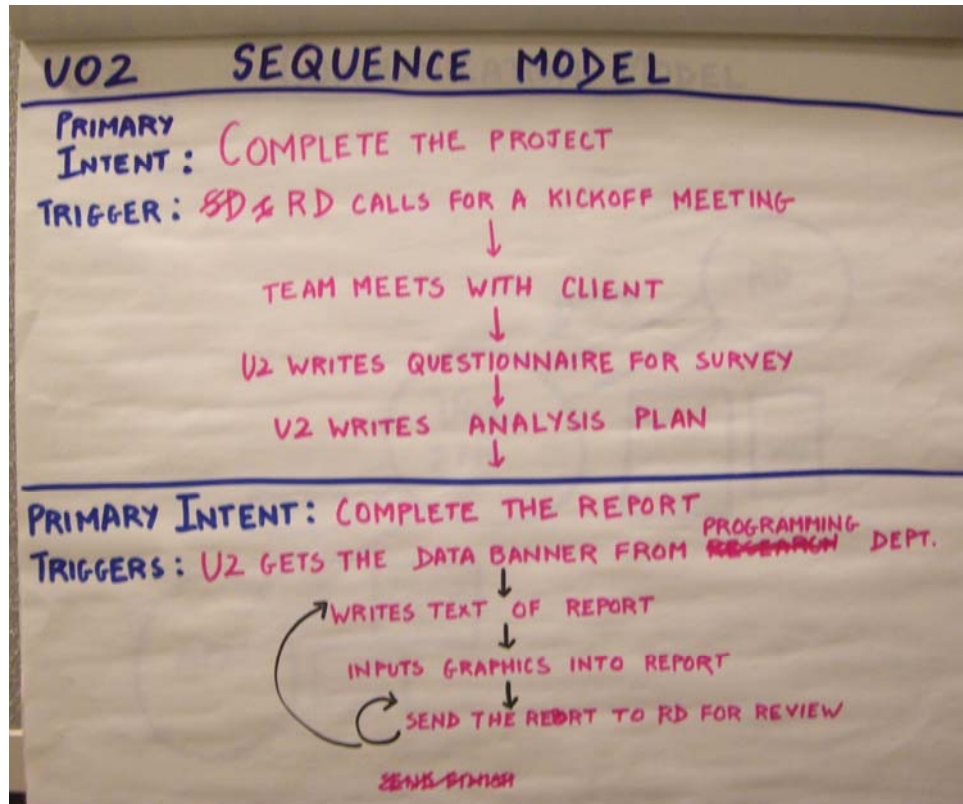


SI 501, Section 012: Assignment 4- Team Consolidated Model
uCentric (Anand, Baker, Bhatnagar, Chao, De)

1. Interview List

Interviewee	Position	Date	Interviewer	Note taker
U01	Project Manager (Global Life Science)	Monday, Oct. 1st, 2007	Anindita De	Gaurav Bhatnagar
U02	Project Manager (Healthcare)	Tuesday, Oct. 2nd, 2007	Gaurav Anand	Todd Baker
U03	Project Manager (Financial Svs.)	Wednesday, Oct. 3rd, 2007	Todd Baker	Anindita De
U04	Study Director (Energy)	Thursday, Oct. 5th, 2007	Gaurav Bhatnagar	Gaurav Anand
U05	Study Director (Financial Svs.)	Friday, Oct. 6th, 2007	Gaurav Anand	Gaurav Bhatnagar
U06	Project Manager (Energy)	Friday, Oct. 6th, 2007	Todd Baker	Tiffany Chao
U07	Study Director (Global Life Science)	Monday, Oct. 8 th , 2007	Gaurav Bhatnagar	Anindita De
U08	Study Director (Healthcare)	Wednesday, Oct. 9 th , 2007	Tiffany Chao	Todd Baker
U09	Director (Corp. Brand & Marketing)	Wednesday, Oct. 10 th , 2007	Anindita De	Gaurav Bhatnagar

2. Individual Models (sequence models for U02-U08)



U03-APM / SEQUENCE

INTENT: TO DO HER PROJECT

TRIGGER: SPM assigns her the project task.

