Product Development The Menlo Way

Annika Themm, Menlo High-Tech Anthropologist®
James Goebel, Menlo Co-Founder and Partner

Agenda

Relationship With Customers

Managing Turbulence

Set Based Design

Designers & Experts

Deep Relationships With Product Users

Then Genba Walk Thru Menlo

Building Customer Relationships

All Menlo Team Members Are Encouraged To Be Public Speakers

MENLO innovations

Building Customer Relationships

All Menlo Team Members Are
Encouraged To Be Public Speakers

Menlo Team Members Lead Tours

MENLO innovations

Building Customer Relationships

All Menlo Team Members Are Encouraged To Be Public Speakers

Menlo Team Members Lead Tours

There Is No Dedicated Sales Team

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Building Customer Relationships

All Menlo Team Members Are
Encouraged To Be Public Speakers

Menlo Team Members Lead Tours

There Is No Dedicated Sales Team

Publish Your Secret Sauce

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Week ending: 1/20/2023	AGID Annika	AMUY Andrew	LCHU Leigh	LKRU Lindsey	MCAL Mollie	MPOM Michelle	NHAR Nehemiah	MSCH Matt	JREN Jean	LHO Lisa	CSHE Carol	ESTO Emily	VSCH Victoria	SNEA Sarah	JTHE Jim
Monday	MACHLI	CARTER	ATHENA	WILBUR	CARTER	WILBUR	MACHLI	QA	QA	PM	PM	ROLLER COASTER	X	FOS Support	IT
1/16/2023	MACHLI	CARTER)	ATHENA	WILBUR	CARTER)	WILBUR	MACHLI	QA	QA	PM	PM	ROLLER COASTER	X	FOS Support	IT
Tuesday	MACHLI	EGAO	CLOVER w/ SNAG	KENT	EGAO	KENT	MACHLI	QA	QA	PM	PM	ROLLER COASTER	MARKETING	FOS Support	IT
1/17/2023	MACHLI	EGAO	CLOVER w/ SNAG	KENT	EGAO	KENT	MACHLI	QA Sales 3:00-4:30	QA	PM	PM	ROLLER COASTER	MARKETING	FOS Support	IT
Wednesday	MACHLI	CARTER	CLOVER w/ SNAG	WILBUR	CARTER	WILBUR	MACHLI	QA	QA	PM	PM	ROLLER COASTER	MARKETING	FOS Support	X
1/18/2023	MACHLI	CARTER Remote Checkin	CLOVER w/ SNAG	WILBUR	CARTER Remote Checkin	WILBUR	MACHLI	QA	QA	PM	PM	ROLLER COASTER	MARKETING	FOS Support	IT
Thursday	MACHLI	CARTER On-site at Client	CARTER On-site at Client	KENT	CARTER On-site at Client	KENT	MACHLI	Prep PM workshop agenda	QA	Prep PM workshop agenda	PM	ROLLER COASTER	MARKETING	FOS Support	IT
1/19/2023	MACHLI	CARTER On-site at Client	CARTER On-site at Client	KENT	CARTER On-site at Client	KENT	MACHLI	QA	QA	PM	PM	ROLLER COASTER	MARKETING	FOS Support	IT
Friday	MACHLI	CARTER Travel back to A2	CARTER Travel back to A2	HARRISON	CARTER Travel back to A2	HARRISON	X	QA	QA	PM	PM	ROLLER COASTER	MARKETING	X	IT
1/20/2023	MACHLI	CARTER	CARTER NBCR	HARRISON	CARTER	HARRISON	X	QA	QA	PM	PM	ROLLER COASTER	MARKETING	X	IT

Week ending: 1/20/2023	ABUR Andy	AFAH Angelina	AKAU Alex	ASEG Antonio	BURB Brian	CCAS Charles	CHUT Chris	CSAN Caleb	DROM Dan	EBOY Ethan	GLUN George	GSTU Giovanni	HHAG Helen	JCIP Jake	JPTO Joe	JRIC JD	KWIL Kealy	LFAR Logan	MJAN Michael
Monday	LELAND w/ AKAU	HARRISON w/ BURB	LELAND w/ ABUR	PATTERSON w/ NHUT	HARRISON w/ AFAH	ROADTRIP	BROOKLYN KIK	BROOKLYN KIK	ATHENA	FLORENCE w/ SAND	LOWRY	MATERA w/ MMAG	X	BROOKLYN KIK	ROLLER COASTER	LOWRY	ATHENA	PATTERSON w/ SBAL	PATTERSON w/ NMCL
1/16/2023	LELAND w/ AKAU	HARRISON w/ BURB	LELAND w/ ABUR	PATTERSON w/ NHUT	HARRISON w/ AFAH	ROADTRIP	ROME 1:00 - 5:00	BROOKLYN	ATHENA	FLORENCE w/ SAND	LOWRY	MATERA w/ MMAG	X	BROOKLYN	ROLLER COASTER	LOWRY	ROME 1:00 - 5:00	PATTERSON w/ SBAL	PATTERSON w/ NMCL
Tuesday	LELAND w/ AKAU	HARRISON w/ BURB	LELAND w/ ABUR	PATTERSON w/ NHUT	HARRISON w/ AFAH	ROADTRIP	Public tour 9-10:30	BROOKLYN	EGAO	FLORENCE w/ SAND	X	MATERA w/ MMAG	X	BROOKLYN	ROLLER COASTER	Public tour 9-10:30	Pair with RSHE - Lead with Joy	PATTERSON w/ SBAL	PATTERSON w/ NMCL
1/17/2023	LELAND w/ AKAU	HARRISON w/ BURB	LELAND w/ ABUR	PATTERSON w/ NHUT	HARRISON w/ AFAH	ROADTRIP	ROME 1:00 - 5:00	BROOKLYN	X	FLORENCE w/ SAND	X	MATERA w/ MMAG	X	BROOKLYN	ROLLER COASTER	LOWRY	ROME 1:00 - 5:00	PATTERSON w/ SBAL	PATTERSON w/ NMCL
Wednesday	LELAND w/ ASEG	HARRISON w/ BURB	CLOVER w/ DROM	LELAND w/ ABUR	HARRISON w/ AFAH	ROADTRIP	BROOKLYN	BROOKLYN	CLOVER w/ AKAU	FLORENCE w/ SAND	X	MATERA w/ MMAG	HOUDINI	BROOKLYN	ROLLER COASTER	LOWRY	BROOKLYN	PATTERSON w/ Client	PATTERSON w/ SBAL
1/18/2023	LELAND w/ ASEG	Public tour 2-3:30	CLOVER w/ DROM	LELAND w/ ABUR	Public tour 2-3:30	ROADTRIP	BROOKLYN	X	CLOVER w/ AKAU	FLORENCE w/ SAND	X	MATERA w/ MMAG	HOUDINI	BROOKLYN	ROLLER COASTER	LOWRY	Prep PM workshop agenda	MCCOY	PATTERSON w/ SBAL
Thursday	LELAND w/ ASEG	HARRISON w/ BURB	CLOVER w/ DROM	LELAND w/ ABUR	HARRISON w/ AFAH	ROADTRIP	GYGAX	BROOKLYN	CLOVER w/ AKAU	FLORENCE w/ SAND	X	MATERA w/ MMAG	HOUDINI	FLORENCE w/ SNAG	ROLLER COASTER	LOWRY	Prep PM workshop agenda	PATTERSON w/ Client	PATTERSON w/ SBAL
1/19/2023	LELAND w/ ASEG	HARRISON w/ BURB	CLOVER w/ DROM	LELAND w/ ABUR	HARRISON w/ AFAH	ROADTRIP	GYGAX	BROOKLYN	CLOVER w/ AKAU	FLORENCE w/ SAND	X	MATERA w/ MMAG	HOUDINI	FLORENCE w/ SNAG	ROLLER COASTER	LOWRY	PM workshop prep	PATTERSON w/ Client	PATTERSON w/ SBAL
Friday	LELAND w/ ASEG	HARRISON w/ BURB	CLOVER w/ DROM	LELAND w/ ABUR	HARRISON w/ AFAH	ROADTRIP	GYGAX	BROOKLYN Prosperity12-1	CLOVER w/ AKAU	FLORENCE w/ SAND	X	MATERA w/ MMAG	HOUDINI	FLORENCE w/ SNAG	ROLLER COASTER	LOWRY	PM workshop prep Prosperity 12-1	PATTERSON w/ Client	PATTERSON w/ SBAL
1/20/2023	LELAND w/ ASEG	HARRISON w/ BURB	CLOVER w/ DROM	LELAND w/ ABUR	HARRISON w/ AFAH	ROADTRIP	GYGAX	BROOKLYN	CLOVER w/ AKAU	FLORENCE w/ SAND	X	MATERA w/ MMAG	HOUDINI	FLORENCE w/ SNAG	ROLLER COASTER	LOWRY	PM workshop prep	PATTERSON w/ Client	PATTERSON w/ SBAL

