

Positioning

Problem Statement

Problem:	In trying to accomplish everything that a “planner” is used for (calendar, note-taker, address book, etc.), many users rely on multiple systems (since no one system delivers an optimal solution for all of their needs)—this leads to added complication and the potential for missed/lost information.
Stakeholders affected:	A vast majority of consumers—anyone who cannot rely solely on his/her own memory to organize/remember tasks, notes, reminders, lists, contacts, etc.
Impact of problem:	Consumers’ use of multiple unrelated (and sometimes poorly designed/complicated) systems increases user workload, increases likelihood of lost/missed information, decreases user efficiency, and leads to added stress & frustration.
Successful solution:	A successful solution will blend all the features of a “typical” planner into one program that is easy to use and aesthetically pleasing, so as to be welcoming to users, encourage exploration of its features, and encourage users to centralize their organizational tasks in one place. The successful solution will also offer a full range of advanced features (remote access, multi-platform syncing, etc.) which some users require, while ensuring that these features can be easily disabled/hidden by users seeking a more streamlined or “bare-bones” solution.

Product Position Statement

Target customer:	The target customer base is comprised of individuals (as opposed to groups/teams/whole companies) who have varying degrees of technical know-how.
Need or opportunity for customer:	The successful solution will provide customers with a streamlined, welcoming, centralized means of organizing their lives. It will replace a paper planner, electronic planners, and other improvised solutions currently in use with one program that is feature-rich enough to address all users’ needs, while customizable enough (i.e. features can be easily turned off/hidden) that users looking for a simple, uncluttered solution will not be overwhelmed.
Category of product:	It is an electronic planner program, offering a fully-featured calendar, note-taker, address book, and other features for the management of individuals’ time and information.
Key benefit:	The key reason to develop this product is to consolidate tasks for which users are currently employing multiple solutions side-by-side. We will attempt to address the varied needs of our users in one solution, offering all of the features they require in one place while offering some new innovations that may enhance their current methods of organization.
Competing alternative:	The competing alternative is users’ current systems, from which our product will have to offer compelling reasons for users to convert. Many of the current users we’ve interviewed are employing multiple planners (both paper and electronic) simultaneously, so in the case of these users the ideal solution would replace several current systems.
Primary differentiation:	Our product will be differentiated from current alternatives in several ways. First of all it will provide an easy means of performing multiple information-management tasks, allowing it to replace not one but several systems upon which a given user may currently rely. This will enhance efficiency and decrease lost/misplaced information. Additionally, our system will offer unique

	features such as voice prompting and recording, email integration, and other enhancements that aim to address common deficiencies of current solutions.
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Data Gathering Methods and Instruments

Our group leveraged a semi-structured interview process where each member interviewed two users of his/her choosing. An interview script was composed and agreed upon by the group. The script included 27 questions, starting with general questions and then branching into two sets, one geared toward task manager users and the other geared toward respondents not currently employing a task-management system. The interviewer recorded notes in the method of his/her choosing as the interviewees spoke.

A total of eight users were interviewed, ranging in technical skill level from novice through computer science master's degree holder. The interviews were conducted in informal, relaxed settings at a pace selected by the interviewee.

The first interviewee was recently retired and uses a "paper" system for keeping tasks manageable. This candidate was selected, among other reasons, due to comfort with technology and a willingness to try new technology among other reasons. The second interviewee is a thirty-year-old working professional who uses Apple's calendar app on the iPhone to track tasks. The interviewee was selected because this potential user would be using a task management system for both personal and professional use and has a moderate technology skill set. This interviewee expressed a desire for the technology to be efficient and intuitive without having to spend additional time.

The third subject holds a master's degree in computer science and works for a major hardware/software developer. She was selected due to her strong computer background and the possibility that she had tried a number of different solutions. The fourth subject is a parent of two young children and is technologically savvy. He was selected to represent a more heavily home-life-focused perspective in our sample.

The fifth interviewee also works in IT and was selected for a familiarity with technology. The interviewee was also known to have strong opinions about software options and design. The sixth interviewee's career has included a fair bit of project management -- a professional task organizer! The subject was selected both for his insights from a project management perspective, as well as to explore his needs in his current position in outside sales.

The seventh subject was selected as a competent computer and smartphone user who is known for constantly forgetting (or forgetting to charge) his smartphone. This subject is also a strong project manager and extremely detail-oriented. Our eighth subject was selected as the seventh subject's polar opposite in both personality and present career stage. This candidate is currently finishing his undergraduate degree in a non-computer centric field and doesn't even have a smartphone, but did express strong interest in the idea of electronic task management.

