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Abstract: Proposal User Agent Button Development

The R-Button User-Agent is an indispensable tool -- your personal agent -- representing you as you assert your preferences and negotiate terms of service for privacy, tracking, and data sharing on the web, phone, tablet and other devices.

Customer Commons proposes to build a tool to create Do Not Track Plus, or DNT+, that will allow the user to assert more than just a preference not to be tracked. DNT+ will act as a user agent to express preferences for how long data is retained, for what purposes and under what terms or policies. DNT+ will allow users to see how their preferences match up, at first and over time, as entities change their data policies.

The Project:

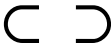
The R-button, or “relationship button” is meant to allow a person to set their preferences for privacy, tracking, and personal data sharing. Among these are choices for “Do Not Track” (DNT), which several entities including Internet Explorer, Firefox and Chrome are all working toward, as well as the W3C specification. But choices could encompass much more.



Each time a person interacts with a phone app or web site, or shares data, they face the tracking of their activities and often a desire to set some level of privacy. But, doing this with every entity we work with on a case-by-case basis would be tedious and time consuming.

The R-button proposes to give a person a User-Interface method to see when their pre-chosen preferences are being respected, and make changes or find other ways to do what they want without losing control of their data, privacy or being tracked. The R-Button would connect what a person has chosen in the past at a personal cloud or other preference tool, or let a person set simple preferences for privacy, tracking and preferences at the R-button UI if they didn’t have anything else. The R-button would then share those preferences to those entities at the other end of wherever a user goes on the web, in their phones or anywhere a person can be tracked or share data.

Interface:

We propose to start with a hypothesis for design and meaning here:

 - shown in the state of “no relationship”

The symbol on the left, , represents the individual user, the first party to the relationship. The symbol on the right, , represents the second party to the relationship, typically an organization or service. The two symbols resemble magnets, suggesting attraction to each other. Their parallel lines and equal size also suggest equality, correspondence and interoperability.



The left and right pieces could close when a relationship has been made between the person's preferences and the entity the person is interacting with online, on their phone or elsewhere.

Clicking on the symbols would allow a person to set preferences for that moment, see what is set already by default, and see what the entities terms are to the user.

We expect to test and build the UI and functionality that works best for a broad range of users. We expect that what user's need may be different that what we propose. We think building for user's is the best method for getting this right.

No Company Will Own This

The R-button specifications, UI and code, and usability research will be put out under an open source license and as an open standard for any entity to use. The R-button will live at Customer Commons (customercommons.org), a non-profit, which will shepherd the project as well as maintain it and future releases as part of its non-profit mission to support individuals and their ability to be treated fairly wherever they interact.

The R-button was originally conceived at Harvard's ProjectVRM by Doc Searls, author of the Intention Economy.

Development Scope

The **R-button Research and Development Project** will follow an agile usability and development model to professionally build and test the concept of the R-button (including the name "R-button") as a standardized user interface affordance independent of any vendor, device, or application.

The R-button will depend and inter-operate with many other efforts including policy tools like Open Notice, Privacy Icons and the Information Sharing Group's Nutrition labels, the W3C user agent architecture under discussion now, trust frameworks in use and under development, and identity agents such as Mozilla's Persona agent. We will work with all entities to develop a symbol for the user, and interactions that will translate and tie together at the UI level all the efforts that are needed for user's to assert preferences and see in simple fashion what their data and identities are doing.

Developed and tested affordances we want to include are *choice, privacy, security, resilience, interoperability, auditability* and *reduction or elimination of cost*. Among a person's choices will be:

- *Specifying identity providers* (including the individual himself or herself)
- *Establishing and maintaining relationships with relying parties* (those guys on the other side of your surfing, apps or purchases)
- *Establishing and maintaining connections with personal data stores and lockers, personal clouds and*
- *Establishing and maintaining personal terms, preferences and policies toward relationships with other parties* (including "do not track" me and "here are the permitted uses of my data")
- *Accessing audit trails of agreements and actions that take place within relationships*

between the individual (C) every other party (D).

The Emergence of a New Paradigm

Fortunately a new paradigm is emerging, one based on the concept of individual independence and agency and peer-to-peer relationships among equals. One example is the *Information Sharing Agreement*, which requires parties of equal agency, power, and ability to form non-coercive agreements. Another is the *personal cloud*, an autonomous collection of data and capacities for individuals that corresponds — and can relate directly to — the clouds maintained by organizations (or other individuals). Personal clouds can interact with servers, but outside the subservient role required by the cookie model. (In other words, it will work with, rather than against, the client-server paradigm.) Another is the *trust framework*, which is comprised of autonomous individuals making voluntary assertions about each other, and does not require a single dominating party.

The need for the *R-button* come from this paradigm shift. It will become not only the literal symbol of this new paradigm — the goals for user-driven control of identity and personal data — but the actionable trigger point for simple, safe, secure identity and relationship management across all types of digital devices. Furthermore, adoption will be driven both by users and by vendors, because both want the convenience, trust, and relationship value it represents.

We've spent the last four years at Harvard's ProjectVRM studying and defining the problem. Now, with Customer Commons, we want to create a tool that will give people controls and a way to share their preferences everywhere they go. And because it's open source, it will constantly evolve with the help of a global community of developers.