Managing Turbulence

Start With Knowing Capacity, Do NOT Over-allocate Resources

Make It Easy For Everyone To Know Exactly Which Task They Are Working On Now (No Multi-Tasking)
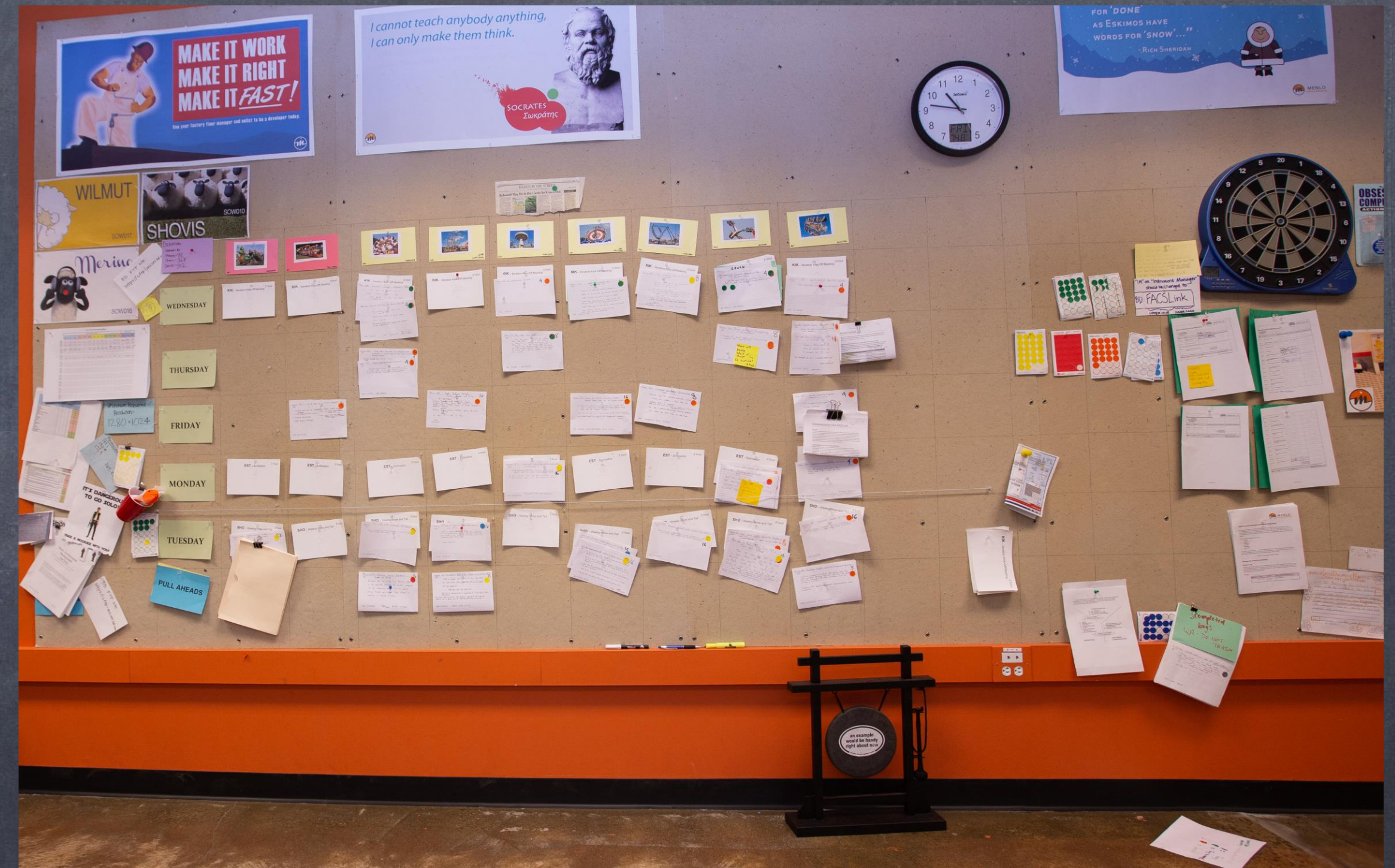
Managing Turbulence

Start With Knowing Capacity, Do NOT
Over-allocate Resources

Make It Easy For Everyone To Know
Exactly Which Task They Are Working On
Now (No Multi-Tasking)

Plan Your Work

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Managing Turbulence

Start With Knowing Capacity, Do NOT Over-allocate Resources

Make It Easy For Everyone To Know Exactly Which Task They Are Working On Now (No Multi-Tasking)

Plan Your Work

Everyone Tracks Their Time

Weekly Timesheet
Each team member submits a weekly timesheet with the hours they worked on each storycard

| Name: | Corissa (CNIE) |
| Week Ending: | 1/10 |

Company	Project Code	Project	Role and Story Card #	Sat 1/4	Sun 1/5	Mon 1/6	Tue 1/7	Wed 1/8	Thu 1/9	Fri 1/10	TOTAL HOURS	
ACME	SOW024	PROULX	HTA - KIK						1.50		1.50	
ACME	SOW024	PROULX	HTA - STU			0.25			0.25		0.50	
ACME	SOW024	PROULX	HTA - 48			6.25					6.25	
ACME	SOW024	PROULX	HTA - 49			1.75					1.75	
ACME	SOW024	PROULX	HTA - 51						6.00		6.00	16.00
BETTER BOX	SOW002	RAMUS	HTA - STU				0.25	0.25		0.25	0.75	
BETTER BOX	SOW002	RAMUS	HTA - 564				7.75	8.00		4.00	19.75	
BETTER BOX	SOW002	RAMUS	HTA - 564							3.50	3.50	24.00
								Billable Subtotal:			40.00	
			Daily Totals:	0.00	0.00	8.25	8.00	8.25	7.75	7.75	40.00	

I certify that this is an accurate and complete record of work-related time.

