



*Immersive Internet Storytelling Series, Issue #3*

## How To Give New Users A Good First Experience The ThinkBalm Innovation Community Shares Lessons Learned

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### NEWCOMERS FACE A WIDE VARIETY OF OBSTACLES

One of the most significant barriers to adoption of the Immersive Internet at work is a steep learning curve exacerbated by what is all too often a poor first-time experience.<sup>1</sup> Many peoples' early forays into virtual worlds and other immersive environments are tainted by technology and user experience issues. Enterprise Immersive Internet advocates and implementers can certainly help shorten the learning cycle and time to value by selecting an immersive platform that makes it easy for new users to get started, or by customizing a platform to meet the needs of their specific user base.

But technology choice alone isn't enough. No matter which platform an organization uses, a newcomer training program is required. We cannot overstate this. Training is the key to the success of a newcomer's early experiences in immersive environments. The initial exposure can be a make-or-break moment — especially for people who are not early technology adopters by nature or who are predisposed to dismiss anything that might smack of fun and games in the workplace.

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<sup>1</sup> ThinkBalm defines the Immersive Internet as “a collection of emerging technologies combined with a social culture that has roots in gaming and virtual worlds.” See the November 17, 2008 ThinkBalm report, [The Immersive Internet: Make Tactical Moves Today For Strategic Advantage Tomorrow](#).

## Technology Requirements Can Be Intimidating To Mere Mortals

A good first-time experience with an immersive environment requires some skill with technology. Not only does a person have to be in a location where they have a consistent high-speed Internet connection. They have other technology issues to deal with, as well.

- **Installation: getting the client software up and running.** Simply entering a non-browser based immersive environment — never mind navigating through it and communicating with others while they are in it — can be daunting. Like any rich-client software application, each viewer has its own requirements for computer processor speed, minimum amount of memory, graphics cards, audio and video drivers, etc. The user has to download a file — sometimes multiple files — and know how to execute the file to install the client software (sometimes called a viewer). The user then has to know how to find the application they installed and launch it to get into the immersive environment in time for the first meeting.
- **Communication: using voice over IP to talk with others.** People need to know how to get others' attention in the immersive environment and communicate with them. Most immersive platforms have built-in local text chat, enabling everyone whose avatar is in the same immediate vicinity to participate in a text conversation. This is similar to the chat function built into many Web conferencing tools. Most immersive platforms also have private text chat and some have voice over IP (VoIP). To get voice to work, people have to have a microphone and speakers or a headset and know how to configure them. They need to know how to turn their mike on, mute themselves, and initiate and end a conversation.

## Okay, I'm Logged In — Now What?

Once a new user has gone through the trouble to download, install, and configure their viewer, they face the next set of challenges.

- **Behavior: other users acting in unexpected, unprofessional ways.** Anonymous environments like virtual worlds can breed behavior that is unacceptable in a work context. As an example, during one of Erica Driver's early experiences in Linden Lab's Second Life a male avatar text chatted, "Hi, where are you from?" and within 10 seconds off flew his virtual clothing. Other undesirable behaviors can include pushing and shoving peoples' avatars, begging for money, and using foul language. To be fair, this issue is not specific to the Immersive Internet — it also applies to online forums, discussion boards, and even email.
- **Appearance: trying to make their avatar look good — or at least less awful.** Some immersive platforms, like OpenSim and Second Life, give people nearly unlimited possibilities for customizing their avatar. But the default avatar can be hideous (see Figure 1). This is rather disruptive in a first meeting as some people may have already customized their avatars and therefore newcomers cannot focus on anything but getting their own avatar to look better. People want an avatar they feel comfortable representing them in a highly visual, interactive environment.

- **Navigation: getting around in 3D space.** For people who aren't video gamers, the metaphors and navigation tools for moving an avatar around in 3D space take some getting used to. Depending on the immersive platform, people may have to learn how to make their avatars walk, turn, sit, run, fly, and teleport. Keyboard and mouse commands vary depending on the immersive platform. In addition to avatars, 3D environments typically contain objects like walls, tables, and chairs, and some semblance of "physics," which means people must move their avatars around these solid objects. We recommend setting up wide-open areas for newcomers and keeping the number of walls, doors and other obstacles to a minimum.
- **Interaction: using content and tools.** Interactive content ranges from posters to read or objects that launch an informational note card or Web page when clicked, to brainstorming and other collaboration tools, to vehicles that really work. Some immersive environments provide presentation and desktop sharing tools, video support, and drag-and-drop support for office documents and 3D models. The controls and interaction mechanisms for tools like these vary from one platform to the next, and it takes time to learn how to use them.

