and greatest. They have probably been disappointed by the promises of the never-ending stream of silver bullets and have become cynical and reluctant to go along with even the most convincing arguments.

However, they are always interested in something that will help make their jobs easier and improve the quality of their products. They just need solid evidence. Usually, managers and developers will trust the judgment of the local guru—the person who keeps up with the latest trends. This person is also called a Maven—a reliable source of knowledge [Gladwell00.

Gurus or Mavens can often be found among those who sit on the front row when you have a meeting about any new technical idea. If these people are also Respected Techies, they can help you influence a much larger audience.

Most managers have a long-term relationship with a Respected Techie. Whatever the Respected Techie says is usually taken to heart by the manager. To convince the manager about a technical topic, you must convince the Respected Techie.

Therefore:

Suggest that the Respected Techies, and other individuals respected by managers, have a chance to evaluate patterns.

The names of the people who are on the evaluation team should be those respected by management and developers alike. Get the names of these people from managers or from Connectors. Include all the right people. If someone is left out, you could hurt your cause.

Personally invite these individuals to be part of the evaluation phase for your new idea. Hold a series of Brown Bags or short information sessions or a half-day or full-day workshop. Encourage discussion to uncover any areas where the Respected Techies have doubts. Use Corridor Politics to improve your chances of success.

Prepare a report to management. Keep the results of this activity around forever. You can use it whenever a manager wants to hear “What’s this patterns stuff all about?” Be ready to ask any questions that will be generated by the report and have a plan for the next step. If management support appears, be prepared to take full advantage of it while the time is right.

Remember to Just Say Thanks for any support.

If you encounter resistance, use So What’s New? Fear Less, Champion Skeptic.
This pattern “builds” support for your effort: data, first-hand evaluation from respected colleagues.

At A, an evaluation phase was requested by the Vice-President and his staff after an initial presentation on patterns by an Evangelist. Each member of the Vice-President’s staff named a Respected Techie for the evaluation team. Innovators who had been involved with patterns from the beginning were also invited to join the team. After a positive evaluation, the management became active supporters of patterns and the word spread throughout the organization that patterns were a good thing.

**Originator:** Linda Rising
**Evangelist**

*As I look back on the beginning of the patterns activity, I can see that I did a lot of things unconsciously, in other words, I was lucky! I was naturally enthusiastic about patterns. I wanted to share this information with others. I tried to think of ways of getting the message across. I didn’t do all this because I understood how to get things going. I did it because that’s the way I was.*

**To introduce patterns into your organization, begin by letting your passion for the new idea drive you.**

You’re part of a software development organization that wants to stay abreast of new technologies. You’re excited about patterns. Maybe you went to a conference, read an article or book and, as a result, started learning more. You feel patterns will have value for your organization and you want to spread the word.

**You want to get patterns going in your organization but you don’t know how to start.**

As Ralph Waldo Emerson has said, “Nothing great was ever achieved without enthusiasm,” but it’s hard to translate enthusiasm into action that has lasting impact. New ideas are always out there—more than we can handle. Even the best ideas still need to be sold. You only have so much time to get your ideas across.

Introducing new ideas depends on the enthusiasm of effective Evangelists. They are the natural instigators of new ideas and new practices [Senge+00].

If you have a deterministic view of people—that they come programmed by their genes, there’s only a 10% margin of improvement and 20% of them will screw you if they get a chance—then that belief, in itself, will severely limit your ability to lead profound change. On the other hand, if you really love people, and if you believe there’s an enormous reservoir of untapped potential in each person then you want to help them be all they can be. If you can bring that attitude to your work, and if you can muster the courage and compassion to act upon that love, then you can be effective [Senge+99].

*Therefore:*

**To introduce patterns into your organization, let your passion for the new approach drive you.**

To start, Test the Waters, then share your vision with others. Let them feel your enthusiasm. Learn as you go and be prepared for setbacks.

To grow your idea into real change for your organization, first invest yourself in your cause. Look for possibilities in every situation; take advantage of even small opportunities to get your idea across. Don’t worry if you don’t have an all-encompassing vision; develop a simple plan of action and experiment with it. Let each stage build on the previous one [Senge94].

One of your goals should be to encourage others to be Evangelists to spread the word in their own teams.

Give Brown Bags and Plant the Seeds. Set up an e-Forum. Start a Study Group. If you have a well-known contact who will come in to your organization at no cost, bring in a Big Jolt. Do Food at events when you can. Begin to identify Innovators and Connectors. Use Personal Touch. If you are an author, consider using Bread Upon the Waters. Just Do It. Ask for Help. Always remember to Just Say Thanks.
If you are introverted or opinionated, you are not going to get anywhere because people are not going to trust you, even if you've got the best data in the world. You must be a strong communicator, someone who can build personal credibility [Alexander01].

This is not a role for the fainthearted. The first person to convince is you. If you don’t believe in your cause, it will be difficult to sell it to anyone else. Your own determination will be required in the face of resistance. You can also use Fear Less and So What’s New? Use Gold Mine if your job description allows it. Just Enough can help you interact with newcomers.

It’s hard to be a Salesman and a Connecter, and a Maven (Yiddish for ‘one who accumulates knowledge’) but all three roles are needed to make real change [Gladwell00]. Ask for Help from others who can play one or more of these roles. A Respected Techie is a good candidate for a Maven.

An Evangelist is typically an Innovator or Early Adopter. If you are an Innovator realize that people are less likely to trust what you have to say, since Innovators get excited about new things just because they are new. If you are an Early Adopter, you are more down-to-earth and as a result, people will trust your judgment because you have thought how the new idea can help the organization. An Early Adopter is usually more effective in reaching the rest of the organization.

If you are successful in conveying your enthusiasm, a small group of those who also believe in the new idea will support you. These Innovators will help spread the word and bring in Early Adopters and ultimately create Early Majority support for patterns. Real impact will require a Local Leader and a Corporate Angel. Be on the look out for possible managerial support.

This pattern “builds” a role for an initial enthusiastic introduction of a new idea.

The patterns movement at A began with an Evangelist who talked to everyone about patterns and gave Brown Bags. A small group of Innovators supported this early effort and helped identify others who might be interested. An e-Forum was established and ultimately a Local Leader helped identify a Corporate Angel.

Originator: Linda Rising

You always know who “they” are— the people who don’t show up for your Brown Bags, the people who don’t stop by to ask about patterns, the people who just don’t care. So, you slip into denial and focus on the positive responders. You tell yourself that “they” will come around because your idea is so good. That was my strategy until another re-org and subsequent move put me next to one of “them.” He was one of those guys who had been with the company forever. At first I was polite and smiled and nodded, “Morning! How’s it goin’?” until one day I heard him over the cubicle wall, “OK, Linda, tell me about patterns!” I was up like a shot. We spent nearly a half-hour and it was great. I got to hear first hand what he thought the problems were and it was amazing because we were almost always in agreement. Patterns were not a silver bullet. There was a lot of hype. I learned a lot from that discussion. He brought up some things I hadn’t considered and I used that in my next presentation. We still have great discussions, even though we both left the company. I still enjoy hearing his side of things.

Identify resistance to your new idea and turn it to your advantage.

You’re an Evangelist or Dedicated Champion trying to introduce patterns into your organization.

Some people who are not interested in patterns are introducing noise and gossip.

New buzzwords and hot topics are always accompanied by a lot of hype. People seem wary of more silver bullets. Patterns are just one of a collection of useful tools, not a silver bullet.

Any innovation is disruptive, so some resistance is likely to result [Mackie+88]. Every change agent complains about it, but if you think resistance is bad, consider the alternative: It’s frightening to encounter someone who doesn’t resist your ideas, because that places the full responsibility on you to be correct at all times. Nobody’s perfect; we need resistance to test our ideas. So, the first step in dealing with resistance is to appreciate it. Fortunately resistance is universal. Resistance is like fungus. It doesn’t thrive in daylight. Therefore, once you suspect that there is resistance, your next step is to get it out in the open, rather than let it fester in the dark [Weinberg85].

It’s difficult to investigate others’ views when you do not agree with them. Our usual response is to expand our views or simply repeat what we have already said. Usually, this is done without malice but because we truly believe we have thought things through and have a valid position. Unfortunately, this polarizes or terminates discussions. Ask the other person to say more about his point of view. This is more likely to produce a better outcome [Senge90].

When introducing patterns, you'll have to address fear, both the listener's fear and your own. Listeners may fear loss of position or status, or loss of comfort, or they may fear being taken in by hype. Someone resists change because he is trying to avoid the (1) pain he believes will result or (2) loss of something positive and enjoyable that will be lost if the new way is adopted [Kerth01]. These fears manifests itself as resistance to your ideas.

Your reaction to that resistance is likely to be to advocate your views harder. That, too, is motivated by fear, the fear of looking wrong when everyone's looking at you, the fear that your ideas may in fact be wrong.

The collision of two fearful people leads to impasse. Resistance is not the primary reason why changes fail. It’s the reaction to resistance that creates problems.
No one can persuade another. Each of us guards a gate of change that can only be opened from the inside. We cannot open the gate of another, either by argument or by emotional appeal [Covey89].

Don’t ignore the skeptic, he “can teach us a lot about what we are doing wrong.” [Moore99]

Therefore:

**Identify the resistors. Ask for Help.**

Detractors are good sources of information for the problems that may arise with any new idea. Listen to what they have to say. Understanding the reasons for the resistance allows you to use it to your advantage, rather than allowing others to use it against you.

“You can value the differences in other people. When someone disagrees with you, you can say, ‘Good! You see it differently.’ You don’t have to agree with them; you can simply affirm them. And you can seek to understand.” [Covey89] Detractors are good sources of information for the problems that may arise with any new idea. Listen to what they have to say. Understanding the reasons for the resistance allows you to use it to your advantage, rather than allowing others to use it against you.

Anticipate objections by examining an organization’s history and culture and determining what issues you should be prepared to answer. It’s much better to bring up those issues instead of waiting for someone else to do it for you. Inviting resistance makes sure that all concerns are heard.

When communicating with people about new ideas, you don’t have to absolutely convince them. Help them see that the story you are telling is “on their side,” and therefore worth listening to. It need not align perfectly with their point of view, but show that their point of view is treated fairly, and that they are not regarded as an outsider [Senge+99].

People like being recognized and receiving special attention. Give resistant individuals extra attention. Use Personal Touch. Show that learning a new approach with patterns does not mean throwing away their experience. Point out how patterns can improve things for them.

In some cases, Ask for Help to Adopt a Skeptic or create a Champion Skeptic.

Be humble in your efforts and compassionate toward imperfections, including your own. While you may like some people more than others in your group, keep in mind that a range of personalities lives within each person. The way you operate toward them will elicit the personality you see—the resistor you fear or the best person someone is capable of being [Senge+99].

Learn from the skeptic. If they are Respected Techies, help them write A Pattern of Their Own or use Ghost Writer.

Emphasize that “patterns will not solve all your problems.” Point to references that point out the difficulties in using patterns, for example, “Patterns: The Top Ten Misconceptions,” http://www.research.ibm.com/designpatterns/pubs/top10misc.html

Use So What’s New? if resistors do not see any value in patterns because they appear to be so obvious.

Listening to the concerns of skeptics will bring to light the limitations of patterns so that these limitations can be addressed frankly and honestly throughout the organization. Giving these individuals special attention and validating their concerns may bring them around to your side. Others, who see you dealing
respectfully with these resistors, and even raising objections in advance, are likely to be impressed with you as the messenger of the new idea.

This pattern “builds” a relationship with a skeptic.

*In a medium-sized European organization that facilitates insurance companies, an Evangelist tried to introduce object-oriented approaches. There were signs of resistance at the introduction. Later resistance decreased when the resistors were actively involved in the process.*

This approach was also used at A. Any negative comments were followed up one-on-one to hear the detractor’s side and to address issues. These issues were always brought up in any subsequent presentations—to deal with problems before they were raised. In some cases, detractors became enthusiastic supporters. In other cases, detractors remained unconvinced but they were no longer as noisy about it.

*In trying to introduce XP at a process-intensive company, the group understood what the main objections would be as they tried to sell XP to the management team. Like good lawyers, they prepared anticipated questions along with the answers for their presentation.* [Grenning0]

**Originator:** Rob Westgeest

*Shepherded for PLoP’01 (August 2001).*
Capture the knowledge of domain experts who don’t write patterns by writing the pattern for them.

You are an Evangelist or Dedicated Champion in an organization building a patterns repository.

A domain expert is willing to contribute to the repository but is not interested in writing, or does not have the time to write patterns.

It takes a lot of work to write a good pattern, and most domain experts don’t have the time. Even if they don’t understand patterns, they are interested in conveying the information.

Ideally, the domain expert should be the pattern author, but there are several hurdles that must be overcome. The domain experts:

- Need to learn what patterns are and how to identify and use them, and
- Need practice at abstracting away detail and writing patterns, but
- Are so tied up in their daily projects that they find it hard to take the first step and actually write patterns [Beck+96].

Some people aren’t cut out to be pattern writers, but people who have great ideas but no inclination, time, or talent in writing, can be tapped in a pattern mining exercise and their patterns “ghost written” by someone else [Coplien00a].

Therefore:

**Ghost write the pattern for the expert. Capture the domain knowledge and document that knowledge as a pattern.**

Ask the expert to review the draft. Iterate until the pattern is mature enough to be workshopped. Keep the expert involved.

Acknowledge the expert as the “author,” and acknowledge the pattern writer with “as told to.”

The expert must be willing to spend time with you. Use this time wisely. The expert will lose interest quickly if you keep coming back. Three interviews are usually enough to finish a pattern [Beck+97].

Learn enough about the domain to ask intelligent questions. This will keep the expert from getting annoyed at what may be perceived as stupid questions [Hanmer01].

If you ask good questions, you will discover more patterns related to the one you are currently writing.

Two experts can sometimes make an interview more effective. The experts can play off one another and together share more knowledge than either one alone [Hanmer01].

Include a story in the expert’s own words. This will lend an air of authenticity to the solution and make the pattern more credible.
Don’t forget to Just Say Thanks to the expert. You may want to give them a Trinket or a Treasure.

This pattern is related to Mercenary Analyst [Coplien95] where an expert technician takes on the burden of documenting part of the system and frees up developer’s time.

This pattern “builds” contributions to the patterns literature and a stronger relationship with someone who is too busy to create patterns himself.

Many of the patterns in the repository at W were ghost written by the Dedicated Champion who talked with developers willing to share their stories, advice, and best practices.

This is how the patterns effort began at L and “was a big factor in the success of the patterns.”

Many of telecommunications patterns at L were mined from experts through a ghost writing process.

At A, the Dedicated Champions were both involved in writing patterns with the help of domain experts. These patterns included design patterns, system test patterns, and patterns for customer interaction.

**Originator:** Mary Lynn Manns

Shepherded for PLoP’01 (August 2001).
Gold Mine

Combine pattern writing with the rest of your work.

You are an Evangelist hoping to become a Dedicated Champion, working in a domain without an established patterns literature. You have access to documentation in your organization and have noticed recurring information throughout this documentation.

There are always patterns to be found in any work product but it’s hard for people to see them when they don't know much about patterns.

You have not been officially authorized to do patterns work, so you have little time to spend on writing them. Most of the patterns that people in your organization have heard about are from a different domain or are too high level to be useful to them.

