

USER RESEARCH: BDC PIPELINE/DASHBOARD IMPROVEMENT

Timeline

November - December 2024

Skills

User Research, User Interviews, Miro, Teams

Team

1 UX Design Specialist, 1 Co-op UX Designer

Project Context

What is the Business Development Consulting Team?

The Business Development and Consulting (BDC) Unit is the first point of contact for Central Agencies I&IT Cluster (CAC) clients and business partners seeking I&IT business solutions, advice, information or issue escalation support.

Background

The BDC team utilizes a Power BI pipeline and dashboard on SharePoint that filters initiatives based on various categories.

Information from this UX research will be given to next term's co-op students to start brainstorming and designing the new BDC pipeline and dashboard.

The Process

1. Identify

Research Goals

- Research Plan
- Recruitment Plan

2. User Interviews

- Moderating and notetaking sessions

3. Data Analyzation and Reporting

- Cleaning data
- Desk Research
- UX research report

Problem Statement

BDC wanted to enhance and develop new pipeline dashboards to be shared with CAC branches and ministry partners that will help support decision making, demand planning, and the holistic alignment of stakeholders around active initiatives. However, there were data gaps and inconsistencies in the CAC work intake process, which complicated the mapping of these dashboards.

How can we customize the BDC pipeline/dashboard to better support decision-making and initiatives alignment for our CAC and ministry partners?

Establish Research Objectives

What we wanted to learn?

The research focused on understanding the workings and challenges of the pipeline, the data captured, and the dashboard.

- **Understand** what data is valuable for an initiative and its purpose.
- **Understand** how the current repository pipeline works.
- **Understand** how users feel about the current dashboard and what they hope to see on future dashboards.

Identify Participants

We identified potential BDC pipeline/dashboard users as all stakeholders that work with BDC for work intake (primarily manager level). This included CAC branches and ministry partners to ensure comprehensive representation of their experiences/wants for the pipeline and dashboard.

Who we talked to

User group #1: CAC Branches (13 participants)

- Architecture, Information Management and Project Management Office (AIP)
- Business and Service Management Branch (BSMB)
- Cluster Applications Branch (CAB)
- Enterprise Applications Branch (EAB)
- IT Source

User group #2: CAC Ministry Partners (6 participants)

- Cabinet Office
- Treasury Board Secretariat (TBS)
- Emergency Management Ontario (EMO)
- Ministry of Finance (MOF)

Recruitment

Since we had limited time, we did not send out screeners for participant recruitments and instead went with **internal referrals**. I sent out emails to BDC's referred contacts of the approved user research plan, explaining our intent, scheduling interview times, and confirming participant's consent for recording.

Research Method

As we had limited knowledge about the intricacies of how BDC worked with different stakeholders, we decided that the optimal way to collect qualitative data of stakeholder experience would be through **semi-structured 1:1 or group interviews**. The flexibility of semi-structured interviews allowed us to follow up on different inquiries as the stakeholders had varying experiences and needs. Originally sessions were planned for 1:1 for more tailored conversations, however, due to scheduling difficulties there were occasional group interviews ranging from 2-4 participants. All group interviews had participants from the same group (branch or ministry) so that their feedback could be consolidated together. Sessions ranged from 30-45 min long, hosted on **Teams**.

Developing Interview Questions

We developed open-ended interview questions addressing our research objectives, and as well as a facilitator guide that was used for all interviews for consistency. We iteratively updated the questions based off our prior interview experiences, and customized some of them for specific ministry partners that had distinct needs/unique workflows compared to CAC branches.

Understand what data is valuable for an initiative and its purpose.

- *Tell me about how you track new and ongoing work.*
- *What are the main data points that you and your team would like to capture per initiative?*

Interview Process

A total of **19 stakeholders were engaged in 12 stakeholder interviews**. Due to time constraints and availability, we were not able to talk to one representative from each ministry's divisions.

I was either the moderator or notetaker for the sessions. Each session was joined by a BDC team member as a spectator.

★ My Moderating Experience

Challenges and lessons

Moderating stakeholder interviews occasionally presented challenges.

