July/October 2004 Volume 3, Issue 4

June Event with Dr. Sheryl Ehrlich

Driving Product Development via User Research

By Greg Cohen

Dr. Sheryl Ehrlich, User Research Manager at Adobe Systems, spoke at the June 2004 meeting of the SVPMA on Driving Product Development via User Research. Dr. Ehrlich explained how user research plays into development at Adobe and the varied methodologies her group employs. She illustrated many of her points through a series of case studies.

Dr. Ehrlich joined Adobe four years ago and was the first member of the user research team. She has since built the department to 18 employees. Prior to joining Adobe, she was a member of the research staff at Interval Research. She received her Ph.D. in Cognitive Psychology from the University of California at Berkeley.

The User Research group works collaboratively with Product Management, Design, and Engineering to conduct systematic research about Adobe's target users. Adobe has a wide range of products targeting a varied customer base made up of corporate users, consumers, video specialists, and creative professionals. This means there are more products than the User Research team can handle. Dr. Ehrlich is pragmatic in her approach to this challenge. She focuses on maximizing what they have and often bypasses formal research methods that are not always practical. One of her main focuses is to get beyond usability and move the research earlier in the design process where it can have the most impact.

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Top 10 Tips for Writing a White Paper

By Nigel Hall
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Writing a white paper is not rocket science, but it is no walk in the park either. If you are a product marketer, engineer, or SE, and you are about to start a white paper project, these tips might help.

Tip #1—Writing is a Process

No matter how well you write, and no matter how much you love writing, you will not write a good white paper in one draft. It is almost impossible.

Writing is a process. It begins with a first draft and progresses, through many edits and revisions, to a finished piece.

Rather than try to get everything right the first time, focus on writing down everything you know about the subject. Get it out of your head and onto paper - or laptop, desktop, etc..

At this early stage in the process do not concern yourself with

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Career Development: An Interview with Brad Maihack, Director of Finance, HP, Open View Software

By Monish Pahwa



Brad Maihack, Director of Finance, HP, Open View Software

SVPMA is a non-profit association for Product Managers in Silicon Valley and around the San Francisco Bay area.

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• Topic: What does it take to be successful

BM - There is a certain macro-level economic change that is taking place. Knowledge-based/ Technical workers are becoming less expensive as these talent pools move to places like India and China. The fundamental underlying cost structure advantages of these reasons and the quality of the technical talent puts the equivalent US talent pools at an **absolute disadvantage**.

Compounding this pressure in SW engineering and other technical disciplines is the fact that these regions of the world are themselves emerging as large players in driving overall market growth for technology-based products and services and therefore the need to have regionally oriented innovation teams to serve those unique market needs for products and services.

As a US worker in one of these "threatened" areas a number of new skills become paramount in an effort to survive and thrive. What are these new "survival" skills that help position one for long-term success in a technical career? They include:

- ► Flexibility skills; ability to quickly and effortlessly shift between assignments and the difficulty of those assignments,
- ► Collaboration skills; the ability to synergistically and efficiently interact with a wide-range of people regardless of their cultural, technical or interpersonal orientations.
- ➤ Creativity skills; the ability to generate novel and valuable ideas within the context of the business and one's work assignments (a skill leveraging one's unique life experiences, technical skills and educational training).

When looking to hire new additions to a team, the current hiring manager assesses these areas in the following priority order:

- Intelligence and base technical training/education (if you don't pass this first step your out of luck... it's a minimum requirement to be considered),
- 2. Flexibility (once you've got the raw technical and intellectual horsepower, can a hiring manager rely

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on your ability to be plugged into any appropriate assignment),

- 3. Collaborative (once you're plugged in, are you going to be a source of creating a synergistically powerful team or are you going to be the one that drags the team and the process down from accomplishing things greater than any one person on the team? To keep one's self humble, a good reminder is: everyone around you already knows what you need to know, and you know the rest!
- 4. Creativity (can you think out of the box, make connections and contributions that help discover and stimulate ideas about new and valuable opportunities; in regards to new products, services, ways to solve problems, ways to work effectively and efficiently, etc.

Differentiating yourself along these dimensions gives you a meaningful way to differentiate your talents for long-term success in your professional career.

• Topic: Getting outside the box

BM - I think we get entrenched with the scope of fundamental education. Enabling activities that diversify one's experiences, skills and connections are the key. Seeking opportunities like: internships, arts, clubs, networking, or starting your own business. All of these experiences grow one's collaboration skills, creativity and flexibility.

