

# PRD: Meerkat

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# Vision

Professionals working on innovation projects struggle to manage projects across a myriad of digital platforms. Imagine you are Rivian and have conducted hundreds of user studies; only to find those research notes hidden and unorganized across different tools and personal accounts. Meerkat is a project management platform for innovation teams to streamline and enhance their product development processes by aggregating project data into a single searchable platform. This enables actionable discovery across tools and accounts through NLP-based (natural language processing) proprietary algorithms. Meerkat will allow users to surface research insights across various levels of specificity and connect project artifacts to the product development process through seamless integration of their existing collaboration tools.

# Motivation

## Personas

We considered three personas across three different job responsibilities on innovation-focused teams. The product persona encompasses designers, engineers, researchers, and product managers. These people are making product decisions and are on the front line of developing products/services to solve user needs. The product-parallel persona includes account/program managers, communication-focused roles, and business analysts. These people are an integral part of the process, but they have limited experience with innovation, design thinking, and product/service development processes. Executives are the third persona group. Executives are part of the process, especially the final decision-making portion, but they are less hands-on during specific product decisions.

### Primary Persona:

#### ***Product Peter***

“As we generate insights throughout the innovation process, insights are easily left out by the way they are organized across different digital tools. The move to virtual work during the pandemic highlighted the need for a solution.”

#### About:

- 28 year old product designer in Chicago
- This is his third product role
- Has a BS in mechanical engineering and MS in design innovation
- Loves consumer products

#### Goals/Tasks:

- Work more collaboratively with product and product-parallel teams internally
- Document and organize the innovation process more appropriately
- Carry insights throughout the process from research to the final product

- Sort through archived work more efficiently to apply to current work

Needs/Implications:

- He is losing time searching through old materials for specific information

Fear/Frustrations

- Peter may want to revert back to his old process because he believes it will help him land the project in a better place.

Why is he/she a challenge?

- This new offering will make Peter work through his innovation process differently. Is he willing to take time out of a sprint to become fully acclimated with the new process and adopt it?

***Product-Parallel Patricia***

“The product people sort of live in their own world and speak their own language. I can not even keep up with all of the digital tools they are using. I think both groups could benefit from one another if we could blend the working process together more and have a primary digital location for the project.”

About:

- 33 year old business strategist in New York City
- Her first job in innovation
- Has a BBA in finance
- Passionate about financial technology

Goals/Tasks:

- Work more collaboratively with product people and executives
- Better understand the innovation process and how the product-parallel efforts impact the work (and process)
- Be integrated with the product person for more of the innovation process

Needs/Implications:

- Understand and work better with the product oriented people
- Does not want to be overwhelmed with the technical aspects of the product process

Fear/Frustrations

- Patricia is already working long hours and is worried about how this will add work and time to her already swamped schedule

Why is he/she a challenge?

- Patricia has never been a part of a full innovation process. What will her timeline for adoption look like?

**Secondary Persona:**

***Executive Evan***

“Our goal as an organization is to be human-centered and innovative. We are not reaching our potential because of the way our processes are currently organized and managed.”

About:

- 46 year old head of product in San Francisco
- First executive role
- Has a BS and MBA

- Enjoys working at the intersection of business, design, and technology

#### Goals/Tasks:

- Be able to provide feedback or sign off on projects/products without direct communication
- Have the flexibility to be as involved as desired

#### Needs/Implications:

- Be able to check in on the process of a project without needing long meetings whenever he wants information
- Does not want to look at the entire process, he wants to be as high level as possible

#### Fear/Frustrations

- Evan does not want to become too hands-on
- Evan also wants to build relationships with the people he is managing though

#### Why is he/she a challenge?

- Evan oversees several projects. Will he really have time to be more involved? Will he be interested enough to do so?

## **Unmet Needs**

As digital collaboration and work continue to become more cemented as a part of life for working professionals, there is a clear need for collaboration tools across the digital and physical worlds so innovations can reach their full potential. Current tools are not built to unleash the potential of innovation or only focus on a specific task/tool of the process. In order to do this, consumers need a tool for collaboration and project management to integrate the entire project process from research to launch.

Today, tools are focused on a specific part of the innovation process. Users store and manage different pieces of their current innovation process on multiple products. Powerful discoveries and insights are easily lost or forgotten while using multiple tools. Productivity tools continue to improve individually, but there is a lack of tools that combine collaboration and project management. We believe there is power behind developing a product that promotes collaboration throughout the innovation process while fostering a variety of integrations.

To better understand how people are working together today, we conducted six interviews. Based on our interviews, we developed three core personas that demonstrate our user base. We spoke to people with varying innovation-focused roles. These interviews included a product manager, user research PhD student, mechanical engineer, design researcher, and software engineer. Below were our three core questions for initial interviews:

1. When working on a research project, do you ever find that you want to reference some of your learnings from your (or your colleagues') past projects? When? Why?
2. What are your biggest challenges with coordinating research from different projects?
3. How do you make sure that all relevant insights are carried through the entire project?

From our initial interviews, we learned interesting information about our personas in order to develop hypotheses. Our interviewees strive to be problem solvers and make an impact on the world. They collaborate with other job functions. Some organizations are built to collaborate

across job functions better than others. Executives are less involved in the day to day but want to be a part of the vision, high-level process, and end result of a project.

We have identified the following unmet needs for our users:

1. All user insights and discoveries from the research team are unlikely to be considered in a final product. When researchers hand off their work, there are commonly insights immediately or soon after lost by the team on the receiving end.
2. Information organization is a nightmare unless a significant amount of effort is put in. Innovation teams need a more simplified way to organize all of their work so it can be accessed in the future.
3. People do not always know where to start when synthesizing information. A form of templates can help document, organize, and present information.

Design thinking processes emphasize understanding the user needs to develop a solution. Digital collaboration tools help projects reach their potential — especially in virtual or hybrid environments. Organizations continue to invest more in collaboration tools as they push to leverage digital tools for better in-person and virtual working environments.

Specific hypotheses about unmet consumer needs include:

- Product Peter
  1. I believe Product Peter experiences poor collaboration when working on multidisciplinary teams.
  2. I believe Product Peter experiences losing insights during the innovation process because of limited existing technology tools.
- Product-parallel Patricia
  1. I believe product-parallel Patricia experiences confusion on product-focused projects when working on innovation projects.
  2. I believe product-parallel Patricia experiences a lack of understanding the product development process because she has not done it before and does not understand the roadmap (just based on meetings).
- Executive Evan
  1. I believe Executive Evan experiences weak communication on innovation projects when he wants to understand the current state of the project.

Based on these hypotheses, we have developed three overarching pillars which summarize the problems we uncovered: all your data in one place, searchable research database, and proactive insights. These three pillars allow us to provide a differentiated value to our users that does not currently exist in the market.

