

STRATEGIC PLAN

A consulting service offered by:

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Introduction and Overview

This document is one of a series of white papers prepared by Enterprise Integration Group (EIG) to help clients understand EIG methods and processes. EIG is a leading provider of design and evaluation products that deliver superior customer self-service solutions to the enterprise.

What is a Strategic Plan?

A strategic plan is a printed document that guides the analysis and improvement of client products. The document is the physical deliverable for a consulting service performed by EIG analysts, designers, and consultants. By building on a disciplined process for evaluating the business case, prioritizing functionality, determining measures of success, and designing the behavior (“look and feel”) of the target product, EIG strategic plans lower the risk and maximize the return on investment for products of all kinds.

EIG is skilled at creating strategic plans for traditional Interactive Voice Response (IVR) systems that rely on touch tone or speech recognition, as well as voice portals, personal virtual assistants, unified messaging applications, and other enhanced services. EIG also

has extensive experience with products that use embedded speech recognition or similar emerging user interface technologies in vehicles and consumer products.

What is the Value of the Plan?

Self-service applications often depend on the success of the user interface. While the goal of the enterprise is to reduce costs without losing customers, that goal is undermined when call flow and scripting—elements of the user interface that have the greatest impact on user acceptance—are inferior. Enhanced services for the wireless market, embedded systems, and similar value-add applications also suffer from interface design problems that limit customer acceptance. Speech recognition applications, in particular, can exhibit instability or even failure as a result of design techniques that are less than optimal.

Expertise in user interface design, on the other hand, is not often within the core competency of the enterprise. Although problems are known (or suspected) to exist, it is not always easy to identify which of many options are most likely to bring customers into communication with the enterprise reliably and consistently.

EIG is expert in pinpointing problems and then designing solutions for user interfaces of all kinds. What's more, EIG goes beyond opinions, bringing years of data from research and fielded systems to the planning process—in effect replacing “art” with science. By outsourcing its strategic planning needs to EIG, the client can achieve predictable and quality results at a fraction of the costs that it would incur by applying its own experimental guesswork.

Methodology

A strategic plan is sometimes sold as a standalone EIG product, but more often is one phase of a more complex consulting effort. The strategic plan is based on information gathered by an EIG planner/consultant through a rigorous three-step process devised by EIG over several years. Some complex projects take advantage of more than one specialist, calling on analysts, designers, and usability testing experts to ensure that all areas of the strategic plan are accurately and thoroughly considered.

Step 1: Initial Evaluation

To start the strategic plan, an EIG consultant first performs a pre-analysis by calling and becoming familiar with the client's product. The consultant also reviews any printed design documentation. The analysis may be a simple cursory examination, or it may take the form of a full-fledged evaluation/audit.¹

Step 2: On-Site Strategic Planning Meeting

Armed with this analysis, the consultant engages in a two- or three-day on-site meeting with the client's design and development team. Using a methodology proprietary to EIG, the consultant guides the design to its most stable and usable form. The process is a top-down approach that starts with business goals and establishes measures that will be used throughout the life of the product to ensure that the product is meeting those goals.

During the second day, a great deal of attention is devoted to the elimination of unnecessary functionality, the correct ordering of interactions, and the careful analysis of each component of the interface with an eye toward simplicity, clarity to the user, and ease of implementation. This information is carried into the third day, where scripting, voice selection, help routines, host-connection dependencies, and other details are discussed and worked through.

Step 3: Final Plan

The consultant returns to EIG with all talking notes and materials from the on-site meeting. After reviewing these materials, the consultant writes the strategic plan. The plan begins with the client's business goals and works its way through the various design issues until a clear roadmap for design and development of the user interface emerges.

The final deliverable is a paper report.

EIG applies an internal peer review system to control the quality of the plan. It is not unusual for an EIG strategic plan to pass across several expert eyes before the final

¹ See the separate white paper, "Spoken Dialogue Evaluation and Audit" for more information.

document is released to the client. After sign-off, the strategic plan phase is often followed by subsequent consulting services. Such services may include support for the plan in the form of on-site presentation and review meetings, prototype development, or total project management in which EIG sees the design all the way through to a final stable product.

Timing

A strategic plan is a thorough analysis of a client's existing or proposed product. Timing depends sensitively on the size of the project, and so a single estimate is not possible to provide in a white paper. A good rule of thumb for the range of times is from two to five weeks. The designer typically requires a couple of days before, and several days after the on-site meeting to develop the plan. After completion, EIG requires some additional time for internal peer review.

Typical Calendar Time: Two to Five Weeks