Personas

Name:	Julie
Profile:	Julie is a 26 year old apartment-finder agent living in Gold Coast. She has a bachelor's degree and has been in her current position for 3 years. Success in her career has provided her with a substantial income at an early age, and she is very tech-savvy, always craving the latest phones and gadgets. She is a "power user" of multiple programs, and thus not afraid to try new features/programs, but they must bring her quickly-realized increases in efficiency—she's not interested in frills for frills' sake. She has a new top-of-

	<p>the-line Android which she uses constantly, and she wants a program that works well on it, syncs with her laptop, and also is accessible remotely through a means such as the Cloud. Being an avid Facebook and Twitter user, she is not averse to having some of her information shared/accessible to others in a controlled way, but she is still very security-conscious and wants to know that any sensitive information she records is stored and accessed securely.</p>
Goals/Motivations:	<p>Between an unending stream of work appointments and numerous social/personal engagements, Julie is always on the go and often taking on new tasks/appointments faster than she can remember them. She would like a centralized, easily (& reliably) synced program that can combine her several current systems of recording appointments/tasks/reminders. She would like it to be accessible from anywhere (laptop, phone, remote web portal in a pinch), she is open to new and clever features (as long as they truly bring enhanced value/efficiency), and she is willing to pay (within reason) for the right solution.</p>
Frustrations and Pain Points:	<p>Julie spends most of her days on the road, which raises a number of issues. Her laptop is not up & running in the car, leaving her phone and sometimes paper notes as her primary means of interacting with her several current systems. While her phone planner will sync with Outlook, it does not sync with the other systems she uses, forcing her to double-check multiple places to make sure she's not missing anything. Also, she finds herself attempting to enter data into her phone while driving; while she knows this to be dangerous, she often does not pull over, and would like a means of note/task entry that could let her keep her eyes on the road.</p>

Name:	Jim
Profile:	<p>Jim is a 40 year old heating & air conditioning repair technician living in Aurora. He earned an associate's degree at a local technical college, and has been in his current job for 12 years. He is married and has three kids ranging in age from 3-10 years. Jim is always trying to move quickly through the tasks of his day so as to maximize time with his family, and he is always trying to save money. While he knows the basics of web-browsing and uses email for work (& to keep in touch with distant family and friends), he sees computers and technology primarily as a means to those basic ends, and will rarely seek out new technological solutions to problems if he knows other ways of getting the same things done.</p>
Goals/Motivations:	<p>Jim has used a paper planner for years, and while he has experimented briefly with one or two software-based planners, he's never seen a compelling reason to make him switch from paper. Jim has numerous appointments and to-do's, both for work and for his home/family life, and he acknowledges that his paper-based system is starting to make him feel like he's working hard instead of smart. But, in order for Jim to switch, an electronic solution will have to be extremely welcoming, easy to set up, simple to use, and reassuring in its operation/reliability. Jim recently got an iPhone at the encouragement of his family and co-workers, and likes the idea of using it to enter tasks and sync them with his computer, but will hesitate until he knows the syncing is absolutely reliable and not leaving any tasks visible on only one system. The bottom line for Jim is that the new system needs to be as easy and quick for him to use as his old system, while offering increased reliability and efficiency. Also, he needs to sense that potential very quickly after sitting down with the new software—</p>

	otherwise he's not interested.
Frustrations and Pain Points:	Jim's main motivation in switching to a new system would be to gain a system that travels well, and eliminates the potential for lost/misplaced/overlooked notes. Most of Jim's days are spent out on service calls, and he sometimes finds himself needing to make notes or adjust his calendar while driving, while in a customer's home, etc. When his paper planner is not with him, he resorts to other means (paper notes, basic notes in his phone), and worries he'll lose/forget them. Also, trying to keep his paper planner with him means that it's likely to get lost at some point, and that scares him—he wishes there was a way for his info to be stored redundantly (for example, in his phone AND his computer) so he's not dead in the water if one thing gets lost. That said, he has hesitations about web/cloud-based solutions (for any use—not just for his planner), because he has security concerns with such systems. Also, he's used to being frustrated with new pieces of software that are not immediately intuitive, and which make assumptions about settings, tools etc. without clearly and simply asking him ("I never asked it to do that...").

Requirements

As a user, I want an electronic planner that centralizes the important tools for organizing one's life such as a calendar, note-taker, task/list organizer, and contact list so as to optimize my efficiency.

User will be able to create a task or note directly from email, contacts or calendar. It is important to our design that users be able to create tasks from whatever window they are looking at.

While browsing the web, user will be able to easily create a new task which includes a link/bookmark to the current website, as well as a screen shot of the site if desired.

User must be able adjust security settings and enable/disable password-protected entry.

User will be able to set preferences with the help of a setup wizard.

User must be able to easily locate and contact support when confused or encountering an error.

User must be able to set up shortcuts and place these shortcuts where desired.

User will have software versions available for both his/her computer and mobile phone. While there may be slight differences in the appearance of these two versions, controls should look the same and be arranged similarly. This will help users to more quickly gain familiarity with the product and promote efficiency.

User will be able to create voice-to-text notes for situations where hands aren't free or where typing/text entry would raise safety concerns.

If a microphone is present on operating device, user will have option to create a voice recording and pin it to the created task. When no microphone is present, the option will be grayed out; but attaching other audio files will remain an option.

User will be able to sync information between all platforms. This function will be available both at scheduled intervals or on demand via an easily-accessible button.

User will have the option for remote (cloud-based) storage of data.

Process Retrospective

In looking back on our interview process, all team members agreed that our interview script had been a bit too long. While we had a solid and diverse set of questions, the set could have been pared down and structured a bit differently. We also realized that with certain subjects, some questions seemed redundant.

Our approach of starting with “generic” questions and moving to the more specific questions was theoretically sound, but raised some difficulties in practice. Some questions could elicit a line of thinking from the subject to which followup questions weren’t always ideally suited. Given another iteration, we might try “piloting” with one specific interviewee in order to get a feel for the flow of the questions and identify weaknesses therein. The knowledge gained in this exercise would then let us tighten up our questionnaire for use with the remaining subjects.