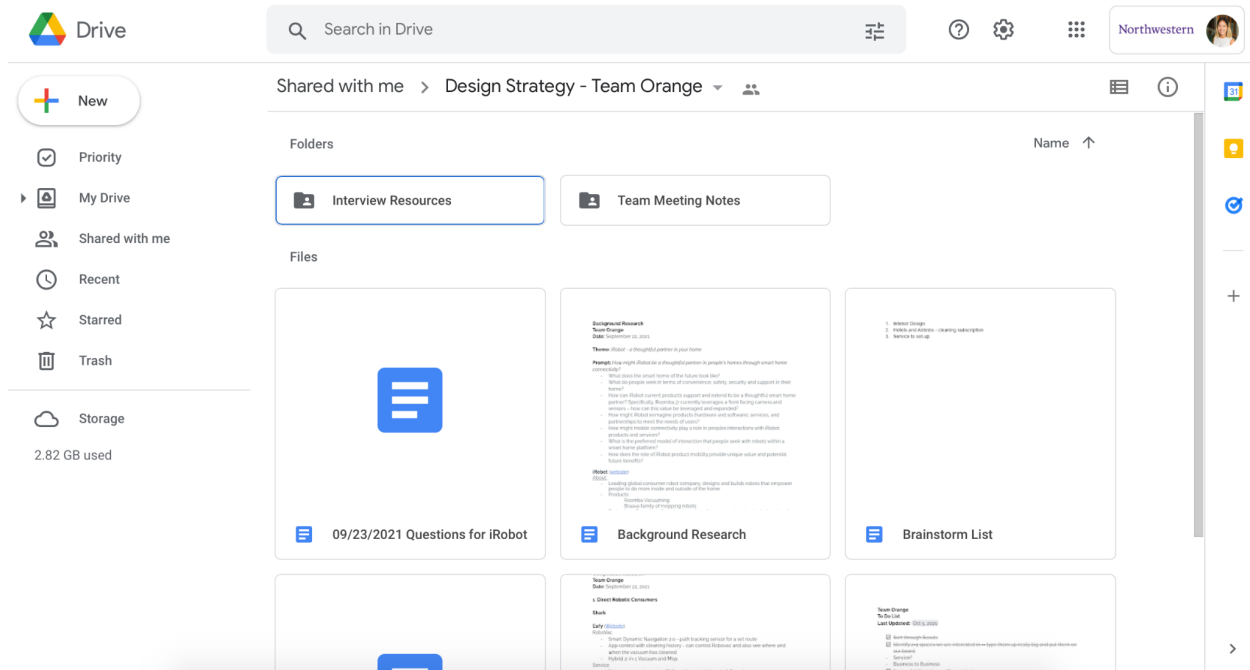
## Existing Solutions

### Existing Solution #1: Shared Network Drive for Files

The most common method for storing research findings is within a shared network drive for files.

Companies already utilize these systems to store other files, so it is also the go-to for research purposes. Popular examples include Microsoft OneDrive, Google Drive, Dropbox, or Box. Users are able to collaborate on files, search for files by name, and sort by file name, date modified, or file size.

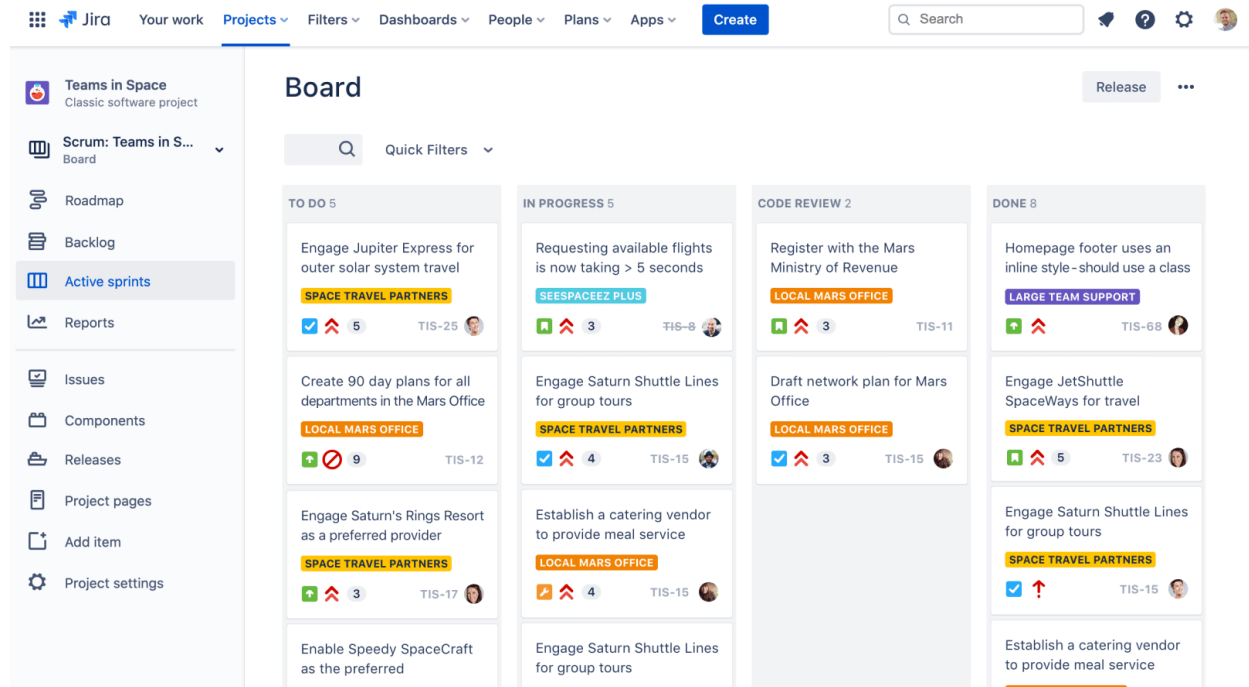
The advantages of network drives such as OneDrive or Google Drive is that they have a low barrier to entry since most people are familiar with this organization structure and it is easy to use. However, a big disadvantage is that it is difficult to identify unique information within documents. This process occurs when users know what they are specifically looking for. Currently, one must rely on the file name or file preview to try and figure out what information is in a document. Users can search across documents, but the user must know what specific words or phrases they are looking for in order to search successfully. If they can not figure it out, they need to fully open up files. As the number of documents increases, it becomes more difficult for researchers to remember where specific information is stored. These shared networks are made for general use and are insufficient for research-specific purposes.



## Existing Solution #2: Jira

Jira is a proprietary issue tracking product that allows bug tracking and agile project management. Researchers can list out the tasks that they have to complete and place these tasks into columns depending on the status of the task. Jira is similar to Trello, which is more commonly used by students to keep track of their projects.

There are a couple of insufficiencies with Jira. First, Jira is extremely difficult to use, especially for new users. There are a lot of features on the platform other than the board where users can list out their tasks. As a new user, Jira is extremely overwhelming. Secondly, Jira has a decent adoption period, because it is time consuming — ironic for a productivity tool. Many users give up using Jira and instead use basic methods to track their projects, such as pen and sticky notes. Lastly, Jira is designed to be used for software development as opposed to carrying research insights to product launch. While UX researchers can use Jira to keep track of their user research tasks, they don't use it to document findings and insights on it.



### Existing Solution #3: Confluence

Confluence is a Jira plug-in built for teams needing a secure and reliable way to collaborate on mission-critical projects. Researchers can write discussion guides and research findings on Confluence that other researchers on their team can read and edit. Confluence is similar to Google Docs, which is more commonly used by enterprise customers to collaborate on documents.

There are a couple of insufficiencies with Confluence. Similar to Jira (also made by Atlassian), Confluence is extremely difficult to use, because there are a lot of features on the platform other than the collaborative documents. As a collaborative tool, it does not allow users to collaborate on the same document at the same time. Users will have to edit the document one by one in order to collaborate, which makes it extremely inconvenient for professional teams to use. Lastly, Confluence is not designed to be used for software development as opposed to research insights, which is likely why the collaborative feature works similar to Github.