| Signature: | | Approved: | |
| Date: 1/10 | | Date: | |

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Set Based Design

Design Ideas Are Generated, Elaborated On Collectively, And Made Tangible
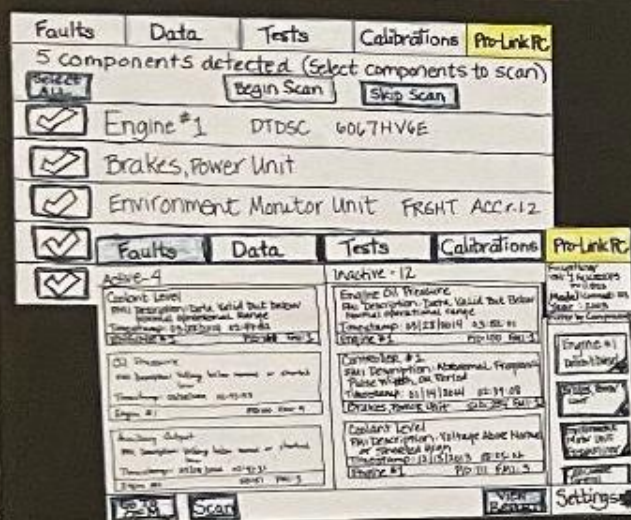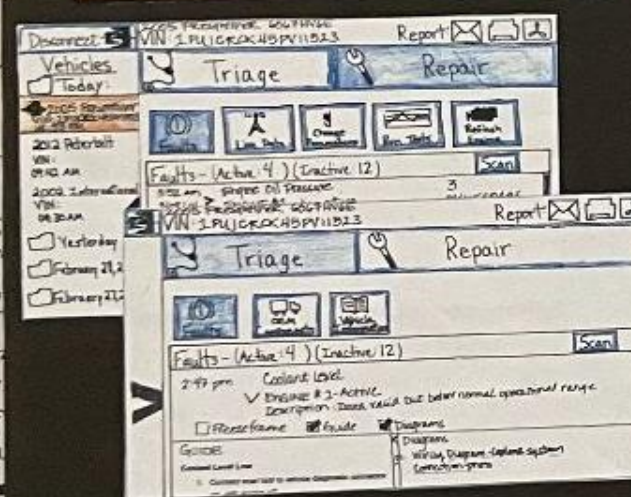

HIGH-TECH ANTHROPOLOGY®
DISCOVERY PROCESS MAP

Project Kickoff
Observations & Interviews
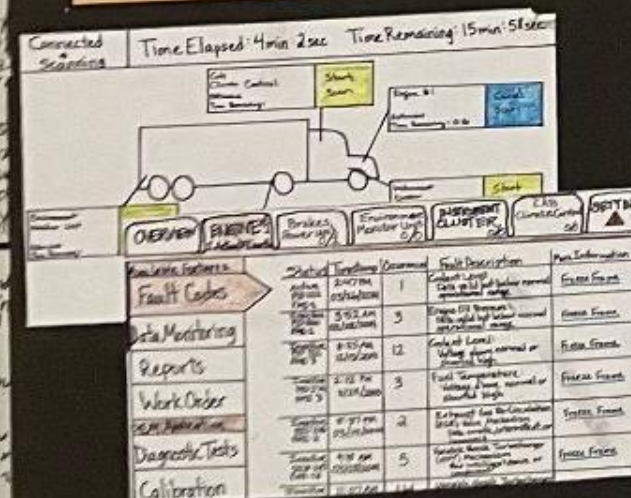Problem Statement
Personas
Persona Mapping
Persona Goals
Workflows

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DESIGN CONTRASTS
Examples

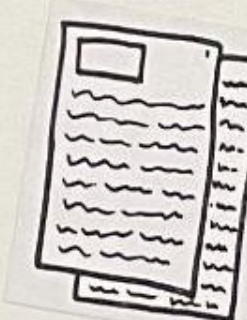|	DESIGN BASED ON:	SCREEN SIZE & TOUCH-SCREEN COMPATIBILITY:	ORGANIZATION:	LOGIN:	CONNECT & SCAN:	REPORTS:
PRO-LINK PC	CONSISTENT WITH PRO-LINK IQ	SPECIFICALLY FOR A TABLET	VIEWS FILTERED BY COMPONENT	USERNAME & PASSWORD	FORCED TO CONNECT, CHOSE TO SCAN, & SCAN SHOWS OVERALL COMPLETION %	FULL REPORT
TRIAGE/REPAIR	CONSISTENT WITH WORKFLOW	DESIGNED FOR LAPTOP WITH WINDOWS 8 TOUCH-SCREEN IN MIND	FEATURES SPLIT BASED ON TASK	NO LOGIN	CHOOSE WHEN TO CONNECT AND SCAN & SCAN SHOWS COMPLETION % BY COMPONENT	SELECT WHICH INFORMATION TO SHOW IN THE REPORT
COMPONENT BASED	CONSISTENT WITH MARKET	DESIGNED FOR LAPTOP WITH WINDOWS 8 TOUCH-SCREEN IN MIND	EACH COMPONENT HAS A SET OF FEATURES ORGANIZED BY LEVEL OF OEM DATA INTEGRATION	PIN CODE	FORCED TO CONNECT AND BEGIN SCAN & SCAN SHOWS TIME ELAPSED AND EST. TIME REMAINING Scan Time: 3min 40sec Time Remaining: 1min 28sec	REPORT AVAILABLE BY COMPONENT
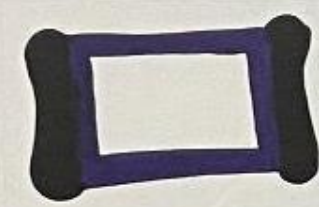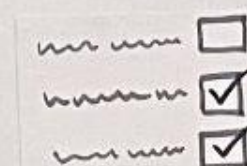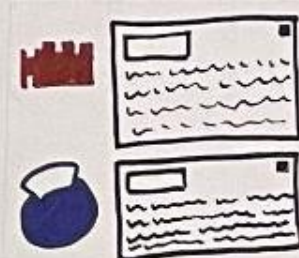
Set Based Design

