

Attendees: Robert S.

Date: Mar 11, 9:15AM PDT

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. Yeah we've got a variety of customer study materials on Diamond. Although I don't know exactly where they are posted. I usually go through Harry to get access to them. It is usually IDC, 451 research, etc.
 - b. If you are aware of the materials is the current format sufficient or insufficient for your needs?
 - i. I think they did a pretty good job for the Diamond effort. I think that they are relatively effective. In terms of the presentation, I think that we could do a better job in how it is mined presented and charted. This was likely a result of not being able to access the raw data.
 - ii. CONCLUSION: It seems as though he is confusing analyst data with company generated user interviews.
2. Experiencing the content
 - a. How would you like to explore the materials to get the best possible benefit?
 - i. I like to get the data in raw form not aggregated from analysts. I think when we did the customer interviews that raw data was helpful. However we didn't get the raw interviews and were left with the summaries.
 - b. Do you imagine that some kind of visualization of the findings would be useful/helpful?
 - i. Yeah I do. I think that some of the way the analysts are presenting in terms of histograms are helpful. Data sometimes stands out more if you can find the right way to visualize the data. Although if you don't have the raw data you may be stymied from doing proper visualizations.
 - c. Are you familiar with Word/Tag Clouds and key term visualization? If so do you think they would be helpful?
 - i. We were focused on using the data as a form of sentiment analytics in the past when I worked at analyst firms.
 - 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. Yeah that's what you try to get to. If you can get to linear regression models to predict the future that is what you

want to get to. However, this is hard to do, especially given that we need to be giving decisions to financial firms. However the challenge is that it isn't really possible to aggregate continuously the entire population of users. This leads to data/information that might be incomplete and therefore would result in inappropriate conclusions. Especially important for complete linear regression analysis.

- ii. **CONCLUSION: Visualization techniques are mentioned several times in this interview and in particular regression techniques are cited.**

- 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. I go both directions. I like data that helps me understand what I don't have in the data set. If I have a big source of data I want to know what intangibles aren't in the data set. Visualizations that can help me understand topics that are outside are important.
- f. What platform is the best target for such an exploration system?
 - i. I usually like it in an analytical platform like SPC or SAS. In terms of the actual consumption the device doesn't matter.

3. Outcomes and consumption practices for the content

- a. What kinds of discoveries and findings do you anticipate are possible or even relevant?
 - i. There's a couple of different ways you can use the results. You can resell the data to financial firms and technical vendors to help provide insight into customer sentiment. Data can also be sold to customers directly to help them get a better understanding of what's coming next from a technology/trend perspective.
- b. If so what kind do you think are preferable or relevant?
 - i. It is relevant for each of them, but the audience depends on the population of users included in the study. In terms of project Diamond there was a weighting towards the interviews done versus the analyst data that was used for validation.
- c. How do you typically use customer study materials in your plans?
 - i. See above
- d. If you do not how do you consolidate your own information to produce release, plan, other content?
 - i. Mostly through peer networks. I still have a lot of colleagues in the analyst and market research space. I'm having dinner with some folks tonight. Most of my

organization/consumption techniques are through peer interactions, etc.

- ii. **CONCLUSION:** Definitely a different approach to getting at the collateral and using for other purposes. His view is colored by past experiences as a financial analyst.

- 4. Are there other kinds of data to include in conjunction with customer study data/materials? If so can you describe the data?
 - a. You've got 3rd party market research, you've got the hands on data, you've also got sales for data from internal teams, I think you want to look at blogs especially of the competition. There are a couple of projects to get competitive information, but not social media.
 - b. **CONCLUSION:** Need to pull in other data sources.