

BUSINESS DISCOVERY

Stakeholder interviews

- * Fact-gathering
- * Project scope interviews
- * Mission, strategy
- * Goals & key business objectives

Create the dream team

- * Expert consultant
- * Champion
- * Project leader
- * Project guides
- * Project support

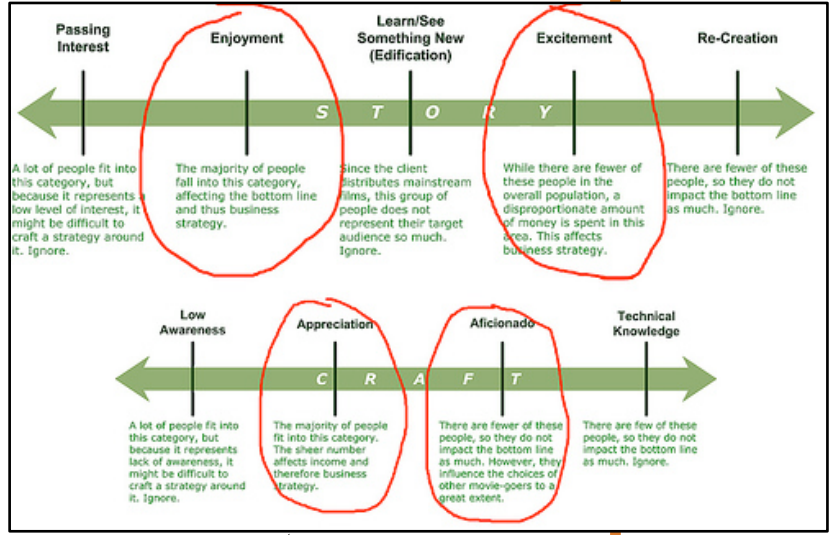
Secondary research

- * Patient satisfaction surveys
- * Surveys & logs

Stakeholder report

Team & roles

GOAL	PRIORITIZED KEY BUSINESS OBJECTIVES
Simplify Access to Information	1. Simplify Web Navigation 2. Have One Site 3. Make Things Consistent 4. Base Navigation on Audience Needs 5. Improve Look & Feel 6. Resolve Access to Large Information Stores
Support Decision Makers with Better Information	1. Support International Customers & Sales 2. Understand Users' Needs 3. Improve Depth of Technical Material 4. Tag/Purge Old Information 5. Support All Stages of the Buying Process 6. Expose More Good Internal Material 7. Give In-Depth Explanations/Transcripts for Presentations 8. Expose Governance Material
Save Company Resources	1. Allow Customers to Answer Questions Themselves 2. Allow Customers to Track Inventory, Shipping & Orders 3. Streamline Web Content Creation & Maintenance 4. Eliminate Product Sales & Marketing Materials 5. Allow Customers to See Their Satisfaction Data 6. Attract Qualified Staff



General Number of Possibilities	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
3	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
4	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
5	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
6	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
7	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
8	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
9	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
10	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
11	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
12	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
13	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
14	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
15	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
16	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
17	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
18	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
19	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
20	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1

Task	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
3	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
4	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
5	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
6	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
7	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
8	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
9	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
10	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
11	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
12	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
13	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
14	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
15	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
16	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
17	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
18	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
19	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
20	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1

Mental Model Project Plan



Mental Model - Bird's eye view

Deliverable

AUDIENCE SEGMENTATION & RECRUITING

Brainstorm tasks

- * List tasks: all the things people do when they use our product/service.
- * Tasks in verb + noun format

Identify performers

- * Identify types of people who do these tasks
- * Draw out similarities between types of people

Define audience segments

- * Brainstorm segment names
- * Vote & finalize names

Set research scope

- * Use stakeholder report to decide which segments to study
- * Review with stakeholders, project champion
- * Identify subset of the audience segments to study immediately, based on their importance to the business

Recruit participants

- * Hire recruiting firm
- * Write the screener
- * Coordinate schedules
- * Recruit participants

Task list

Grouped tasks list

Performers matrix

Audience segments

Recruitment screener

Interview schedule

Task means actions, thoughts, feelings, philosophies, and motivations -- everything that comes up when a person accomplishes something, sets something in motion, or achieves a certain state.