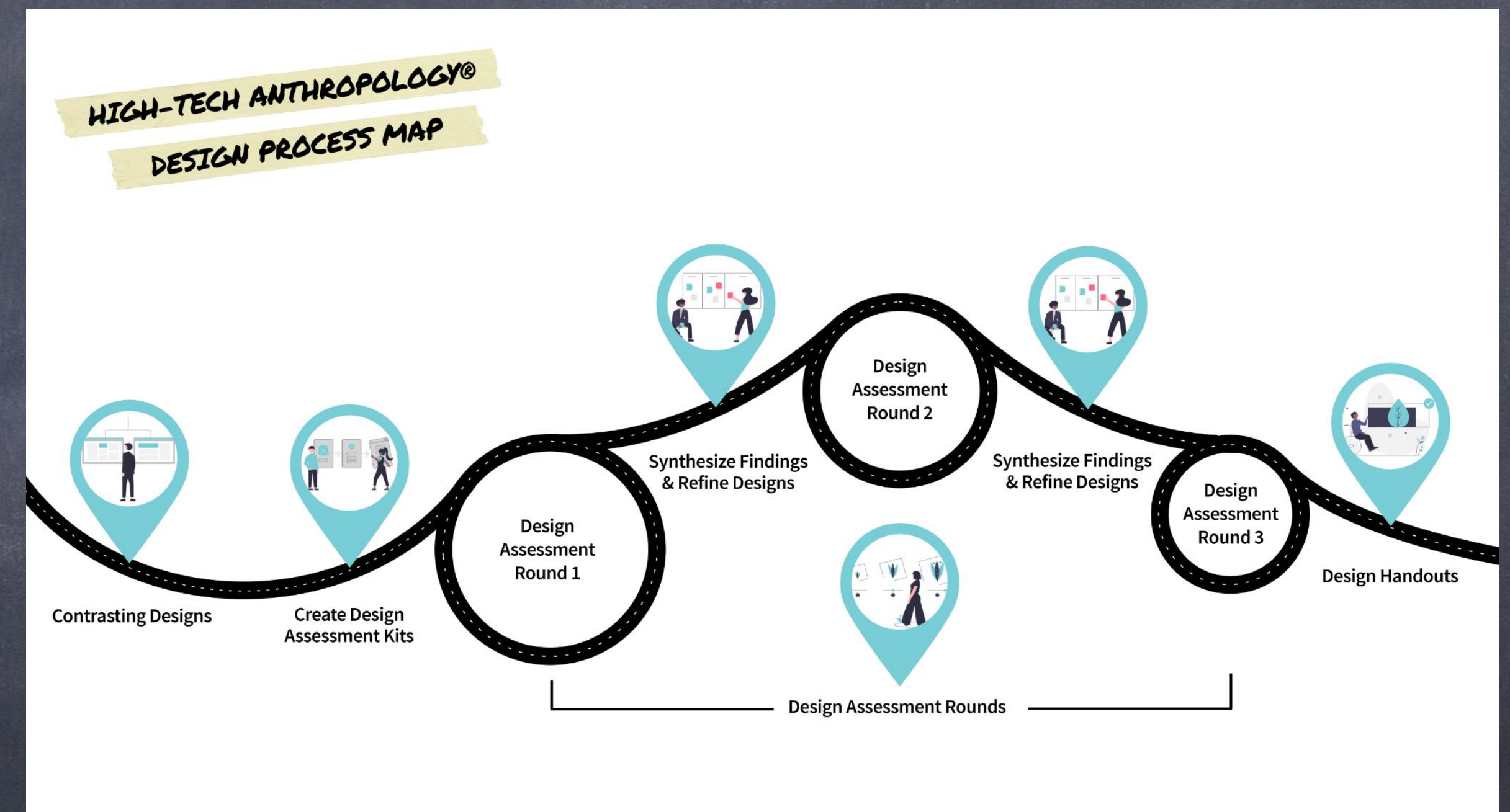Design Ideas Are Generated, Elaborated
On Collectively, And Made Tangible
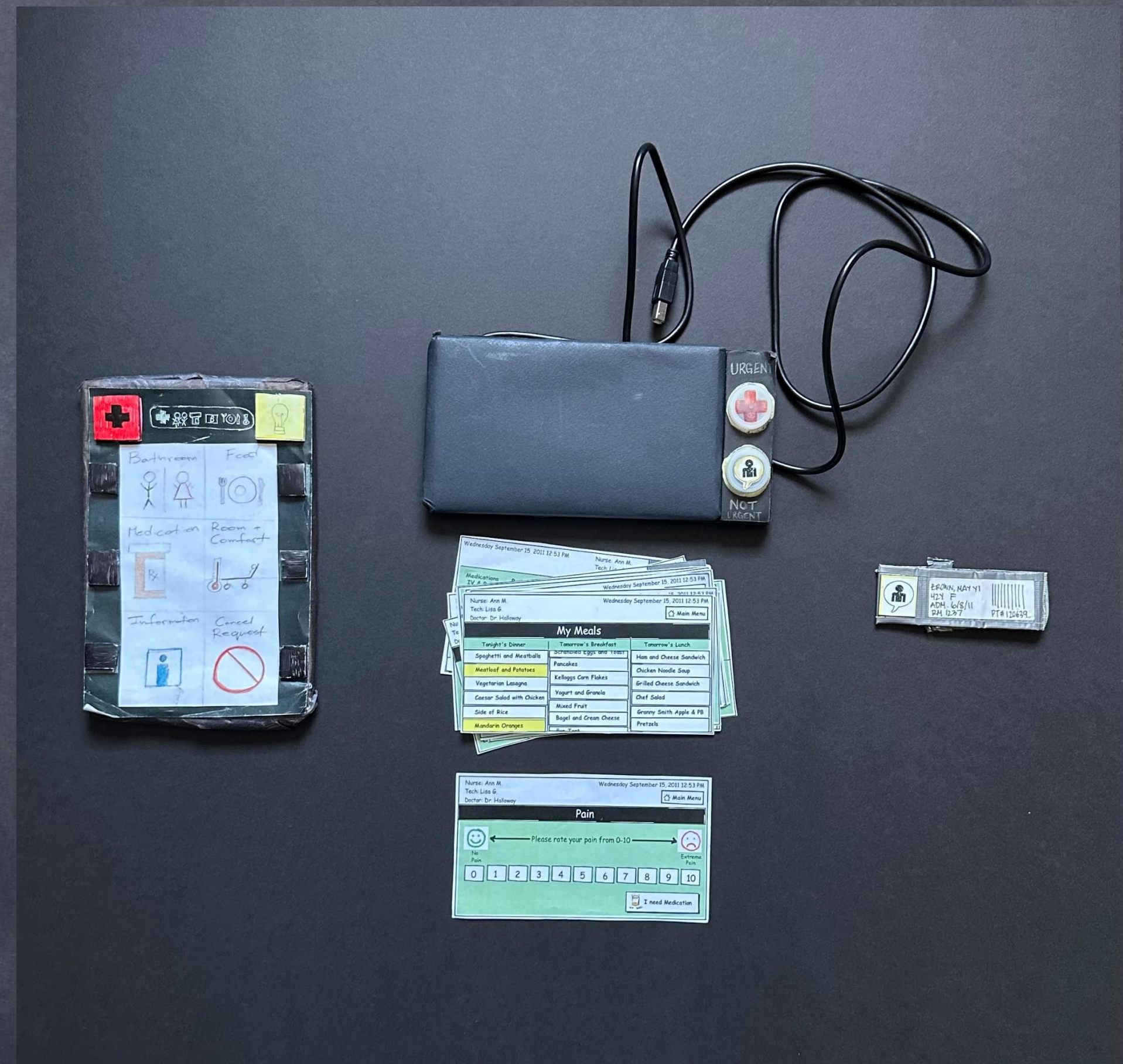
Set Based Design

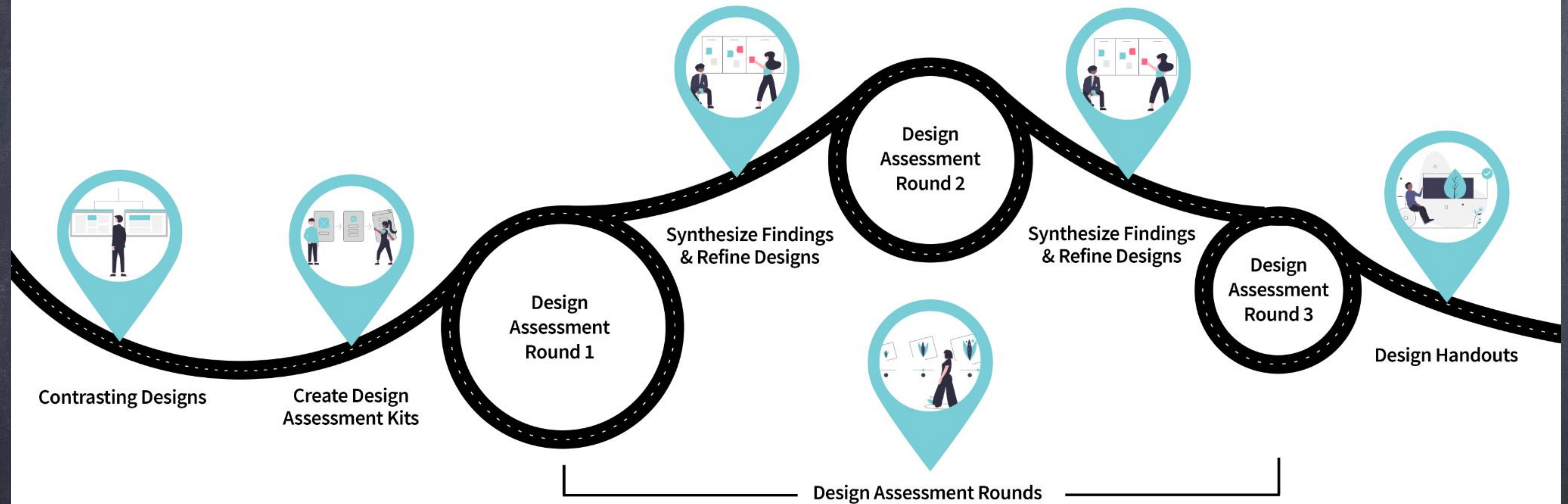Design Ideas Are Generated, Elaborated On Collectively, And Made Tangible