Home Recent Spaces People Apps Templates Create Search

Marketing / Meeting notes Share

## Brainstorm Notes

Created by Brittany Sudlow  
Feb 16, 2021 • 1 min read • 1 person viewed

<b>Facilitator</b>	@Alana Grant
<b>Participants</b>	@Will @Jose @Emma
<b>Brainstorm date</b>	Feb 26, 2021
<b>Video conference link</b>	www.zoom.us/confluence
<b>On this page</b>	<ul style="list-style-type: none"> <li>📌 Brainstorm planning</li> <li>📌 Brainstorm pre-work</li> <li>📌 Brainstorm agenda</li> <li>📌 Brainstorm outcomes           <ul style="list-style-type: none"> <li>Summary of results</li> <li>Decisions</li> </ul> </li> </ul>

LINK TO OTHER PAGES.  
Link to other Confluence pages to provide more context and easy access to information.

### 📌 Brainstorm planning

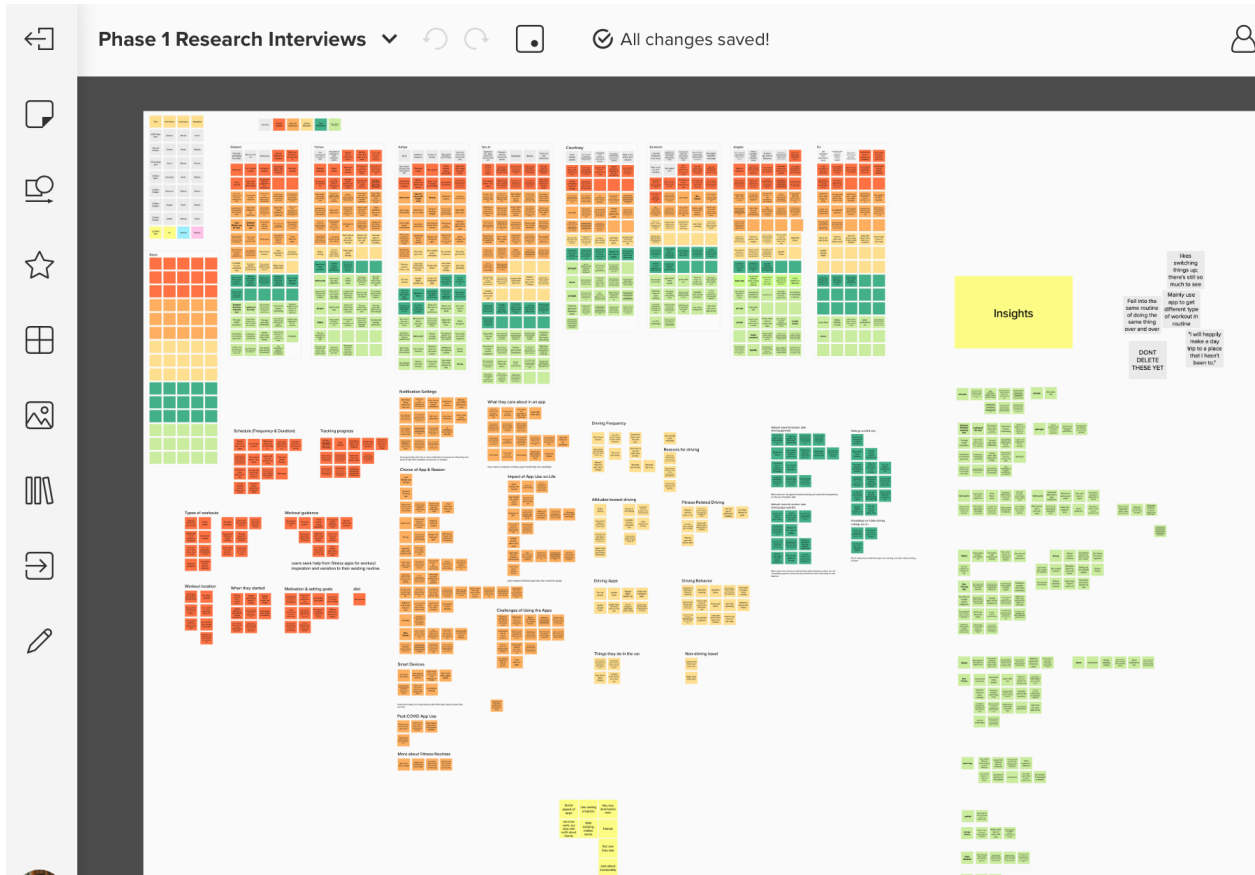
<b>Goals of the brainstorm</b>	Increase adoption Reduce churn
<b>Brainstorming method</b>	📌 Creative workshop with the product team to address customer

### Existing Solution #4: Mural/Miro

Digital collaboration tools, such as Mural and Miro, are increasingly used to generate and document insights. Researchers can arrange data visually to identify themes and insights that inform product requirements.

A disadvantage of using Mural or Miro is that once researchers have made their insights, the insights live within the mural that they are created. It is difficult to sort through the information to locate the insights; they get lost amongst all the data. Finally, the platform is set up so that each Mural stands alone -- there are no organization features such as branching, creating folders, or linking that allow users to present information at a high level and dive deeper into the data.

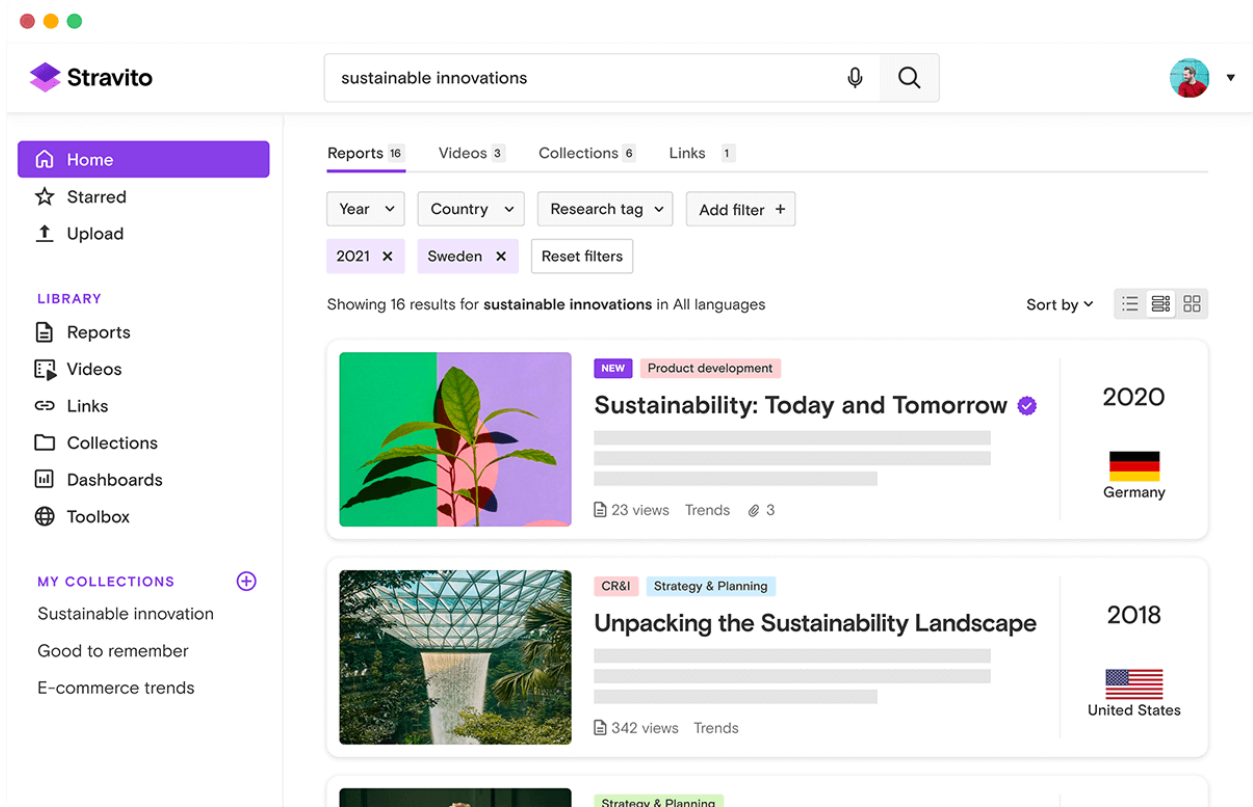




### Existing Solution #5: Knowledge Management Systems (Stravito/Sharpr)

Current knowledge management systems, such as Stravito or Sharpr, use artificial intelligence to detect and centralize market research insights. Users upload their documents to the platform and key information is extracted automatically. For Stravito specifically, it has been compared to Spotify, where users can centralize internal and external information in “playlists,” which are known as Collections.