While we all tried to select candidates thoughtfully, we did so individually, which ultimately led to some gaps in our user sample. It could be argued that we did not have enough (if any) “true” electronic task management users--most of our sample used combinations of electronic / non-electric task-tracking tools. Perhaps a “pre-interview” of candidates would have allowed the team to optimize the balance of candidates. On the other hand, such a process could have skewed our results unintentionally. A larger sample size may also have helped alleviate this concern and offered greater user insight, but on a tight schedule, interviewing a meaningfully larger user sample may have not been possible.

Despite these concerns, our interviews were fairly effective in showing what a “typical” user would seek in such a system, and the most obviously recurring theme evident in our data was an emphasis on simplicity.

Once all interviews had been conducted, the data for each interview was provided to the entire team electronically. The next step was for one team member to analyze the summary results. While having one person digest the results and start the processing of requirements was a challenge, we felt it would produce the most unified “view” of the data on hand.

Overall, the team agreed that changes to our approach could have helped us better accomplish our goals and perhaps increased our efficiency. However, we feel that we received valid results and met our requirements/goals.

Conceptual Task Scenario

Viewing and creating a calendar event

Jim is an air conditioner repairman who occasionally takes calls directly from customers. Jim is on the phone with a customer who needs him to come out on Thursday to repair an air conditioner. Needing to see if he has any conflicting events for that day, Jim opens his task management application and selects his calendar. Once he views his calendar, he can see that he is available on Thursday. Needing to save all the critical information in his calendar, Jim creates a new event. There, Jim is prompted to enter the specifics of the event. Upon entering the information, Jim saves it and then views his calendar. Jim sees that his event has been successfully created and now shows on his calendar. He then exits the application.

Usability Goals

Goal:

Efficiency (in creating a task entry)

Question:

How much time/effort does it take to create a task entry?

Metric:

(End Time - Start Time) = Total Time for a Task Entry

How this will be tested:

All test subjects will be given the same test—to create a task. Evaluator will record start and end times with a stopwatch. Test group's times will also be used to calculate an Average Task Entry Metric (Average Task Entry Metric = Sum of all task entry times / Total number of task entries tested).

Goal:

Learnability

Question:

How easy is our software to learn?

Metric:

#1 (recorded number of inputs to reach desired end - smallest possible number of inputs to reach desired end)

#2 (Total test failures to complete task / Total tests performed) * 100%

How this will be tested:

While test subjects are creating a task (starting from Home Screen), the evaluator will count the number of button presses or clicks it takes a user to reach the point of entering a task. Our Quick Add feature will provide the shortest possible path to completion. We will subtract that shortest path's number of clicks from whatever recorded number of clicks our user made during his/her test.

We must take into account test subjects who are unable to complete the assigned task. Evaluators will record failures to complete, and we will determine a failure rate from the total number of tests.

Design Analogies (Interface Metaphors)

Analogy:

Paper Planner, a book in which tasks are entered in individual "lines" for daily tasks and then sorted by due date/time

Contributions:

In the "view event agenda" the layout is similar to a paper planner, having a daily agenda that is arranged by times of appointments and brief descriptions of each appointment. Users also have the option to delete (i.e. cross off in a paper planner) any appointment that has been cancelled or postponed.

Analogy:

Tape Recorder, a device on which a person records and stores vocal notes

Contributions:

After creating a new event, user has the option to create an event by typing the event details manually or by recording them through the microphone. Similar to a tape recorder, a microphone icon will appear. While the event is being created, a circle will rotate around the microphone icon (mimicking the rotation of tape), showing that the event is being recorded.

Interaction Types

Interaction Type:

Writing

How and Where Used:

Writing is primarily used when creating a new event or task. By using the touchscreen or keypad (on non-touchscreen mobile devices), writing is used to enter time, date, and any information that correlates to the event.

