Mapping Modes and Mindsets

What are Modes and Mindsets?

Modes: the ways in which users engage with benefits

Unlike a linear process flow, modes outline the state of the client through fluid, recurring activities.

Mindsets: users' outlooks and approaches towards benefits

Mindsets help us understand distinct behaviors that define groups of people.

Modes and Mindsets help us understand the relationship between people and benefits in digital times. This methodology not only translates the findings obtained during the field research phase into opportunity-driven, user-focused insights, but also it scales to depict the potential behaviors and motivations of future clients.

User Modes

Modes

Monitor: Understand current state and metrics on processing

Prioritize: Identify how to focus resources on processing

Investigate: Quickly answer a specific mission question

Report: Answering consistent and routine operational questions

Operationalize: Translating insights into operational action

Activities

Monitor
- Apply filters
- Check status of a region
- See capacity metrics
- Determine compliance
- Make operational decisions

Prioritize
- Filter by location
- Sort by time
- Filter by supplier
- See current status of region
- Determine priority
- Operationalize/assign tasks

Investigate
- Search a unique identifier
- Expand connections
- See current location
- See duration and event times
- Read narrative
- View current status
- View historical events
- Inquire the field
- Generate report

Report
- See current aggregate status
- Apply stakeholder filters
- Apply location filters
- Sort by time
- See capacity metrics
- Compare current to historical metrics
- Generate report periodically

Operationalize
- Draft reports
- Notify external party
- Shift resources

User Mindsets

1. **Digital** vs **Analog**

   More traditional or tech-savvy?

2. **Mission-focused** vs **"9-5"**

   Cares about mission or sees work as merely a job?

3. **Independent** vs **Dependent**

   Wants to seek help or fix their problems on their own?

4. **Curious** vs **Uninterested**

   Curious to collaborate or not interested in being involved with tech development?

The Engaged Experienced Leader

Analog · Mission · Dependent · Curious

Highly engaged and has lots of ideas. Little understanding of tech but highly valuable institutional knowledge. Values high-touch relationship.

The Skeptical Self-Starter

Digital · Mission · Independent · Uninterested

Very tech-savvy but also independent in operations. Likes to innovate on small scale and create own solutions. Mistrusting of HQ's solutions because of past failures.

The Aloof Action-oriented Doer

Analog · Mission · Independent · Uninterested

Less interested in tech and more interested in real action in the field. Wants to see things get done, not interested in "pretty" yet useless analytics.

The Needful Nine-to-Fiver

Digital · 9-5 · Dependent · Uninterested

Apathetic about mission and only interested in most efficient way to get through shift. Familiar with tech but not fully adaptable to learning new things and needs help.

The Super Helpful Superuser

Digital · Mission · Independent · Curious

Highly valuable first-hand mission knowledge and enthusiastic about tech. Willing to engage and provide feedback.