Particularly with companies, like HP, we are putting tremendous pressure on colleges to become more inter-disciplinary. There is a continual push to develop a student's ability to think outside the box.

● Topic: How to get <u>ANY</u> job?

3 is the magic number

BM - Every human being has three unique skills or qualities that differentiate them from everyone else. . .I am convinced of this. Between human interests, passions, perceptions, technical skills, social/emotional

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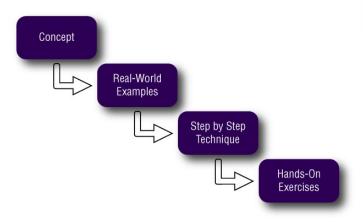
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Workshop Format



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behavior, religious identifiers, everyone has three.

Now, these are qualities that contribute value in business terms. The focus should be determining what they are.

Don't wait to be interviewed...

BM - Students, and professionals, fall into this trap almost unnecessarily. Just sitting there and answering questions per protocol. The strategy should be to interview the interviewer! ASK QUESTIONS! What has worked? What hasn't worked?

With this knowledge in hand how do your 3 skills mesh with what they need?

Big Picture

BM - Your global environment is changing. Recognize we are moving to a more service (less routinized) economy . . .But you still have 3 skills.

• Topic: Not pursuing your passions

BM - It is just a dead end. The way you find your pas-

sion begins with your personal vision statement . . . finding those core drivers inside of you.

In addition to developing great skills and abilities in being flexible, collaborative and creative, it's always a smart idea to follow your passions. Your passion in and around what you do is the fuel that keeps you fully engaged in both life and career.

Topic: the success of Networking

BM - What you have learned from career centers, college courses and the many books have helped you build a strong base that you add and subtract from as you go through your career. Think of this initial base as a square block of granite...solid yet square and having sharp edges...traits that don't make for much of a base to "roll" efficiently down one's career path. Networking with others more experienced and wiser than yourself allows you to harvest the knowledge of others, rounding off the edges of this block.

Once you are rid of the edges you begin to resemble a well honed and rounded sphere and now roll quite nicely

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Using "Themes" to Focus Your Product Releases

By Brian Lawley

Oftentimes your team will have far too many good ideas to implement in the next version of the product they are working on. One technique that can be used to focus their efforts and simplify the process is to use themes.

This typical product planning process of gathering data and delivering an MRD/PRD presents 2 challenges:

- 1. How does the Product Manager prioritize, rank and make sense of what sometimes amounts to hundreds or thousands of feature requests?
- 2. When new features are proposed after the functional spec and schedule are frozen, how can they be evaluated to determine whether it is reasonable to consider risking the schedule to include them?

Using a theme for your product can make both of these dramatically easier.

To create a theme take the original list of feature requests and begin to classify them into similar categories to see if any trends emerge. It might be that the majority of requests are for product stability or for increased performance. There might be a trend towards better security

in the product, or a trend towards multi-user collaboration. The key is to identify whether there are one or two high-level categories that have a large number of features that fall under them.

If you can identify one or two, then you can go to your team and propose using a theme for the release. Your theme might be "Security and Performance", "Secure Collaboration", "Extreme Ease of Use" or something else in line with what you are trying to accomplish. Come up with a good name for it and then meet with engineering and other groups who have a stake in the product and get them to buy into this as the primary theme for the product.

So why go to this extra work? There are many reasons. First, writing the MRD or PRD will be far easier because you'll have a focal point around which to make decisions and tradeoffs. You'll have some context for making your high-level decisions about what is in and what is out of the release. Second, when one of your engineers or salespeople insists on adding a new feature late in the development process, you can ask whether it

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falls under the theme of this release. If it does, maybe it should be considered. If not, it is much easier to defer it to one of the next releases. (you may even want some high-level theme names to use as placeholders for upcoming releases as well so that people can see where their deferred suggestions might fit into the future product roadmap).

I have used this approach several times as a Product Manager with great success. One product that I used themes on was an all-in-one Internet appliance for small businesses named the Whistle InterJet (server, router, etc.). The theme for one of the releases was "Total Control", which included being able to monitor and control website usage by employees, perform basic spam blocking, and limit the hours of usage of the device to business hours. When new feature requests came in we as a team could immediately ask "Does this fit under the theme of Total Control?" If so, then we evaluated whether it was worth risking the schedule and what the

resource implications would be. Oftentimes the team was much more understanding if their feature wasn't included because they saw that it didn't fit in with the theme, yet they could see where it would fit in the future.