Therefore:

Combine pattern authoring with the rest of your work—“patternize” existing work products.

Your organization has probably been using patterns all along and just hasn't realized it. Use this opportunity to show your colleagues that patterns are not something that is beyond their grasp. Many companies encourage employees to document best practices or lessons learned. Scour this documentation for potential patterns and, without spending too much time, extract meaningful patterns from it. If you are not familiar with the content, Ask for Help from the author. Use corporate buzzwords your colleagues will recognize for names.

Give a presentation summarizing your findings and simply use the patterns. You may find that people will identify with them and begin to use the names naturally. This will ease the transition to patterns since your co-workers will already be familiar with the names and ideas even if they are new to the pattern format and terminology. When you use pattern names in everyday technical discussions, colleagues will learn the pattern form while they are absorbing the technical information. This gentle learning curve may overcome the roadblocks associated with introducing a brand new concept. Use Personal Touch.

Rewriting documentation as patterns and thinking patterns as you create new documents will help you refine concepts, improve descriptions, and add extra structure to the information. Patterns may allow you to simplify difficult concepts.

This approach makes less of a big deal out of patterns. You will be able to talk about them naturally and in circumstances where the focus is on the content not the form. Concepts that have always been valued will now be seen as patterns. You will be in a better position to justify continuing your work in growing the effort within your organization and justify to your Local Leader a possible position as a Dedicated Champion.

Some will be skeptical and may obstruct your progress. Some will see patterns as just a way of documenting common sense. You may not be able to get your whole organization on board right away, but by leveraging the gold mine of patterns in your industry, you can be on your way to introducing a new idea. Use Fear Less and So What’s New?

This pattern is one way to Just Do It.
This pattern “builds” contributions to the patterns literature that help novices understand what patterns are all about.

This pattern was used at D to generate an initial set of patterns. There were a number of valuable concepts with buzzword names that could be documented and catalogued as patterns. When the concepts were presented in a pattern format, co-workers were already familiar with the names and ideas and could see the value in using a patterns approach to structure the material.

**Originator:** Frances Evans

*Workshopped at the OOPSLA’00 “Introducing Patterns into Organizations” workshop (October 2000). Shepherded for PLoP’01 (August 2001).*
**Hero Story**

Before starting to write a pattern, have students list their areas of expertise. These become topic areas for patterns.

You’re an instructor in a class of students who are writing their first pattern.

**Students usually struggle with a topic for their first pattern.**

Pattern Writing Guided Tour is a good prerequisite for an individual’s first pattern writing experience. Even students with experience in using patterns often have trouble writing their first patterns. It’s hard to come up with an idea for a pattern. It’s especially difficult in a classroom situation, where the student must "perform on command."

One of the challenges of writing patterns is that when we become expert in an area, we are "through the gate" [Alexander79]—we no longer use our patterns consciously, they have become part of us. So it is difficult to bring them to mind.

It’s human nature to see others’ accomplishments while being blind to our own expertise. Some people don’t think they know anything worth writing as a pattern, even though they are skilled and experienced.

Therefore:

**Before writing patterns, have students list their areas of expertise—these become possible pattern topics.**

Some people freeze up when asked about topics they might write patterns about or their areas of expertise. Approach it obliquely. Ask them think about: questions others ask when they need help; their favorite work areas; their hobbies; times where they felt they were successful. See War Stories [Harrison99]. Point out that these are the things of which patterns are made. Things they consider mundane may be startling revelations for people without their expertise.

In extreme cases, you can point out that this is simply an exercise to teach pattern writing, so the pattern topic need not be deep or profound. Many students find that writing about a hobby or favorite sport is a good first pattern.

Have the students write this information down right at the start of class, and post it for all to see. Remind them as you teach them about patterns that the things they wrote down are a source of knowledge they can and should share with others. This also helps the students get to know each other, and begins to build trust. This is important as they move into workshopping each other’s patterns. See Workshop as Teacher.

**Originator:** Neil B. Harrison

Shepherded and workshopped at KoalaPLoP’01.
Shepherded for PLoP’01 (August 2001).


**Hometown Story**

Encourage people to share their patterns success stories with others.

You’re a Dedicated Champion trying to Involve Everyone.

People want to know how others have successfully solved problems.

Hearing the experiences of respected colleagues is the next best thing to personally having the experience [Rogers95].

We tend to see the same people up front giving presentations. We know there are others who could talk about their experiences, but don’t want to take the time to prepare and deliver a formal presentation. Informal, interactive presentations require little preparation and can be just as, or even more effective. Many more are more likely to talk about experiences when they can do it in an informal way with little or no preparation. When the setting is informal, this helps those who might be hesitant about speaking in front of a group.

Therefore:

**Encourage individuals to share their patterns experiences in an informal setting.**

Do the legwork necessary to prepare the event and promote it as an informal and highly interactive session. Advertise In Your Space and on an e-Forum.

You do not need a large audience. Small group settings can create an informal, interactive atmosphere. Attendance can be encouraged with Do Food and Brown Bag.

Although you should encourage anyone who has had a positive experience with patterns to do a Hometown Story, Respected Techie and Early Adopters are likely to have the biggest impact on others because they are generally seen as opinion leaders.

Remember to Just Say Thanks.

This pattern “builds” an event in which individuals share their experiences with patterns.

This pattern was used at W. Meetings were well attended and filled with discussion.

This pattern was used at A. Patterns success stories were often reported at team meetings. One presenter even went on to give his presentation at OOPSLA.

**Originator:** Mary Lynn Manns

Shepherded and workshopped at EuroPLoP’00 (July 2000).
Shepherded for PLoP’01 (August 2001).
In Your Space

Keep the patterns effort visible by prominently posting information.

You’re an Evangelist or Dedicated Champion trying to introduce patterns into your organization.

Unless people are reminded often, they may forget about patterns.

Technical people like to be in the know and are willing to get to the bottom of anything new. They don’t usually take time to periodically look at documents on the web but they’ll notice, and are likely to discuss, things that are put in places they usually see every day.

In the beginning, when people are curious about something, mass media approaches are especially effective [Rogers95].

“Because members have to have a way to get to know each other, a community can’t really exist without gathering places—mailing lists, message boards, chat rooms—wherever a group can come together and talk amongst themselves.” [Kim00]

Therefore:

Post pattern information around your organization—wherever people are likely to see it

For example, posting the “Pattern of the Week” encourages pattern writers to show their work and get feedback from others. It draws attention to the patterns effort and stimulates discussion by people passing by. These patterns can be “ready for prime time” (the ones that also appear in a repository) or proto-patterns that still need review. If a proto-pattern is displayed, it should be marked as such. Change patterns on the same day each week (or other time period) so people know when to look for a new one.

A pattern may need to be odd, unique, or even questionable. Something that sparks conversation can improve the pattern or uncover new patterns. Try “Jeopardy”—post a pattern solution and ask for the problem and forces.

Announce upcoming patterns events—a Brown Bag, Big Jolt, Hometown Story, or a Study Group.

Consider putting information in the “public space” in your Work Community [Alexander+77] or your Team Space [Taylor200].

High traffic areas may be easy for people to see but then simply forget as they move on. Use an intriguing quote to capture attention. Package information so that it is noticed and not forgotten.

Make a message “stick” [Gladwell00] by providing ways for the viewers to interact. Ask viewers for feedback on the “Pattern of the Week.” The ideal space is really one that allows spontaneous feedback, like a white board. Follow up with Personal Touch.

Be creative. Post a sign near your office that says, “Ask me about patterns.”
Patterns will stay “in the space,” and in the mind of the organization. Those who see the patterns will be intrigued and might decide to write a pattern too. Those whose patterns are displayed will see that they are valued by the organization and may be encouraged to write more.

This pattern “builds” space where people can see the latest pattern information in the organization and, in some cases, have a chance to provide input.

*This technique was used at W. A board containing “Pattern of the Week” was placed in a high traffic area. It was a whiteboard with a pen nearby to encourage comments on the pattern.*

*One Evangelist* writes, “In my organization, the disciplines are highly disparate and a new technology simply doesn’t garner widespread interest. It is expected that the use of patterns could be useful across disciplines, but it is not really known outside of Architecture and Software Engineering. *In Your Space* is a way to capture eyes, imagination, and interest in patterns in much the way as Don Olson’s *HandsInView* [Olson98a], by showing a useful pattern that is not necessarily technical.”

Alistair Cockburn describes an Information Radiator that displays information in a place where passersby can see it. The passersby don’t need to ask questions; the information simply hits them as they pass. The information should change over time—this makes it worthwhile to look at the display. [Cockburn02]

**Originators:** Mary Lynn Manns and Carol Stimmel

*Shepherded and worked at PLoP’99 (August 1999).*
*Shepherded and worked at EuroPLoP’00 (July 2000).*
*Shepherded for PLoP’01 (August 2001).*
**Innovator**

When you start to introduce patterns, **Ask for Help** from the co-workers who are interested in new ideas.

You’re a new **Evangelist** or **Dedicated Champion** just starting to introduce patterns into your organization.

You know the job of introducing a new idea is too much for one person to do alone.

Even though everyone is busy, there are always a few people who like to know about new ideas. They are among the first to attend **Brown Bags** and other meetings where new ideas are being introduced.

“Seek to establish a community of people, even if it is only a few, who share your interest and want to work together. A small group of genuinely interested and committed colleagues will make a world of difference amid the confusion and inconsistencies that invariably arise in organization wide movements.” [Senge90]

Therefore:

**Find the people who are quick to adopt new ideas. Talk to them about patterns and enlist their help in sparking an interest for patterns in the organization.**

Ask For Help by encouraging them to take the role of gatekeepers, the ones who have the interest and competency for doing an early evaluation of patterns. Listen to their suggestions for appealing to the larger community.

You won’t feel so alone in what can be an uphill battle to spread the word. Some of the **Innovators** will help you attract the interest of others, but be careful not to lean on them too much and wear them out. Don’t forget to **Just Say Thanks** when you **Ask for Help**.

Because **Innovators** take the risks associated with a new idea as it is introduced into an organization, this allows later adopters to avoid these risks and better cope with the high degree of uncertainty [Rogers95].

Look for **Innovators** in **Brown Bags**, **Study Groups**, and **Big Jolt** presentations. Use **Personal Touch**.

**Innovators** who are especially enthusiastic may become **Evangelists** in their own groups.

This pattern “builds” support from a group of individuals who can help get patterns going in the organization because they are willing to accept new ideas.

*The patterns community at A began with Brown Bags that were attended by a small group of Innovators and Early Adopters. These people were invaluable to the Evangelist, since many of them had been with the company for a number of years and could offer suggestions about reaching others in the organization.*

*A small group of Innovators helped to spread the word about patterns at W.*

**Originator:** Linda Rising

*Workshopped at the OOPSLA ’96 “Introducing Patterns into the Workplace” workshop (October 1996). Shepherded and workshopped at PLoP’97 (September 1997).*
Shepherded and workshoped at EuroPLoP’00 (July 2000).
Shepherded for PLoP’01 (August 2001).
**Involve Everyone**

A small group of secretaries stopped by my cube. “We heard that your patterns classes are open for everyone. Do you think we could understand it?” I said, “When I said “everyone” I really meant all technical people, but I think except for a few technical patterns, you should be fine! Just don’t get too worried about the design patterns and focus on the rest.” It opened up lots of possibilities. Why not encourage marketing, legal, HR, if this was to become a real patterns community, everyone should be invited. What was surprising in the classes that were a mixture, was how much commonality there was and how much everyone understood the problems outside their own domains. This kind of sharing was new and extremely powerful.

For a new idea to be successful across an organization, everyone should have an opportunity to be part of it.

You’re a Dedicated Champion, trying to grow the grass roots.

When Innovators and Early Adopters become interested in patterns, it can be tempting to believe that patterns have taken root in the organization. But the support of these two groups of individuals won’t give the organization-wide impact needed to sustain patterns in the long term.

Sometimes a group that’s interested in patterns can become a clique. When a group focuses on a new idea it’s easy to become isolated from the real needs of the organization. Those who aren’t part of the effort may become defensive and withdrawn, perhaps afraid of not being able to keep up with changing technology.

Although people may be too busy to keep up with all the latest trends, they can become interested if they are given learning opportunities appropriate for their needs. Sometimes they just need a chance to feel a part of something new.

**Therefore:**

Help everyone to feel part of the patterns effort in the organization. Involve people from as many different groups as possible: management, developers, testers, support people, marketing, training.

Use Personal Touch. Hold a Brown Bag, Hometown Story, or invite a Big Jolt. Let everyone know of the many opportunities that can be enjoyed. Use e-Forum and In Your Space to promote these opportunities. Consider the skeptics with Adopt A Skeptic, Fear Less, Champion Skeptic, or So, What’s New?

Create a community of learning. The best people thrive in this kind of environment [Webster95]. In this kind of community, learning is an essential part of the organization. Learning is encouraged and there is active involvement in Study Groups, on-site courses, off-site training and degree programs. People like to learn and are more excited and happy in their work when they have opportunities to continue acquiring knowledge, especially if it is useful for their work.

Everyone, even those who don’t want to take a great deal of effort, can have the opportunity to become involved in growing and sustaining the patterns culture. The patterns effort will be strongest if as many people as possible play a part in sustaining it. Shared pattern experiences can go a long way to keep others in the organization interested.

This pattern “builds” a community. Without it, only small clusters of interest will form.
This pattern has been successfully applied at A. Everyone in the organization, not just development, was involved in the patterns community: system test, marketing, management, and product development.

This pattern has also been used at F. Presentations have been given to the entire company. The feedback from these presentations has allowed everyone to increase their involvement in patterns.

**Originator:** Linda Rising

Workshopped at the OOPSLA’96 “Introducing Patterns into the Workplace” workshop (October 1996).
Shepherded and workshopped at PLoP’97 (September 1997).
Shepherded and workshopped at EuroPLoP’00 (July 2000).
Shepherded for PLoP’01 (August 2001).
**Just Do It**

A letter in the “In My Humble Opinion” column of Fast Company expressed frustration about a company filled with people who refuse to try anything new. The author claimed that everyone at her level knew exactly how to save the company, but no one above would let them do it. Seth Godin, Change Agent, responded with the following:

What you're looking for is an insurance policy that will protect you against retribution if your plan goes awry. What you're waiting for is someone way up the ladder to tell you that you can launch a product or institute a cost-savings plan. You want their approval to free you from risk. That's not going to happen.

Just do it. If you wait for approval, it means that you want someone to cover your backside if you fail. The people higher up on the corporate ladder are well aware of the risk that comes with trusting you and your bellyaching associates. If you and your colleagues screw up after receiving their approval, then it will be your bosses who get into the deepest hot water, not you [Godin01].

To prepare to spread the word about patterns, find out for yourself what the benefits and limitations are.

You are an individual contributor to a project—an Evangelist wanna-be, who is motivated to adopt patterns. You are interested in spreading the word to the bigger organization. Your local group has some, perhaps limited, tolerance for experimentation.

You haven't any experience with patterns yourself, so all you have is theoretical information. You believe that patterns can help but you're not sure.

New ideas usually incur resistance. You don't want to make a big deal too soon or people might reject it if it has no internal track record.