**Figure 1: The default OpenSim "Ruth" avatar is the same for male and female users**



Source: ThinkBalm

Often the first thing people want to do when they first create an OpenSim or Second Life account is get a better avatar — unless grid owners or project teams have created new default avatars or kits to hand out that help with initial setup.

## ROLE-PLAYING SESSION: “GIVING NEWBIES A GOOD EXPERIENCE”

Members of the ThinkBalm Innovation Community have been putting our heads together to illuminate challenges and identify solutions to enterprise Immersive Internet problems since the community was launched in August of 2008. We discuss. We experiment. And on January, 9<sup>th</sup>, 2009, fourteen community members got together for a 90-minute role-playing session to 1) focus on what the newcomer experience is like and how to improve it, and 2) document our collective expertise.

We held the session in an immersive environment that was unfamiliar to most participants: Qwaq Forums, a business-oriented immersive platform for document and process collaboration.<sup>2</sup> ThinkBalm principals Erica Driver and Sam Driver and ThinkBalm Innovation Community member Cherisa Burk, a technologist with the Federal Reserve Bank of New York, were already familiar with Qwaq Forums and played the role of “tour guides” (trainers). The tour guides were tasked with giving the rest of the participants, who played the role of newcomers (sometimes called newbies), the best introductory experience possible.

## The Run-Up To The Event: Lots Of Organization And Planning

Planning began well ahead of time. As community members RSVPed we added their email address to an access list in Qwaq Forums. Participants received an auto-generated set of instructions for downloading the viewer and logging into the environment. This was just the beginning.

- **Communication: sending out logistics details.** We posted the logistics information on our community Web site and emailed it, along with technical instructions, to participants several times. Once isn't enough. Still, some participants had trouble locating the instructions at the time of the meeting and arrived late. We also asked people to download, install, and test the Qwaq Forums viewer at least an hour prior to the start of the meeting. Those who got set up early tended to have a better experience during the event than those who didn't.
- **Preparation: holding a pre-event just for the tour guides.** Before the role-playing session, the three tour guides met in the immersive environment to map out what we wanted participants to learn and how we could best teach it. We developed an agenda and determine who would take the lead on which parts. We decided how and when we would use the various rooms in our 3D space. We set up items we wanted to demonstrate like a whiteboard, cork board, and Web page viewer.
- **Extra help: logging into the environment during the week prior to the event.** A few participants downloaded and installed the Qwaq Forums viewer as soon as they received instructions. By logging in when we could during the week leading up to the event, the tour guides ran into participants in the environment and were able to answer preliminary questions right then and there. It would have been better if we had been able to log in more often, as we're sure we missed people. A good practice is to schedule preliminary orientation sessions for people who want them and notify people about when tour guides / mentors will be available to help.
- **Early help: logging into the environment an hour prior to start time.** We helped early arrivals on the day of the event get their VoIP working, select an avatar, and customize their avatar with a photo or company logo. We gave some quick tutorials and when others joined, the early birds could help answer others' questions. Since people were expecting to learn something new, they were tolerant as new people showed up and had trouble. This is an important element of the Immersive Internet experience: it makes learning social and collaborative.

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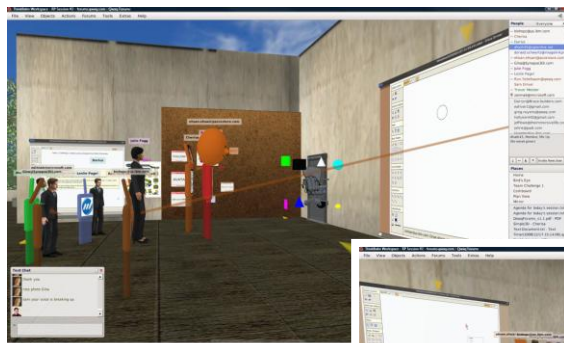
<sup>2</sup> You can find info about Qwaq Forums at <http://www.qwaq.com>.

