Attendees: Bob O.
Date: Feb. 25, 2014 8:31AM PST
Title: Interview notes and questions for determining feature set

Questions:

1. History of current content
   a. Do you know if there are any customer study materials and where you might go to find them?
      i. I think in the past there have been customer study materials. Where would I go? I'd likely have to go to the right individual to find them and they would dig them up. I believe that the material exists in some form but is not easily accessible.
   b. If you are aware of the materials is the current format sufficient or insufficient for your needs?
      i. The material I'm thinking of is the old TPM fill out a customer interview approach, or more recently the stuff that Craig and the UX team has done. It can be somewhat focused and not as broad as I would like it. In terms of meeting with customers we don't need 20 people visiting customers. I think if we had some consistency with our formats it would help. Perhaps if we can divide and conquer topics. Maybe we should be visiting the customer once a half and then following up. So I don't think it is sufficient.
   c. CONCLUSION: There is a clear lack of awareness here regarding type of collateral and location.
2. Experiencing the content
   a. How would you like to explore the materials to get the best possible benefit?
      i. I would like to think that we would have some type of search. If it was a search type of approach, I could get several customers back based upon the criteria I was searching on. I think that flat files don't help me very much unless I can have a tool that pulls data out. Because if it is flat files I have to interrogate them manually. I'd rather submit some search terms and have the results come back that meet my criteria including when it was last updated.
   b. Do you imagine that some kind of visualization of the findings would be useful/helpful?
      i. Hmm. That's a good question. I haven't given that much thought. I'm just trying to think of a good example. Maybe you could visualize it like a mind map? It would allow a core set of customers that meet your criteria, and then the relevance trails off. Something that shows me

> how things linked together and their percentage of connectedness.

c. Are you familiar with Word/Tag Clouds and key term visualization? If so do you think they would be helpful?

   i. Yeah. I think that would definitely be helpful. Bottom line is that anytime you're trying to get through this type of data the quicker you can get to the information you need the better. With that type of visualization it should save me a hell of a lot time.

d. Are specific organization techniques useful/helpful such as content/key term by geography, time, and vertical/sector? Are there others than those mentioned?

   i. You know, I think that what I need to do is see more examples. Conceptually that sounds beneficial. I just don't have enough examples or things I can reference.

e. Do you imagine that you want to get to the content directly or are more summarized abstracts or key term visualizations a better place to start?

   i. Oh definitely at some point. Especially if it is an audio recording if it was smart enough it could take me to the time [sequence] where the words came from. Again this helps me not have to sit there and listen to the whole recording. I have some sort of [audio] index would be helpful. MS Word is a little more helpful because I can jump to a word by searching.

f. What platform is the best target for such an exploration system?

   i. I definitely want the web form factor. There is some flexibility I can access it at my desk in the office on my tablet while I travel. On my phone I could do certain things and then have it sync back to a central version which can then be picked up by other form factors.

3. Outcomes and consumption practices for the content

   a. What kinds of discoveries and findings do you anticipate are possible or even relevant?

      i. Uh, I think that one of the key things is what are the customer initiatives. This will help me better frame my products and directions accordingly. Level of investment from customers as in budget. Are they taking the time to look at competitors. This will help me determine which requirements are the most relevant. These kinds of outputs would be great! It would be better than the current state of affairs where we have to continually go back to the field and ask some of these data.

   b. If so what kind do you think are preferable or relevant?

      i. See above.

    c. How do you typically use customer study materials in your plans?
        i. One of the areas was things like the Command Director business plan to justify the business plan. This helps us tailor things in business plan and justify investment.
    d. If you do not how do you consolidate your own information to produce release, plan, other content?
        i. Yeah, there's the rub. My system is poor. I think that's something that I have to try to improve on in this fiscal year. I have to move past the fact that I have note taking applications on the iPad. Today it is a manual effort of scouring through notes. We even have a customer interaction Sharepoint site that you're supposed to go into and fill out customer interaction. So at a rudimentary level I have the tools. Right now I'm pretty terrible it is just the notes.
    e. CONCLUSION: There's definitely a need for these studies and collateral, yet personal organizational strategies are not as solid as they could be. Also there appear to be other customer study and interaction efforts which aren't connected. General usage is about better planning.

4. Are there other kinds of data to include in conjunction with customer study data/materials? If so can you describe the data?
    a. Um, I think that one of the things that come to mind is maybe some competitive information. If we can index that across say, this customer's interested in private to public cloud type capabilities and then bursting into the public cloud. And then based upon that information here's say Eucalyptus and then from a cloud based system the [sensitive] data is kept on premise, yet customers can burst out as required with the aim to protect sensitive information. Competitive information, Open source projects, use case… Especially with Open Source in the mix what are we going to build and what are we going to pick up from an Open Source perspective. PM may need to be a little bit more pushy to tell engineering on the usage of open source. Tools that help to gather these trends from customer make our planning more relevant. The ability to give this information to our engineers could save time.