Of course, not all of the new features will fit cleanly under the theme you choose. There will be some required features that have to be put in even if they have nothing to do with the theme (bug fixes, must-have requests to close deals, competitive pressure, etc.). But using this approach will help your products and team to stay more focused and on track, and will result in a higher likelihood of meeting the schedule and delivering a great product.

Brian Lawley runs the 280 Group, which provides handpicked Marketing and Product Management Consultants and Contractors to help clients define, launch and market their products more effectively. Visit <u>www.280group.com</u> or call 408-832-1119 for more information.

Annual SVPMA Picnic



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down the path of your choosing.

Isn't it time to focus on building your core 'survival" skills and rounding off those edges? I think so!

• Brad's Professional Background:

Brad's career at Hewlett Packard has spanned 27 years. Brad is currently the chief financial execu-

tive for their Open View Software Business Unit. Prior to his current position, Brad held Controller positions in a broad range of HP BU's.

Monish is a double major at San Jose State University. A senior majoring in Marketing and Management Information Systems, Monish is looking to make a splash in the High Tech marketplace. Originally, from Mississippi, Monish now resides in Fremont, CA.

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structure and logic. There will be plenty of time to make changes during the editing process.

Outlines are often helpful. But, don't be afraid to throw it out if it doesn't work for you.

For excellent insight into the writing process, and a reassuring read when plagued by doubt, find William Zinsser's book "On Writing Well." You do not need to read the whole book. Chapters 1, 2, and 3 are short and a good place to start. After you have your first draft in hand read chapters 4, 6, and 7. And, as the piece begins to look like it is finished, read chapters 8, 9, and 10 - and 20 if you really start enjoying yourself.

Tip #2—Writing Should Really be Called Editing

Now that your first draft is complete the work begins. Writing is 2% creative thought and 98% editing.

Expect to revise your paper upwards of 20 times before it is complete. If you want to track your edits try renaming your document each time you complete one revision cycle. Start at blah_blah_blah_D1.doc and increment as you make each pass through the document.

Tip #3—Be Fearless

You may find that you get stuck, during the editing process, because you get emotionally attached to your words. This is not unusual but it is time consuming. When you find that you have spent hours, perhaps days, turning your paper upside down in an attempt to hold onto a cool phrase, a clever metaphor, or a witty joke, then you are here.

The answer is to be fearless. Delete anything in your paper that appears too clever, too funny, or extraordinarily literate. You can do it now, or several days from

now. But, one way or another, those words will not make it to the final draft. So save yourself some time and be fearless.

As a rule of thumb, never use a metaphor that you have seen used before and avoid humor. It takes a lot of skill to be funny. It is worth remembering that a white paper is an educational piece. Your audience does not expect Hemmingway. They will be very happy if the writing is clear and concise.

Tip #4 - Don't Sweat the Small Stuff

Ignore punctuation, spelling, grammar, and usage rules in your first few drafts. There is no sense spending time dotting i's and crossing t's when half of the paper is going to be thrown out and the other half completely rewritten!

Tip #5—Keep it Simple and it will be Readable

There are a couple of tricks that you can use to make things more readable. Zinsser's book is a great resource for this type of thing.

- Keep sentences short
- Avoid jargon. You can never be certain that the reader and you agree on the meaning of a jargon phrase.
- Use simple, straightforward language. Your readers will not be carrying around a dictionary and thesaurus. If they don't understand something you've written they are likely to put your paper down and not pick it up again.

Tip #6—Welcome Other People's Edits

Sending your white paper out for review is a necessary step in the process, but it can be traumatic. Although

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your paper will be returned with so many comments and corrections that you barely recognize it, each comment is valuable.

You must keep in mind that the edits are not personal. Those red-lines and comments are readers telling you that they love your work, "but wouldn't it be clearer if you said it this way instead."

Don't get upset about the edits. They will make your paper stronger. Better that the marketing assistant correct a strained metaphor now than to have it staring at you from the pages of Computing - where that same marketing assistant managed to work a miracle and get it published as a vendor-neutral piece - for the rest of your career.