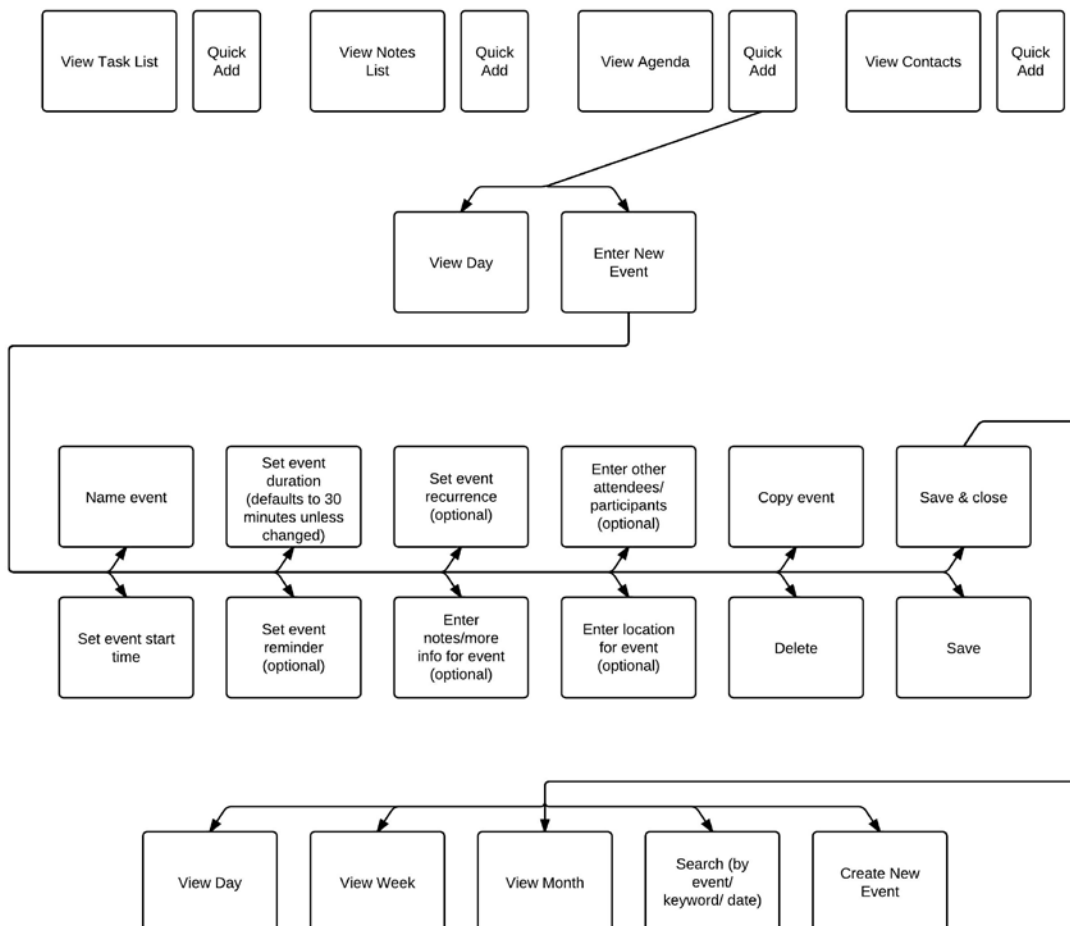
Interaction Type:

Manipulating

How and Where Used:

Manipulating is used in the first screen by selecting Quick Add to add (open/create) a new event. Manipulating is also used when deleting or postponing an event (if needed).

Navigation Map



Appendix

Final Interview Questions -

General “Intro” questions

1. How do you currently organize tasks or To-do items? If a program or mobile app, what is the name?
2. If you don't use an electronic task manager, why? What do you find is the hindrance?
3. What is your biggest complaint with your current system and why? Are there any things that your current project management system doesn't let you do that you wish it did?
4. Regardless of *how* you organize, do you organize for a single day, a week or as far out as you can?
5. Do you use your task manager/to-do list every day? What types of tasks or projects do you use your system to help you keep track of?
6. Would you prefer a cloud enabled/ remotely accessible solution over a mobile or desktop only version? Would this add utility to or hinder your task organization?
7. Which mobile platform do you use? {Blackberry, Android, iPhone, etc}
8. On your mobile platform would you use the web browser for task management or would you prefer a {native} application?
9. Thinking of computer software in general, what concept do you appreciate most in a program? Is there another program (doesn't have to be a planner—maybe better if it's not) whose interface/overall appearance you really like? What made you choose that program as your answer/what few things come to mind that make you like its interface so much?)
10. Thinking of mobile software, in general, what concept do you appreciate or want the most in a mobile app?
11. Have you ever used the “voice recorder” app or anything like it? Have you used a voice note taker and actually reviewed the notes?
12. Do you mind if a smartphone application automatically determines your location *with* your permission? Does that permission need to be one time or always?
13. Do you currently/Would you ever pay for a planner/task manager system? Why or why not?
14. What would get you to use your task manager/to-do list every day?
15. Whether you're using a paper or electronic planner now, if you switched to new software, would you have interest in more advanced features (team collaboration tools, drawing/graphing/table tools, for example), or do you prefer a product that “keeps it simple” with a basic feature set like calendar, note-taker, address book, etc? (basically replicates functions of a paper planner)
16. If you've tried several task-manager programs (or even different electronic or paper-based systems), do you remember what features made you settle on your current system initially?

NOW EACH PERSON ASKED ONE OF THE BELOW SETS OF QUESTIONS:

Questions 17-20 if person uses a software- or paper-based task manager(s):

17. Given that those features drew you to your current system initially, but now that you've settled into it with all its features, interface and drawbacks would you say that you are happy with the product? Specifically, why or why not?
18. Why do you use a [software-or paper-] based task manager/to-do list?
19. Do you use your system for personal or professional use? Or both?
20. How much time do you spend per day/ per instance entering information into projects/to-do lists?

Questions 21-27 if person does not use a task manager:

21. Why do you not use a task-manager/to-do list currently?
22. Would you ever use one in the future?
23. What would your primary focus be for your task-manager/to-do list?
24. What platform would you want your task-manager/to-do list to be on (i.e. computer, phone, paper)?
25. What features must the system have for you to use it?
26. Would you use your task-manager for personal or professional use? Or both?
27. What would get you to use your task manager/to-do list every day?