Group tasks

- * Group related tasks
- * Label groups
- * Adjust tasks, groups as needed

Group performers

- * Group similar patterns
- * Verify patterns & make adjustments

MENTAL MODEL SYNTHESIS

Set research goals

- * Review stakeholder report
- * Pinpoint what stakeholders are interested in
- * Goals, objectives
- * Advantages & difficulties

Prepare interview prompts

- * Assemble topics, reminders
- * List interview prompts
- * Write interview script
- * Get recorder technology

Conduct interviews

- * Perform non-leading interviews
- * By telephone
- * Face-to-face at health screenings, fairs
- * Behaviors and philosophies, not product preferences
- * Transcribe interviews

Analyze transcripts

- * Comb for tasks
- * Track desires & complaints
- * Group tasks into patterns

Build the mental model

- * Format towers and mental spaces
- * Convert the data into diagram format

Mental model diagram review

- * Review with stakeholders
- * Adjust based on feedback

Research goals

Interview prompts

Greeting script

Transcribe interviews

- * Hire transcriber
- * Make transcripts

Transcriptions

Mental model

Mental model findings report

Atomic Task	Task ID	Atomic Task	Task ID	Atomic Task	Task ID
Purpose: B2 Concepts from Industry Magazine	101A	P2N	NA	Because I read industry magazines, IT magazines have been mentioning business intelligence.	101A
Read industry magazines, trade press, and read vertical industry publications	102A	P2N	NA	I have lots of IT magazines, industry trade press.	102A
Read neutral trade newsletter vendor comparison reports	103A	P2N	NA	One to day through either weekly or daily newsletters, which are other business journals or industry tracking, as well as a couple of specific telecom comparisons so I had an idea of what new companies with that size. I used neutral sorts of sources.	103A
Use industry research newsletters to learn future developments in IT industry	104A	P2N	NA	I have these research things (Forrester and Gartner) by the newsletters. I'm interested in and following developments in data warehousing work. Came to attention to several of us in the IT dept was before the business.	104A
Actively survey and consider new technology from business and tech side	105A	P2N	NA	I survey technology and have an opinion about it, both from a technological side and from a business side.	105A
Research technologies and products to use	106A	P2N	NA	Reading with research to find exactly what technologies and products we need to survive in IT.	106A
Subscribe to and read vertical industry publications	107A	P2N	NA	There is no way to survive in the IT world without reading something.	107A
Learn from tech experts' responses to latest industry developments	108A	P2N	NA	Our tech people, their trade magazines, their experience (reviews, industry group meetings, one of the tech people right say, "This	108A

Atomic Task	Task ID	Atomic Task	Task ID	Atomic Task	Task ID
Purpose: B2 Concepts from Industry Magazine	101A	P2N	NA	Because I read industry magazines, IT magazines have been mentioning business intelligence.	101A
Read industry magazines, trade press, and read vertical industry publications	102A	P2N	NA	I have lots of IT magazines, industry trade press.	102A
Read neutral trade newsletter vendor comparison reports	103A	P2N	NA	One to day through either weekly or daily newsletters, which are other business journals or industry tracking, as well as a couple of specific telecom comparisons so I had an idea of what new companies with that size. I used neutral sorts of sources.	103A
Use industry research newsletters to learn future developments in IT industry	104A	P2N	NA	I have these research things (Forrester and Gartner) by the newsletters. I'm interested in and following developments in data warehousing work. Came to attention to several of us in the IT dept was before the business.	104A
Actively survey and consider new technology from business and tech side	105A	P2N	NA	I survey technology and have an opinion about it, both from a technological side and from a business side.	105A
Research technologies and products to use	106A	P2N	NA	Reading with research to find exactly what technologies and products we need to survive in IT.	106A
Subscribe to and read vertical industry publications	107A	P2N	NA	There is no way to survive in the IT world without reading something.	107A
Learn from tech experts' responses to latest industry developments	108A	P2N	NA	Our tech people, their trade magazines, their experience (reviews, industry group meetings, one of the tech people right say, "This	108A

Atomic Task	Task ID	Atomic Task	Task ID	Atomic Task	Task ID
Purpose: B2 Concepts from Industry Magazine	101A	P2N	NA	Because I read industry magazines, IT magazines have been mentioning business intelligence.	101A
Read industry magazines, trade press, and read vertical industry publications	102A	P2N	NA	I have lots of IT magazines, industry trade press.	102A
Read neutral trade newsletter vendor comparison reports	103A	P2N	NA	One to day through either weekly or daily newsletters, which are other business journals or industry tracking, as well as a couple of specific telecom comparisons so I had an idea of what new companies with that size. I used neutral sorts of sources.	103A
Use industry research newsletters to learn future developments in IT industry	104A	P2N	NA	I have these research things (Forrester and Gartner) by the newsletters. I'm interested in and following developments in data warehousing work. Came to attention to several of us in the IT dept was before the business.	104A
Actively survey and consider new technology from business and tech side	105A	P2N	NA	I survey technology and have an opinion about it, both from a technological side and from a business side.	105A
Research technologies and products to use	106A	P2N	NA	Reading with research to find exactly what technologies and products we need to survive in IT.	106A
Subscribe to and read vertical industry publications	107A	P2N	NA	There is no way to survive in the IT world without reading something.	107A
Learn from tech experts' responses to latest industry developments	108A	P2N	NA	Our tech people, their trade magazines, their experience (reviews, industry group meetings, one of the tech people right say, "This	108A