Tip #7—Books, Books, Books

Now that we're getting close to the end, you need to look at some reference material. Check out the recommended reading list on this page and find a copy of a good dictionary, thesaurus, and style guide.

Armed with you reference books, find a quiet corner, pour yourself a big cup of coffee, and work through every sentence in the paper.

- Check punctuation refer to Strunk and White.
- Don't assume that you reader is smarter than you. If you are not sure of a word's meaning, look it up and make sure you are using it in the right context.
- Use the thesaurus to find simple words to replace anything that might be misinterpreted. And don't just pick the first word you see. Find words that match the context of your discussion.

Tip #8—Reading Aloud

Here are a few tricks that can help root out problems that resists all other methods.

- Read the paper through in your mind in the voice of your favorite TV news presenter (I use Morley Safer from 60 Minutes). Look closely at any wording that causes you to stumble.
- Read your paper aloud. Again, any wording or phrase that causes you to read something twice means there's a problem. Figure out what it is and fix it.
- Finally, to flush out some of those truly impossible-to-spot problems, change the font and read the paper

again. This is a good way to spot echoes - words used twice in the same sentence, or in consecutive sentences.

Tip #9—Online Resources

In addition to a good selection of writing books - see the recommended reading list - the sites listed below offer great reference material, and it's free!

- Merriam-Webster Online Dictionary and Thesaurus http://www.m-w.com
- Editorial styles and standards from IEEE Computer Society Style Guide http://www.computer.org/ author/style/abc.htm#A
- The SNIA Dictionary of Storage Networking Terminology http://www.snia.org/education/dictionary/
- Unsure about how something works? These guys probably know. The IBM Redbooks Web Site http://www.redbooks.ibm.com/
- Check your facts! The best free reference sites on the web http://www.ala.org/ala/rusa/rusaourassoc/rusasections/mars/marspubs/publications.htm

Tip #10—Don't Forget Product Positioning

Finally, a tip that may save not just time but your paper. Stick with product positioning.

If you fail to take account of the official positioning messages when writing you paper you risk stumbling into a region of hell that exists solely for writers of white papers. Sending your paper out for review will prompt conflicting sets of edits from different groups within your organization, each with their own idea on product positioning messages.

It is not unusual for a sales team to use one set of messages - often tactical and eye-catching - the CEO to use another - strategic and philosophic - and product marketing yet another. Engineering, needless to say, will be the only group that really understands what the product does, and will have their own ideas about what is most important about the product. And customer support, based on actual experience with customers, will have a pretty good feel for what doesn't work, and, hence, what should not be emphasized.

At best, disagreements about positioning can lead to a thorough review of product messaging, and at that point you can continue with your project. At worst, unfortunately, it can mean that your paper is put on a shelf and never sees the light of day.

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Getting positioning straight is a challenge. If a product positioning document does not already exist you might consider creating one, just to save time later on.

If you think this is a lot of effort, and it can be, remember that your words will take on a life of their own once they leave the confines of your laptop. White papers have a habit of finding their way onto the desks of important people, like the analyst putting together a marketplace overview for some Fortune 10 company, or the CIO of that same Fortune 10 company, as he decides whether to spend a couple of million on your product or your competitors. With this in mind, it is perfectly understandable why so many people would want to influence how you describe your product.

I hope you enjoy these tips and tricks. And I hope they help.

If you embark on a white paper writing project I wish you the best of luck. And if you need any help or support please feel free to drop me a line.

All the best.



Nigel Hall is a freelance writer and owner of Parallel Prose (http://www.parallelprose.com), a full-service content development firm serving technology vendors in the enterprise storage and IT infrastructure markets. Nigel leverages his combined technical and marketing background to deliver clear, concise, technically credible white papers in the language of IT and business..

Recommended Reading on White Papers

- On Writing Well by William K. Zinsser
- If You Want to Write by Brend Ueland
- The Elements of Style, Fourth Edition by William Strunk Jr., E.B. White, & Roger Angell
- The Chicago Manual of Style, 15th Edition by University of Chicago press Staff
- The New York Times Manual of Style and Usage
 by Allan M. Siegal, William G. Connolly

May Event with Cynthia Typaldos and guests Sachin Gangupantula and Heather Hamilton

My Career Is My Business

By Greg Cohen

The May 5th meeting of the SVPMA covered managing one's professional presence in an age of commoditization and globalization. Cynthia Typaldos, founder of Software Product Marketing eGroup spoke first on how the job market has changed and the emergence of professional guilds. Sachin Gangupantula, Director of Business Development for the SVPMA, followed with a "how to" session on setting up a professional blog. Heather Hamilton, Senior Recruiter for Microsoft finished with how she uses blogs and the internet to identify key talent. Together, the three speakers gave a full picture of how to successfully manage one's career in the 21st century.