Raw Interview Answers From All Interviews -

General “Intro” questions

1. How do you currently organize tasks or To-Do items? If a program or mobile app, what is the name?

Frank A: Identify what needs to be done; figure out resources (Tools & resources); plan documentation depends. House = Pen and Paper; school might be word or excel. Fluid plan but will adjust as time goes on.

Frank B: Some in phone, email, notepad app, some on sticky notes (but really the main list in mind)

Pat A: For Work and Personal: Uses Outlook and creates tasks. Does a lot of driving and also cannot create tasks in Outlook from mobile device so handwrites notes on a notepad and transfers them from a computer later. Recently started his own company on the side and is learning to use Clarizen which is a business PM tool but is not familiar with it yet

Pat B: Uses a variety of systems because he likes various features in each. Outlook(Calendar), Awesomenote (Notetaking-iOS), 2Do (Tasks-iOS), Homeroutine (Home Cleaning task), Memento(Physical Training Log)

Maya A: Currently I use a piece of paper.

Maya B: Uses the calendar on my phone. iCalendar in iPhone.

Kyle A: Uses her blackberry's app but that app doesn't have a name AND Has big monthly paper planner at home--Has weekly pages & monthly pages AND takes a smaller paper planner with her, then transcribes major appointments to the big one—some stuff just stays in little one, and then she checks both of these & blackberry daily

Kyle B: He made Excel doc—has 4 columns—date, task, Completed?, and comment—Comment column for latest update .He's been using literally same worksheet for several years and it's now thousands of lines long

2. If you don't use an electronic task manager, why? What do you find is the hindrance?

Frank A: No specific knowledge of a universal enough tool.

Frank B: Never really gotten, to a state of dependency of one. Tried but never pulled in

Pat A: N/A

Pat B: N/A

Maya A: Not aware of the different electronic task manager and not familiar with apps.

Maya B: N/A

Kyle A: She's physical person “kinesthetic”—if I can have it physically here, she'll choose that—even her phone without physical keyboard (touchscreen) she doesn't like. Used to use Google calendar in school but now easier to just write it down—changed because likes to have physical task list that she could scratch things off—also didn't like Google having her info

Kyle B: Personal he uses phone memo tool (Android) for shopping lists & stuff around the house, to do for vacation, but interestingly for big family trips he uses Excel

3. What is your biggest complaint with your current system and why? Are there any things that your current project management system doesn't let you do that you wish it did?

Frank A: For small projects and school / house projects. Have what I need--- No Central system where it can be accessed anywhere. Organization b/c notes are scattered.

Frank B: Not sure there is a complaint. At times list becomes too long if written down so sometimes it's better to not write down the list. Then realistically, one never does all to-dos. So, if something is really important you'll do it.

Pat A: Can get many phone calls in a row (not in office) and can't enter quick enough sometimes. Can't access tasks in Outlook from his smartphone

Pat B: Wants it all in one place. Consolidate

Maya A: Pieces of paper are scattered all over the place and can't find the specific paper. Like to have new system on phone.

Maya B: Does not like how it does not remind you in continuous times. Have more alerts, though I like how it reminds from outlook and Google calendar. Doesn't like how you placing reminders everywhere, and wishes it was more in sync.

Kyle A: For blackberry app the view is too small—daily tasks don't have enough space – only shows you tiny bit of task's full text. She writes everything in a few places (like both books or both & blackberry) –she only puts non-private, high level general reminders in blackberry (privacy issue again)

Kyle B: He might like it to be web based that he could access it from anywhere—Excel doc is stored locally in his computer—also his Excel doc won't let him sort tasks by date (even using Excel's sort features will not do properly)

4. Regardless of *how* you organize, do you organize for a single day, a week or as far out as you can?

Frank A: Depends - for school it's a semester at a time.--- Housing project = whenever I have time. Business idea = could be out to a year.

Frank B: For a set event where there is a critical path, will organize key tasks. Smaller events just for the day if there is a lot of stuff.

Pat A: Far out

Pat B: Far out

Maya A: Usually for the day. But for calendar it's generally a year or plus (doctor's appts, etc.). Usually 365 days, keeps things on the old calendar until I get the new calendar and transfer dates/appts over.

Maya B: Puts it down as soon as she remembers the tasks so it could be for the day or for three months out.

Kyle A: Far out—she'll put move date far out on calendar & then work back to schedule tasks necessary leading up to that

Kyle B: Doesn't necessarily plan a certain distance ahead—every day in his Excel doc he copies incomplete tasks from day before (drags down anything not done to next day), updates comments, etc. So for example if one day he has 10 tasks and completes 4—tomorrow he'll mark the four complete, copy the 6 incomplete rows to the next day—So, the 6 then appear as To-Do's for the next day, while the four Completes live on in the doc, under the day on which they were completed, marked as Complete. --For planning out farther ahead, he uses Outlook calendar

5. Do you use your task manager/to-do list every day? What types of tasks or projects do you use your system to help you keep track of?

Frank A: Not every day.

Frank B: Yes -- constantly thinking about everything to do.--- Always done it.

Pat A: Yes. Personal. Sales appts.(Outlook) Billing and all task and projects for side company.(Clarizen)

Pat B: Work and Personal

Maya A: Yes (when working), now (retired) only major things that she would forget. Anything that has a deadline connected to it especially a deadline that she has trouble remembering. For work it was everything, now it's more major.