## During The Role-Playing Session: A Flurry Of Multi-Tasking And Activity

The three tour guides tag-teamed to guide the rest of the participants through a newcomer introduction experience role-play. We used lecture-style and hands-on demo-style techniques. We started out the session by making sure participants' VoIP was working and teaching people how to mute and un-mute their voices. We familiarized people with their controls and showed them how to personalize their avatars. We gave a tour through the immersive environment, pointing out tools, navigation menus, and features, and giving "how-to" tips (see Figure 2). We demo'ed collaboration tools like a cork board, whiteboard, and basic 3D forms and shapes.

Then we broke into three groups to give people an opportunity to try out some of the tools we had demo'ed. Each group took 10 minutes to design a robot — one group using 3D shapes and the others using a 2D whiteboarding tool (see Figure 3 and see Figure 4). At the end of the event we debriefed on how the session went and how the first-time experience for new users could be improved in the future. Throughout the role-playing session, participants communicated with the tour guides and each other via voice, local text chat, and private text chat.

**Figure 2: Role-play in session — members of the ThinkBalm Innovation Community practice giving new users a good first experience**



Source: ThinkBalm



Source: ThinkBalm

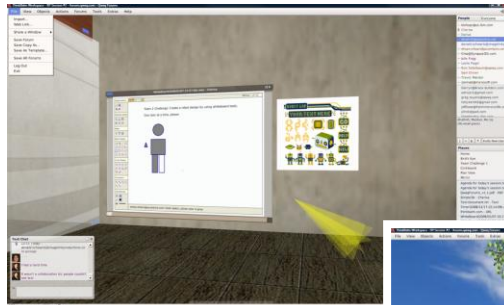
**Figure 3: Teamwork in progress — members of the ThinkBalm Innovation Community collaboratively creating a 3D robot**



Source: ThinkBalm

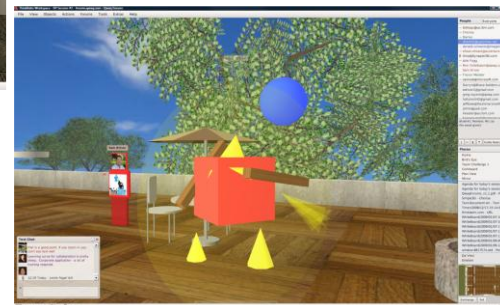
**Figure 4: The finished products from group exercise to design a robot**

The 2D edition created using a whiteboard



Source: ThinkBalm

The 3D edition



Source: ThinkBalm

## LESSONS LEARNED: NEWCOMERS REQUIRE CARE AND ATTENTION

Our experiences during this role-playing session are similar to those taking place in organizations all around the world. When project teams begin to roll out virtual worlds or campuses, immersive learning environments, and 3D business applications, the same challenges exist for everyone in orienting newcomers and getting their buy-in and support.

- **Preparation: reach out early and often to people who might need help.** At the start of our role-playing session, one participant was confused about how to get into the immersive environment and was trying to log in via Qwaq's Web site. He ended up joining very late. This is just the kind of incident you want to avoid. Making sure people can get the software configured correctly and running smoothly, as well as feel comfortable with the technology, will greatly improve the odds of a newcomer having a positive experience. Distribute logistics details, training materials (e.g., short videos, podcasts, PowerPoint slide decks, "how-to" cheat sheets, etc.) well ahead of the time when people will need them. Make sure people know how to access these materials. Provide office hours during which people can get help. Offer to help orient newcomers in any capacity. Plan to provide hands-on training both with groups and one-on-one if warranted.
- **Testing: discover and resolve technical kinks ahead of time.** For this role-playing session held in Qwaq Forums, a couple of participants were unable to log into Qwaq Forums at all, for one reason or another, and had to drop out of the session. One of the tour guides' viewer crashed no less than a half dozen times during the event, requiring some fancy footwork among the guides. And for some of us, performance suffered badly toward the end of the session when we had half a dozen avatars working on a 3D robot model and the remaining participants working at whiteboards. These issues may have been avoided if we had had an opportunity to test Qwaq Forums with each participant's machine head of time — more realistic in an enterprise environment than in an enterprise-independent scenario like ours.
- **Support: have someone play the role of tech support lead.** We have been advocating that immersive meetings include a tech in all of our ThinkBalm Immersive Internet Storytelling Series reports.<sup>3</sup> Immersive technology is emerging technology and with this comes the need for lots of support and hand-holding. During the ThinkBalm Innovation Community role-playing session some people had a lot of technical problems and we were grateful to have Ron Teitelbaum from Qwaq with us to help out. He connected with participants who were having trouble via Skype to walk them through issues and he answered questions people posed about the Qwaq Forums product during the event via voice and text chat. Having Ron with us to reach out and handle technical problems without derailing the session helped improve the first-time experience for participants dramatically.