Supporters of the status quo will have plenty of reasons why a new idea shouldn't be adopted, so you should be able to provide some rationale for patterns. Lack of hands-on experience is easy for opponents to attack. On the other hand, positive experience is difficult to refute. Understanding the limitations helps you avoid overselling and provides insight into approaches that will work. This is particularly important for Early Adopters because they need to see real-world benefit [Rogers95].

“Many organizations [evaluated] the use of objects through small projects to 'prove' the technology. This approach (which I've also seen applied in the last few years to patterns) works fairly well, if the team doing the prototype project is knowledgeable in the correct application of the technology.” [Goldfedder01]

“When in doubt, do it. In my professional career as well as my personal investments, trying new things has paid off more than 90% of the time. I'm glad I did it, and I wouldn't want it any other way. Even the 10% of experiences that can be unpleasant help you appreciate the other 90% all the more [Edler95].

“For many people, the first question that occurs is, ‘But how do I persuade my CEO to get it?’ My answer: Don't worry about that. Focus instead on results—on subverting mediocrity by creating an effect within your own span of responsibility. As long as we can choose the people we want to put on our own minibus, each of us can create a pocket of greatness. Each of us can take our own area of work and influence and move it from good to great. It doesn't matter whether the CEOs get it. It only matters that you and I do.” [Collins01]
Therefore:

Gather first-hand information on the benefits and limitations of patterns by integrating them into some of your current work and by encouraging your team to do so.

Incorporate design patterns into design sessions, presentations, system documentation, and code. **Gold Mine** for patterns. Add relevant pattern references to an existing design document template. Record any benefits and pitfalls of patterns. (Ideally find a way to quantify the benefit, although this is typically very difficult.)

**Ask for Help.** **Innovators** in your team might use patterns in your project. If a **Pattern Mentor** is available, enlist his help. Encourage a **Respected Techie** to join in. Encourage everyone to document their experiences and share this information with others, perhaps in a **Hometown Story**.

The participants will increase their understanding of patterns and be able to apply them to their work; others can see this application and become enthusiastic about patterns. Any patterns that are written from the experience in this project will become effective tools to increase software development productivity in your organization. The project will also provide an opportunity for writing patterns in your organization and create a legacy for other projects.

You will gain experience in using patterns. After using them first hand you will have some lessons learned, some concrete ideas, and a **Hometown Story**. Nothing succeeds like success. In this industry, everyone wants to know ways of improving their work and is keenly interested in anything that will help them produce better, faster, cheaper.

You might even have created the beginnings of a framework or process that other teams can use as a prototypical example. Once in a while an idea will catch hold and grow quickly in the organization without additional effort.

If your initial efforts are not successful, you can **Test the Waters** to decide your next steps.

Keep others informed, if possible, with e-Forum and **In Your Space**. Encourage those who take part to later share their experiences with others in a **Hometown Story**.

This pattern “builds” a first step toward creating an **Evangelist** role.

**This pattern has been successfully applied in a project at J.** The participants were novices at object-oriented technologies, but the pilot project produced good practical patterns. These patterns increased the software development productivity by the end of the project.

**This pattern has been used at F.** **Innovators** were involved in a pilot project to refine the new technology.

Developers on a project at W used the pattern format to write some portions of their project documentation. They did a **Hometown Story** to explain and show how much easier the documentation was to write and to read.

The system engineering organization at M was using an old interface development practice (a derivative of a hardware development technique) that did not fit well with object-oriented development approach used for software development. A **Programmer Interface Guide** (PIG for short—a catchy title really helps) and used to document several interfaces. Even developers outside the group immediately saw the benefit of this approach. A process was written to augment the document, support tools were developed, and the concept
was adopted by the entire organization. Without a concrete example, built internally, this infusion of object-oriented programming practice would not have been adopted.

**Originators:** Jeff Garland, Rieko Yamamoto and Tadahiro Uehara

Just Enough

To ease into more difficult pattern concepts, provide a brief introduction and then make resources available when the learners are ready.

You’re an Evangelist or Dedicated Champion working to spread the word about patterns in your organization.

There are difficult, complex pattern concepts that can overwhelm novices.

Concepts such as QWAN, generativity, and pattern languages cannot be clearly understood in a short period of time. However, individuals should understand these concepts at some point if quality patterns and pattern languages are to be written. Giving a thorough explanation of complicated concepts while you are covering the basics can put people on the right path to striving for better patterns and pattern languages, but can also confuse them and possibly turn them off.

“Alexander could have written a one-sentence definition of a pattern or an essay, but instead he wrote a 550-page book. Because the concept is hard.” [Gabriel96]

Therefore:

When introducing individuals to patterns, give only a brief description of the more difficult concepts. Provide resources for them to learn more when they are ready to do so.

Include a few difficult concepts, such as QWAN and generativity during an introduction—a slide or two. Provide enough information to start the learners on an investigation of their own and provide URLs or a list of references for more details. Make yourself available as one of the resources. If you have the opportunity revisit these ideas for a more in-depth discussion. Use Personal Touch.

Learners will be aware of these concepts and will receive the encouragement and resources they need to look at these ideas when they have more experience. They will not be overwhelmed with too much detail. Instead, they will request information when they are ready to receive it. They will build their knowledge of patterns as they are ready to do so, after they have a foundation in the basics.

This is similar to Alexander’s recommendation for creating a complex building structure, “… build a building in such a way that it starts out loose and flimsy while final adaptations in plan are made, and then gets stiffened gradually during the process of construction, so that each additional act of construction makes the structure sounder.” [Alexander77]

This is how large, complicated software systems are built. We create the foundation for a software system around what we understand from the analysis, and then add incrementally as we understand more about what the system can and should do.

Those who are enthusiastic about spreading the word about patterns may find that this approach is too slow.

This pattern builds a better understanding of difficult topics.
In the “Introduction to Patterns” course at A, bulleted items on overheads that presented difficult topics were usually covered using this approach. A high-level discussion was initiated that could become deeper depending on questions raised by participants.

When patterns were introduced during workshops at N, the concepts of QWAN and generativity were mentioned as important but were not covered in detail. Attendees were pointed to The Timeless Way of Building if they wished to read more, and the workshop leader mentioned that she was available to answer questions for those who wished to learn more about these and other more advanced concepts.

**Originator:** Mary Lynn Manns

*Shepherded for PLoP'01 (August 2001).*
**Just Say Thanks**

I have a friend who was laid off from a large company where he had worked nearly 30 years. I saw him after his last day and he said that the worst thing about the experience was that no one, not even his boss, had come by to say they would miss him or that they appreciated his work. I thought about my last day when I was laid off at A. I recall a constant stream of people coming by to share a brief story how something I had done or said had influenced their life for the better—how I had really made a difference for them and the company. I really don't remember sadness on that day but an overwhelming gladness at having had the chance to work in that company with those people—and all they did was just say “Thanks!”

To make people feel appreciated, say “thanks” in the most sincere way you can to everyone who helps you.

You are an Evangelist or a Dedicated Champion. Others are helping you introduce patterns into the organization.

**People feel unappreciated when they work hard and no one notices or cares.**

It’s easy to take for granted the people you see and work with on a daily basis. But people are happy and feel their contribution is appreciated with just simple acknowledgement and encouragement. Even when we don’t have resources to reward supporters with anything tangible, an expression of our gratitude is worth a lot.

A recent survey of 1,400 chief financial officers shows that a simple thank you can go a long way in motivating employees. When asked what, other than monetary reward, is the most effective means of motivating employees, 38% choose frequent recognition of accomplishments as the best way to encourage staff members. [Accountemps]

As information technology people, we spend a lot of time with machines for which courtesy isn’t important but “we would do well to focus a little more attention on the people skills that will enable us to gain real benefits from the technological process.” [Young97]

Everyone on a team performs a “heroic act” during any project. We seem to have lost the ability to give someone a “high five” or say “great job,” so heroes often remain unappreciated [Kerth01].

A sincere thank you is likely to make such an impression on people that it will be easier to ask for and receive their help again in the future. More importantly, it will remind you that you didn't do it all alone. It will keep you humble and be a real boon for those who've made a difference in your efforts [Edler95].

Therefore:

**Find everyone who has helped you and just say thanks in the most sincere way you can.**

You can do this even if a large amount of time has passed. Find that person to simply say, “Thanks” [Edler95].

Spending a small amount of money can also generate a huge return. A card, a morning pastry, a piece of fruit, or a small gift shows that you took extra effort and spent time thinking about the receiver and his contributions.
Writing a thank you note is “shoestring marketing.” It is a quick, responsive, cheap, and surprisingly effective way to win friends and influence people. “People remember thank-you notes (and the people who write them) because good ones are so rare.” [Austin00]

When appropriate, acknowledge achievements publicly. Tailor the thanks [Messmer00].

A sincere thank you is likely to make such an impression on people that it will be easier to ask for and receive their help again in the future. More importantly, it will remind you that you didn't do it all alone. It will keep you humble and be a real boon for those who've made a difference in your efforts [Edler95].

This pattern builds better relationships with the recipient of the expression of thanks.

Among the techniques in his book, Project Retrospectives, Norm Kerth describes the “offer appreciations” exercise. This gives project team members the opportunity to give recognition to everyone else, for what each person has accomplished, contributed, or knows, or simply for whom each person is. [Kerth01, Loeschen91]

The inspiration for this pattern came from a co-worker at W who expressed extreme frustration because her manager did not say thanks after a long, difficult project was completed. Although she didn’t mind working the long hours, she was upset that her manager didn’t show appreciation with even a simple thank you to the team.

So many times when "pattern mining," at A, I knew I was taking the valuable time of a Respected Techie. I don't know how many times I just dropped by someone's office to say thanks for the time and say the pattern had been posted. Almost without exception, every one of these hard-boiled, tough engineers would just beam and tell me that it was great to have someone really listen to their stories and then come by and thank them. They said, "We're all too busy to say thanks!"

**Originator:** Mary Lynn Manns
Local Leader

_I had three Local Leaders who were truly the backbone of all the patterns activity at my company. Yes, I did the legwork. Yes, I wrote the articles. Yes, I devoted my time. But it was the encouragement, the unflagging support of these managers, and their belief in me that really made it happen._

Enlist the support of first-line management. When your boss lets patterns activity become part of your job, you can truly be effective.

You’re an Evangelist, trying to introduce patterns into your organization.

You need attention and resources for your new idea.

It’s hard to get people involved unless they think there’s a real pay-off. Management support legitimizes things in the workplace.

“We have seen no examples where significant progress has been made without [Local Leaders] and many examples where sincerely committed [Corporate Angels] alone have failed to generate any significant momentum.” [Senge96]

New technology can make an impact across an organization when local management commits to the technology [Korson96].

Therefore:

Find a first-line manager to support patterns, ideally, your immediate supervisor or boss.

“[Local Leaders] have significant business responsibility and 'bottom-line' focus. They head organizational units that are large enough to be meaningful microcosms of the larger organization, and yet they have enough autonomy to be able to undertake meaningful change independent of the larger organization.” [Senge96]

The Local Leader keeps the focus on business results and can commit limited resources to efforts that can show results.

When adopting an innovation is voluntary, developers feel more in control of their destiny [Green+00]. The Local Leader should encourage but not mandate the use of an innovation.

When you find a Local Leader, Stay Close. If a Big Jolt visit is planned, offer the chance for a Royal Audience.

The Local Leader can also help you find support at a high-level and is your best hope for identifying a Corporate Angel. If the Local Leader is your manager, you can Ask for Help to become a Dedicated Champion.

The Local Leader may play the role of Coplien's Fire Walls (keep pests away) or Patron (project champion and high-level decision-maker). [Coplien95]

This pattern builds managerial support for your work in introducing a new idea.
This pattern has been successfully applied at A. Two Local Leaders have supported the patterns activities and the work of a Dedicated Champion. The Local Leader was instrumental in opening the door to the Corporate Angel.

This pattern has also been used at F. In a small organization, the Corporate Angel could also be the Local Leader and the Dedicated Champion and may also be involved with project implementation.

The pattern effort would not have been started at W without the budget from the Local Leader to support the Dedicated Champion.

**Originator:** Linda Rising

Workshopped at the OOPSLA ’96 “Introducing Patterns into the Workplace” workshop (October 1996).
Shepherded and workshopped at PLoP’97 (September 1997).
Shepherded and workshopped at EuroPLoP’00 (July 2000).
Shepherded for PLoP’01 (August 2001).
**Location, Location, Location**

F is located in Campinas in Brazil. A partnering organization is located in Curitiba. Meetings were held in one city or the other, which provided an off-site experience for the visiting group but the on-site group suffered all the disadvantages mentioned in this pattern, while the off-site group gained all the benefits. The two organizations decided to have future meetings in a third city, to allow both groups to go off-site.

To avoid interruptions that disrupt the flow of an event, try to hold significant events off-site.

You are planning a half- or whole-day seminar or workshop event, maybe to bring in a Big Jolt speaker and perhaps Do Food, or you are organizing a training course for your company, rather than sending people away to an open enrollment public course.

**On-site events allow on-site interruptions and day-to-day distractions to disrupt the flow of the event.**

It is natural to assume that events for a company will be held at the company's site—a meeting room or a training room depending on the company set up. This is normally seen as a good use of resources, and presents attendees with a comfortable and familiar environment. However, holding an event that is half a day or longer inevitably leads to breaks, and people will wander off to look at their email or be grabbed by their managers or co-workers to just look at "a small problem." This disrupts the flow of your event—people always seem to spend longer than planned, and "a small problem" is rarely that—so people are late, distracted, or even pulled out of the event for a few hours or its duration.

Such disruption reduces the impact of the event, makes it seem less special, and becomes an obstacle to getting back to some other task that may suddenly seem more important (to someone else, if not the attendee in question). Even without actual disruption, there is often the feeling that "real work" is just a knock-on-the-door away.

Trainers and facilitators know that when teaching classes or leading retrospectives in the same location as the attendees’ offices, it is tempting for them to get caught in email, scheduled meetings, conference calls, and other happenings around the office. Even when they miss just a small portion of the class or retrospective, it can be difficult for them to catch up.

Distance and separation allow attendees to be more relaxed. They are away from their usual workspace, and because it is no longer as convenient for co-workers to grab them, only genuinely high-priority interrupts will get through. Minor queries and problems will resolve themselves or wait, as will email. The separation makes the event special. A new context often makes something stand out more clearly, creating a freer environment, less constrained by the expectations back at the office. Some people behave more openly because the perception is that "this isn't really work."

However, choosing an alternative location should not introduce inconvenience: People still have children to pick up from school, car pools to organize, squash ladders to climb (or descend), and so on. Choosing a location that is too remote or difficult to get to, rather than just being a stroll or short ride from the office, may not be that popular.

Therefore:

**Hold significant events of half a day or longer off-site but nearby.**
A different location, whether a meeting room in a pub, hotel, health club, or at a nearby training company, often means that participants are more focused. They are there for the duration, and are as encapsulated from the worries of work minutiae as the sources of work minutiae are from them—out of sight out of mind. This means that you can expect more focus, with more constructive discussion about the event in the breaks and over lunch, and better personal contact and bonding. There is a sense of purpose to the event that is nurtured by removing it from the usual context of in-house meeting rooms.

Some companies don’t have internal resources for separate meeting or training rooms, which means that they are either completely disrupted—the office is basically "turned off" every time there is a significant event—or the off-site solution is used by default. If the former is the case, an off-site location is still strongly preferred—the sense of a company outing makes the event more fun.