Maya B: Yes, every single thing she has to do for work

Kyle A: Everything—major events and small tasks needed to complete that task—activities she needs to do as well as things she needs to delegate to other people—she keeps reminders to herself to put what others need in a central (work) repository (separate from any of her planners) where her staff can see them

Kyle B: Pretty much anything he doesn't feel like remembering, which is pretty much everything (uses 3 systems incl phone, Excel, and Outlook calendar)

6. Would you prefer a cloud enabled/ remotely accessible solution over a mobile or desktop only version? Would this add utility to or hinder your task organization?

Frank A: yes - provided it easy to manage. Nothing major to use it.

Frank B: Cloud task

Pat A: Cloud for data protection

Pat B: Cloud. No

Maya A: Yes, she would like it to be on everything at all times. But if it requires extra steps then no, would only want it on the phone. If it's easy then yes.

Maya B: Cloud enable/remotely accessibly solution since she doesn't bring her phone everywhere.

Kyle A: Doesn't like cloud because of security—nothing online, but would use something on her own hard drive—might sync with her phone, just as long as it doesn't go online/become trackable by others (i.e cloud host companies)

Kyle B: Would like that—but does worry about security (interesting I didn't expect this from this person, but found this was mentioned in both my interviews)

7. Which mobile platform do you use? (Blackberry, Android, iPhone, etc.)

Frank A: Basic phone right now. Can't even check email.--- Does have a kindle fire.

Frank B: Android mobile device

Pat A: Windows phone

Pat B: iPhone

Maya A: iPhone

Maya B: iPhone

Kyle A: Blackberry

Kyle B: Android

OBSERVATION: All three major smartphone types (iPhone, Android, Blackberry) platforms AND a non-smartphone represented, just in our small sample

8. On your mobile platform would you use the web browser for task management or would you prefer a (native) application?

Frank A: No - too slow

Frank B: Prefer native; in particular on cell phone. consider the need for rapid interaction.

Pat A: App

Pat B: Native App

Maya A: Prefers an app for the task management system.

Maya B: Prefers an app for the task management system – the easier the better.

Kyle A: Native application—web browser “ticks her off” She used the Google calendar for one class for awhile, but then couldn’t get rid of a reminder (end dated it, deleted it, etc.)—but still got reminders auto which was annoying

Kyle B: Native app—doesn’t need to rely on reception/internet access—best would be able to be update sometimes when has time/internet avail, but still work locally when internet unavailable.

OBSERVATION: ALL prefer app on phone as opposed to browser-based and accessed through phone

9. Thinking of computer software in general, what concept do you appreciate most in a program? Is there another program (doesn’t have to be a planner—maybe better if it’s not) whose interface/overall appearance you really like? What made you choose that program as your answer/what few things come to mind that make you like its interface so much?

Frank A: Keyboard short cuts; wizards; Menu bar. Dived in to the more complex features.--- No macros. Trying to learn but not actively using.

Frank B: Simplicity, Speed, Tagging not particularly important.--- Prefer folders - b/c it follows her very structured mind-set and it creates a very specific folder. Otherwise it can get messy.

Pat A: Prefers large lists with minimal screen space for options. Has used Outlook for a long time. Very familiar.

Pat B: Prefers functionality over aesthetic. Couldn’t come up with specific software.

Maya A: Ease of use and when they automatically have short-hand (think like I think), so you can use it quickly.--- iCalendar, quickly store the information you need and it comes naturally (you don’t have to hunt to find things).

Maya B: User-friendliness, organize folders and not hard to figure out. Easy application to learn and remember.

Kyle A: Very easy to use easy to set up—doesn’t take long to figure out how to do what you need to do—aesthetically she likes rounded boxes as opposed to square—likes an almost “bubbly” feel to the appearance—doesn’t like reading owner’s manuals—when she bought a Mac, it was set up in 15 mins—nice, clean & clear --If they have a an online user manual, it needs to be worded in ways that are easily query-able—not much jargon/acronyms but layman’s terms that are easily searchable

Kyle B: Tools (1st question)—ability to find things easily, like with keywords

Appearance (2nd question)—likes Outlook, and that he knows where every button is (familiarity)--likes Excel and Sequel—notes that Open Office is similar, but doesn’t work as well as “the real thing” (cites example of having to save locally before can manipulate read-only docs, etc.)—likes no-frills—“give me what I need, present it elegantly, and let me get out of here”—give me simple—loves Google; hates car websites like Mercedes’ with its full minute of loading Flash and animated junk before getting you in

10. Thinking of mobile software, in general, what concept do you appreciate or want the most in a mobile app?

Frank A: N/A

Frank B: Zoom in and out; integration with other things.

Pat A: Ability to see tasks in Outlook. Would like to be able to handwrite notes (like on a tablet) and label them to be searchable later.

Pat B: Drag and drop to rearrange order of tasks in a to-do list.

Maya A: Speed and ease

Maya B: Mobile app where you can say something and it automatically records it in personal calendar.