Ms. Typaldos' presentation was aptly titled *My Career is MY Business*. She opened by speaking about how the job market has changed. Business has transformed to become project based, where teams form and disband to meet each challenge. The Internet has enabled these groups to be distributed throughout the globe. Further, the best people for a project do not always work for the company. The Internet has made it possible for companies to easily find the best people for a problem that needs to be solved.

Professionals have similarly adapted to the changing market place. Professionals are no longer loyal to their

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employer. In fact, they identify more with their profession than their company. The recent recession has led many individuals to realize that they are their own business. At times they will work for a company, other periods they will contract, sometimes they will do both, and on occasion neither.

Social software, which is a synonym for a web community, can allow a professional to be found for a project or employment opportunity as well as work with a group to solve a problem. Individuals, therefore, need to maintain a persistent identity and reputation. You can further enhance your reputation by developing a deep expertise as a differentiator. Having no presence on the web is the kiss of death. If you receive an email from someone whom you don't know, the first thing most people do is Google the individual. A blog is one tool for building this presence and becoming visible on the web. Unlike a personal website, a blog requires minimal maintenance. You can further enhance your presence by linking to a portfolio, speaking engagements, articles, and white papers that directly show your accomplishments.

Mr. Gangupantula then gave an overview of Resume-BlogsTM on the SPM website. The ResumeBlog is one of the fastest and simplest ways to develop a professional online presence because blogs are trivial to create, searched by search engines, and are easy to link to other colleagues. Your resume blog can provide a 360° view of your career. It can contain an overview and descrip-

tion of your skills, a photo, contact information, colleagues, resume, fields of expertise, accomplishments, press mentions, articles, and presentations. Mr. Gangupantula then stepped the audience through the four screens at http://www.blogger.com to create a resume blog and use the ProfGuilds template. This "how to" presentation can be found at the SVPMA website http://www.svpma.org/preso.htm. You can then register your resume with the ProfGuilds engine, which are automatically submitted to Google, at http://profguilds.sastar.com. You can return to the same site to view the statistics of who is viewing your resume.

Heather Hamilton, Senior Recruiter, Marketing Talent Acquisition at Microsoft, was the final speaker. She offered her insight into how a recruiter searches for talent. Ms. Hamilton spoke about how her world is changing. She has noticed an increased focus on talent in addition to skills. She is now looking for people who can assume different roles, since specific jobs often change. Social networking changed the landscape. Recruiters all use Google now as well as searching through blogs. Their job is to find the "best" in the industry, so it is important for candidates to be visible.

In summary, there are a number of new technologies that are changing how work is accomplished, how recruiters find talent, and how one should frame their career. Professionals need to be their own talent agent, creating a presence and reputation in their industries and professional circles.

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http://www.svpma.org/forum/

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The teams typical research centers on target customers, workflows, pain points, goals, and user profiles. They also assists in determining how to prioritize features. The group is becoming more involved in future products. To that end, they are involved in ethnographic research in the U.S. and abroad to observe how people live and interact and how future technologies might change this.

As a product moves from Concept to Release, there are three primary phases:

- 1. Formative Research
- 2. Idea Evaluation
- 3. Product Evaluation

During the formative research phase, the research team seeks to learn about users' goals, pain points, and their current usage. They employ a series of different methods that include site visits, interviews, observation, workflow analysis, diary studies, card sorts, and surveys.

Idea Evaluation is used to obtain user feedback on designs before engineering begins implementation. This might include using paper prototypes, interactive models, competitive studies, and participatory design. In participatory design, a user might cut out screen elements and design their own screen.

Product Evaluations are conducted pre and post release. These are conducted using task based scripts, and iterative studies. Dr. Ehrlich has found that the team gets much more out of iterating on the design and conducting more small studies than by performing one large study.