Inevitably, off-site venues will cost more than on-site ones, but such costs can be absorbed more easily when the costs to Do Food, the Big Jolt, or the training course are taken into account.

A nearby location means that the usual beginning and end of day rituals can continue uninterrupted, and that if interruption during the day is required, it is not a big effort to get back to the office.

As any real estate agent will tell you, the three most important qualities of any property are: location, location, location. The same can be said of holding special events for your company, with the observation that the location should be away from the usual office environment. This is old wisdom that applies to training courses, team days, and so on.

This pattern builds a better environment for training.

The originator was a Big Jolt for a team from a worldwide company in the Midlands. They have instituted team days that are off site in exactly the way described in this pattern. A few years ago a company that I worked for used this pattern to run workshops for a project that I was on. The off-site location was a very nice country manor.

Off-site locations are better for project retrospectives. On-site locations "may be seen by participants as cheap and therefore unimportant, the site is ‘the same old place,’ the [event] is easily interrupted, and participants may not prepare as well since they can duck out to look for whatever materials they need at the last minute." [Kerth01]

An early version of this pattern, Gone to Maui, was created by David DeLano.

Originator: Kevlin Henney
My Gold Nugget

Show students many different patterns to find ones that are most likely to address problems the students have struggled with. Try to find a "gold nugget" for each student.

You have a class full of people from possibly different backgrounds. The first few minutes of a course is the critical time for catching their attention for the entire course.

To the casual observer, patterns tend to look like "nice simple ideas" or an interesting way to format knowledge. Patterns are much more, but it is often hard to get beyond this simple-looking façade.

Patterns are solutions to problems, and they are proven solutions, so they are not new. Some may be well known. On the surface, this isn't terribly exciting. Use So What's New?

Patterns tend to be fairly simple ideas. Complex patterns are often broken into smaller patterns. Even more important, patterns belong to pattern languages, and don’t stand alone. So a single pattern may look simple and even mundane. But you have to use simple patterns when teaching; there isn't time to delve deeply into pattern languages or complex single patterns. Students are just learning the basics.

When first introduced to patterns, some people are apathetic until they see a pattern that directly relates to their own experience—then they get excited.

In any class, the first few minutes are the most critical. At the start, students are naturally attentive; they expect to learn something new. It is much easier to hold the attention of the class than to recapture it if you have lost it.

Therefore:

Early on, show students many different patterns, carefully selected to address problems the students might struggled with. Find a "gold nugget" for each student to capture the imagination of as many students as possible.

Domain knowledge plays a significant role in the motivation of patterns. Bring patterns in the realm of the students’ experience and expertise; only then will they catch the vision of patterns. Without that, patterns are just another buzzword.

Certain patterns address problems that nearly everyone experienced in that domain has had; make sure to include them. For example, most OO programmers have had the need for a Null Object [Woolf97]. C++ programmers will relate to patterns of localized ownership in C++ [Cargill95]. Designers of highly available systems will recognize Leaky Bucket Counters [Adams95]. If possible, evaluate the background of the students before the course begins, and select patterns accordingly. Otherwise, pick patterns that are generic, and those that don't require deep domain knowledge.

Introduce these patterns early in the course because they are designed to catch the imagination of the students. Once the light comes on, the students will be eager to learn all about patterns.

As you introduce the patterns, highlight the problem first, and try to relate it to the students’ experience. Then explain the solution. Pique their interest with the problem, then when you introduce the solution, they are ready to understand and accept the associated pattern.

Show parts of a pattern language, so the students begin to get a feel for how a pattern language is much more than the sum of the individual patterns. Some of Alexander’s patterns in “A Pattern
Language”[Alexander+77] work well. It was originally thought that pattern languages were too complex to be introduced early, but pattern languages are too fundamental not to be introduced early. Use *Just Enough*.

A closely related pattern is *Personal Touch*. This pattern differs in that in a classroom, you have several people with different or unknown backgrounds. Present several patterns, and try to hit a problem they have had in the past.

When students see pattern that solve problems they have struggled with, lights go on. They suddenly see the value of patterns, and become excited about them. If they have solved the problem and the pattern shows their solution, they get excited to see their ideas documented. If they didn’t solve the problem, then the pattern shows them how to solve it.

You can’t always reach every student in every class. Some will just not get excited about patterns.

*The essence of this pattern is to find a way to capture the interests’ of students. This can also be done in other ways. For example, a class on patterns at W begins with the instructor asking the students what they dislike about documentation they have to read and write. Once their list is composed, the instructor chooses some of the dislikes on the list and briefly explains how patterns could eliminate them.*

**Originator:** Neil B. Harrison

*Shepherded and workshoped at KoalaPLoP’01 (May 2001).*
*Shepherded for PLoP’01 (August 2001).*
Pattern Mentor

We held a three-day pilot patterns training. Everyone in the class thought there was too much material. They felt overwhelmed by the number of patterns. One suggestion in the evaluations was some help in actual use of the patterns. We expanded the three full-days to a week: Monday training, Tuesday-Friday half-day training and half-day mentoring. The half-day mentoring was not class exercises but consulting on real projects. It made a tremendous difference in the effectiveness of the training.

When a project wants to get started with patterns, have someone around who understands patterns who can help the team.

You’re a Dedicated Champion, trying to introduce patterns into your organization. A project is interested in patterns but some/all of the team members are unfamiliar with patterns.

People want to use patterns on their project but don’t know how to begin.

If the project members are willing to introduce patterns into their project, they can study patterns to some extent. However, they might need guidance in applying patterns since they are not necessarily experts.

The number of patterns experts is usually small compared with the number of projects. The patterns experts don’t always know the problem domain or have time to understand the domain.

“Several organizations I worked with initially staffed [a project] with people who had no real understanding of object technology and thus [their pilot] showed that objects would not work in their environment. I have seen similar things happen in recent years with patterns. I still recommend proof of concept starter projects as a training experience but always recommend having an external expert help to jump start the efforts.” [Goldfedder01]

Pattern mentors can help provide a balance between encouraging good design practices based on patterns and discouraging overly high expectations of designs based on patterns. Initially, pattern mentors can help developers recognize the patterns that they already use in their application domain and show how they could be reused in subsequent projects [Beck+96].

Therefore:

Find an outside or intra-organization consultant or trainer to take on the role of a Pattern Mentor to provide mentoring and feedback for the project members.

The Pattern Mentor should use a hands-on approach, work side-by-side with the team, and let them know that he has struggled with the same problems. This will help open their minds to the new technology [Letourneau00]. Use Personal Touch to help all team members understand how patterns can be useful to each of them.

The mentor doesn’t have to be an expert in the domain. A single Pattern Mentor can support several projects at the same time.

A Study Group can help jumpstart the project.
Project members will receive help with patterns and develop confidence in their use of patterns and then be able to help others.

Send the entire team to training together to prepare for the project, as described in Don Olson’s pattern, TrainHardFightEasy [Olson98b]. The training could be internal and the trainer can be the Pattern Mentor, or the training could be external. In either case, the benefit lies in the shared experience of training together as a team, which not only enables the team to communicate effectively about the new topic but also serves as a team building exercise.

When you encounter resistance to the idea of using patterns on a project, use Fear Less and So What’s New?

Introduce complicated topics carefully using Just Enough.

This pattern builds a better understanding of the topic than just training.

This pattern has been applied to the introduction of design patterns into a software development project at T. In this development, the Pattern Mentor was also a member of the development project.

T is also planning to develop a CASE tool that behaves as a Pattern Mentor for design patterns.

At A, patterns training was available to anyone in the company. In some training classes, the instructor worked as a consultant with teams who were taking the class together. This combination of classroom instruction and hands-on Pattern Mentor was very effective.

B reports the role of a Pattern Mentor as one of their “lessons learned.” Jim Coplien says that “the use of pattern mentors in an organization can speed the acceptance of patterns and can help provide a balance between encouraging good design practices based on patterns and discouraging overly high expectations of designs based on patterns. Initially Pattern Mentors can help developers recognize the patterns that they already use in their application domain and show how they could be reused in subsequent projects. Pattern Mentors should also watch that the wrong patterns are not applied to a problem (i.e. people tend to reuse things that they know and the same temptation will apply to patterns, regardless of whether the pattern actually fits the problem).” [Anderson94]

Originator: Junichi Yamamoto

Workshopped at the OOPSLA ‘96 “Introducing Patterns into the Workplace” workshop (October 1996).
Shepherded and workshopped at PLoP’97 (September 1997).
Shepherded and workshopped at EuroPLoP’00 (July 2000).
Shepherded for PLoP’01 (August 2001).
A Pattern of Their Own

There’s an old saying—something about the sound of your own name being the sweetest thing you can hear. Well, right after that, I think they list seeing your name in print—especially if it’s a recognition of your own contribution. When we started teaching pattern writing classes, I was surprised at the people who signed up. I was stunned to see how many people wanted to write their own story. This was their chance to tell the world what really happened and to give their great idea a name.

Help individuals play a role in the patterns effort in your organization by mentoring them through the process of writing a pattern of their own.

You’re an Evangelist or Dedicated Champion who wants to use a Personal Touch to get people interested in patterns. Some of these people have valuable experience to share.

Most people who adopt patterns will be interested primarily in using them. But some people will want to contribute more and you want to help them to do so.

Taking the time to appreciate the value in someone’s effort is important in encouraging change to take place. Individuals who see their work as worthwhile and useful are likely to be more enthusiastic about continuing to do it and encourage others to do the same.

Writing patterns is difficult work. Those who have struggled to capture their experience in a pattern are in a good position to help others who have chosen the same path [Rising98].

Therefore:

Encourage individuals to write a pattern of their own. Suggest that individuals write about something they have observed many times.

Use My Gold Nugget, Pattern Writing Guided Tour, Hero Story, Play-by-Play Workshop, and Workshop as Teacher to teach individuals to write patterns.

Have a few “good” patterns to use as models. Brainstorm an outline. Discuss “A Pattern Language for Pattern Writing” [Meszaros+98]. Coplien suggests reading about pattern languages in The Timeless Way of Building [Alexander79] and The Oregon Experiment [Alexander+75].

Be enthusiastic and encouraging while the pattern is being drafted. Give immediate feedback. Help writers understand that theirs are as important as GoF or any other patterns. At the same time, be realistic about the fact that it takes time and plenty of feedback to develop a good pattern. Introduce the writer to the shepherding and writers’ workshop processes.

After the first pattern, authors may become excited about writing more patterns. They can also help in spreading the word and building the Early Majority.

This is a good way to build a patterns repository. It’s also an excellent way to teach people about patterns by getting them to write one. Some say you can't truly understand what a pattern is until you write one.

This pattern takes time to do well. Those who dislike writing, have poor writing skills, or have trouble thinking at an abstract level will need lots of attention. Consider using Ghost Writer in these situations. But
when a person is willing to work at it and is teamed with a mentor who enjoys teaching, the experience can be memorable and rewarding.

You may wish to give a Trinket or Treasure to all who participate.

This pattern “builds” a contribution to the pattern literature and creates a new contributor to the patterns community.

A has a pattern writing class in which individuals write patterns and workshop them. Often, after having successfully written a pattern in the class, students will go on to write more patterns, especially if a reward system is in place to encourage this. At AG Communication Systems, authors were given a Treasure, a copy of a patterns book.

L expanded a one-day introduction to patterns to two days to allow time for pattern writing and workshopping.

ChiliPLoP uses this technique in their “newbies” track.

An introductory-level patterns tutorial at the OOPSLA’99 conference was held over two days to allow time for attendees to write and review their own patterns.

Originator: Mary Lynn Manns

Shepherded and workshoped at OOPSLA’99 (August 1999).
Shepherded and workshoped at EuroPLoP’00 (July 2000).
Shepherded for PLoP’01 (August 2001).
**Pattern Writing Guided Tour**

Teach students the structure of a pattern by leading them in writing a pattern as a group.

You have introduced the students to the basics of patterns. Now it is time to move deeper into the structure of patterns.

One of the best ways to gain insight about patterns is to write a pattern. But it is hard to begin writing a pattern if the student is really new to patterns.

In just about every field, experience is the best teacher. But there is always a bootstrapping problem: the students must learn something about the topic before they can begin to learn about it through experience.

There is a logical flow of information in a pattern, no matter the form. It begins with a name, then goes from context, problem, forces, to solution and resulting context. This is the logical way to read patterns and the natural way to teach them, but it is not the typical order of writing patterns. Usually you begin with a solution in mind, then derive the problem and other sections. Starting to write with the pattern name is an invitation to writer's block.

It is hard to write poetry—and patterns—on demand.

The context and forces sections in a pattern are difficult to grasp. It isn't always clear what information goes in which section. Writers iterate among these and other sections. This is hard to teach, even with examples.

Examples are helpful in almost every teaching situation.

In a typical classroom, most students will not become pattern writers. In fact, many are likely not natural writers. Both these conspire to make writing a pattern difficult. The experience is still valuable, because it helps the student understand patterns in more depth.

Therefore:

Introduce a well-defined pattern form that illustrates the sections. Teach them the form as well as the typical order of writing by leading them in writing a pattern as a group.

Become a "tour guide," leading students through a typical flow of generating and writing a pattern. The students learn the pattern form by seeing it in action. They see the pattern writing process. You are teaching them more than the sections of the pattern, you are showing them how patterns emerge.

A good example to use is Body Follows Eyes. First, describe and demonstrate various solutions in sports: Hitting with power in T-ball; running a slalom course in water skiing; golfing; skiing steep mogul slopes (Hands in View [Olson98a] -- a specialized pattern of Body Follows Eyes). Students may suggest one or two more, for example, target shooting or driving a car. Talk about what all these have in common.

Ask them to describe the general solution. Write suggestions on a flip chart or white board titled “Solution.”

Determine characteristics of a good solution. Ask what problem this solves. Capture their comments, and talk about problem statements.
Ask them, "What makes this a hard problem?" Discuss forces. Ask when the solution works, and when it doesn't, thus setting bounds, or context. Discuss characteristics of forces, as well as context. There is often iteration between the context and the forces sections.

Ask for suggestions for the name of the pattern. Talk about qualities of good pattern names.

Talk about resulting context and finish with sketch and attributions. Now you have a rough first cut at a pattern with something in every section. You might also discuss other possible patterns in the language.

Follow this exercise with an assignment to write a pattern following the order described above. If they continue to write patterns, they will develop their own style of writing.

This approach works well with the Coplien pattern form. It would not work as well for Alexandrian form, where the sections are not nearly as explicit. Students should learn what goes into a pattern, such as problem, forces, and having an explicit form helps them learn. They can convert it to Alexandrian form later if they wish.

Although this pattern has been shown to be helpful, it can’t help with the biggest problem that many students face—what to write about. See Hero Story.

After project retrospective sessions at D, they name the lessons learned and write one of them as a pattern.

**Originator:** Neil B. Harrison

*Workshopped at the OOPSLA '00 “Introducing Patterns into Organizations” workshop (October 2000).*

*Shepherded and workshopped at KoalaPLoP’01 (May 2001).*

*Shepherded for PLoP’01 (August 2001).*
**Personal Touch**

I often hear frustrated managers declare a particular person a lost cause because he doesn’t respond in exactly the same way another did to a particular technique. When one manager asked if I agreed that he should terminate a certain employee, I asked the manager to show me his key ring. I selected a key and asked, “What does this open?” “The door to my car.” “Will it also unlock your wife’s car?” “No. Of course not.” “Well it’s a perfectly good key. We know it works. Why don't you just junk her car and get another one that will open with this key?” [Brown85] We’re all different. We all need a slightly different approach to unlock our resistance to new ideas.