Kyle A: Simplicity & usability—not needing to go through many Windows, which she defines as usable—Mapquest app on her phone she doesn't use because it has some quirks like when she selects a text box, it brings up map screen and then says Choose location, but immediately presents Favorites & other options SHE DIDN'T ASK FOR—She showed me and said “What are these for?”—she generally thinks it has an unwelcoming, unhelpful intro screen, and that keeps her from using it. She wants one Button that says “Click to Go” or the like

Kyle B: Mobile apps don't offer all the content of their PC counterparts—likes ones that still let you access all those tools without making them unreadable —likes that Facebook mobile still has all commonly used tools easily accessible .

By contrast, Cincinnati.com mobile app shows up as phone sized on an iPad—looks crappy & tiny in middle of big screen

11. Have you ever used the “voice recorder” app or anything like it? Have you used a voice note taker and actually reviewed the notes?

Frank A: N/A

Frank B: Not really.

Pat A: Yes. No.

Pat B: No. Lame.

Maya A: No, never

Maya B: No, never

Kyle A: When in grad school, she used school-provided lecture recordings (like COL) & even put audio on her iPod to let lectures play in the background while she did other tasks—she described as “learning even while I'm not” —just letting it play in the background to sink in (after she had actively listened to it once)

Kyle B: Not once

12. Do you mind if a smartphone application automatically determines your location *with* your permission? Does that permission need to be one time or always?

Frank A: Yes [I mind]

Frank B: Usually won't allow. Perhaps for a task list. So usually no but it depends on the context.

Pat A: No [don't mind]. One time.

Pat B: No [don't mind]. One time.

Maya A: Doesn't mind if finds her, but I don't want it to use too much power. Just one time.

Maya B: No, not at all and it should only be one time.

Kyle A: Would never want that—does not like having “tracking devices on me”—“What do they need my info for?”

Kyle B: No don't necessarily mind, but "with my permission" are key words—doesn't need to prompt every time, but he needs option to turn off/override.

13. Do you currently/would you ever pay for a planner/task manager system? Why or why not?

Frank A: Yes - Save personal time.

Frank B: No -- no way.

Pat A: Yes. Needed for organization.

Pat B: Yes. To make yourself more efficient.

Maya A: No, though someone could convince her to spend a small sum of money with good marketing (and she can see the use of it).

Maya B: No because she is satisfied with current system

Kyle A: No—Cost would make her mad—she already pays for paper planners—doesn't want to pay for a subscription. Might buy software that she would then own, as long as updates are free—doesn't want software to "poop out after a year and need an upgrade." She would ideally like a planner program/app to be free—she'd like it to not cost extra after she's already paid for the device it's on.

Kyle B: Doesn't pay now—has for work. Would do everything in his power to avoid paying, because there are plenty of open source or very cheap planners out there—"You'd really have to blow me away to get me to pay anything substantial."

14. What would get you to use your task manager/to-do list every day?

Frank A: If reminders happened.

Frank B: Already use it every day.

Pat A: Already does

Pat B: Already do.

Maya A: Already use it every day, when she has a lot of responsibilities and feels like she is forgetting tasks.

Maya B: Currently already use it every day.

Kyle A: Does use it every day.

Kyle B: Just waking up.

15. Whether you're using a paper or electronic planner now, if you switched to new software, would you have interest in more advanced features (team collaboration tools, drawing/graphing/table tools, for example), or do you prefer a product that "keeps it simple" with a basic feature set like calendar, note-taker, address book, etc? (basically replicates functions of a paper planner)

Frank A: Yes

Frank B: Focus with feature need but may check on new features.--- Tried to use adv. features of things like collaboration but it didn't work out.

Pat A: Advanced options - attach a variety of files to tasks.

Pat B: Advanced features.

Maya A: Rather keep it simple, but likes the idea of having other people interacting/collaborating on it.

Maya B: Simple is best since if it's complicated then she won't use it, but wants a voice recorder.

Kyle A: Likes the idea of being able to draw—likes being able to draft things/helps her think. Not into others –has team collaboration tools through her employer so doesn't need her own.

Kyle B: He likes simplicity, but might like other tools if you don't bombard him/"beat him over the head with them"—then might find them handy.

16. If you've tried several task-manager programs (or even different electronic or paper-based systems), do you remember what features made you settle on your current system initially?

Frank A: N/A

Frank B: "Out of milk" - No features stood out. Out of milk tracked pantry items and it'd add things to your shopping list but never uses features. Too much work.

Pat A: Used Outlook from early on through employer.

Pat B: Outlook was forced through company. Awesomenote- clean interface, Moment-very specific use, 2Do- Task-in-task feature, Homeroutine- has premade templates.

Maya A: N/A

Maya B: Reminders and free

Kyle A: Likes being able to see monthly and weekly—likes being able to see long term & short term to have idea of when things need to happen

Kyle B: Availability & familiarity with programs—not opposed to looking at new ones, but these were what he had and knew. Was already using Excel, and said, “hey I can do my to-do list in here”

NOW EACH PERSON ASKED ONE OF THE BELOW SETS OF QUESTIONS:

Questions 17-20 if person uses a software- or paper-based task manager(s):

17. Given that those features drew you to your current system initially, but now that you've settled into it with all its features, interface and drawbacks would you say that you are happy with the product? Specifically, why or why not?

Frank A: N/A

Frank B: N/A

Pat A: Happy but still missing some features(mobile access to tasks).

Pat B: Happy but would prefer consolidation.

Maya A: No, doesn't have a designated spot for to-do notes so she forgets she wrote things down. She says she does not have a good system.