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<sup>3</sup> See the December 17, 2008 ThinkBalm report, [Role-Play Redux: "Convince The Curmudgeon"](#) and the January 14, 2009 ThinkBalm report, [End Death-By-Lecture: Tours, Not Speeches](#).

- **Expectations: perceptions are informed by past experiences.** Most if not all of the ThinkBalm Innovation Community members who attended this role-playing session were familiar with Second Life. Because Second Life looks and works differently from Qwaq Forums, people had to set aside their past experiences and learn a new set of skills. For example, Qwaq Forums offers just a few basic avatar types to pick from, some of them simple “Lego men” or egg shapes, others humanoid. People can customize their avatars with a photo or logo. Qwaq Forums also has a set of navigation tools, like “follow” and “go to,” which allow a user to take others with them or share their point of view. The 3D shapes used for communicating ideas or creating simple prototypes work differently from those in Second Life. The camera controls, which allow users to zoom in on certain objects or parts of the environment, also work differently.
- **Technology: getting everyone’s VoIP working is no small task.** It ended up taking nearly 30 minutes to make sure everyone’s voice over IP was working. Some people didn’t have the right drivers on their machines. Other needed to switch microphones. Even once we got most people up and running with voice, we heard a loud squeaking sound a couple of times and communication was sometimes difficult due to people talking over each other because of lag. One participant never was able to get her microphone working and responded to what she heard through her speakers via text chat — though she said she didn’t feel that anything was lost in the experience because she is used to communicating via text chat in virtual worlds. It’s a good idea to set peoples’ expectations that the first, say, 15 minutes of the newcomer introduction session will be dedicated to making sure everyone can communicate. This allows you to handle issues as people arrive.
- **Fun: people like to have a good time.** We found a general consensus among participants in this role-playing session that the playfulness inherent in learning to use a new immersive technology — with its cartoony visual style and the funny bloopers and snafus that can occur — increases engagement. Immersive experiences are interactive. During our role-playing session as soon as one of the tour guides pointed out a feature or tool, people clicked on it to see if they could make it work. Lots of laughter broke out during the robot-building exercise and afterward while each team presented its robot to the whole group as if making a sales pitch. During the debrief at the end of the event, one of the participants even suggested making a game out of the first-time experience, with simple prizes (e.g., add-ons for your avatar, more appealing avatars, etc.) for achieving learning objectives.
- **Connection: people will take the opportunity to socialize.** When there is an element of fun or you’ve got time left at the end of an immersive learning session, people tend to hang around and discuss what they just experienced more so than in other kinds of eLearning environments. (How often have you seen people willing to stay on a web conference after it formally ends to discuss how they will implement what they learned or network with other participants?) In immersive environments, people want to hang out in a relaxed and playful area to continue chatting, much as they would at an in-person event.

- **Overload: too much multi-tasking can impede learning.** One of the participants said he found it hard to listen to the tour guides talk at the same time he was browsing through menus, looking at dialog boxes, and adjusting his avatar, all the while navigating to whatever the group was discussing, trying to stay out of others' line of sight, and trying to resolve a problem with an object he made that he couldn't delete. His experience was common to many participants. Some people will take naturally to the multitasking and others will have a more difficult time with it. The key is to organize the time well to limit multi-tasking to just the activities that add value, such as communication among participants.

## CONCLUSIONS AND RECOMMENDATIONS

We recommend that a newcomer introduction program be part of the rollout plan for all enterprise Immersive Internet initiatives.