To convince individuals of the value they can gain from patterns, show them how patterns can be **personally useful and valuable to them.**

You’re an Evangelist or Dedicated Champion who is introducing patterns into an organization.

**Changing a paradigm in an organization really means convincing the individuals in the organization.**

Coplien has noted, “Change happens one individual at a time."

Innovations are adopted when the benefit is effectively communicated to the people who must apply it [Rogers95]. If people don’t see the need for an innovation, they usually won’t listen to an argument about the benefits. You have to address the needs of individuals [Mackie88].

Successful change agents determine what individuals need and make sure the innovation addresses those needs [PriceWaterhouse95].

**Brown Bags** and training will arouse curiosity and interest in patterns, but you must do more to ensure that the interest is strong enough to be sustained. Those who see personal advantage will move past curiosity and interest to enthusiasm, creating the momentum you need. People take change personally; help them understand how the change can personally benefit them [PriceWaterhouse95].

Old habits die hard, and often not without effort. How individuals see an innovation’s relative advantage will determine their willingness to change [Rogers95]. Regardless of the accuracy of the information, the listener’s appreciation of the innovation will depend on his experience [Mackie+88]. So a personalized approach is needed.

**Therefore:**

**Talk with individuals about ways in which patterns can be personally useful and valuable to them.**

Spark their interest by finding one or more patterns that will help with a work-related problem. Do a lot of listening—consider “eavesdropping” on problem discussions.

People who learn about an promising innovation will seek additional information [Mackie88]. When you see that someone is interested, find a comfortable, informal environment for discussion. Use **Just Enough.** Encourage an interest in pattern writing with A Pattern of Their Own.

People who find something useful are more likely to become excited about it and tell their friends and colleagues. Identify Connectors and Respected Techies. They have the most impact on spreading the word.
Ask For Help from those who are using patterns, especially Respected Techies. Introduce people with similar interests. The most effective exchange of ideas occurs between individuals who are alike [Rogers95].

While finding pattern solutions for individuals can spark their interests, some may end up relying on you too much to solve problems. This can take time away from your primary responsibilities. Create an e-Forum and use In Your Space to help.

Some people will not be ready to hear what you have to say. Use Fear Less or So What’s New? You might have to Ask For Help in order to Adopt a Skeptic.

This pattern “builds” a relationship in which the individuals can discuss their personal needs for patterns.

This technique was used at W. When individuals showed interest in patterns, the Dedicated Champion stopped by their office or invited them for lunch or coffee to discuss ways patterns might be helpful.

A began to spread the word about the usefulness of patterns by showing individuals how they could use the GoF patterns. They claimed, “Immediate results, it hooked them in.” Innovators also used this approach. Those who were excited early on about patterns seemed to naturally work one-on-one with others on their teams to show them how patterns would be personally useful.

“This pattern is essential to keep any new technology (or process improvement) going.” At A, the Dedicated Champion used this during postmortem sessions. When she heard about troubles in a project, she was quick to point out patterns (design, organizational, customer interaction, etc.) that could help.

One consultant used this pattern when introducing patterns to H. He “first figured out what their frustrations were” and then identified patterns that would help ease those frustrations.

This is what shepherds do in the pattern community. They take a personal interest in the work of the person they are shepherding.

One consultant notes that this pattern can also work on a collective level. When he visited P with organizational patterns, it was clear the patterns addressed problems whose perception was widely shared by the team, for example, Firewalls (protecting engineers from requests from marketing for a change in direction.) This pattern, therefore, may be more powerful when you appeal to the pain of a shared cultural malaise.

This pattern is written with the assumption that when first working with any new innovation, most people think about what it can do for them. This was reflected in a comment during the question and answer time near the end of the OOPSLA’00 “Sequel to the Trial of the Gang of Four” panel session. Someone at the microphone said that all he cared about was that patterns “help me do my things faster, cheaper, easier – that will be of value to me as a human.”

At one site in a global Fortune 500 company, the new technology group worked hard to become a part of each development team. They attended process and development team meetings, listened for developers’ pain and team dynamics, which helped formulate a strategy to use when negotiating changes later. They looked for opportunities to add value and provide impromptu explanations of the new technology [Radler+01].

Originator: Mary Lynn Manns
Shepherded and workshopped at EuroPLoP’00 (July 2000).
Shepherded for PLoP’01 (August 2001).
One manager found it difficult to convince another manager of the value of patterns until she mentioned that patterns could be used as a tool in the organization’s knowledge management efforts. This was something the second manager could understand. He knew that knowledge management was important. That was enough to convince him that patterns could be of some value in their organization.

To convince the organization of the value it can gain from patterns, tailor your message to the needs of the organization.

You are a Dedicated Champion and have attracted some Innovators. You are using Personal Touch to show individuals how patterns can be personally useful.

While individuals are often intrigued about interesting ideas, organizations are not quick to adopt something that is merely interesting.

The value patterns can provide to an organization is not always apparent, since benefits do not appear overnight, but rather in the long term. Yet, when management considers a new idea, they want to see the benefit to the organization. The organization can be encouraged to adopt something new if it can see how it fits into and improves what the organization already does [Fichman+93].

Look for a need within the organization that fits the innovation and fit the innovation to that need [Rogers95]. The organization will be more likely to adopt something new if it can see how it fits into and improves what the organization already does. “… organizations are more likely to be willing and able to adopt innovations that offer clear advantages, that do not drastically interfere with existing practices, and that are easier to understand.” [Fichman+93]

When it comes to new ideas—packaging matters. Even the best ideas, if not sold to people to get through their filters will have no impact [Weeks+01].

Management wants you to show them that you see their world and can adapt to their needs. They want you to be flexible and understanding, and if you can't be flexible in a particular scenario, they want to know why—and what it would cost to make things flexible. They don't want you to tell them what they can and can't do. They want you to give them the possible scenarios and the cost of each one, then let them determine where the return on investment is. [Alexander01]

Show previous success and provide easy-to-understand information and remember: gaining management confidence is 70% politics and 30% facts [Alexander01].

Therefore:

Mold your message about patterns to the needs of the organization.

Show that patterns can improve what the organization already does—persuade them from their point of view. Study the development processes and the business goals and requirements. Consider how patterns can be integrated into and improve the processes and/or can help to meet the business goals and requirements. Then, rather than presenting the general benefits of patterns (such as improved communication, documentation of best practice, etc.) present the specific advantages patterns can offer to the specific organization.
Management likes to hear what other companies are doing, especially if the organization is in the same business, a partner, or even a competitor. If you know organizations that are having success with patterns, include this information.

Don’t sell the technology, sell the business solution.

Use **Beyond the Fire House** to discover how the organization may be interested in using patterns.

This pattern builds a better understanding of the business impacts of your new idea.

*Thanks to Shawn Dagley, Sales Director at D, for his comment that sparked the idea for this pattern’s title. He drew an analogy between a product his company is selling and “pieces of clay” – let’s mold [the product message] to where [the customer] wants to go.*

*Thanks to Russ Stinehour of C for the additional inspiration for this pattern. He said that his clients would be interested in patterns only if it could be shown how patterns can improve the client’s existing processes. (He referred to this as the “Meat on the Bones”)*

*An Evangelist at L advises:*

> Particularly in today’s market when everybody is tightening belts the only thing that will sell to upper managers are those things that can be executed fairly quickly and will lead to either faster time to market reduction of cost or a proven practice that leads quickly to higher quality.

> I frame any new idea as an outcome that speaks to the manager who will be funding the effort.

> I listen a lot the first couple of times I meet with him and then include the needs that I have heard in the proposal that I make. Then I describe the steps that we can take that will lead to solving the problems that have been articulated.

At **D**, patterns have been introduced into the organization by including pattern writing as part of the organization’s project retrospective process. The concept of patterns is introduced during the second half of a retrospective event. Participants then record the lessons they learned during the retrospective in pattern form. The goal is to build a pattern repository from the “lessons learned” during project retrospectives.

This pattern was used to spark the interest in pedagogical patterns among the faculty at **N**. The advertisement for the initial presentation to the faculty appealed to their desire to capture and share practices in teaching and learning with each other. The presentation highlighted this need, and then introduced patterns as a way to capture these practices.

*This pattern may be implemented in a Solution Alignment Workshop. An Evangelist at D uses this workshop to determine how to tailor out of the box solutions to meet a customer’s requirements. The purpose is to quickly and directly focus the customer on the available solution and their issues relevant to immediate usage of that solution.*

*The effort to start patterns at **A** was helped by, in part, by management’s awareness that the parent company was using patterns.*
Stephen Covey states, “To make an effective presentation, you’ve got to empathize with the listener. You’ve got to get into his frame of mind. You’ve got to make your point simply and visually and describe the alternative he is in favor of better than he can himself.” After hearing this, one Evangelist went in to make his presentation. He started by saying, “Let me see if I first understand what your objectives are and what your concerns are about this presentation and my recommendation.” He took the time to do it slowly, gradually. In the middle of his presentation, demonstrating his depth of understanding and respect for their point of view, a senior manager turned to another manager, nodded, turned back to him, and said, “You’ve got your money.”[Covey89]

**Originator:** Mary Lynn Manns

*Shepherded for PLoP’01 (August 2001).*
Plant the Seeds

One consultant takes patterns books to every OO or UML training course he delivers in industry. They always get a response. In fact he’s learned only to bring them out on the last day, or he loses the attention of the participants for the topic at hand. Most often, if consultancy follows, it’s on patterns, not UML.

Carry pattern materials (seeds) to plant the idea of patterns whenever the opportunity arises.

You’re an Evangelist or Dedicated Champion working to introduce patterns into your organization.

You want to spark an interest in patterns.

Technical people like to keep up on the latest buzzword and are drawn to sources of information, especially if they can have a close look, pick up a handout or borrow a book.

Articles and books are especially persuasive for individuals in the early stage of a decision, where they are gathering knowledge [Rogers95].

Therefore:

Carry pattern materials (seeds) to plant the idea of patterns whenever the opportunity arises.

Good examples of seeds: a collection of patterns, a supply of articles, a stack of books. When you give a presentation or attend a meeting, people will be drawn to these seeds, pick them up, and ask about them. When you tell the story behind the seeds, they may become interested and take a copy of a pattern or an article, or borrow a book. They may stop by your office later or send an e-mail asking for more information. If they do, tell them Just Enough and use Personal Touch to show how patterns may be useful to them and use Pieces of Clay to explain the benefit to the organization.

Just having the seeds will attract some people. If you refer to the patterns, papers, or books during a presentation, you are likely to spark even more interest and perhaps a Study Group.

Be prepared to address skeptics with Fear Less and So What’s New?

We’re bombarded with URLs for more information than we can absorb. Instead of a list of URLs, having the article to scan and perhaps take along or a copy of a book to consider means that it’s more likely that people will see the information you think is important and if it seems useful, they will ask for more. If you do make URLs available, send them by e-mail to save the recipient the trouble of typing it in.

You might be scheduled to give a presentation late in the day. The seeds will attract attention and get conversation going during breaks before you talk. The seeds can also serve as a reminder to the moderator to make sure you’re not forgotten!

Don’t underestimate the effect this pattern can have. Although the seeds usually spark the interest of only a few, they may Innovators, a Respected Techie, or a key individual that can help you spread the word to others.
Carrying a collection of patterns materials can be problem on a plane. Even in a car, you might have to make several trips to the parking lot or get help unloading material. If books are displayed, you run the risk that someone could borrow one and not return it.

One innovator tried to introduce new ideas by sending books or articles up and down the management chain. Only rarely is that successful. Finally, a colleague told him that other people saw his penchant for crediting sources (which he regarded as honesty and humility) as intellectual browbeating. They felt they couldn’t keep up the pace of reading, and he was making them feel inadequate. He was encouraged to state ideas as simple, authentic statements, and if anyone asked, he could then provide more background [Senge+99].

This pattern builds interest and awareness for the participants of the session where seeds are planted.

Patterns book were brought to a project retrospective session at D. This generated curiosity and questions about patterns among the retrospective participants. Funny story: One of the participants picked up a PLoP-D book to look at during a break. At the end of the break, he placed the book back on the table and told the other attendees, “You should check out this book – it has a really good ending.” 😊

Whenever one consultant gives a presentation on patterns, a stack of books is always available, both for reference during the talk and for perusing at breaks and after the presentation. People like looking at books. At one talk, a participant said, “Some of my happiest times have been spent with books.”

Seeds can take unusual forms. When donuts were leftover from a patterns presentation at W, the Dedicated Champion took them to the Tech Staff. This prompted the Tech Staff to ask questions about patterns—while they were eating the donuts.

Originator: Linda Rising and Mary Lynn Manns

Shepherded for PLoP'01 (August 2001).
Play-by-Play Workshop

At early patterns conferences where writers workshops were going to be heavily used, the conference chairs wondered how to show newcomers what the writers workshops were all about: a handout, a short presentation? Finally, they realized that they could simply hold a workshop with a small number of experienced participants and let the others watch. This was so successful, that it’s how all PLoPs begin.

Do a writers’ workshop demo. Give a running commentary as students participate.

Students have written patterns and are ready to workshop them.

The form and ceremony of a writer's workshop contribute to its effectiveness. But for a neophyte,

p is an effective means of providing authors with feedback on their patterns. It balances partly through the form of the workshop and partly through t

for improvement contribute. Not allowing the author to speak during the workshop contributes to the work as well as protecting the author's dignity. This has led to a form that is rigidly "to save time, and

politeness to the author, as the commentator may well be the next author! It’s hard to capture culture ins for writers’ workshops capture many of the cultural nuances of writer's

in one or two workshops.

Therefore:

Execute a writer's workshop with the students participating, and an instructor giving running

 can use a student pattern for the workshop, but it is better to use a pattern just for this purpose. Don’t too improvement and should be short.

If th that they all actively participate.

Give an overview of the process before doing the workshop. Coplien's "A Pattern Language for Writers' s" [Coplien00c] gives a description of writer's workshops as they are practiced by the software
This demonstrates the workshop in a way that can never be described on paper. As students participate, questions will occur to them which can be explained before they start workshopping each other’s patterns. At the conclusion of the sample workshop, ask students for questions about the process.

At A, this technique was used in all two-day pattern writing classes. Usually one of the students’ patterns was chosen. Invariably, one round was enough to show how workshops worked.

**Originator:** Neil B. Harrison

*Shepherded and workshopped at KoalaPLoP’0 (May 2001).  Shepherded for PLoP’01 (August 2001).*
Respected Techie

When I gave a Brown Bag on patterns, one of the attendees came up afterward and said, “This is good stuff but no one knows you. You should talk to Jeff or Randy. If they like it, then others will follow.” I went right to see these senior programmers and sure enough, at the next Brown Bag, attendance doubled and most of the newcomers said, “Jeff (or Randy) said I should hear about this.” I was really grateful for the help!

Enlist the support of senior-level technical people who are esteemed by members of the organization.

You’re an Evangelist or Dedicated Champion. You may have some Innovators who support your ideas.

The technical community can be reluctant to show interest in a new idea unless it has been certified by other technical people they respect.

