

How to Gather the information?

Plan the Process

1. **Define the purpose of the survey**
2. **Target survey audience and choose the proper method accordingly** - One can gather the required information using various methods, such as: personal interview, focus group or automated questionnaire.
 - When gathering information from a major stakeholder - A personal interview is recommended.
 - When a sample group is small - it may be practical to survey all members of the group by conducting a focus group session.
 - When the sample group is large - it may be useful to identify a subset of users (based on common characters) and conduct a focus group session.
 - If it is important to survey all members of a large group (where user profile indicates wide variance due to geographic distribution, regulatory differences or lack of standardization in job function or business process) - it may be practical to use an automated questionnaire.

Get ready for the Session

1. Be cognizant of the stakeholder's or group's characteristics - Understand the background of the audience, including their environment and specific terminology.
2. Make sure that the question wording is clear and concise, using terminology that is familiar to the respondents.

Conduct The Session

1. Communicate the purpose - Explain the objectives of the interview/ focus Group session
2. Select a few core questions off the list below and use them to get the key-user talking.
3. Then, as they are talking about their vision for the Dashboard, use this questions list to guide the conversation and ensure you're discussing the Dashboard completely.

***TIP:** Don't be surprised if you actually ask about only half of the questions. The rest will be answered by the key-user indirectly through conversation.*

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