- **Refresh: keep the content and methodology current.** Best practices are for the most part not yet existent, though we're working on this in the ThinkBalm Innovation Community. The Immersive Internet is evolving at an extremely rapid clip. Your first training session will probably be quite different from your fifth or fifteenth. Keep your documentation, guidelines, and tips fresh. Use each newcomer introduction session as a listening and learning experience, keeping in mind that as you gain experience with the Immersive Internet you may start to forget how hard it can be for first-timers. Leave 10 minutes at the end of each session to solicit feedback and perhaps conduct a quick survey. Use the information you collect to improve the experience for future sessions.
- **Options: include self-guided learning options in your newcomer introduction program.** Consider leaving readable or downloadable content — or links to it — in the immersive environment you will use for the training in case newcomers show up when no one else is around. Or, if you have scripting skills on your team, you might provide a 3D robot ("bot") that can act as a guide and answer frequently asked questions — as long as it is perfectly clear that the bot isn't an avatar with a real person behind it. You may also consider recording high-density, multi-channel communication, as occurs in newcomer introduction sessions, so participants can watch and listen to recorded sessions on their own.
- **Socializing: take advantage of the social nature of the Immersive Internet.** Humans (well, most of us, anyway) need social interaction. One of the benefits of immersive environments is a visual presence — an avatar — for each participant, which lends a feeling of being together not just in time but in space. Integrated voice over IP and spatialized audio further enhance this experience. Unless all participants in an immersive meeting or training session already know each other, it's a good idea to take advantage of the feeling of togetherness with introductions all around. This is especially important when using immersive environments where avatar names don't identify who the user is. Just like at physical meetings, it takes a few minutes for some to feel comfortable interacting with others, so scheduling time for introductions is just as important as other agenda items. Perhaps lighten things up with an icebreaker activity before jumping into the

formal content. Even something as simple as “What’s your favorite movie?” can get people going.

- **Apprenticeship: help people help each other.** Many of the challenges encountered in a first-time session are great opportunities to help build community and improve the learning experience. While some newcomers will need specific one-on-one help, there are benefits to enabling participants in the session to teach others something they just learned or to discover and share their experiences with others. Having someone available to notice problems or find people who are having trouble so that they can offer help without disrupting the whole group is useful but that person should resist jumping in too often for things that people might be able to solve on their own or with the help of their peers. Encourage people with more skill to be sensitive to and keep an eye out for colleagues who may not be as comfortable, and to offer help and guidance.
- **Scenarios: structure the newcomer introductory experience around realistic work scenarios.** Defining specific, albeit simple and attainable, objectives helps focus the experience and can help make people feel less overwhelmed by technology. We got into a little bit of a bind during our ThinkBalm Innovation Community role-playing session by demonstrating features and functions devoid of context — other than during the robot-building exercise. Participants suggested that the experience could be improved by having people collaborate on a document or engage in a planning discussion. Or we could have framed the entire discussion around the robot-building theme to increase context. If you are providing an introductory experience for a group of product designers, for example, take them through a scenario in which they might use the environment to review and modify a design. If your audience is from human resources, show how they might use it for a recruiting process like testing or interviewing.
- **Platform choice: carefully consider your user base when assessing immersive platforms.** The ThinkBalm Innovation Community is a varied group of people, from a variety of countries, industries, companies, academic institutions and government agencies. From large organization or small, members have two important things in common: we advocate for adoption of the Immersive Internet in the workplace, and we are generally pretty adept with technology. A mainstream enterprise rollout would likely have a different demographic makeup. When selecting an enterprise immersive platform, look for features and functionality that make the user experience easy and fun. Carefully consider the trade-offs between simple environments, which typically have thinner clients with less functionality yet are easier to operate, and more complex, robust environments that offer more powerful capabilities but have higher technology requirements and a steeper learning curve.
- **Focus: manage expectations and be realistic about limits.** New learning experiences can be intimidating. It can be even more stressful for participants who feel stuck, not knowing how to move or communicate, when other people are zooming around with their avatars with no apparent problem. Keep this in mind when gathering your group for a newcomer introduction experience. Setting expectations that some people will have difficulty at first will help set the tone to encourage people to help each other. Have a good estimation of the skill levels of your participants so that you can judge how much time will be devoted to getting started. Don’t invite too many people at once if this will extend the getting-started period too far into your planned time. Try to keep the group working together via group activities and discussions.