NEW CLIENT

↓
MAKES SHELL FROM
SCRATCH

OLD CLIENT
(90%)

↓
PULL DATA FROM OLD REPORT
TO CREATE SHELL

↓
UPDATE STYLE

↓
GET FEEDBACK FROM PM

U04 Sequence Model

INTENT: Complete Report

Trigger: ~~Approaching Milestone Date~~ Informed that Data is collected

Data is verified

(Trigger)
PM sends back report

Recommends ~~writes~~ text for report (Annotates, ~~adds~~ Design ideas)

Reviews text for report

(Trigger)
When Report is finalized after feedback/ Review

send to client

Client Unsatisfied

Client satisfied

U05 - Sequence

Intent: Write analysis plan.

Trigger: ?

Write proposal

↓
Organize client kickoff meeting

↓
Go through questionnaire question-by-question

< Not enough time.

↓
Finalize report sections

↓
Analysis plan complete

↓
PM shell out report (start)

Intent: Turn raw data into finished data (PPT)

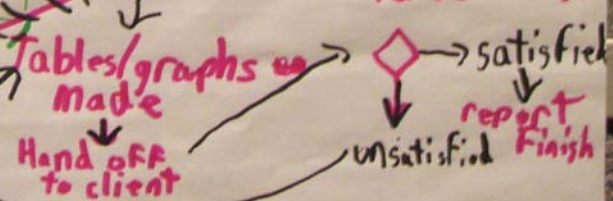
Trigger: Research Services informs U05 data ready, and data verified
Get data from Vinyaps

↓
Export data to Excel

↓
Export from Excel to PPT

Intent: Finalize report

Trigger: Analysis plan complete Data verified



SEQUENCE MODEL

U06

Primary Intent : complete the report

Trigger : data banner is complete



Create shell & put in statistical data into the shell.



put in statistical data into the shell



create graphs according to client specification



animating graphics

hands in the report (with the graphics) to study director



Study Director puts in the text



Final report delivered to client by Study Director

UO7 SEQ MODEL

Intent: ~~Completing~~ & Deliver Report

Trigger: Receiving Questionnaire from VP

↓
Create Analysis Plan

↓
Share Analysis Plan w/ Project Mgrs.

↓
Review Report Shell

↓
Pass Report Shell to VP for approval.

Trigger: VP approves Report Shell.

↓
Review Report Drafts.

↓
Pass Final Report to VP

⚡ Not enough detail!
- key questions missing

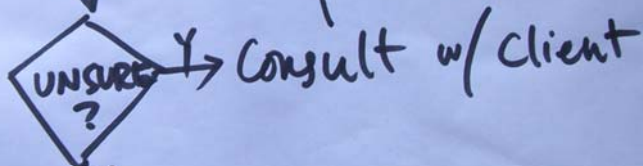
Recv. Report Drafts from PMs

U08 SEQUENCE

Intent: Finish the report.

Trigger: Informed of proposal.

↓
organizes kick-off meeting.



Get the questionnaire (from who?)

↓
Define Analysis Plan.

↓
Share Analysis Plan w/PMs

↓
Review Report/write text
↓
send Report to VP (in Portland).