People are bombarded with new ideas and are too busy to keep up with the latest and greatest. Many people depend on others they trust to help evaluate new ideas. Usually these trusted advisors are senior-level people who are respected by everyone. When these people get behind an idea, it’s the best approval you can have.

“Reputation is a fundamental aspect of social identity; it helps people know how to interpret each other’s words and actions and make decisions about who to trust.” [Kim00]

Therefore:

Enlist the support of experienced, senior-level technical gurus that are respected by both the technical people and management.

Approach the guru with humility. You’re there to learn from them, not educate them about every nuance of patterns. Someone with a great deal of experience has a lot to teach, even if he doesn’t know much about patterns.

Gurus usually know about certain projects. Ask them to tell you a story about the project. Have your paper and pen ready if the guru has time to talk or have your calendar handy if you need to come back later. Don’t be disappointed if it takes several attempts before you can find a good time for both of you.

Offer to take the guru out for coffee. On the way to the cafeteria, give your abbreviated spiel on patterns, ask for a story, and then be prepared to listen. You want to win them over by telling them Just Enough and giving them to the opportunity to be involved, perhaps by mining patterns. Use A Pattern of Their Own, or Ghost Writer.

The experienced person will probably look at most patterns and not see the benefit of documenting the ideas because they understand most of the solutions. You will need to use So What’s New?

If you’re new to the organization, Innovators can help you find the gurus.

It helps if you have a high-level manager or other guru for an introduction. For example, “Charlie said you know a lot about this functional area. Can you tell me about it?” The connection is not to impress the guru but to show that you are impressed by the recommendation.
These veterans can make or break you. If you can convince them that patterns are a good idea, other individuals will at least hear you out. Management, especially upper management, often depends on these respected individuals to provide an assessment of potential solutions in an Evaluation Phase. Once the Respected Techies are on your side, your battles are half over.

A Respected Techie can also help you win over a Local Leader or Corporate Angel and start you on your way to building the Early Adopters.

This pattern builds credibility in the organization among those who need verification that the idea has merit.

A member of the Mont Fleur scenario team reported: “I had had almost no time to prepare. With more time, I would have done my normal thing: reading up on the problem, forming opinions, and coming in with a recommendation. I was effective here because I arrived in ignorance and respect. One of the participants said afterward, ”We couldn't believe anyone could be as ignorant as you. We were sure that you were manipulating us. But when we realized you really didn’t know anything and you were really there just to support us, we decided to trust you.” This was my first lesson: I was more effective when I gave up the stance of knowing and arrogance and replaced it with one of wonder and reverence.” [Senge+99]

After an initial presentation had been made to the Corporate Angel and his staff at A, each manager at the meeting was asked to name a Respected Techie to be part of an evaluation team to hear what patterns were all about and make recommendations back to the appropriate manager. The favorable outcome of this evaluation resulted in full management support, including that of the Corporate Angel, and an increased number of engineers who became part of the grass roots.

A Respected Techie at W got other technical people talking about patterns.

**Originator:** Linda Rising

*Shepherded for PLoP’01 (August 2001).*
The Right Time

Timing has a lot to do with the outcome of a rain dance. [A Cowboy’s Guide to Life, author unknown]

To increase the possibility that there will be good attendance at patterns events, schedule them when people are not extremely busy.

You are an Evangelist or Dedicated Champion planning a patterns event such as a Brown Bag, Big Jolt or Hometown Story.

When people have too much to do with deadlines facing them, they will focus their attention only on things that move them towards completing the necessary tasks and making the deadlines.

People are always busy. However, there are times when they are less busy.

Therefore:

Be aware of and make note of those times when people are likely to be the busiest. Schedule your patterns events outside those times.

The less busy times may be immediately after a project has been delivered, just before the Christmas holiday when people are winding down, or possibly during the summer. The best “timing” will vary from organization to organization, group to group, and person to person. What is good timing for one will not be for another. Avoid planning patterns events when almost everyone is too busy to attend.

The timing does not need to be considered in planning every patterns event. For example, Study Groups are usually held on a regular basis and it is expected that people will come when they can.

Some people always claim to be too busy to attend anything that doesn’t directly relate to their immediate job. For these individuals, use Personal Touch to reach them.

It’s impossible to find a time that’s good for everyone. If possible, schedule the event more than once—choose different days or times. This will make it possible for more people to attend. Announce both dates up front to allow people to plan.

Get feedback. Ask attendees at any event what could have been done to improve the event—and this includes timing. You might learn that some people, for example, would like an early morning event, while others prefer noontime or late afternoon.

This pattern builds a better environment for patterns events, one more likely to achieve success.

The first patterns events at N were held during lunchtime when people usually wind down for an hour. The second one was held at the end of the semester, just after grades were due. Both of these events were well attended. The third event was held during the fourth week of the semester, just as the workload was heating up—it had to be cancelled due to lack of replies.

It’s good to request the last or second-to-last interview slot of the day, since these time slots are the most memorable time slots for the interviewer. If you want to be remembered, make it as late in the day as possible.
Royale Audience

The first time a *Big Jolt* visitor came to our company, I tried to make sure the day was full of activities. I wanted as many people to take advantage of the opportunity as I could. When the visitor said, “I’ll be here the night before, if anyone is interested we could do dinner.” Aha! Dinner! Lunch! These are really special chances to spend time with the *Big Jolt* visitor. After that, people were always invited to meals with any *Big Jolt* visitor. *Do Food* is right, it makes the event really special.

Arrange for management and members of the organization who have helped with the patterns effort to spend time with a special *Big Jolt* visitor.

You’re an Evangelist or Dedicated Champion using *Big Jolt*. The visitor has a few spare hours during the day or during the evening before and/or after the day of the visit.

You want to get the most out of a *Big Jolt* visit.

It’s better if the event is more than just a presentation to a large group. Famous people are usually charismatic and can give your cause a boost. If management and other influential people in the organization will take time for a short, one-on-one meeting, that can lead to more interest and support.

Therefore:

Use spare hours or lunchtime during the day or evenings before and/or after the featured presentation to make the *Big Jolt* visitor available for teams, individuals, or managers that have helped with the patterns effort.

People who are invited to a Royal Audience will enjoy the time spent getting to know a famous person. This can be a reward for those who have helped with the patterns effort, such as the Innovators and the Respected Techies and can be a public relations opportunity for management who have not yet bought into the idea of patterns. The *Big Jolt* may also be willing to help the patterns efforts in your organization by taking some one-on-one time with managers who still need to be convinced of the value in patterns. This can lead to sponsorship from a Local Leader or Corporate Angel. This can be a good way to Stay Close.

Be careful that this doesn’t backfire. If anyone is upset at not being invited, that can hurt your cause. In addition, don’t expect everyone to accept the invitation. It is important that you offer them the opportunity. For those who can’t come, it may be enough to know that they were invited.

This pattern builds an opportunity for people to meet with a *Big Jolt* speaker.

At A, invitations to join *Big Jolt* visitors for lunch or an open discussion forum were sent out to Involve Everyone. Free “consulting time” was also announced on the e-Forum. Even when people were unable to attend, they always felt that the opportunity was open to them.

Originator: Linda Rising

*Shepherded for PLoP’01 (August 2001).*
Shoulder to Cry On

When I began introducing patterns in my company, I wasn’t sure most of the time whether I was doing the right thing. If it hadn’t been for the patterns-discussion listserver, I would have had a harder time. The people on that list were supportive and helpful. They always had good suggestions and provided an ear when I needed it. That saying about standing on the shoulders of giants certainly applies to any situation.

To avoid becoming too discouraged when the going gets tough, make opportunities to talk with others who are also struggling to introduce patterns.

You’re an Evangelist or Dedicated Champion, working to introduce a new idea into your organization.

When you’re struggling alone, it’s easy to become discouraged.

Misery loves company but if it’s the right kind of company, commiserating can lead to rejuvenation. Getting together with others who share the same or similar problems can often lead to startling solutions. The group dynamic helps everyone become more creative in tackling tough situations.

Research has shown that for certain issues, group support is very helpful. You feel like you're not the only one dealing with an issue, which by itself is useful.

Therefore:

Get together regularly with others who are also interested in patterns. A Study Group and Brown Bag are good ways to do this or just gather informally for lunch or dinner.

A community begins to form wherever people gather with a shared purpose and start talking among themselves. This community provides a confidence boost, a shoulder to cry on when you’re discouraged, and a source of helpful suggestions and strategies.

This is a good way to meet Innovators and Connectors within your larger community. Ask for Help from these individuals and remember to Just Say Thanks for any support.

Even if you are enthusiastic about patterns, you will need and deserve a boost now and then. If funding permits, attend a conference where you can learn more about patterns and meet others to talk about your struggles.

We need a “third place”—a local, public establishment that isn’t home (the “first place”) or work (the “second place”) but a friendly, neutral spot where people gather together to relax and talk and take a break from everyday life [Oldenberg89].

This pattern builds a larger community that encompasses the organization where patterns are being introduced.

There are patterns users groups all over the country:
http://c2.com/cgi/wiki?PatternsGroups

The eXtreme Tuesday Club is a group of extreme programmers that meets every Tuesday at The Old Bank of England Pub on Fleet Street. http://www.xpdeveloper.com/cgi-bin/wiki.cgi?XtC
XpMidlands, a group for the exploration of XP for the Midlands in the UK. 
http://groups.yahoo.com/group/xpmidlands/

Originator: Rachel Davies
*Small Successes*

When you’re involved in an organizational change effort, celebrate each small success and learn from each small setback.

You're an Evangelist. You've applied some patterns from IPIO. Some worked but some didn't. You're not sure whether to go ahead or not.

Every organizational change effort suffers setbacks. This is a difficult process.

After successfully completing a task or achieving a goal we often don't acknowledge our achievement and may even demean what we have done. We see everything else that hasn’t been done instead of the small successes that have come our way. Sometimes we even say we were lucky to avoid recognizing our accomplishments.

Usually we’re so busy and our To Do List is infinite, that when we finish any task, we’re already thinking about the next one.

Most jobs give few opportunities to be winners. Usually the celebrations are reserved for big events and only a few are singled out. Recognizing and celebrating small accomplishments makes people happier and more productive.

"Great things are not done by impulse, but by a series of small things brought together." Vincent Van Gogh

*Therefore:*

**Celebrate each small success and learn from each small setback.**

Growing a community is an incremental process. For every step forward, you might have to take two steps backward. Don't be discouraged.

To be a successful change agent, you must overcome the feelings of frustration and chaos and proceed despite setbacks. Allow small successes to snowball into larger accomplishments.

Most Peace Corps volunteers establish metrics for judging success before they embark on their journey but they also encourage them to remain flexible and to redefine success over and over again as situations and expectations change. This is a difficult task for people who need to quantify their actions and their time in a tangible way. Some volunteers finish their stint with Peace Corps thinking they didn't accomplish much because they didn't achieve some quantified, measurable thing, but it's important for volunteers to recognize the good they did. Conferences are held with all returned volunteers to help them identify their successes. Often, they don't see that they achieved a great deal by successfully negotiating a cross-cultural meeting, by teaching one child to read, by helping one woman start her own business, or by changing one person's view of American.[Layne00].

**Originator:** Linda Rising
Smell of Success

After an early project went in on schedule and received high acclaim from the users, Sue dropped by to talk about some issues that concerned her in our project's technology. She seemed interested in knowing how our techniques, which were quite different from the "standard" practices, allowed us to be productive and successful with a very inexperienced team.

When your initial efforts result in some visible positive result, people will "come out of the woodwork" to talk to you. Treat this opportunity as a “teaching moment.”

You're an Evangelist or Dedicated Champion, trying to Involve Everyone.

A newcomer is interested in your recent success and has stopped to ask questions.

Some people will be waiting to hear about successes before they become interested in patterns. Innovators love new ideas. They must have the latest and greatest gadget. It doesn’t matter to them if the interface is bad or if it doesn’t work properly. In fact, the poorer the behavior of the innovation, the better the Innovators like it! The rest of us, however, usually hang back. What we have now is good enough. We wait until the early bugs are mostly worked out before we spend our money on the new gadget.

"If an innovation is to spread, it must prove its practical merits. This keeps us honest. It prevents us from being champions simply because we "believe in this work." [Senge94].

Therefore:

Treat the inquiry as a "teaching moment.”

The inquirer may not know about your new approach and may need information. The inquirer may be looking for a silver bullet—be sure to manage expectations. Your success may have negatively impacted the inquirer who is now looking for a way to neutralize that effect.

The inquirer may be looking for information. Be sure to head off a search for a silver bullet. If your success has had a negative impact on the inquirer, listen to his story to find a win-win solution.

Recruit the inquirer. Invite him to your next Brown Bag or other event. Identify a small task and let him complete it. This is the "Yes, that's a very difficult problem, thank you for volunteering to tackle it" ploy!

Unfortunately, the more personal and business results you achieve, the easier it is to become arrogant and intolerant. Even with success, as you become convinced of the effectiveness of patterns, take care to remain open and listen to comments from others. Make sure you learn something from each success.

The Smell of Success invites interested skeptics, Early Adopters, and Local Leaders to sniff out interesting aspects and ask So What's New? Use Personal Touch and Fear Less to responding to this interest.

A Hometown Story is a good way to share success. You can also use In Your Space, e-Forum, and Brown Bags.

Originator: Steve Newton
*So What’s New?*

The first draft of the patterns that became ADAPTOR was delivered to a specially convened design review. The patterns had been developed jointly with some of the company's developers in the previous twelve months. Cannily, DS, the Design Authority, decided to invite some developers who had not been involved in case those who had worked on it were "too close" to be objective. At the end of the presentation DS asked these people what they thought. They were not very forthcoming either way, so DS turned to one of the most experienced men and asked him directly about one particular pattern. He asked whether it was recognizable as something the division did. "Yes. I recognize it. I use it a lot. But, that's what worries me. What does it really add?" At this point a new hire, a junior, spoke up and said, "What do you mean you use it all the time? I had this exact problem last month and it took me nearly two weeks to work out a solution. Do you mean you had the answer all the time?"

When experts believe that patterns don’t add value because they are so obvious, welcome their comments as validations of the patterns while showing the value of patterns to novices who don’t have the same experience as the experts.

You are an Evangelist or Dedicated Champion trying to introduce patterns into your organization.

For experts, patterns add no value because they are so obvious.

Patterns are “discovered not invented,” so experienced people use patterns without knowing it. For them best practice is standard practice, and any pattern might look like common sense at best or trivial at worst. On the other hand, there will be people for whom the pattern is genuinely new as a solution to a recurring problem.

Patterns are abstract and tend to appear simplistic, but their complexity appears in the relationships to other patterns in a domain-specific pattern language.

Genuine masters of their trade, by definition, already use the best patterns but best practice needs to be articulated if a culture of design is to be created.

No one knows everything. Even experts can improve. In a recent experiment, teams of leading heart surgeons from five New England medical centers observed one another’s operating room practices and exchanged ideas about their most effective techniques. The result? A 24% drop in overall mortality rate for coronary bypass surgery or 74 fewer deaths than expected. These surgeons were all trained and presumably experts since they were “leading heart surgeons” but simply by observing, they were able to improve [Davenport+98].

Therefore:

Welcome comments such as, “This is the way I do things already,” as validations of a pattern, but emphasize the value of the pattern for novices.