Learning Cycles Are Used To Narrow The Solution Sets

HIGH-TECH ANTHROPOLOGY®
DESIGN PROCESS MAP

Contrasting Designs

Create Design Assessment Kits

Design Assessment Round 1

Synthesize Findings & Refine Designs

Design Assessment Round 2

Synthesize Findings & Refine Designs

Design Assessment Round 3

Design Handouts

Design Assessment Rounds

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HIGH-TECH ANTHROPOLOGY®
DESIGN PROCESS MAP

Contrasting Designs

Create Design
Assessment Kits

Design
Assessment
Round 1

Synthesize Findings
& Refine Designs

Design
Assessment
Round 2

Synthesize Findings
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Design
Assessment
Round 3

Design Handouts

Design Assessment Rounds

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Persona Spectrums

✖ Person 1	✖ Person 3	✖ Person 5	✖ Person 7
✖ Person 2	✖ Person 4	✖ Person 6	✖ Person 8

Age
25 ←————————————————————————→ 55

Knowledge of insurance
Low ←————————————————————————→ High

Attitude towards insurance
- ←————————————————————————→ +

Preferred mode of interaction
In-person ←————————————————————————→ Digital
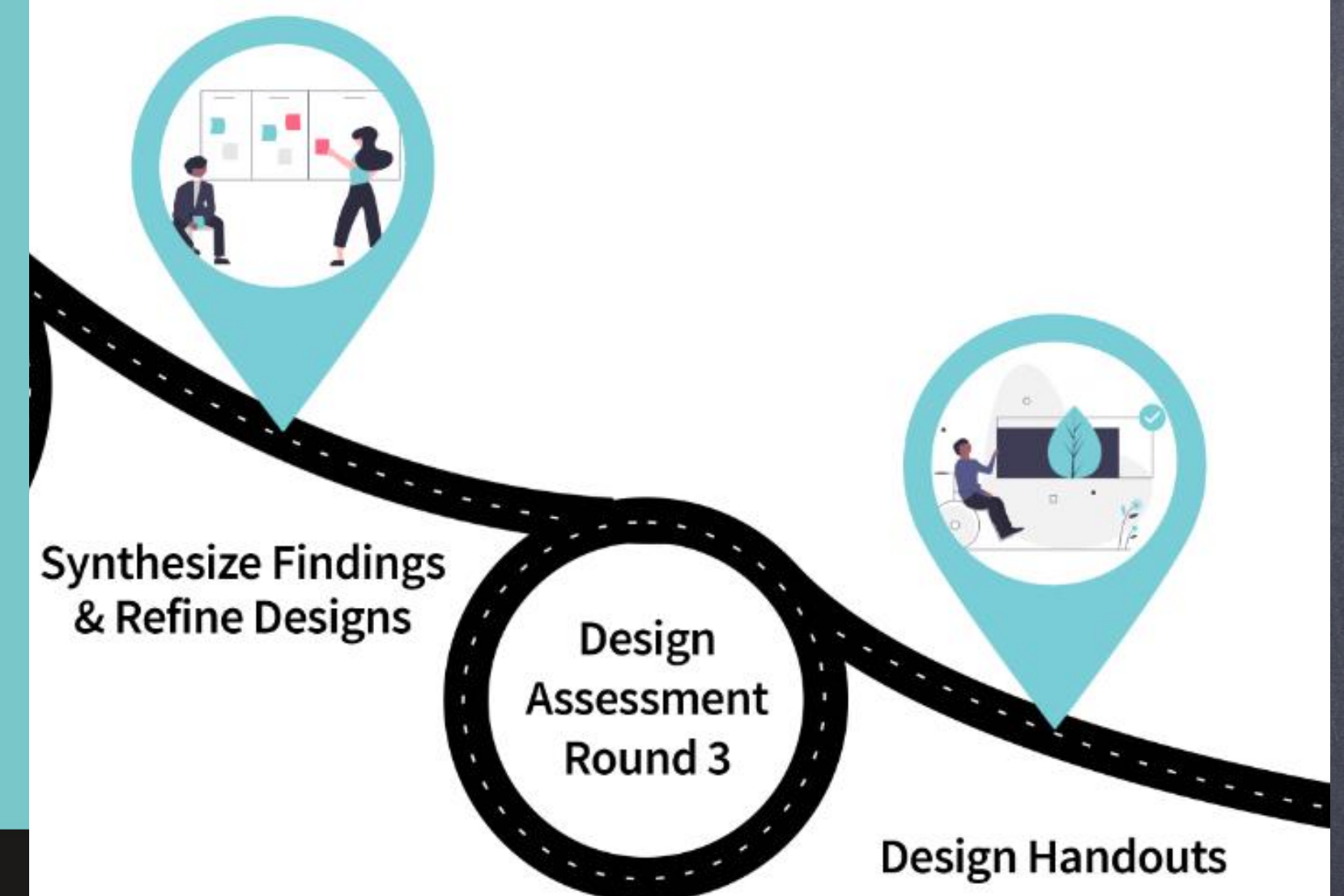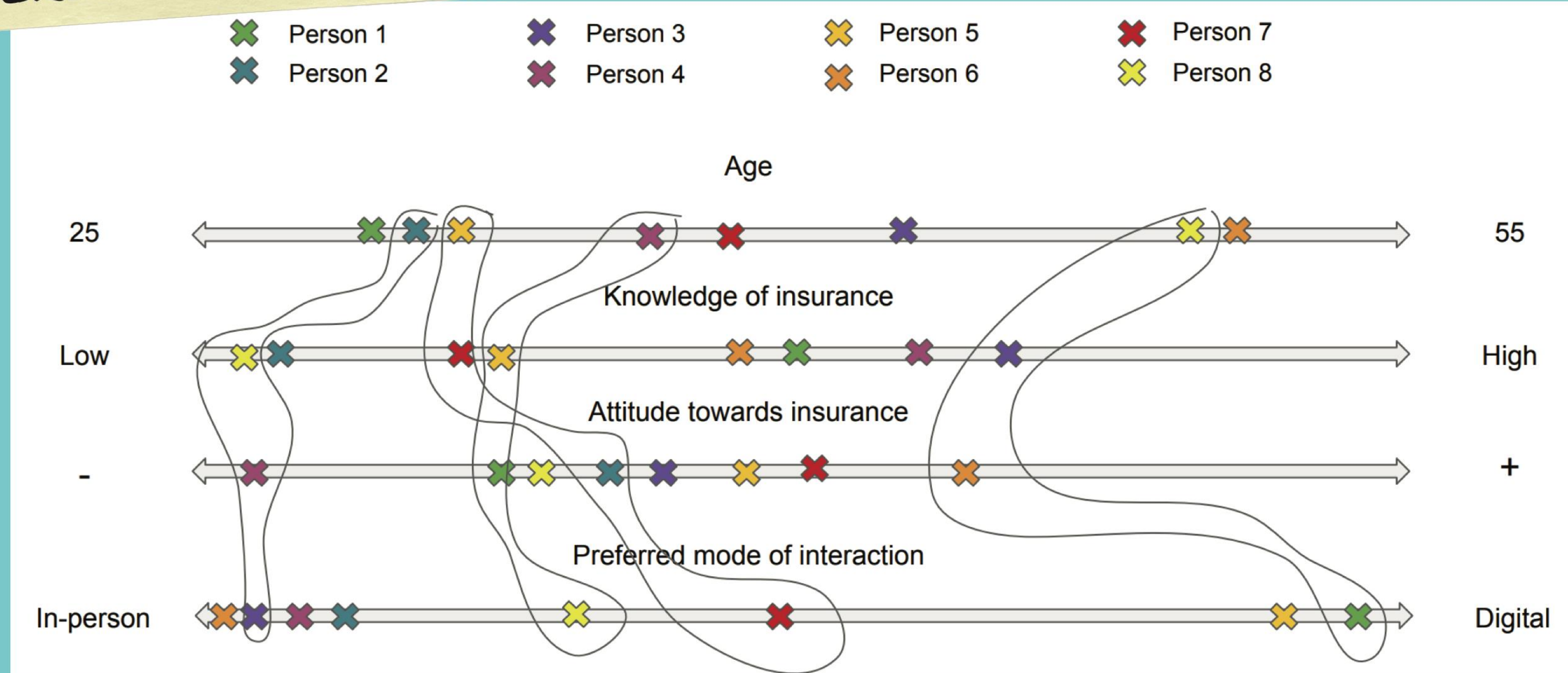
PERSONA SPECTRUMS – PLOT TRAITS