While these systems offer advantages such as their advanced Search functions and modern UI, they are primarily designed for business and market strategy purposes.



### Competitor Feature Matrix

This competitive analysis demonstrates that there are many available solutions to store user research data, but few offer features specifically for insight management. None of the existing solutions address insights management for design thinking and innovation processes. Meerkat's value proposition is a digital platform centered around user research and needs that enables collaborative teams to easily manage and track insights throughout the product innovation process.

	Meerkat	Shared Network Drive for Files	Jira	Confluence	Mural/Miro	Knowledge Management Systems
Primary Purpose	Product Innovation	General use	Project Management	Software Development	Product Innovation	Business and Marketing Strategy
Key Features	View research data on different layers on a project board  Store whiteboards	Upload different types of files (pdf, docx, etc.)  Create folders	Customizable Scrum and Kanban boards	Collaborative editor  Meeting notes, project plans, product requirements	Create stickies and arrange them on a digital whiteboard  See what collaborators are working on in real time	Automatically extract insights into key findings report  Create collections of reports  Recommend to colleagues which reports to read

	documents, and other files in single platform								
<b>Insights Management</b>	Generated insights automatically added to centralized location	Create separate document and manually add insights as you go		N/A - used for project tracking. Use with Confluence plug-in to store content	Create a hierarchy of content and shortcuts to important pages	Insights live within Mural that they are created		AI extracts key findings from each uploaded report	
<b>Collaboration</b>	High	Medium		Low	Low	High		Low	
<b>Barrier to Entry</b>	Low	Low		High	High	Low		Medium	
<b>Cost</b>	TBD	Box:	Business Plus: \$35/user per month	Premium: \$14.50/user per month	Premium: \$10.50/user per month	Mural	Business: \$17.99/member per month	Stravito	Custom pricing
		Google Workspace	Business Standard: \$12/user per month			Miro	Business: \$16/member per month	Sharpr	Custom pricing
		Microsoft Sharepoint	Office 365 E3: \$20/user per month						

## Differentiation

*Why are we best equipped to pursue this opportunity?*

Meerkat acts as the first step of every project as well as an interactive partner throughout the entire project by managing the project while unifying digital collaboration and data storage tools. Unlike current data sharing platforms such as Microsoft Office Suite, Google Drive, and Notion, which are siloed and limit the ease of accessing and untapping project research, Meerkat will integrate formats from different platforms into a single searchable project. This aggregation will

enable the surfacing of meaningful data from across platforms, allowing relevant work to be easily found from projects across the whole organization in one place. Meerkat integrates existing platforms seamlessly to have a low barrier to entry so new users will not feel overwhelmed importing current or previous projects.

## Why Now?

Most of the companies are in virtual or hybrid work settings. Employees do not build in opportunities to have small talks with people to get to know their project and progress — especially in virtual environments. Less communication means less opportunity to collaborate. This change in work style leads to the need for a knowledge sharing platform.

It is common for corporations to seek advice from external consultancies. Organizations have recognized the importance of incubating internal structure and process for innovation. Large organizations are acquiring or developing their own design-focused firms. For example, Accenture acquired Fjord, and Ernst & Young formed an internal design studio. When research and innovation are constantly happening in an organization, it's important to have a knowledge sharing platform so the entire company can have access to the knowledge when needed.

# Key Path Scenarios

## Use Case #1: Admin Onboarding

**Meerkat**

**A Whole New Way to Store, Visualize, and Connect Insights for Design Innovation Teams**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. In sed laoreet nisi, eu faucibus diam. Suspendisse euismod arcu vitae lectus dignissim pretium. Donec pellentesque eros ut auctor venenatis. Quisque tortor diam, blandit non convallis eget, ornare sed orci. Cras vel semper dui. Nunc massa odio, lacinia a turpis feugiat, mollis consequat nisi. Morbi faucibus nisi faucibus urna interdum gravida. Sed vel posuere orci.

[Get Started](#) [Contact Us](#)

Trusted by companies:

The advertisement includes two screenshots of the Meerkat application interface. The top screenshot shows a 'Team 1' overview with a grid of project cards and a '+ Add Project' button. The bottom screenshot shows a 'Project Endorphin' detail view with a progress bar for '2.1 Research Synthesis' and 'Phase 2.2', a 'Most Recent Files' section, and a 'Document Navigation' sidebar.

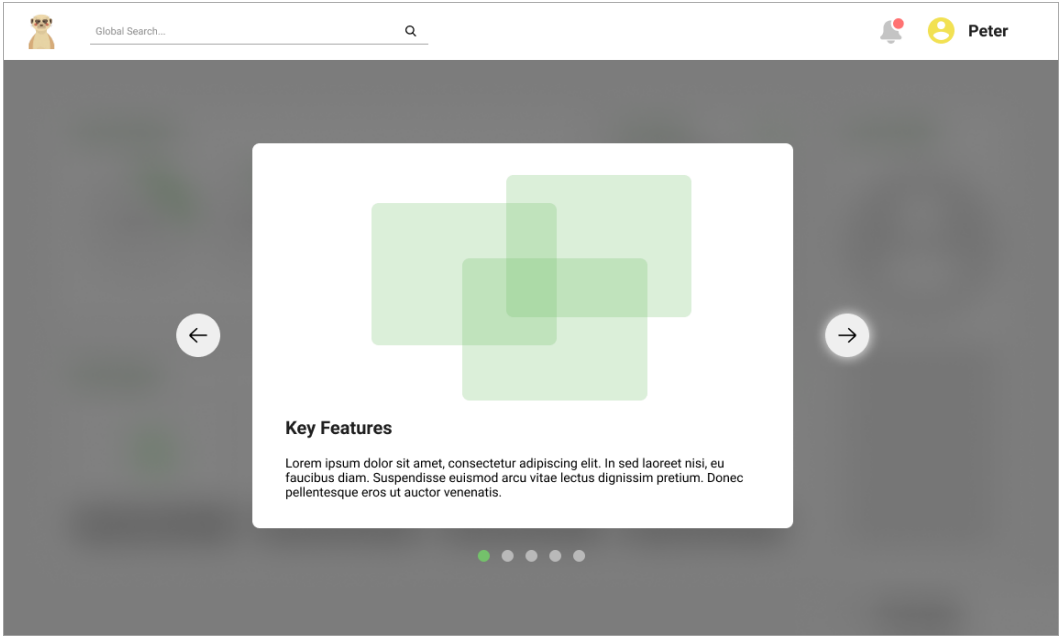
Peter sees an advertisement on LinkedIn, clicks the Ad and is brought to the pricing page.