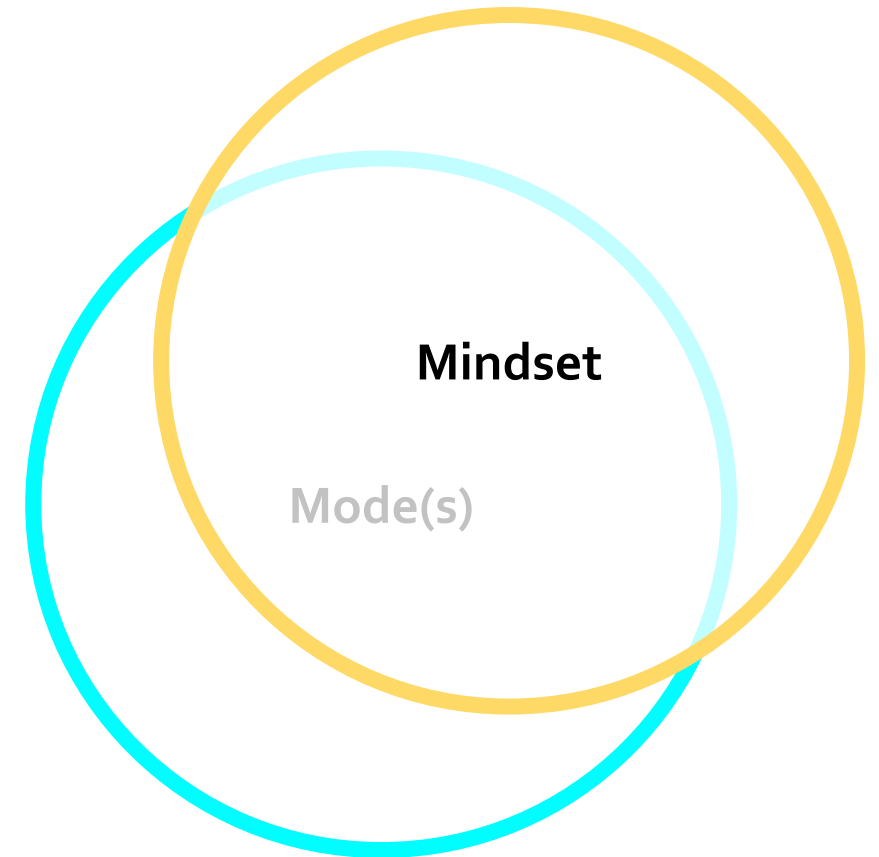## The Accustomed Average Joe

Analog · 9-5 · Dependent · Curious

Just wants to get it done quickly and correctly. Willing to provide feedback but may not be high mission-value. Somewhat set in his/her ways. Interested in tech but not tech savvy.

What are Journeys?

Journeys: the experience of a mindset within various modes

By overlaying a mindset onto a mode, or several modes, we can begin to identify the client's perspective and needs in a journey.

> Mindsets respond uniquely within modes; by understanding distinct behaviors common to groups of people, our team can define and prioritize targeted opportunities to engage clients

Mindset

Mode(s)

User Journeys

Setting the scene:

The Accustomed Average Joe is a Supervisor

MINDSET

The Accustomed Average Joe

Analog · 9-5 · Dependent · Curious

Is desensitized to the process and just wants to get it done quickly and correctly. Is willing to provide feedback but may not be high in mission-value. Interested in tech but is somewhat set in his/her ways.

CHARACTERISTICS

Digital	Analog
Mission	9-5
Independent	Dependent
Curious	Uninterested

Mode	1. Investigate	2. Prioritize	3. Operationalize
Behavior	• Logs into Qlik Dashboard • Filters for region • Exports csv of filtered data sorted by highest time	• Identify which large holding facilities can accommodate the packages • Identify facilities that fit the package type a particular location can accommodate • In those groups, identify packages that have been in the queue the longest	• Draft manifests for the shipping of various packages
Feelings	• Confused as to why they're logged into Qlik and not ULP	• Too many clicks to identify these groups	• "Copying and pasting each invoice into the system from the exported list makes me have to go back and forth between windows too many times"
Opportunities	• Smoother session management between ULP and Qlik, automatic	• Custom filters than can be saved as shortcuts	• Manifest builder in ULP that allows you to import your prioritized list of packages

How Can We Apply in Practice?

Inform Prioritization:
prioritize modes/mindsets to then prioritize features

By prioritizing modes/mindsets before feature prioritization, we can have clear user-driven priorities for features in addition to stakeholder priorities

"We should prioritize the Engaged Experienced leader over the Aloof Action-oriented Doer because X, Y, Z."

Identify Journeys:
whiteboard scenarios with certain modes and mindsets

By whiteboarding scenarios with prioritized mindsets and modes, new features or enhancements can be clearly tied to prioritized user groups

"If I were an Needy Nine-to-Fiver, what would I want to see in ULP to answer an inquiry from executives?"

Guide PBR & Design Crit:
refer to prioritized mindsets during PBR & design crit

By consistently referring back to prioritized modes/mindsets during PBRs and design crit, we hold ourselves accountable to priorities and have a common language to reach consensus

"Does this feature or design meet the needs of our highest priority user groups or mindsets?"