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- Identify trait patterns observed among users that are relevant to the solution path
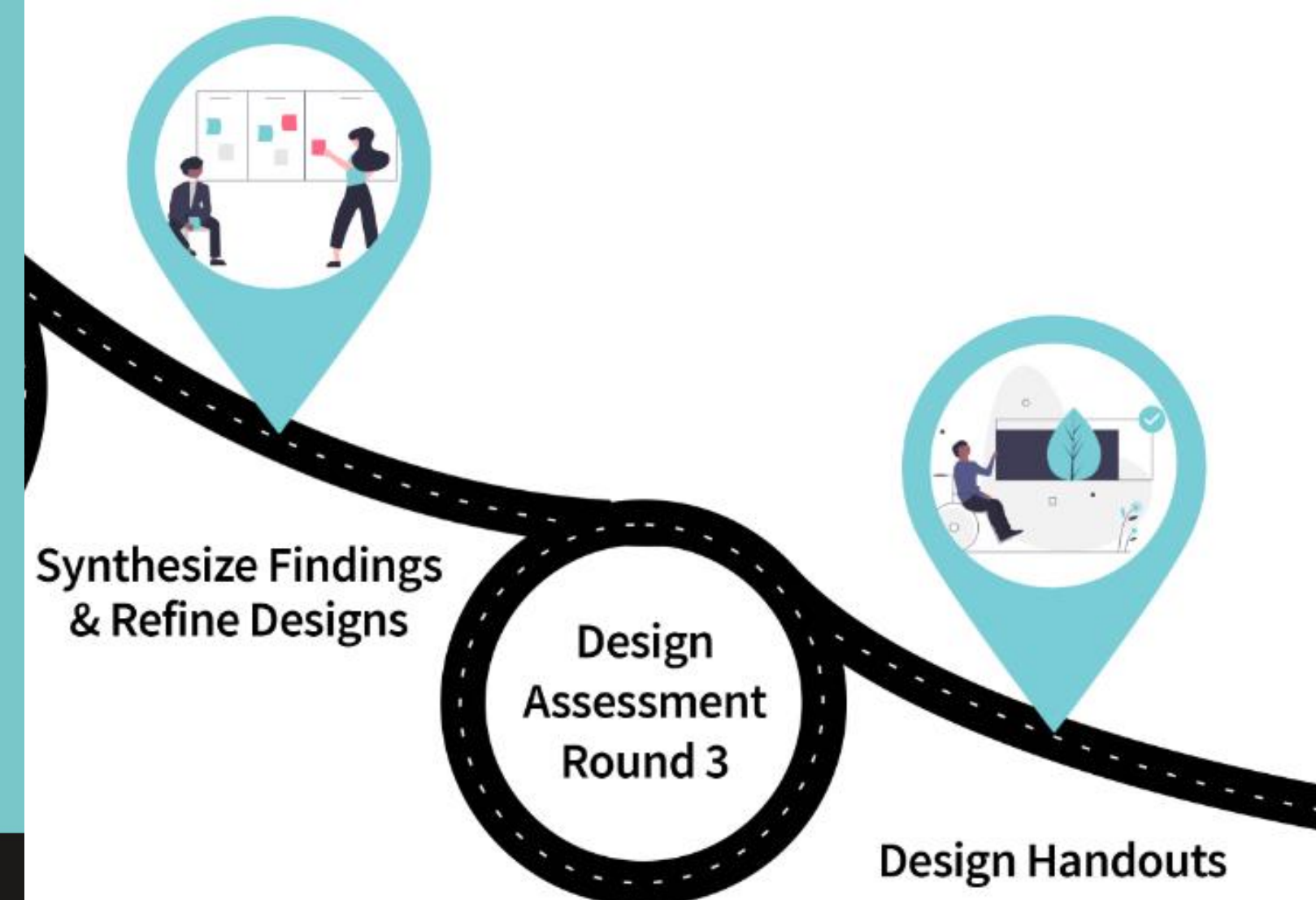- Create trait spectrums that reflect observed variations and plot users based on their unique traits