The pricing page features a navigation bar with a user icon, 'Product', 'Community', 'Pricing', 'Sign In', and a 'Sign Up' button. The main heading reads 'A Whole New Way to Store, Visualize, and Connect Insights for Design Innovation Teams'. Below this are four pricing tiers: 'Free' (\$0), 'Team' (\$7.99), 'Business' (\$16.99), and 'Enterprise' (Contact for Pricing). Each tier includes a description, a price, a call-to-action button, and a footer text: 'Donec rhoncus mauris at orci sodales vestibulum. Curabitur'. The 'Business' button is highlighted in green.

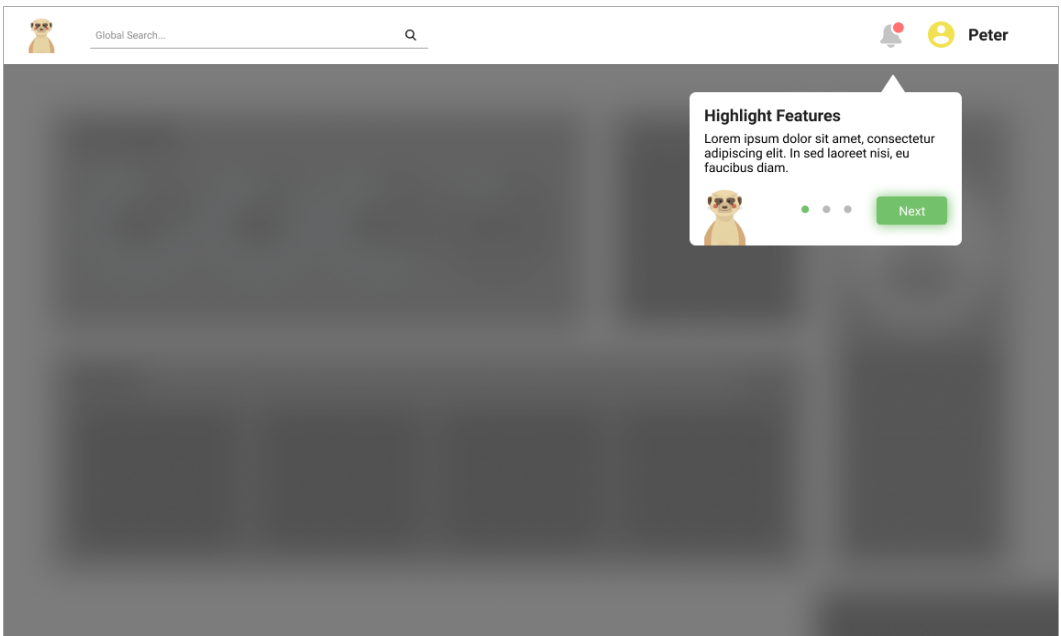
On the pricing page, Peter sees that there are a number of options, starting with a free account to team, business, and enterprise accounts

The signup page features a 'Sign In' button in the top right corner. The main content area contains three input fields labeled 'Name', 'Password', and 'Company', followed by a prominent green 'Sign up' button. Below the form, there is a horizontal line and three social media icons: Google+, Facebook, and Apple.

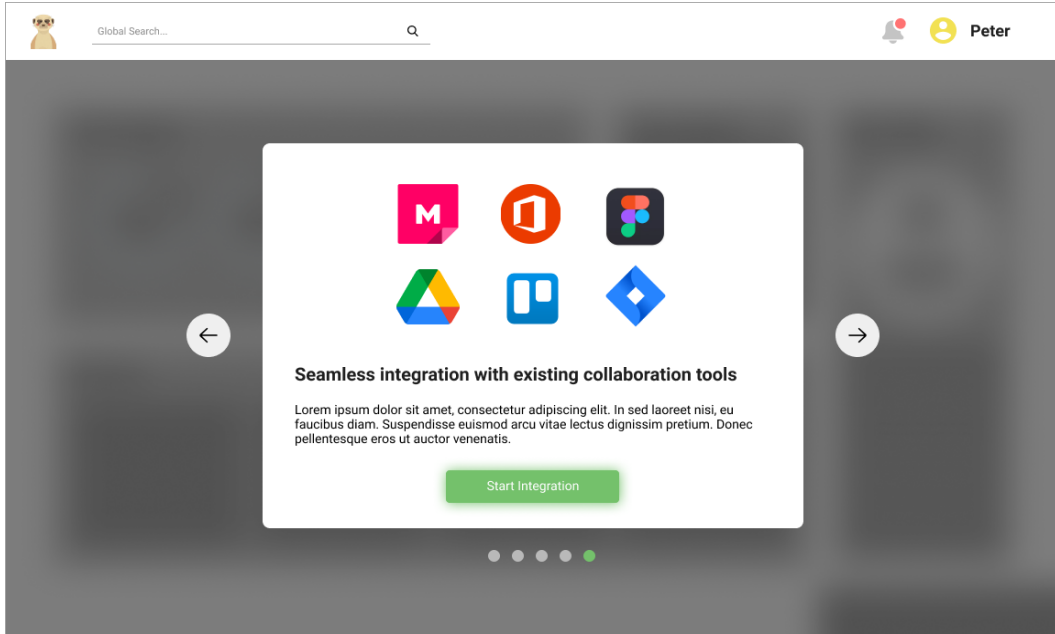
After clicking Get Business, Peter is brought to the signup page where he fills in his details, including name, password, company.



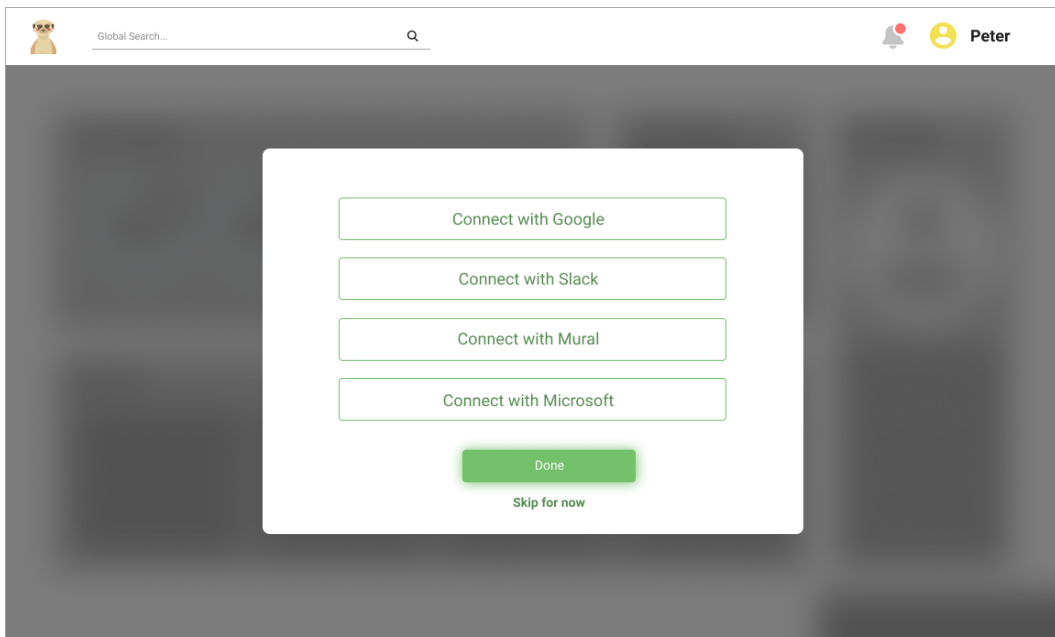
After creating his account he is given a more in depth introduction to the features in Meerkat.