3. Team Consolidated Sequence Model

MSI Reporting Process			
Trigger: Acceptance of project proposal	Overall Intent: Conduct proposed research and provide actionable recommendations based on data		
Activities	Intents	Abstract Steps: Strategy 1	Abstract Steps: Strategy 2
Finalize Project Planning	Make sure client and MSI Team are on the same page		
		Study Director (SD) organizes kick-off meeting to assess client needs as well as develop and share project scope with MSI Team	Study Director (SD) organizes kick-off meeting to assess client needs as well as develop and share project scope with clients and MSI Team
	Define fielding protocol	Client Contact (CC) develops Questionnaire to completely define data fielding	Project Manager (PM) develops Questionnaire to completely define data fielding
		CC reviews Questionnaire with Client	
		CC modifies Questionnaire if necessary	
Finalize Analysis Plan	Facilitate the process of converting the Questionnaire into a deliverable		
		SD gets Questionnaire from CC	
		⚡ BD: Not enough insight/ detail coming in with Questionnaire	
	Convert Questionnaire into Analysis Plan	SD analyzes each question in the Questionnaire	
		SD establishes report sections in the Analysis Plan	
		SD shares Analysis Plan with Project Managers (PMs)	

Activities	Intents	Abstract Steps: Strategy 1	Abstract Steps: Strategy 2
		⚡ BD: Not enough time/ thought put into Analysis Plan	
Finalize Report Shell	Create a structure to efficiently get data into final report		
			PM analyzes each question in the Questionnaire
		PM generates Report Shell slides based on Analysis Plan sections	PM generates Report Shell slides based on Questionnaire analysis
		PM inserts placeholder graphics into Report Shell slides based on Analysis Plan definitions	PM inserts placeholder graphics into Report Shell slides based on Questionnaire analysis
	Verify quality of our drafts	SD reviews Report Shell and provides feedback to PMs	
		PM modifies Report Shell based on feedback from SD	
		SD passes Report Shell to CC for review	
		CC reviews Report Shell and provides feedback to PMs	
			CC passes Report Shell to Client for review
			Client reviews Report Shell and provides feedback to CC
			CC passes Client Report Shell feedback to PMs
		PM modifies Report Shell based on feedback from CC	
Prepare the Report <i>Trigger: Data returned from Research Services</i>	Communicate findings and recommendations based on data		
		⚡ BD: Delay in receiving data from Research Services	

Activities	Intents	Abstract Steps: Strategy 1	Abstract Steps: Strategy 2
	Verify quality of our deliverables	PM verifies the data received	
		PM exports data from data banners (in Winyaps) to Excel	PM exports data from SPSS to Excel
		PM manipulates data in Excel	
	Provide client with actionable insights	PM populates Report Shell graphics based on data imported from Excel and client specifications	
		⚡ BD: Lack of graphics creation training amongst PMs	
		SD writes "Take-aways" for each slide based on graphical data representation	
Finalize Report and deliver to Client	Deliver our promised product to our client		
	Verify quality of our deliverables	PM passes Report Draft to SD/Research Director (RD) for review	
		SD/RD reviews report draft and <i>recommends modifications</i> if necessary	SD/RD reviews report draft and <i>makes modifications</i> if necessary
		SD/RD sends report draft to PMs to <i>make</i> modifications	SD/RD sends report draft to PMs to <i>review</i> modifications
			Client reviews report draft and provides feedback
		⚡ BD: Back and forth cycles can take a lot of time	
		Final Report passed to CC	
		CC delivers Final Report to Client	

4. Consolidated Sequence Model Description

We chose to do a consolidated sequence model because we were most interested in viewing the reporting process as a whole. This model clearly shows the report generating process in its entirety, from the initial client meetings through the delivery of the final report to the client. The Strategy 1 column describes the "main line" of the process. The Strategy 2 column describes alternative steps that happen less often in the process as well as steps that do not occur in the main line but are done by some users. We chose to span two job roles that intertwine throughout the process: Study Directors (SD, who oversee several projects at a time) and Project Managers (PM, who perform data entry and graphics creation for the report). This model reveals that the process is very collaborative and we would benefit by creating a consolidated swimming lane model to focus on the hand-offs that are occurring throughout the process. We can see that three of the five breakdowns in the model revolve around information flow between various roles. Additionally, this model demonstrates the importance of the artifacts created at the beginning of the process and how those artifacts shape the report. Although creating the Final Report is in the last half of the process after data is collected from the field, it is the Analysis Plan and Report Shell, and not the results from fielding that predominantly control the Final Report creation.