In one consumer market, adobe wanted to understand who the user was and what they were doing. They also wanted to identify the segments of users. The User Research team conducted a number of qualitative site visits at the users' homes. From this, the team was able to construct a series of case study cards that contained the person and profile, their goals, challenges, and key activities.

In another project, the team was focused on understanding cross-product workflows. For this project, the user research group pulled together an internal team to create their best guess at the primary workflows. Then the team confirmed these workflows with users and adapted them to real use cases. Doing this helped identify and prioritize features.

In a third project, the company knew the space and the target customer but wanted to identify an opportunity and workflow for a new product. The User Research group first assembled workflows. Then they used direct observation. Dr. Ehrlich commented that observation often yields better results than an interview since users will often omit steps in their explanation. The team then used card sorts to construct the underlying mental model. Users layed out the cards and grouped similar tasks into categories. This resulted in a break through for the researchers. Going into the project, Adobe thought there were only three buckets for features. The study concluded that the user views the tasks as mapping to eight categories.

Dr. Ehrlich concluded with some words of advice:

- Advocate user research within your company
- Understand the market, but also the user
- Speak with a wide variety of users
 - This is inquiry, not selling
 - Suspend Judgment
 - Probe deeply
 - Start early
- The data you collect will also help to build consensus

Lastly, she mentioned a few references that product managers might find helpful:

- 1. The Design of Everyday Things by Donald A. Norman
- 2. GUI Bloopers by Jeff Johnson
- 3. IDEO Method Cards http://www.ideo.com/methodcards
- 4. Bay Area Computer Human Interaction Group http://www.baychi.org

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BOOK REVIEW

Voices into Choices: Acting on the Voice of the Customer

Review by Greg Cohen

Voices into Choices: Acting on the Voice of the Customer is a how-to manual for interviewing customers, capturing data as language, and creating a customer-driven plan of action. The book is written by Gary Burchill and Christina Hepner Brodie and published by the Center for Quality of Management in association with Joiner Publication. The authors step the user through the FOCUS methodology. The acronym stands for:

- Frame the project
- Organize resources
- Collect data
- Understand the voices
- Select action

FOCUS is best applied when the targeted issue is ill-defined, the problems need to be clarified, the outcome will have significant impact, and the solution will need multifunctional alignment and ownership. If your project does not require customer input or is clearly defined, the book points the reader to other problem-solving tools.

Framing the project begins with writing a purpose statement. From there, the research team reviews existing data to gain an understanding of the issue. The team then assembles a customer profile matrix. This includes traditional segments, such as user type or industry, along with non-traditional segments such as satisfaction level. The matrix will act as a guide for who to interview. The team creates an interview and observation guide. The book lists a number of useful interview techniques and advice. For example, instead of asking "Why is that frustrating for you?", phrase the question less critically: "Tell me more about the frustration you're describing?"

Planning occurs during the *Organize* phase. This is where the project costs and commitments are estimated, project sponsors are recruited, resources are negotiated, and interviews are scheduled. The book provides useful templates and checklists to assist in this phase of the process.

Collect data is the "pivot point" of the FOCUS method. The activities, prior to this juncture, are designed to ensure the interviews succeed. Everything after will depend on the quality of the data collected in this step. The authors recommend that no less than two team members participate in every interview and that customer feedback is captured verbatim.

Understand requires analysis of the data collected during the interviews. The major themes are identified and areas for action determined. The first step after the interviews is to compare the learning against the original objectives. During this phase, the team decides if the project still makes sense in light of the data, if the purpose is too narrow or broad, or if any other corrections need to take place. The team organizes the interview data, distills the major themes, and settles on one of three paths for analysis: targeted, requirements, or system.

Select action is the final phase. This involves idea generation, idea evaluation, and action plan development. The team knows how to meet the customer's need and delivers its recommendation. The FOCUS process is complete! The actual implementation may be done be the same or different team.

The book is spiral bound and sells for \$49.95 on Amazon.com, making it the most expensive book this publication has reviewed. Nevertheless, FOCUS is a proven methodology to translate your customer's "voice" into tangible results for your company. Unlike many books that leave the reader to figure out how to put the recommendations into practice, Voices into Choices lays out the entire process in a step by step fashion that is easy to understand and follow.

The SVPMA is looking for a new Director of Communications

This is a board level position providing the opportunity to contribute to the growth and direction of the organization. If you are interested in getting more involved, visit the website at www.svpma.org or contact Greg Cohen at greg@svpma.org