Maya B: Yes [happy] because it does what she needs it to do.

Kyle A: It's ok, but she'd like to see it graphically—would like timelines/ability to see things in a timeline way (bars of different lengths/overlapping according to dates/duration of various tasks)—she settles on her current system, but would like at least that additional ability—also gets screwed up when doesn't keep things in sync –sometimes writes on a scratch paper, but not in either planner, and then those papers get jumbled together/lost.

Kyle B: Yes, but he's creature of habit and this is easy---he's too set in ways to look for something new right now but not averse , but nothing big enough is wrong with old one to push him out of it—again would need to really impress him to get him to switch

18. Why do you use a [software- or paper-] based task manager/to-do list?

Frank A: N/A

Frank B: N/A

Pat A: Fears loss of data. Can access from any computer. Likes cloud storage.

Pat B: Because he can't keep track of everything.

Maya A: Historically, started using paper based task management system before it was available from computers/mobile. What she had available and got comfortable with that system.

Maya B: It is easier to remember things versus writing things down (since she said she has horrible handwriting).

Kyle A: Because she has so much going on that there's no way she can remember everything—"I can handle a lot of balls in the air, but when 14 goes to 27 *balls at once, something's going to drop & I can't let that happen."

Kyle B: He hates paper—it's messy & you lose it—also ability to find/re-create things is important to him; he can find what happened with a task, when he took it off his list and why—could do this with paper but would be harder & he'd have a cabinet full of paper—also likes things neat (mistakes not scribbled out etc.)

19. Do you use your system for personal or professional use? Or both?

Frank A: N/A

Frank B: N/A

Pat A: Both

Pat B: Both

Maya A: Personal (but when working both).

Maya B: Both

Kyle A: Both

Kyle B: He uses all 3 for both sometimes—might put "Pay the bills" (personal) on his professional planner, etc.

20. How much time do you spend per day/ per instance entering information into projects/to-do lists?

Frank A: N/A

Frank B: N/A

Pat A: 1 min per entry/ 20 min per day

Pat B: 1 min per entry / 5 mins per day

Maya A: Very small amount, to her it's a waste of time to spend that much time on it. She uses it to jog her memory, so she abbreviates and uses short-hand most of the tasks.

Maya B: Ten minutes, she prefers it to be less time but okay with the time.

Kyle A: Max of 30 mins total per day —she does it as it happens—has bad short term memory and needs to write things down as they happen—so just writes in it throughout the day & looks in throughout today, unless something sidetracks her ("a fire" springs up that needs attention now).

Kyle B: Few seconds per entry. He uses two screens and his To-Do's are just about ALWAYS on top on the second monitor all day—always in front of him, but very little time writing.

Questions 21-27 if person does not use a task manager:

21. Why do you not use a task-manager/to-do list currently?

Frank A: N/A

Frank B: "Why keep in mind" - Organizing because there is localization.

Pat A: N/A

Pat B: N/A

Maya A: N/A

Maya B: N/A

Kyle A: N/A

Kyle B: N/A

22. Would you ever use one in the future?

Frank A: Yes

Frank B: Nice to have but never mission critical. Would be more likely to use if cloud enabled but wouldn't pay for it.--- Context sensitive. If on work laptop pulled up work tasks. phone tasks more focus on "on the go".--- "Pin an email to a task".

Pat A: N/A

Pat B: N/A

Maya A: N/A

Maya B: N/A

Kyle A: N/A

Kyle B: N/A

23. What would your primary focus be for your task-manager/to-do list?

Frank A: Resource coordination. Reminder

Frank B: Various and contextual. Could be a vacation plan or work tasks. Depend on what is front-and-center.

Pat A: N/A

Pat B: N/A

Maya A: N/A

Maya B: N/A

Kyle A: N/A

Kyle B: N/A

24. What platform would you want your task-manager/to-do list to be on (i.e. computer, phone, paper)?

Frank A: Windows / Android

Frank B: Cloud would be most likely.

Pat A: N/A

Pat B: N/A

Maya A: N/A

Maya B: N/A

Kyle A: N/A

Kyle B: N/A

25. What features must the system have for you to use it?

Frank A: Easy to enter task - if not may stop using.--- Accessible from other computers (cloud enabled but easy).--- Web Browser / App doesn't matter

Frank B: Keeping task in mind is a good brain exercise. So possibly logic puzzles and such might help.

Pat A: N/A

Pat B: N/A

Maya A: N/A

Maya B: N/A

Kyle A: N/A

Kyle B: N/A

26. Would you use your task-manager for personal or professional use? Or both?

Frank A: Both, as long as it'd be helpful for both.--- Recognition of overlapping tasks. So if things are not related and one cloud/should be pushed it should warn.

Frank B: Most likely personal.

Pat A: N/A

Pat B: N/A

Maya A: N/A

Maya B: N/A

Kyle A: N/A

Kyle B: N/A

27. What would get you to use your task manager/to-do list every day?

Frank A: N/A

Frank B: Location specific thing might.--- Tangibility--- "crossing things off is satisfying"--- Easter Egg or random reaction to "completing task"

Pat A: N/A

Pat B: N/A

Maya A: N/A

Maya B: N/A

Kyle A: N/A

Kyle B: N/A