The W3C Event

Currently Customer Commons is in the research phase of this project and we would like to share user research conducted to date at the W3C event. We are in the process of obtaining data and writing it up for public release. This research could be shared at the W3C DNT event, as well as the User Agent / R-Button plans for developing a user interface to knit together the various architecture and policy initiatives.

Who We Are

The mission of Customer Commons, a California-based non-profit, is to restore the balance of power, respect and trust between individuals and organizations that serve them. We stand with the individual and therefore do not take contributions from commercial entities. We are run and funded by individuals.

Building on the work of ProjectVRM at Harvard's Berkman Center, Customer Commons provides individuals with the knowledge and tools they need to shape their online relationships. We believe this is increasingly important in a world where online and offline activities are rapidly merging. Big data, behavioral tracking, mobile geo location and other emerging data collection practices are altering the fabric of our shared social and economic relationships.

Customer Commons holds a vision of the individual as an independent actor who retains autonomous control over his or her personal data, desires and intentions. In this vision, each of us will act as the optimal point of integration and origination for data about us. Individuals must be able to share their data and intentions selectively and voluntarily. Individuals must also be able to know exactly what information is being held about them by those who gather it, by whatever means. To achieve this, people must be able to assert their own terms of engagement, in ways that are both practical and easy to understand for all sides.

Customer Commons believes that informed and empowered individuals, free to make unbiased choices based on their own intentions, are more powerful and engaged participants in the marketplace. Free customers are more valuable to themselves, to vendors and to the market economy, than captive ones. Data that is volunteered intentionally is a far more useful form of economic signaling than either coerced data from captive customers, or from invisible surveillance. As the Internet increasingly comes to dominate global communications and commerce, informed and autonomous individuals will become critical to a healthy, civil, democratic society.

What We Do

As a public-facing organization focused on the emerging issues at the intersection of the empowered customer and the public good, Customer Commons seeks to both educate and inspire change for customers worldwide. We do this through research, educational initiatives and promotion of customer side tools.

Customer Commons seeks to meet individuals where they naturally are, while offering a way forward that demonstrates practical alternatives. Our work is grounded in research exploring public attitudes toward customer relationships with vendors and organizations, online and offline. We also research solutions under development, seeking to understand, present and advocate viable approaches. This information supports the development of new tools and methods while also informing the larger Internet policy conversation and our vision of an empowered individual in the context of a healthy and dynamic market-based system.

All of Customer Commons' programs reflect the values of truly transparent and flexible methods for individuals to maintain their unique voices in relationship to other entities in the marketplace. Therefore, we support technological approaches that are primarily personal, not social, designed from the outset to help people clearly express their own intent. Our work will help individuals engage in equal and open relationships that do not lock them in to a single set of solutions. With truly engaged customers, businesses, governments and institutions of all kinds will have countless more willing hands, heads and hearts to solve the problems of our world, while creating prosperity for all.

Nitin Badjatia serves as Director, Market Strategy at Oracle Corporation. Prior to his current role, Nitin was Director, CX Strategy – Knowledge Solutions at RightNow Technologies (acquired by Oracle in 2011). Prior to RightNow, Nitin was Director, Business Strategy at Knova Software, and was a part of the financial services practices at Siebel Systems and Oracle (his first stint at the software giant).



Jennifer Cobb is Principal at Spruce Advisers, a strategy and communications consultancy dedicated to the intersection of technology and social good. Jennifer has served as a senior staff member at both venture-backed start-ups and in the non-profit sphere. She currently works with organizations working to further the positive impact of technology.



Iain Henderson is Product Director at [Allfiled](#) a builder of personal data services for individuals. Iain is a



long term CRM practitioner and customer data specialist who has long advocated the need to build personal data services that work for individuals in order to complement the tools available to organizations. You can find Iain on Twitter at @iainh1.

Leyla Hill is VP Business Affairs and General Manager at [Hearts of Space](#), the long-running public radio music program and online music service. Her diverse background includes data processing administration (in the pre-PC heyday of mainframes) and business management, editing, and publishing administration. She currently oversees all business and legal affairs and customer service for Hearts of Space.



Mary Hodder is an entrepreneur, founder, user researcher, user advocate and early adopter. She founded [Dabble.com](#) in 2005 and she also founded a mobile app called “wellness mobile” to self track and share one’s own wellness. Hodder has worked with large and small organizations as an information architect and interaction designer, creating algorithms, and conducting user research in the form of usability studies, needs assessments and heuristics.



Doc Searls is co-author of The Cluetrain Manifesto, a business classic, and The Intention Economy: When Customers Take Charge. He is also Senior Editor of Linux Journal, a fellow at the Center for Information Technology & Society at the University of California, Santa Barbara, and an alumnus fellow at Harvard’s Berkman Center for Internet & Society, where he runs ProjectVRM, which coordinates development of tools for customer independence.



Steven Tulsky is Principal of The Benometrics Consulting Group, advising nonprofit organizations and emerging businesses in the areas of financial strategy, planning, and management. He enjoys lending his quantitative expertise to organizations that understand their clients and their services better than they understand their numbers. Prior to developing his consultancy, Mr. Tulsky held roles in industry including Chief Financial Officer, Director of Finance, Treasurer, and Assistant Treasurer of large, medium, and small public and private firms.



Joyce Searls is a serial entrepreneur with a varied background in the fashion, restaurant and real estate development fields. In addition to Customer Commons, she has multiple management and board roles, including Linux Journal and Project VRM. She also collaborates with her husband, Doc in their consultancy, The Searls Group.