Additionally, he is shown other highlight features, such as notifications, and his user profile.

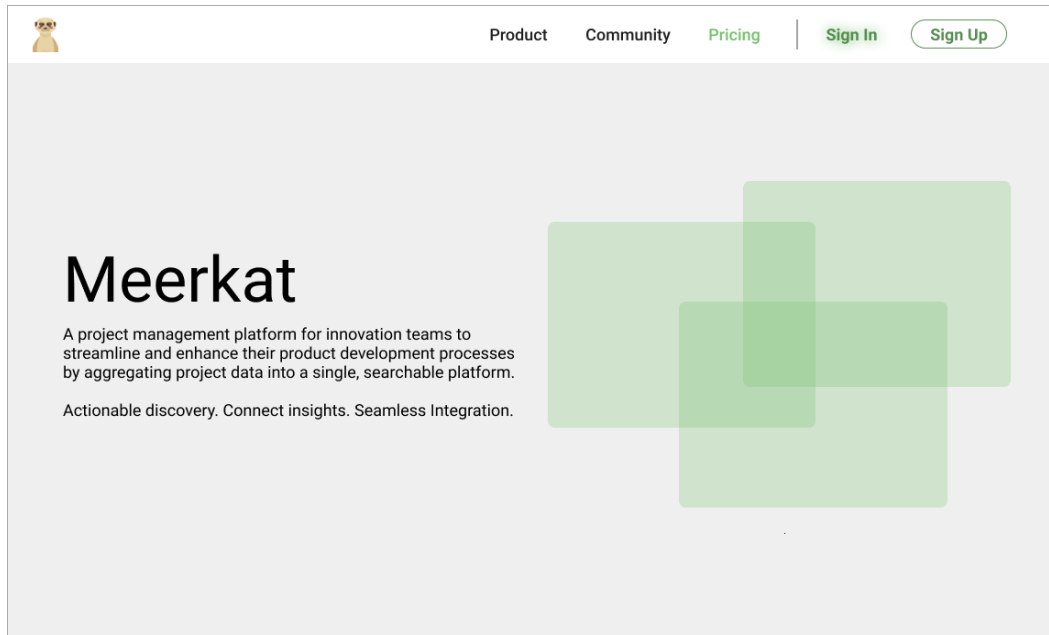


After clicking through the intro flow he is given the opportunity to connect his team's current 3rd party tools

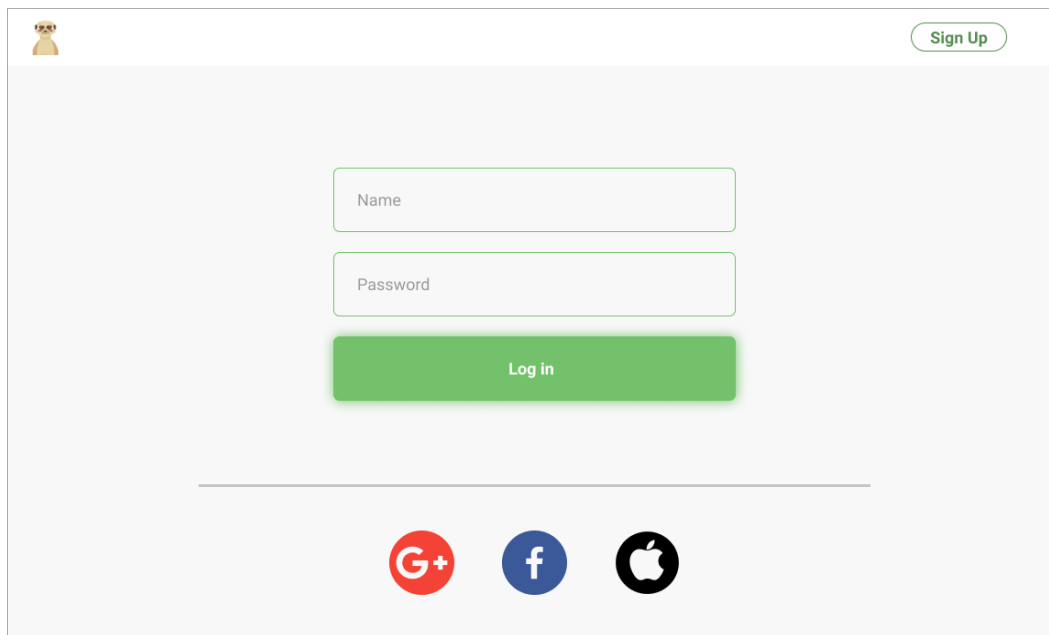


He chooses to connect with Mural, Google Drive, and Microsoft OneDrive.

## User Flow #2: Existing User

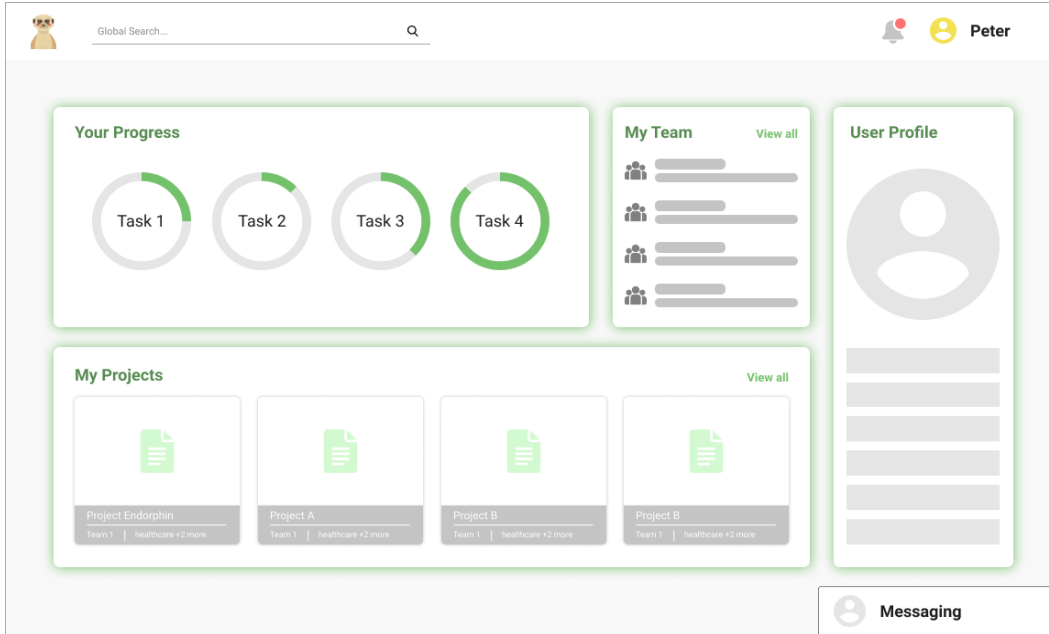


The next time he goes to Meerkat he is brought to the home page and clicks the login page

