Discovery Call Guide

Introduction:
Hi everyone, my name is Rachel Wilken and I am the new Operations & Knowledge Exchange Intern for the Routehappy Product Team. Before we get started, I would like to ask permission to record this call. The recording will be used to help me organize key points and ensure I do not miss any valuable feedback shared today.

Start recording I wanted to verify again that I have received everyone's permission to record this call. Okay, let's get started. First, since I am new to ATPCO, could we take a minute to introduce ourselves? Please share your name, your role at ATPCO, and a fun fact. I'll go first: my name is Rachel Wilken, I am the Operations & Knowledge Exchange Intern for the Routehappy Product Team, and my fun fact is I traveled to India for the first time in November to meet my husband's extended family.

It's great to meet all of you. Thank you for taking the time to attend this call with me today. The Routehappy Product Team is overhauling our Retailing SharePoint page to make it more intuitive and user-friendly for not just our team, but the cross-functional teams that work closely with us. The main goal of this effort is to be transparent, organize all the content on the site today and make it user-friendly for information sharing. We want to make this a one-stop site for everything related to Present the offer (as best as possible).

The purpose of this call is to gather insights from all of you that will help us better understand your needs related to the Retailing SharePoint page. I have a series of questions to help guide our conversation today. First, we'll speak generally about the type of information you seek, and then we'll follow up with some specific questions about the SharePoint Retailing page. I just put that website into the chat for you to review, if you are not already familiar.

General: (Goal: to understand the type of information that users need and where they seek it)
1. What type of information do you need to be set up for success related to your role as it interacts with the Routehappy product?
2. What documents do you find yourself frequently sending to multiple people related to the Routehappy product?
3. What web pages/ internal tools do you visit most frequently to accomplish your tasks related to the Routehappy product?
4. How could knowledge exchange become more efficient related to the Routehappy product?
5. What type of information do you share externally to the larger Routehappy product team?

Home: (Goal: to understand users perspective of current Retailing home page)
6. Have you visited the Retailing SharePoint page before? (For those outside of the team)
7. What information do you find most useful from the Retailing home page?
8. What information do you find least useful from the Retailing home page?
9. What information would you like to see on the Retailing home page?

Documents: (Goal: to understand users document sharing habits and usefulness of the current organization method for the document repository)
1. What method(s) do you use to share documents with multiple people?
2. Did you know that there is a retailing document repository in SharePoint?
3. How frequently do you visit the Retailing document repository to find information?
4. What type of documents would you expect to find here?

Conclusion:
1. Do you have any additional thoughts related to sharing information, or the Retailing site homepage ~~or document repository~~?

Thanks again for participating in this call! I have several more calls like this one scheduled with different teams over the next three weeks. Once those calls are completed, I'll be working with Tripura and Lisa to prioritize user needs and begin brainstorming ideas for the new SharePoint page. We'll keep you informed as the project progresses and will share the new SharePoint page once it's finished.

Meeting Agenda:
Welcome, permission to record, and attendee introductions (5 min)
Introduction to the Project (5 min)
Discussion surrounding the type of information needed to be successful in your role for the Routehappy product (20 min)
Discussion surrounding current home page for the Retailing SharePoint site (10 min)
Discussion surrounding current document repository for the Retailing SharePoint site (10 min)
Additional thoughts about the Retailing SharePoint site (10 min)