1. Managing user curiosity

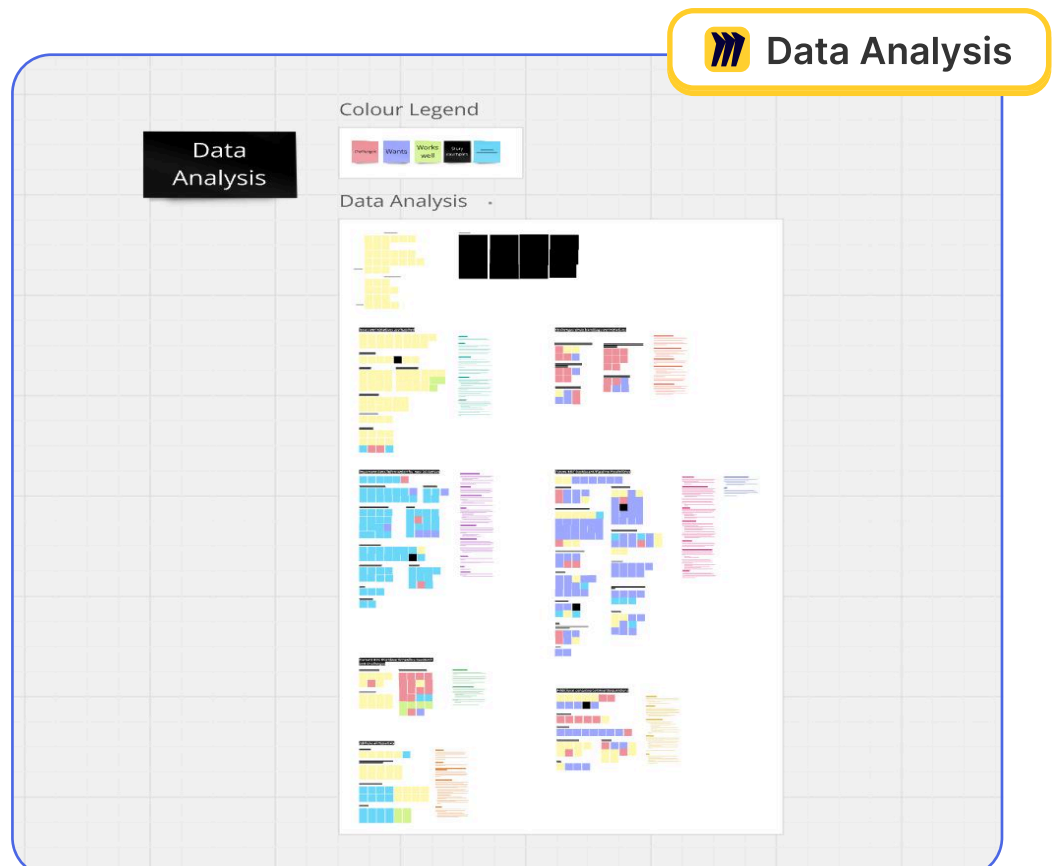
Sometimes participants were highly curious about the specific outcomes of the product, which occasionally disrupted the flow of the interview. Since our research was primarily exploratory at this stage, I learned to steer the discussion back to our research objectives by acknowledging their curiosity and reiterating the purpose of the session.

2. Handling questions beyond my expertise

Participants sometimes asked detailed questions that I couldn't fully answer due to my limited knowledge as a co-op student. To address this, I made it a point to clarify my role and the scope of the research at the start of the interview. If such questions arose, I would assure them that their input was valuable and that I would document their questions for the team to review. This approach helped build trust while keeping the focus on their experiences and needs.

Data Analysis

Interview notes were taken on **Miro** and tagged by the interview number. I conducted **thematic analysis** of all sticky notes through **affinity mapping** into main themes and subthemes.



Key Data Takeaways

What people are looking for: Timeline, Resource planning, Upcoming projects, Intersectionality, Budget estimation

Our research revealed that stakeholders believed the dashboard will have more use focusing on synthesizing and analyzing information collected to answer users' questions.

This can help with reporting and analytics of data, end of year status reports, fostering future thinking conversations about funding and resource allocation, and seeing branches and ministries' IT footprints.

Desk Research

Supplementary research methods

Additional research on existing reports made by BDC were conducted including:

- Quarterly updates for Ontario Internal Audit division (OIAD) & Central Agencies I&IT Cluster
- Executive briefings for Tax, Benefits and Local Finance (TBLF)

I looked at recurring initiative details shared with BDC stakeholder's in these reports and added them to the Miro board for consideration.

Final UX Report

User Stories

While completing the UX report (PowerPoint slideshow), we noticed that similar points were often repeated throughout sections. This was due to the interconnected nature of the BDC pipeline and dashboard, as the dashboard relies on pipeline data.

To address this, we restructured the report into a series of themed user stories. This new format reduced repetition of small details, provided a clearer narrative, and better connected the "what" (user needs and insights) with the "why" (underlying reasons and broader context). Themed user stories would also make it easier for future co-op students to understand and translate our findings into designs.

Impact

The UX research provided the BDC team with valuable insights into diverse stakeholder needs during the CAC work intake process, and connect them to actionable recommendations. Key takeaways clarified the desired features and functionalities for future dashboard enhancements, while a pipeline data points summary highlighted current data requiring consistent updates and identified missing data essential for decision-making and resource planning.

★ Reflections

Challenges and lessons

Looking back, I wish I had spent more time clarifying the BDC's specific goals for an improved pipeline/dashboard before diving into stakeholder needs. This would have allowed me to better align the wishes of both parties and create a stronger bridge between stakeholder feedback and organizational objectives during interviews and final reporting.

This project taught me valuable lessons about navigating ambiguity, honing my user interview skills, and conducting thematic data analysis!