Synthesize Findings & Refine Designs

Design Assessment Round 3

Design Handouts

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PERSONA SPECTRUMS

Person 1
Person 2
Person 3
Person 4
Person 5
Person 6
Person 7
Person 8

Age
25 — 55

Knowledge of insurance
Low — High

Attitude towards insurance
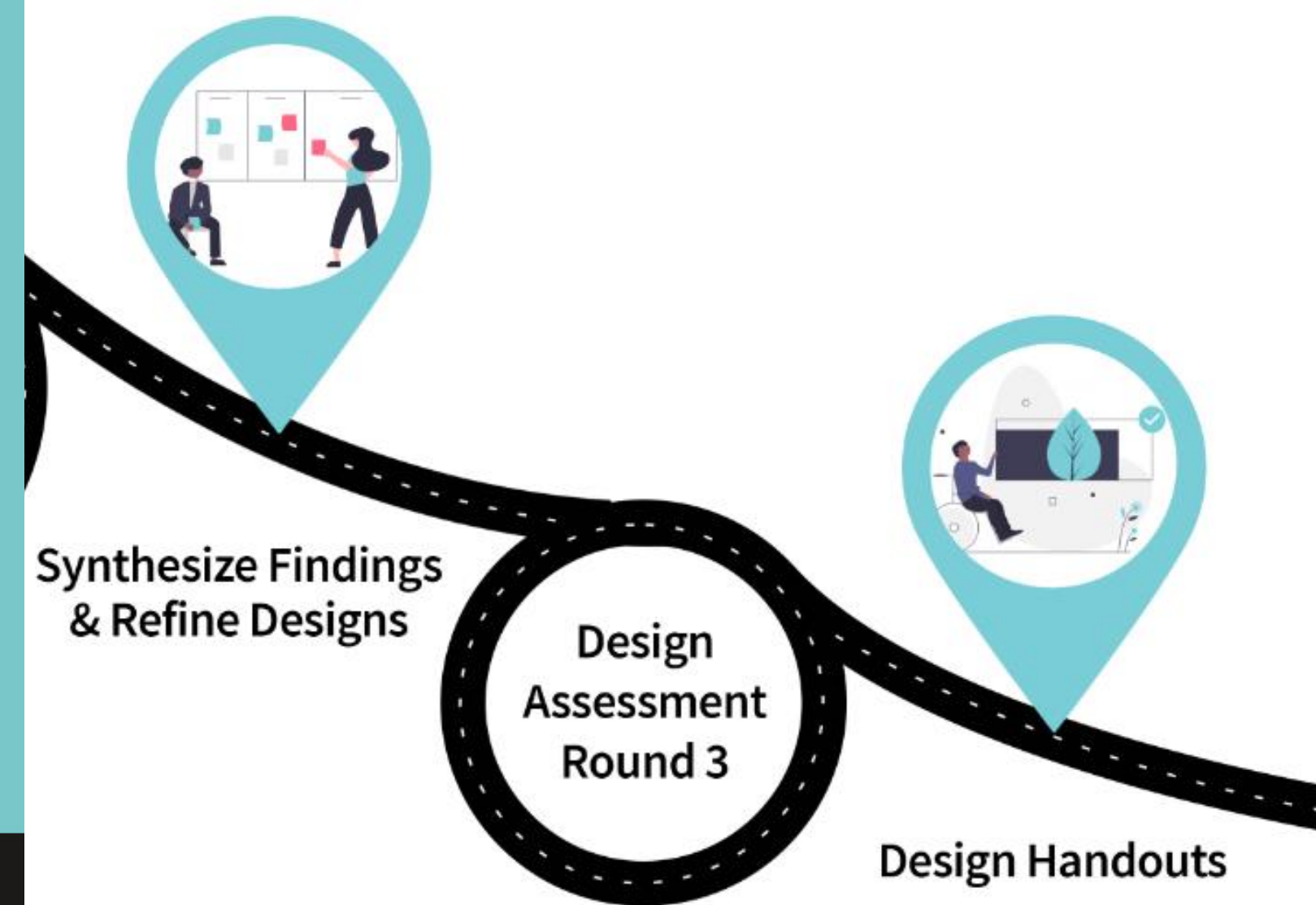- — +

Preferred mode of interaction
In-person — Digital

PERSONA SPECTRUMS - CREATE COMPOSITES

- Create groupings across spectrums that reflect trait diversity of actual users
- Ensure that the distributions of personas capture observed patterns but strategically mix and match unique user traits

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Synthesize Findings & Refine Designs

Design Assessment Round 3

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TERTIARY

SECONDARY

...IARY

Synthesize Findings
& Refine Designs

Design
Assessment
Round 3

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Set Based Design

Design Ideas Are Generated And Elaborated On Collectively

Learning Cycles Are Used To Narrow The Solution Sets

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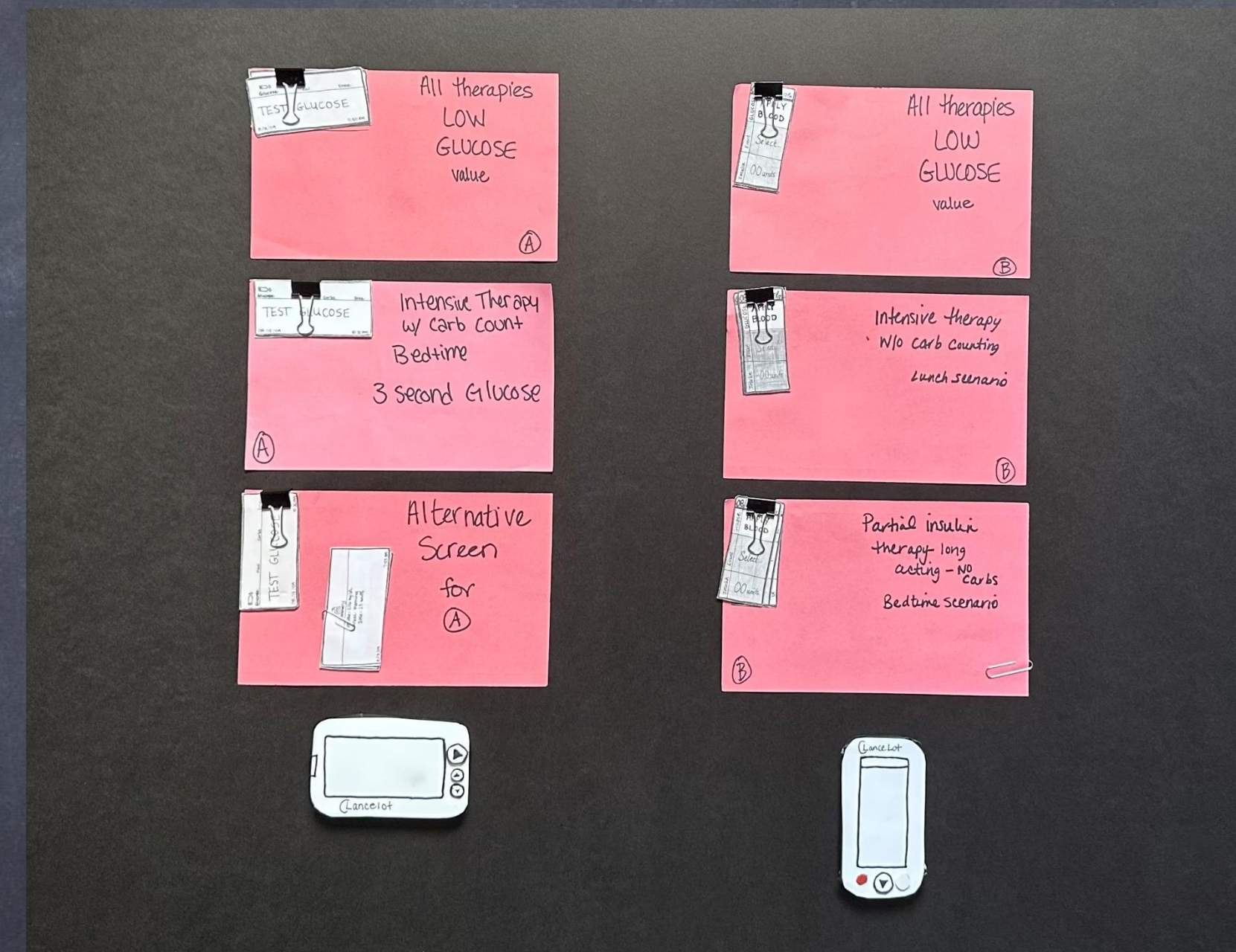
Designers & Experts