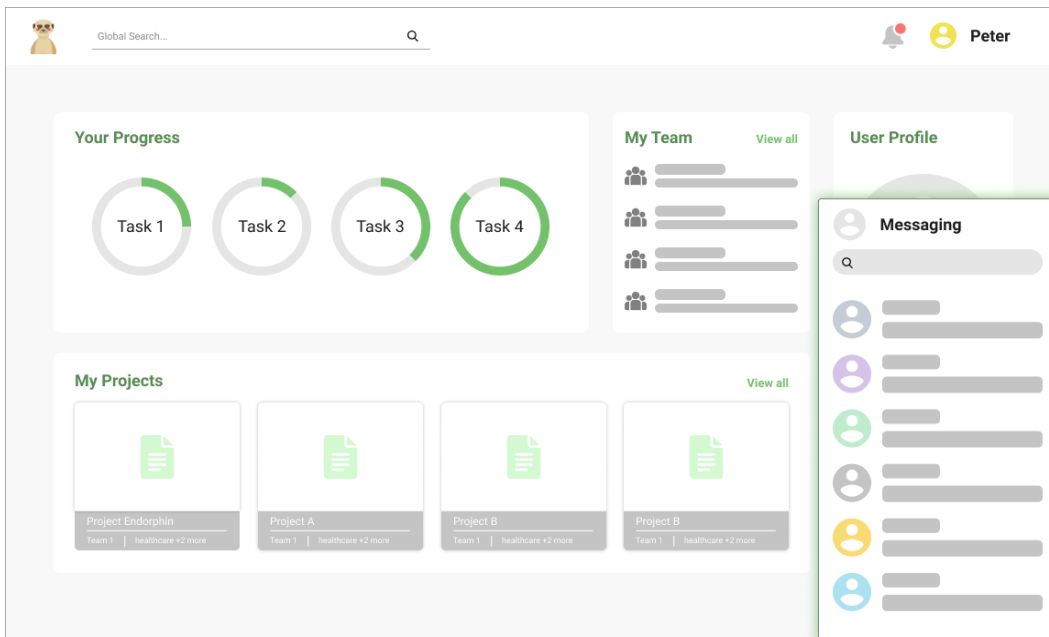


There he enters his email and password.

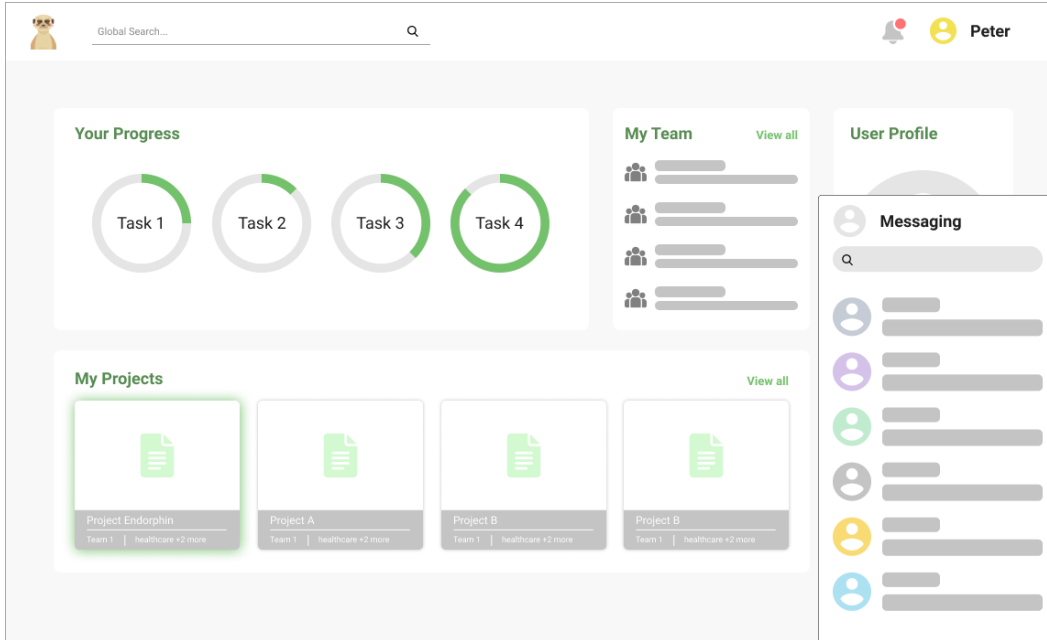




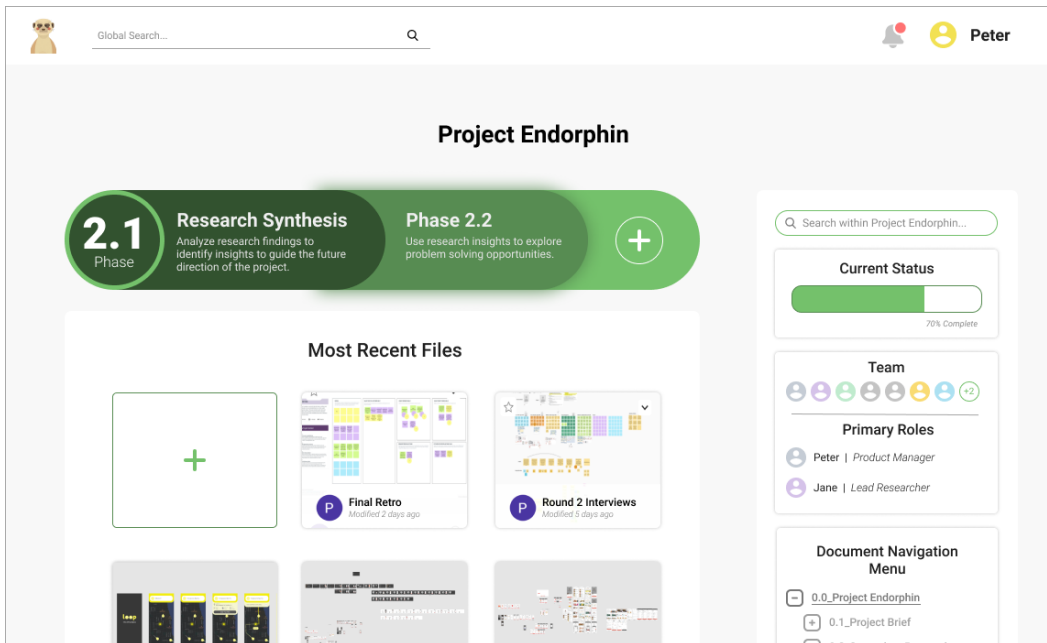
The first screen Peter is brought to is his homepage. On his homepage he is able to view progress on his tasks, his current projects, his team members, and his user profile.



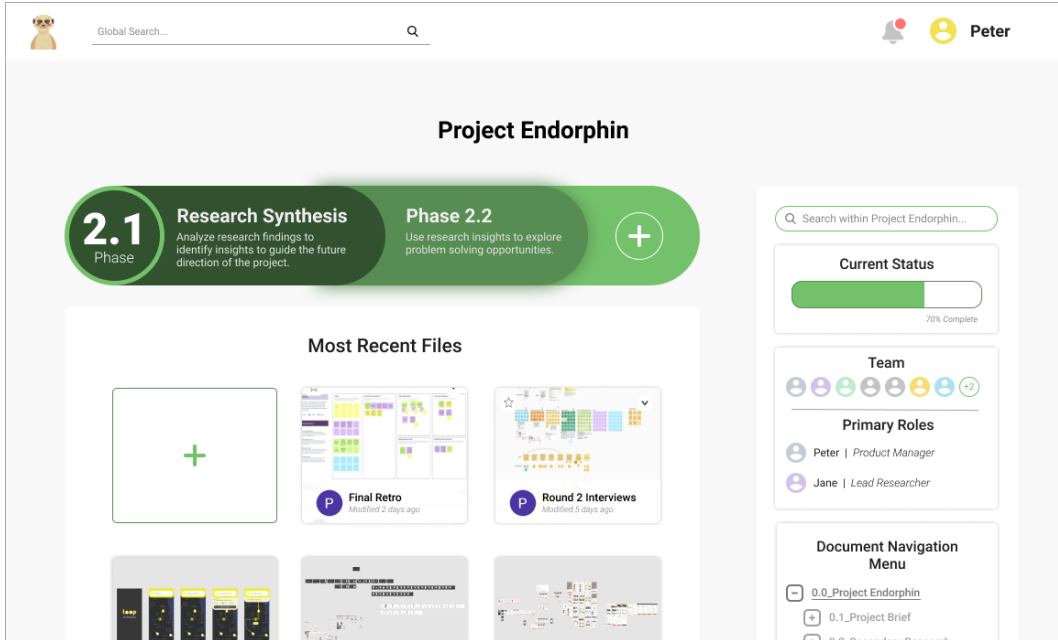
Also on the homepage he is able to open messaging where he can communicate with team members within Meerkat.