Use Personal Touch to illustrate the usefulness of patterns—even to experts! Show experts what patterns can offer them and the less experienced people who work with them.

Ask For Help from the experts in spreading the word about patterns to colleagues who still need to learn the best practices.
Point out to the experienced people that their comments serve as validation of the patterns as best practice. Celebrate comments from individuals such as the Respected Techie and target them as sources for pattern mining. Encourage them to write A Pattern of Their Own, or use Ghost Writer to help them capture their knowledge. Establish a learning relationship with these masters.

Keep in mind the vast experience of experts and how this will affect their perception of patterns. Often we assume that potential adopters are empty vessels and forget about relevant experience with which to associate the innovation. You must understand a potential adopter’s prior experiences before explaining how patterns offer an advantage [Rogers95].

This pattern builds a better understanding in the minds of skeptics of what patterns are all about.

**Originator:** Alan O'Callaghan

Shepherded for PLoP’01 (August 2001).
Stay Close

It was easy for me. The company brought in 8 by 8 cubes and our vice president made the incredible decision to be right there with us. OK, he had two cubes, one with a little conference table and his secretary’s cube was also part of his area but still—he was just around the corner from my team. When I walked in each morning, he was often there, and if he looked up, I could sometimes catch his eye and say, “Good morning!” If he asked, and usually he did, I could tell him what the latest patterns activity was and who the next Big Jolt visitor was. He couldn’t forget patterns!

Once you’ve enlisted the support of key individuals, make sure they don’t forget about you.

You’re an Evangelist or Dedicated Champion working to introduce patterns into an organization. You’ve captured the interest of key individuals throughout the organization.

Your key supporters have too many things to think about and are likely to forget about the patterns activity.

We’re all bombarded with information. New ideas are always out there—more than we can handle. It’s like the old saying, “Out of sight, out of mind.”

Support for patterns depends on the continuing awareness of management and other key people, but their support can lapse. Since there’s always something important going on and critical decisions to be made, your message will be lost if you don’t step up and call attention to your contributions.

On the other hand, you don’t want to make a pest of yourself and overstay your welcome. Some are always anxious to hear more about the latest and greatest technical innovation; others less interested. Beware of hype and buzzword overload.

Just because people decide to adopt an innovation, that doesn’t mean they can’t change their minds. We’re always seeking reinforcement for our decisions. We always have new questions about any innovation. If we don’t get answers, we may revert to old habits [Rogers95].

If it’s possible, build a relationship with these key individuals so you can casually but continually make them aware of progress in small ways [Senge+99].

Therefore:

Stay in touch with the key individuals who are your supporters.

This means talking to management even when you don’t need anything. A lot of people make the mistake of talking about projects only when they need funding. As a result, the immediate association management makes is that you’re there to talk, so you must need money [Alexander01].

Stay Close to Innovators, Early Adopters, Respected Techies, Local Leaders and Corporate Angel. An e-Forum can help.

Keep messages timely and interesting. Don’t overwhelm them with too much that is distracting or they will ignore you. Be sensitive to individual tolerances—especially of managers—for new information. You can loose your support if you are viewed as a pest. Present information in a helpful manner.
If you have used Bread Upon the Waters, make your supporters aware of the publication. If a Big Jolt visitor is of special interest to your supporters, offer them a Royal Audience.

This pattern builds closer relationships with key supporters.

At A, a company-wide, electronic bulletin was sent out several times a week with important notices for everyone in the company. Everyone read this bulletin. Important patterns activities were always advertised and patterns publications mentioned. This kept patterns news in front of everyone, but especially management.

**Originator:** Linda Rising

*Shepherded for PLoP’01 (August 2001).*
While attendees of a lecture may seek information, attendees of a study group seek transformation; they want to make what they study not only something they understand, but something they may use in their everyday lives or work. The study group thus acts as a bridge, helping people move from passive to active learning [Kerievsky].

Form a small group of colleagues who are interested in a specific topic for newcomers to learn about patterns or for those familiar with patterns to continue learning.

You have an interesting book you'd like to read or an interesting topic you'd like to know more about.

There may be little or no time or money for formal training.

When you read any book by yourself, what you get out of it is limited by your own perspective and experience. When you read a book in a group setting, you can take advantage of a variety of backgrounds and expertise.

More formal independent study has its own difficulties. The learner relies on a technical interface, videotapes or broadcast classes, and little social interaction. As a result, the learner goes through material in isolation with no chance for discussion or timely questions.

The lecture method has been described as "a way of getting material from the teacher's notes into the student's notes without passing through the brain of either one." [Weinberg+99] This isn't the best learning environment, especially for adults, who want to extract useful information that can apply to their daily work.

Early Adopters are often frustrated when they can’t understand complicated material. A common solution is to form a user group. Together they can solve problems that individuals in isolation can’t [Rogers95].

Therefore:

Form a study group of no more than eight colleagues who are interested in exploring and studying a common topic.

If resources are available, get your company to buy books or lunch. Meeting over lunch works well because it's usually a time when most people are free. Use Brown Bag. Eating together helps build good group interaction and bridges the work environment and the learning environment.

The intense experience of internal or external training has been compared to drinking from a fire hose, while study groups allow a more reasonable pace. Each week a chapter or topic is covered and while each participant must have prepared, a facilitator leads the group, a role each participant plays in turn. The facilitator must spend a little more time to steer the group through the material but this burden rotates through the group. The result is maximum learning with minimal time invested.

This approach is not only fun and effective but also low cost. Even when companies buy lunch for eight participants and individual copies of a book, the cost per learner for a 12-week study group is less than $200, while internal or external training costs can run from $800 to nearly $2000 per learner [Rising+98].
A Study Group provides adults with a genuine educational experience, focusing on topics learners have chosen. It allows timely, convenient scheduling and a sense of ownership of the learning path. However, it isn’t appropriate for all learning and will not necessarily work for every learner. Study Groups should be considered as part of the total organizational learning plan for any organization.

For more information about setting up a Study Group and one company's experience, see [Rising+98]. Also see Knowledge Hydrant: A Pattern Language for Study Groups [Kerievsky].

This pattern “builds” an opportunity for individuals to explore and learn about patterns.

There are patterns discussion groups all over the country that meet regularly to cover a book on patterns. http://c2.com/cgi/wiki?PatternsGroups

Study groups were effectively used at A and allowed employees to learn about a variety of technical topics. Many of these are described in [Rising+98].

Individuals at G went through two days of patterns training and then formed a study group to continue their learning. They chose to go through the GoF patterns first.

Originator: Linda Rising

Shepherded for PLoP’01 (August 2001).
**Sustained Momentum**

*We can think of introducing ideas as planting a seed. If this really is an appropriate metaphor, then it’s clear that without water, sun, and a source of nourishment, the seeds will die. The seed and the young plant that is produced will need attention to keep it alive and growing. Sometimes we forget how important this on-going support is—for all living things.*

**Take a pro-active approach to the on-going work of sustaining the interest in patterns in your organization.**

You’re a Dedicated Champion or a pattern supporter, trying to Involve Everyone.

There’s always a danger that when some success is evident, it’s easier to just rest on your laurels and stay within your comfort zone. But without pro-active efforts, any new idea can wither and die on the vine.

It takes work to maintain interest. It will not survive unassisted. Failing to reinforce the benefits of patterns runs the risk that excitement and interest will fade, especially when people get busy with other things.

Even when a new idea has been accepted and used, people require periodic confirmation to reduce the possibility that they will discontinue their use [Rogers95, Chew+91].

“Newton’s Third Law was never so true: An object at rest tends to stay at rest until acted upon by external forces. … Stakeholders need continuous invitations to become involved, continuous reassurances that they will get their wins” [PriceWaterhouse95].

**Therefore:**

**Take a pro-active approach to the on-going work of sustaining the interest in patterns in the organization.**

To do this, the Dedicated Champion and all pattern supporters should:

- Ask for Help, Find Connectors and Respected Techie(s).
- Be aware of outside events and call them to the attention of the organization. Keep the e-Forum and In Your Space up-to-date and topical. Have Brown Bags and Do Food when you can.
- Start a Study Group.
- Read the literature and send information to the appropriate people. Plant the Seeds. Your continuous learning is an important part of this effort. Keep your knowledge up to date.
- Attend conferences to learn new things and network with others.
- Bring in a Big Jolt, and consultants.
- Use Hometown Story and Bread Upon the Waters.
- Lead pattern mining sessions to keep the repository growing. Use A Pattern of Their Own and Ghost Writer.
- Don’t avoid skeptics. Work with them. Use Fear Less, So What’s New? Ask for Help to Adopt a Skeptic.
- Stay Close to all key individuals.
- Use Shoulder To Cry On.
• Always remember to Just Say Thanks.

These activities will keep the patterns effort in the mainstream, reinforcing individual decisions to use and/or write patterns. Members of the organization will have a sense of keeping up with the latest and greatest, even when they are too busy to take advantage of everything that is offered.

Those who are not yet involved with patterns are given reminders of what others are doing and the benefits that can be gained. Your manager is also reminded that the work is useful and of interest to the organization.

This pattern builds the effort that sustains the community.

This pattern has been successfully applied at A. The Dedicated Champion did all the things in the suggested list and more. Resting on your laurels means the technology will not move forward.

Originator: Linda Rising

Workshopped at the OOPSLA’96 “Introducing Patterns into the Workplace” workshop (October 1996).
Shepherded and workshopped at PLoP’97 (September 1997).
Shepherded and workshopped at EuroPLoP’00 (July 2000).
Shepherded for PLoP’01 (August 2001).
Test the Waters

I went from successfully introducing patterns at a medium-sized company to a small company. Even though the support of a Local Leader and Corporate Angel were easy to get and the developers were enthusiastic about the idea of patterns, most had no time to attend Brown Bags. The company had no resources for training or conferences, so despite all the support, I got tired and gave up. I realized that some companies with tight schedules have no room for investing in new ideas.

See if there could be some interest in patterns in your organization by using some patterns in the Introducing Patterns into Organizations language and evaluating the effect.

You would like to be an Evangelist for patterns in your organization.

Creating a master plan for introducing patterns will probably set yourself up for failure because there are too many unknowns in any organization.

It’s not always obvious where to start introducing patterns to an organization. You may be new to a company or team, or you’ve just learned about patterns and wish to introduce them to your organization. You need to get your bearings to figure out what patterns to use. Consider the organization’s willingness or resistance to consider new technology and the personalities—Innovators, skeptics, Respected Techies—in your group.

There’s a natural tendency all change agents share to hit the ground running and make tremendous impact as soon as possible. This impulse should be resisted in favor of a “listen and learn” approach. Show that you are open and as willing to learn as to explain you new ideas.

Therefore:

Choose a few patterns in the Introducing Patterns into Organizations language, use them, then evaluate the result. If there appears to be a spark of interest—some Innovators or an interested Local Leader—move forward with your efforts to introduce patterns.

Some suggestions for Testing the Waters.

- Use Personal Touch during a coffee break to informally talk with one of your architects (Innovator, Respected Techie) about the new approach.
- Give a simple demo (Plant the Seed, Just Do It) to a few colleagues.
- Talking with your team lead (Local Leader) about the value of the idea and how it can solve a current problem.
- Give a Brown Bag to present the idea to the rest of your team.
- Talking about patterns during regularly scheduled events.

The initial steps can provide feedback on what should follow. Testing the Waters becomes a foundation upon which to build other patterns. Plant the Seeds may lead to an invitation to host a Brown Bag or a Royal Audience. This evolutionary process is similar to Alexander’s Gradual Stiffening [Alexander+77], where a flimsy structure is gradually made sturdier by building on prior work.
Testing the Waters can also show you when to give up or back off. Sometimes an idea is too new or too radical for ready acceptance by an organization, or may run counter to other constraints, such as a preference to a vendor or product. Understanding the new technology will still be your own personal competitive advantage. You can't save the world. Save your energy for use when you can get payback.

Testing the Waters is the first step of a continual, iterative process, performed with all the other patterns, as you discover what change techniques work in your organization.

This pattern builds the first step toward becoming an Evangelist.

After a few Brown Bags, an Evangelist met with a Local Leader and, as a result was introduced to a Corporate Angel and other supporters. Respected Techies liked the idea of patterns and the company decided to bring in trainers so everyone could learn the new technology. The Evangelist became a Dedicated Champion and was able to apply most of the patterns successfully.

“During your first two weeks on site, don't start calling meetings and making pronouncements,” Peace Corps volunteers are advised. “Spend time observing your village and listening to people talk about their lives. Slowly, you will identify some natural places where you can intervene and share some ideas. In order to earn trust, you must demonstrate a presence and show that you're genuinely interested in learning as well as teaching.”

Originator: Chuck Hill
*Time for Reflection*

Here is Edward Bear, coming downstairs now, bump, bump, bump, bump, on the back of his head, behind Christopher Robin. It is, as far as he knows, the only way of coming downstairs, but sometimes he feels that there really is another way, if only he could stop bumping for a moment and think of it [Milne26 in Kerth01]

To learn from the past, take time at significant points to ask what worked well and what should be done differently.

You are an Evangelist or Dedicated Champion trying to introduce patterns into your organization.

We make the same assumptions and the same mistakes based on those assumptions over and over again.

Insanity means doing the same thing you did in the past but expecting different results [Kerth01].

At the end of a project, people are so focused on the pain they had at the end that they don’t remember their accomplishments. Even in a project that has failed, there are valuable accomplishments for which a team can be proud and in the most successful project, there are things that can be improved [Kerth01].

We have to test our knowledge constantly—using practices like project retrospectives. These review practices should be done after each iterative cycle rather than waiting until the end of the project. The quality of learning derived from practices like project retrospectives provides a key indicator about the true commitment to learning in an organization, and therefore, a key to its adaptability [Highsmith00].

The high-technology industry rushes to do this, to do that. The race is to the swift and the clever, not to the best. The continual rush makes it impossible to step back and reflect, to take a broader view. To the product manager, thinking about the future means to think six months ahead, maybe twelve [Norman99].

In 1988, Joseph M. Juran wrote about the process of deriving lessons learned from retrospective analysis and named this process after philosopher George Santayana, who once observed, 'Those who cannot remember the past are condemned to repeat it' [Godfrey99]. Most large organizations have some form of the Santayana review and call it a retrospective, postmortem, postpartum, or project review. The idea is simple—examine what happened on the last project and learn from it. Capture "what worked well" and "what should be done differently." These project reviews provide a wonderful opportunity to capture knowledge as patterns [Kerth01].

Most of the time when organizations hold project reviews or retrospectives, they don’t come up with startling data. Most of the results evoke the response, “Oh, yeah. We never have enough time to do it right.” And the process ends there. To create learning organizations, we must learn to stand back and really hear what went on in our projects.

*Therefore:*

Pause in any activity, at an appropriate point, and reflect on what worked well and what should be done differently. Document your observations and, over time, begin to look for patterns that you can share with others.
One of the best ways to do this is to run a project retrospective. For more information, see Project Retrospectives: A Handbook for Team Reviews [Kerth01].

Focus on learning rather than fault-finding. Everyone has an opinion and should feel safe sharing it without needing to justify it [Kerth01].

In the movie Dances with Wolves, a tribe of Native Americans celebrates the success of a buffalo hunt by telling and retelling the story of the hunt around a campfire. Telling the story is a very important ritual because it provides lessons for all the hunts to come. It is the way wisdom is passed on. In the software engineering field, a retrospective works much the same way—its purpose is to help review a recent project to understand what worked well and what to do differently next time [Kerth01].