Designers & Experts

We Rely On Beginner's Mind, We Are Experts At Using The Knowledge Of Others – Genba
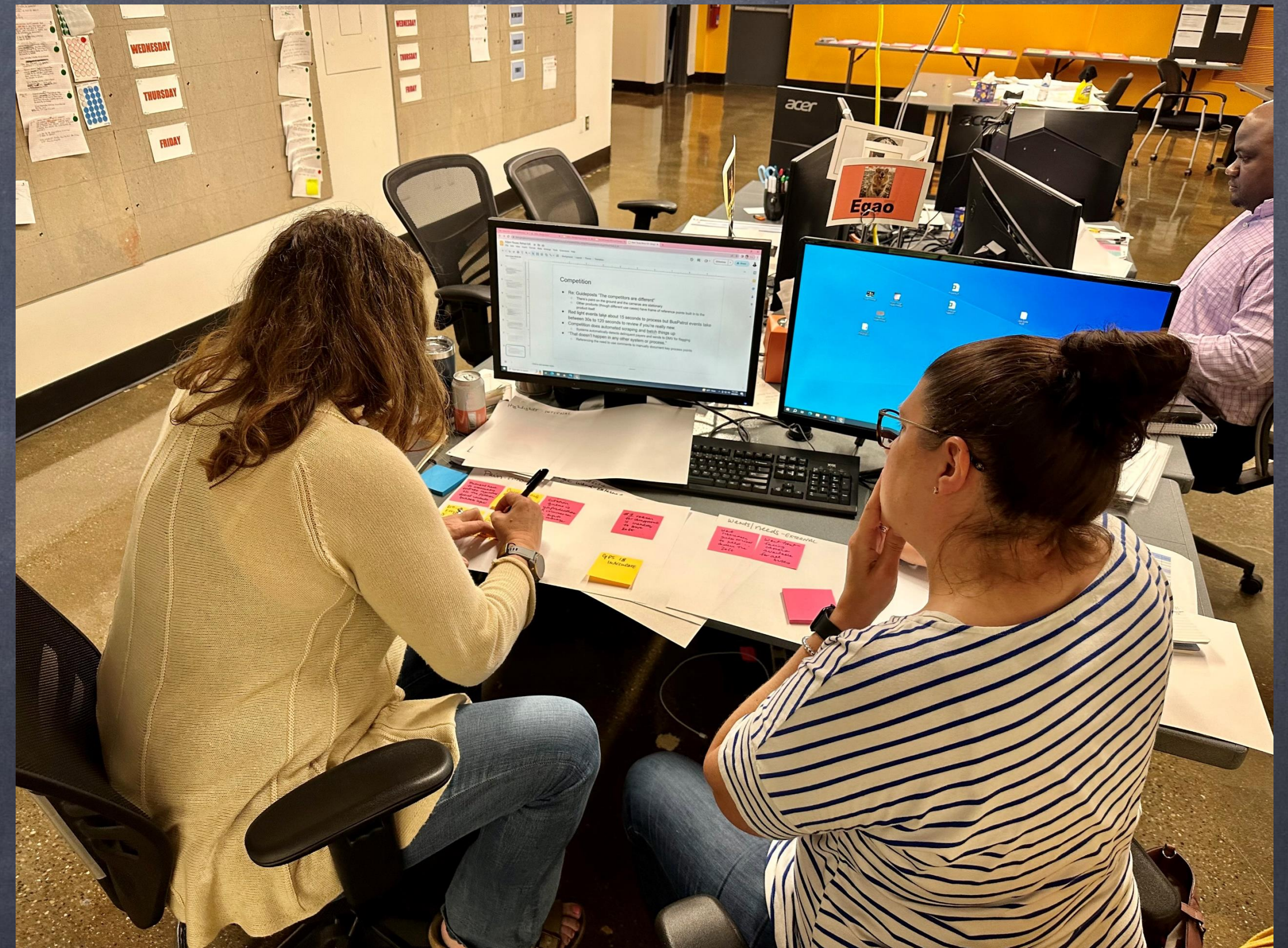
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We Do Not Rely On Individual Super Heros, We Pair, and Rotate Partners

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Designers & Experts

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We Do Not Rely On Individual Super Heros, We Pair, and Rotate Partners

Everyone Has An Opinion, We Favor Directly Observed Behavioral Data

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Designers & Experts

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Everyone Has An Opinion, We Favor Directly Observed Behavioral Data

Help Is Within Earshot

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Deep Relationships With Product Users

We Meet With Product Users In Their
Native Environments, Ideally, We Observe
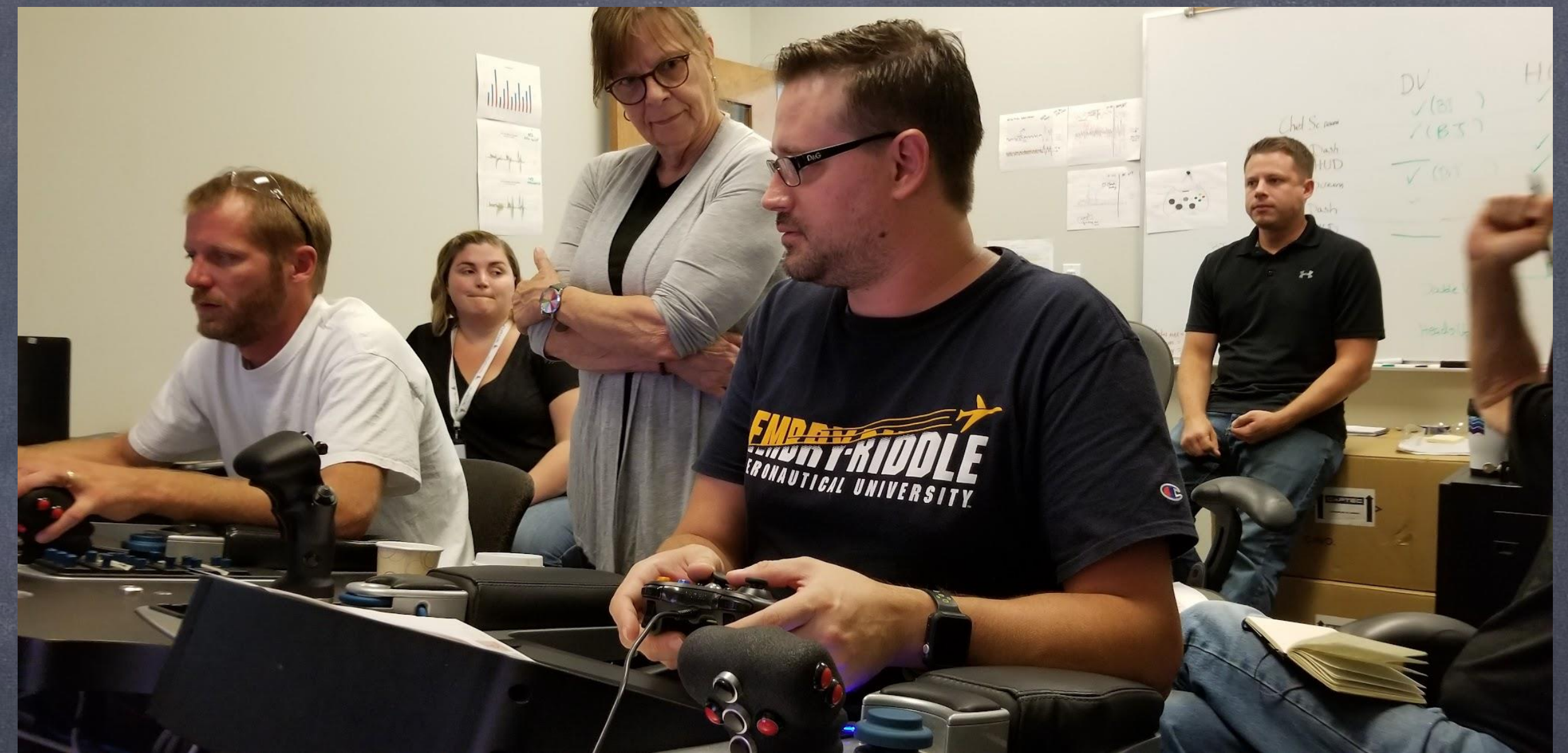Them Doing Actual Work

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Deep Relationships With Product Users

We Meet With Product Users In Their Native Environments, Ideally, We Observe Them Doing Actual Work

Ask Why, Pay Attention To Unexpected Behavior, Empathize

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Deep Relationships With Product Users

We Meet With Product Users In Their Native Environments, Ideally, We Observe Them Doing Actual Work

Ask Why, Pay Attention To Unexpected Behavior, Empathize

Listen, Do Not Sell The Product, Do Not Tell The Users They Are Wrong

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Deep Relationships With Product Users

We Meet With Product Users In Their
Native Environments, Ideally, We Observe
Them Doing Actual Work

Ask Why, Pay Attention To Unexpected
Behavior, Empathize

Listen, Do Not Sell The Product, Do Not
Tell The Users They Are Wrong

We Do Not Use Focus Groups

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Q & A