ALIGNMENT & STRATEGY

Create a content map

- * Include all the ways we serve people
- * All our offerings

Alignment

- * Align content map under mental model
- * Convert the data into diagram format

Do a gap analysis

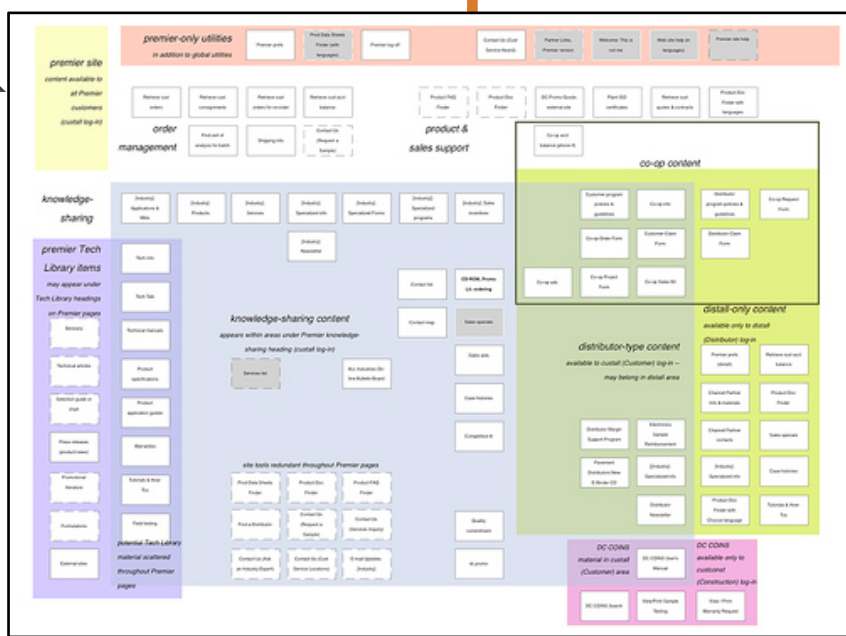
- * Look for obvious gaps
- * Look for scarcity of offerings
- * Look for opportunities to redefine, combine or augment existing products
- * Look at other trends in our domain

Print the mental model

- * Diagram of model and content map

Write gap analysis report

- * Compare competitors offerings
- * Pick out highest priority concepts to implement

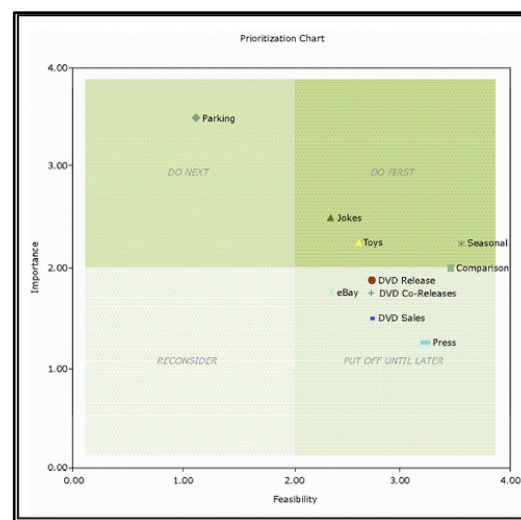
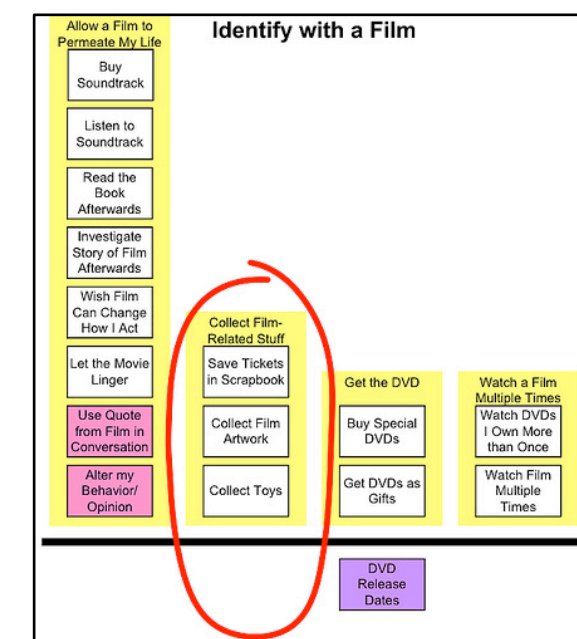


MENTAL MODEL

Adjust the mental model

- * Decorate diagram with trends
- * Adjust the model

Mental model diagram



STRUCTURE DERIVATION

Product structure

- * Derivation of the high-level product structure
- * Information architecture

Conduct tests

- * Test structure and labels with card sorting

Generate features & functionality

- * Product briefs
- * Requirements
- * Wireframes
- * Schematics

Nomenclature

- * Find vocabulary
- * Craft labels for the high-level product structure

Vocabulary for labels

Features & functionality