Since August of 2008, ThinkBalm has hosted more than two dozen ThinkBalm Innovation Community events in immersive environments: planning meetings, training sessions, brainstorming and role-playing events, tours, and un-lectures. We've gained a considerable amount of experience. Still, quite often something goes wrong. A participant can't get his or her VoIP working or can't use VoIP while in the office. Someone experiences unexpected 3D graphics rendering effects on their machine. Performance of the immersive environment grinds to a halt because of the load we put on it. Technology we are using doesn't support a particular participant's operating system.

Because we are an enterprise-independent innovation community comprised of explorers and early technology adopters, we have a level of tolerance and patience mainstream business people will not. Many of the technology and user experience challenges we describe in this report can be addressed by spending extra time plotting and planning up front. By carefully crafting your newcomer introduction program and undergoing intensive testing of your immersive environment, you can eliminate many of the common foibles that degrade the first-time user experience.

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- [\*The Immersive Internet: Make Tactical Moves Today For Strategic Advantage Tomorrow\*](#), November 17, 2008

### Blog Articles

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- [\*Daden Ltd. and VoxVue deliver immersive experiences about real places\*](#), August 1, 2008

## ABOUT THE AUTHORS

### Erica Driver



Erica Driver is a co-founder and principal at ThinkBalm. She is a leading industry analyst with nearly 15 years of experience in IT. She is quoted in mainstream and industry trade press, including *The Wall Street Journal*, *The New York Times*, the *Boston Globe*, *CIO*, and *Computerworld*. Prior to co-founding ThinkBalm, Erica was a Principal Analyst at Forrester Research, where she launched the company's Web3D coverage as part of her enterprise collaboration research. She was also the co-conspirator behind Forrester's Information Workplace concepts and research.

While at Forrester, Erica served as a strategic advisor to a wide range of clients, including Alcoa, Bell Canada, Dominion Resources, GlaxoSmithKline, IBM, Marriott, Microsoft, Raytheon, Roche, the United Nations, and the U.S. General Services Administration. Prior to her tenure at Forrester, she was a Director at Giga Information Group (now part of Forrester) and an analyst at Hurwitz Group (now Hurwitz & Associates). She began her career in IT as a system administrator and Lotus Notes developer. Erica is a graduate of Harvard University.

### Sam Driver



Sam Driver is a co-founder and principal at ThinkBalm. He is an inventor and entrepreneur whose take on the Immersive Internet is heavily influenced by science, game theory, and science fiction. At the University of Massachusetts Medical School, Sam was part of a team that discovered RNA interference (RNAi), which was awarded the 2006 Nobel Prize in Physiology and Medicine. He founded QIK Technology to develop intellectual property (IP) holdings in functional genomics and co-founded a small Rhode Island-based residential real estate investment partnership. Sam also founded and operates Evil Minions Games, an IP and product development company, established and runs a regional gaming organization, and is an instrument-rated private pilot. Sam

earned his BS at Ohio Wesleyan University and a Masters in genetics from the University of Massachusetts Medical School.

## ThinkBalm Innovation Community Contributors

A very special thanks to the following ThinkBalm Innovation Community members who participated in the January 9, 2009 role-playing session and reviewed and contributed to this article prior to its publication:

[Cherisa Burk](#), [Christopher Bishop](#), [Darius Clarke](#), [Ehsan Ehsani](#), [Gina Schreck](#), [John Kinsella](#), [Julie Fogg](#), [Leslie Pagel](#), and [Ron Teitelbaum](#).

## About ThinkBalm

ThinkBalm offers independent IT industry analysis and strategic advisory services. ThinkBalm was established in June, 2008 and is headquartered in Rhode Island, USA.

- **Our research area: enterprise use of the Immersive Internet.** For technology marketers and Immersive Internet advocates, implementers, and explorers, ThinkBalm offers research and analysis and custom strategy consulting focuses on enterprise use of the Immersive Internet. This includes virtual worlds and campuses, immersive learning simulations, and 3D business applications.
- **We operate the ThinkBalm Innovation Community.** ThinkBalm operates the ThinkBalm Innovation Community, a collaborative community with the mission of propelling forward enterprise use of the Immersive Internet. The ThinkBalm Innovation Community runs on the InnovationSpigit™ enterprise innovation management platform.
- **We deliver a ThinkBalm Strategic Community Consulting offering for Spigit™ customers.** This consulting and advisory offering helps InnovationSpigit project stakeholders with the strategy around community development, management, and best practices.

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