

Attendees: Charles H.

Date: Feb. 28, 2014 1:10PM 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. Yes and I know that they are on the OTP Sharepoint, but I do have the links on my computer somewhere. I can even tell you the folder that I've saved those links in.
 - b. If you are aware of the materials is the current format sufficient or insufficient for your needs?
 - i. Hmm. I don't recall that they were consistent meaning that some really make sense and others don't. The ones that did wordclouds were more interesting to me because I could take visual stuff that helps me realize this was what I was looking for.
 - c. CONCLUSION: Has greater awareness of the collateral and immediate understanding of past/previous attempts to summarize with word clouds.
2. Experiencing the content
 - a. How would you like to explore the materials to get the best possible benefit?
 - i. So, I appreciated the fact that a lot of this got recorded, but there are hours of recordings. However I never have the time to listen to everything and the summaries exist, but did we miss something. The word clouds would help me identify which ones were interesting. Is it possible to search audio recordings that would be interesting.
 - b. Do you imagine that some kind of visualization of the findings would be useful/helpful?
 - i. Visualizations that I found impactful as of late: Boston Consulting Matrix models are very interesting, but not sure if this might be a proper/possible summary or not.
 - c. Are you familiar with Word/Tag Clouds and key term visualization? If so do you think they would be helpful?
 - i. Yes.
 - 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. I guess. The only reason that I say "I guess" is that when you consider geography when you drill down too much it may be less useful. I'd like to start from the aggregation across all geographies and then drill down.

- 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. It depends on whether or not I'm going into an area I don't know very well as opposed to this is a topic I understand and I'm going to go more grass roots.
Existing market: Bottom up, Emerging market: top down.
 - f. What platform is the best target for such an exploration system?
 - i. I don't care about how I'm going to consume it. The more mobility the better. I find I have more think time when I'm not bound to my desk.
 - g. CONCLUSION: Discussion included points about how to consume the content depending on the use case.
3. Outcomes and consumption practices for the content
- a. What kinds of discoveries and findings do you anticipate are possible or even relevant?
 - i. It should be used to help plan, validate, explain, etc. It isn't always to create something and there isn't really a predetermined usage.
 - b. If so what kind do you think are preferable or relevant?
 - i. Presentation becomes pretty important well maybe this is a part of messaging and about persuasion and influencing provided that the material is strong enough to speak for itself.
 - c. How do you typically use customer study materials in your plans?
 - i. I think today we use it too late because we use customer stuff after the fact after we've made decisions. Rather than using it to predict we use it to validate.
 - d. If you do not how do you consolidate your own information to produce release, plan, other content?
 - i. I'd have to ponder on that, I don't have a quick answer. I'd have to ask why aren't I using the existing body of work? Why doesn't the company avail itself to it?
 - e. CONCLUSION: There are different outcomes/outputs depending on the intended approach used to consume or generate additional collateral from the materials.
4. Are there other kinds of data to include in conjunction with customer study data/materials? If so can you describe the data?
- a. So if I looked at any sort of planning there are different elements you have to look at one is the market and your customer study materials another is your competition. I don't think we do a great job at competitive analysis. We don't do a good job at really analyzing what the competition is doing other than feature sets. The other dimension we could potentially look at is analyst

information. We'd need to put our interpretation on all of these data to help triangulate the collateral.

- b. **CONCLUSION: Competitive analysis called out as a weak point mostly at the macro/trend level.**