When you are ready to write the successful practices you’ve observed as patterns, use A Pattern of Their Own, Pattern Writing Guided Tour, Play-by-Play Workshop, and Workshop As Teacher.

This pattern builds a better understanding of what happened in the past.

At A, postmortem data is not only used to document patterns for software design, but also for related activities such as system test and customer interaction. When postmortems of successful teams showed that a team size of no more than ten was a factor in the successes of the projects and when those results are backed up by observations by Cockburn [Cockburn98], Brooks [Brooks95], and Coplien [Coplien95], this is an important pattern. Capturing this information and giving the pattern the name, No More Than 10, was a useful way to ensure that this knowledge was not lost.

**Originator:** Linda Rising
*Treasure*

People were always getting awards at my company. It was a great place to work. Usually the memento was accompanied by a small check. The award that I treasure the most was a hand-made framed piece of paper from some guys in our fledgling patterns community. It cost nothing but their time but it meant a lot. It was peer recognition for something special—an extension of *Just Say Thanks*.

*To recognize individuals’ special efforts with patterns, give them something they value.*

You are a Dedicated Champion trying to introduce pattern in your organization. You have resources to obtain rewards for supporters of new ideas.

**People who give special effort to promoting a new idea, such as patterns, should be recognized in a special way.**

“Things” are important! We often attach significance to objects because of who gave it to us and the circumstances under which we received it.

Treasures go beyond identification with a group; they signify achievement or a level of commitment, like the badges scouts receive for exhibiting learned skills or attaining predetermined goals.

*Therefore:*

**Give supporters of patterns something they will value.**

Examples include books, shirts, opportunities to publish, special recognition for their contribution. Expensive items are not necessarily Treasures. The recipient has to attach value to the item and associate it with the topic.

The Treasure should recognize special effort, such as:

- A Pattern of the Week/Month that could be posted In Your Space.
- Presentation of a pattern or use of a pattern in a Hometown Story.
- A Bread on the Waters publication.
- Participation in a pilot project—Just Do It.
- Help with Personal Touch or Adopt a Skeptic.
- Leadership in a Study Group.

To avoid hard feelings, make sure the reward is not too valuable and that it is given for special effort. When a Treasure isn’t appropriate, a Trinket might be appreciated.

There is a fine line here between maintaining a certain amount of exclusiveness in owning a Treasure, and being too exclusive. If there are too many treasures, they may become Trinkets. Too few and they create an atmosphere of exclusion. Anyone should be able to obtain a Treasure if they meet the qualifications.
This pattern is not about having an expensive incentive but one way to build a community.

Sometimes a Treasure can be given away as a prize in a drawing.

This pattern builds a connection with supporters and the community. Giving gifts reinforces ties between individuals.

Pattern books were Treasures at A. Some people saw more value in the books than others. Some even returned books. They saw the value in the book but didn’t identify strongly with the topic and wanted someone else to have the book.

In I, special recognition is given (if there is a winner) to an Employee of the Month. The winner is nominated by peers and receives a coupon for a free dinner. The most enduring piece is the write-up of the nomination, which appears in the company newsletter.

At A, copies of pattern books were given as prizes to pattern writers whose patterns went through a writers’ workshop and were then updated. The patterns were then posted on the internal patterns repository.

In many sales departments giving prizes to motivate people is common practice.

One company selects an "employee of the month" is regularly elected due to some strange stuff or funny mistake he/she did. This prize is taken as part of the fun in the company and not taken to upset people. With this prize, all employees tell each other about the mistakes they make and while laughing about these mistakes, all discuss how to avoid them.

Joe Bergin has written a similar pedagogical pattern Gold Star that says students should get praise for what they do well. http://csis.pace.edu/~Ebergin/PedPat1.3.html#goldstar His compiler course is seen as very difficult, so he publishes the Gold, Silver, and Bronze Medal winners each semester: http://csis.pace.edu/~bergin/compiler/CompilerAward.html

Originator: David E. DeLano and Nicolai Josuttis

Shepherded for PLoP’01 (August 2001).
**Trinket**

*I collect the name badges from conferences I attend and hang them on the walls of my cubicle. They remind me of the conferences I have attended, the many friends I have met at the conferences, and the things I have learned. They are not Treasures because they aren’t worth anything. So I’m not afraid that someone will take them in the middle of the night.*

*To keep a patterns event alive in a person’s memory, hand out a small token that can be identified with the topic being introduced.*

You are an Evangelist or Dedicated Champion trying to get people interested in patterns.

**People may be enthusiastic about a topic when it’s presented, but the enthusiasm quickly wanes as they forget tomorrow what excited them today.**

Our brains can only hold so much; today’s information will be quickly replaced by tomorrow’s information. However, something special can call attention to a particular topic. Reminders of the event can help retain information and can connect the topic with a group of people, for example, the patterns community.

*Therefore:*

**Hand out a small token that can be identified with, and will remind people of, the topic being introduced.**

The monetary value of this Trinket need not be high—it doesn’t need to be a Treasure. Examples of trinkets are magnets, buttons, coasters, cups, pencils, or a set of bound notes, a “quick reference” printed on special paper, or copies of patterns or articles. Don’t just give more URLs. Some creativity is needed to come up with Trinkets that are useful for forming a link with the event.

When people know you have purchased the Trinkets or made the copies of the special references, both your colleagues and your management will be impressed that you believe in your idea enough to support it. A copy of an article or a pattern doesn’t take a lot of effort but it shows the attendees that you cared enough to spend a little of your time to make their lives easier.

People who identify with the topic will keep their Trinket, often prominently displayed, as a memento of the topic. Initially, this identifies the group of people to each other, helping to create a critical mass. Over time, Trinkets serve as a reminder to re-visit the topic.

We all know what it’s like to have another toy that just takes up space. Don’t be disappointed if some people dispose of the Trinket—not everyone appreciates them, and those who don’t “get” the topic will be less inclined to keep them around. They will get cleaned out over time, and this is okay.

The distribution of too many Trinkets reduces their effect—don’t get carried away.

Do Food and Brown Bag can draw people to a meeting. A Trinket can create a memory of the meeting.

This pattern builds a reminder of an event that will be associated with your new idea.
Several trinkets have been used over the life of patterns introduction at A. Writers Workshop reference cards were given to people who attended Writers Workshop classes.

Any good salesman knows the value of giving away Trinkets. Even after a sale is made, a Trinket is invaluable for maintaining a good customer relationship and often results in more sales.

Attendees at a PLoP conference usually take a tangle of yarn home with them—a piece of the web that was woven in the last game at the conference. It reminds them of the connections they have with the people in the patterns community.

One consultant has a foldable card that he gives out at his training sessions. He says that there is not only benefit for the receiver of the trinket, but also to the giver. The consultant feels that he gives a bit of himself away with the card.

A group of human factors experts introduced new techniques by conducting short usability tests at their own workstations. They gave chewing gum as a thank-you gift. [Radle+01]

At our poster session at OOPSLA 2001, we gave “Good Job!” stickers for participants’ badges if they drew a picture of any pattern we had displayed on our poster. The sticker was just a Trinket but it got their attention, many who said they couldn’t draw were convinced by the ridiculously small sticker and it meant they had to read every pattern, looking for one that spoke to them.

Craig Tidal, president and CEO of Net Solve Inc. teaches customer interaction to all new employees, ranging from receptionists to senior managers. He rewards correct answers with a crisp $2 bill. “They’re unique, and if somebody puts one in their wallet, it will remind them of the event,” he says of the gimmick [Reingold0]

**Originator:** David E. DeLano

**Whisper in the General’s Ear**

I noticed that a particular manager was always absent from my patterns presentations. He always had a good excuse but I think he was avoiding the subject. His people never came to any of my training classes. I stopped by his office, "I know you're too busy to come to my presentations. I understand that. I'm willing to get together one-on-one, any time, to answer any questions you have." He was caught. He fumbled with his calendar. "Hmm, not much time. I do have an open slot but it's at 7 a.m. next Friday. That's probably too early for you (he was hoping)." "I jotted down the date and said, "Great! Thanks for your time!'" I stopped by the day before and said, "See you tomorrow!" On the date, we spent a good half hour and he seemed relieved that my idea wasn't just some new OO thing but really did apply to his area. He never became an enthusiastic supporter but he never spoke up against it and his people started coming to my training classes.

Managers are sometimes hard to convince in a group setting, so set up a short one-on-one meeting to address any concerns.

You're an Evangelist or Dedicated Champion working to get management support for your new idea.

A high-level manager is not a supporter and shows every sign of blocking progress. He hasn't been convinced by presentations you've made.

Progress in convincing people in an organization of a new idea depends, in part, on support from the Early Adopters, but to have resources for books and training, you need management support. Many managers aren't that interested in technical details. In a group situation their attention span is much less than it is one-on-one.

Managers are overwhelmed by new ideas and are reluctant to head blindly down new paths without some justification. You can't push a manager in a new direction but you can gently show the benefits of a new way of doing business that will reflect well on those who are successful with the new approach.

Because accountability is always centralized and flows to the top of organizations, executives feel an increasing need to know what is going on, while recognizing that it is harder to get reliable information. That need for information and control drives them to develop elaborate information systems alongside the control systems and to feel increasingly alone in their position atop the hierarchy [Schein96].

**Therefore:**

**Set up a short one-on-one meeting to address any concerns.**

Say exactly what you know and what you can do to help. Don't exaggerate what your technology can do. Nothing can hurt you more than overselling something, [Alexander01] just play the Evangelist role and let your natural enthusiasm show.

It's human nature to want to save face in front of a group. Encourage the manager to Ask for Help to understand technical details—this might have been embarrassing for him in front of others. Educate the manager in a way that doesn't talk down or overburden him with too many technical details [Alexander01].

Use Pieces of Clay. Be ready to say something about the costs and benefits of adopting this approach if you are asked for this information but don’t overwhelm the manager with data. Most managers don’t care if you're using an Oracle or an Access database. It's not important to them. But they want to know about the
overall project plan, the approach, the milestones, and the progress. Tailor the information appropriately to
the management audience [Alexander01].

Whispering in the General's Ear might look like "back-room dealing" to outsiders. Your best defense against
this is to be open and straightforward. Remember that your goal is to build trust with the manager. This will
take time. The manager who needs this kind of special attention is probably insecure or has been burned by
false promises; it will take patience and great strength of character on your part to face these obstacles.

Once you have the manager’s support be sure to Stay Close so he won’t forget your topic.

Don’t worry about who will get credit for the introduction. Whether or not the boss then takes credit is a
matter of personal style. Give the manager credit for the idea or for supporting the idea.

This pattern builds management support for your new idea.

David Pottruck, the number-two executive for Charles Schwab Corp., frequently clashed with his boss,
Larry Stupski, at top-management meetings. Whatever Stupski proposed, Pottruck tended to oppose. Most of
the other executives sided with Stupski, the senior of the two. Pottruck made two big mistakes: He failed to
recruit other people to his cause (Corridor Politics), and he disagreed disagreeably. He was almost forced
out of the company. Then he met with Stupski and proposed a solution: He would never publicly argue with
him again. He might disagree, but he would do so only in private. By questioning his boss behind closed
doors only, he got his ideas into the room and kept the power struggle out of it.

I had lunch with my boss today to discuss a new program we are trying to add to our department. My boss
suggested that we see her boss before the committee meeting to make sure he understands exactly what we
are trying to do, so that we will have his support during the committee meeting.

An Evangelist once had a boss who was hard to convince in a group meeting (darn near impossible!). He
would move forward on an issue during a meeting only if he had all the information and all his doubts
removed before the meeting. He rarely asked questions during the meeting. So, when an upcoming meeting
would have an issue that was important, the Evangelist would meet with him before the meeting and address
all his questions and concerns one-on-one.

Originator: Linda Rising
Workshop as Teacher

After students write their first patterns, have them writers’ workshop each other’s patterns.

Students have written their first patterns.

After writing their first patterns, students need individual feedback about what they have written; otherwise, the writing experience will have limited educational value.

The first pattern that you write is usually not very good. Pattern writing is hard, and takes not only practice, but regular correction and feedback. You want to get students off on the right foot.

In a class setting, it is impossible for you to critique each student's work. It takes too much time. If you could take the patterns home and review them overnight, that would help, but the feedback should be personal and immediate. General feedback to the entire group can be no more than superficial.

Students need to do more than write one pattern. They need to look at other patterns. They need guidance on what to look for—what are good characteristics of patterns, and what aren’t.

Even though students aren’t experts, they can learn from each other.

In music instruction, a student practices, but still needs regular feedback from a master. Periodic master classes, where students listen to and critique each other are also valuable.

Therefore:

Have the students workshop each other’s patterns.

Actively guide these writer's workshops. Since nearly all the students will be new to writer’s workshops, use Play-by-Play Workshop to introduce them to the procedure. Teach the workshop form by participating in the workshop, and showing by example the kind of comments to make. This teaches the students not only how to participate in writer's workshops, but also what to look for in patterns.

Students can workshop as many as ten papers in a day. At first, the instructor will have to lead the group, but soon, students may take turns at moderating sessions. (See Master and Apprentices [Alexander+77].)

Keep the group to seven to ten people; otherwise, students will not have sufficient opportunity to participate. This is true of all writer's workshops. If the class is too large, create two or more workshop groups, each with at least one instructor.

Students will learn how to conduct workshop and by examining each other’s patterns and the students will learn more about patterns. They see what works and what doesn’t work. They do it all under the watchful eye of the instructor.

Workshops introduce students to many of the important aspects of the patterns culture. Students are not just hearing about the culture, they are living it for a short time.

This was an effective technique for two-day pattern writing classes at A.

This pattern was an important part of the two-day pattern writing workshops we taught at G. It’s most effective when members of the group are part of the same development team. The patterns they write can be understood by everyone and the problems they solve are readily applicable back in the “real” world after
the class is over.

**Originator:** Neil B. Harrison

Shepherded and workshopped at KoalaPLoP’01 (May 2001).
Shepherded for PLoP’01 (August 2001).
External Pattern References

Body Follows Eyes. In almost any activity, if you want to go somewhere, simply look there.

Communal Eating. Give every institution and social group a place where people can eat together. [Alexander+77]

HandsInView. Skiers should always keep their hands where they can be seen. [Olson98a]

Leaky Bucket Counters. To handle transient faults, keep a counter for each failure group. Initialize the counter to a predetermined value. Decrement the counter for each error or event and increment it periodically (but never beyond its initial value). If the leak rate is faster than the fill rate, then an error condition is indicated. [Adams95]

Master and Apprentices. Learn something by helping someone who really knows what he is doing. [Alexander+77]

Mercenary Analyst. Have a professional documenter remove the burden of creating documentation from developers. [Coplien95]

Null Object. A surrogate for another object with the same interface, but the Null Object does nothing. [Woolf98]

Patron. Give the project access to a visible, high-level manager, who champions the cause of the project. [Coplien95]

Team Space. To maximize people’s productive time at work, allow team members to own their space and to use it for everything from decision-making to social events. [Taylor200]

War Stories. Include real-life experiences in a pattern to make it come alive. [Harrison99]

Work Community. To create a feeling of community in the workplace, build small clusters of workplaces that have their own common area. [Alexander+77]
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