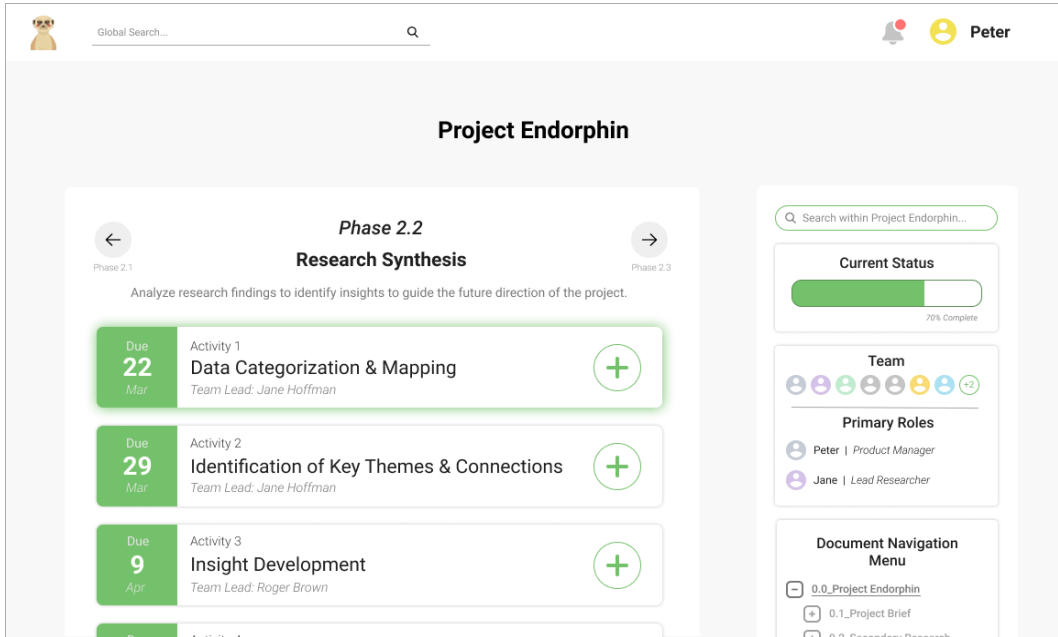
Peter clicks his first project, Project Endorphin.



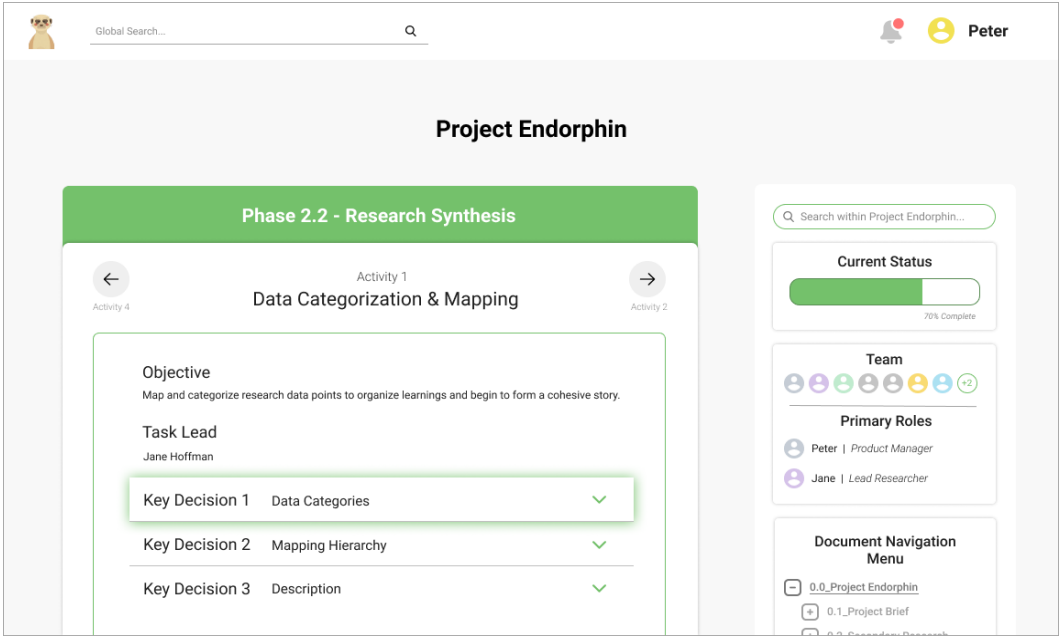
He is led to the project homepage. Here he sees the phase that the project is in. His most recent work from across platforms are shown immediately below. On the right dashboard he sees the overarching status of the project, his team with the primary roles, and a document navigation menu.



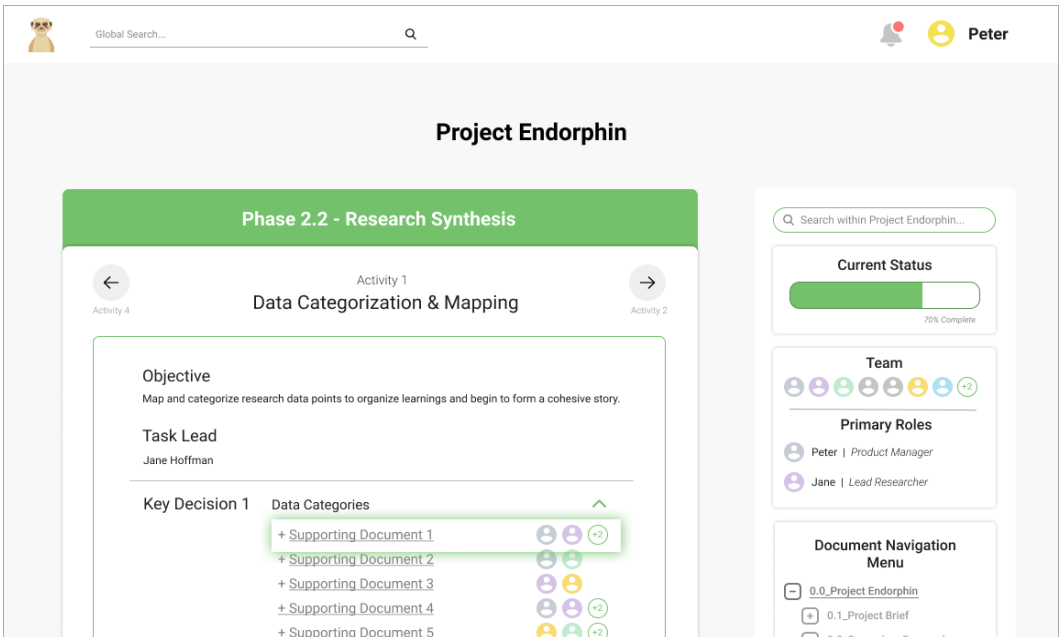
Peter clicks on the plus symbol in the interactive project timeline to dive into the project's current phase, 2.1 Research Synthesis



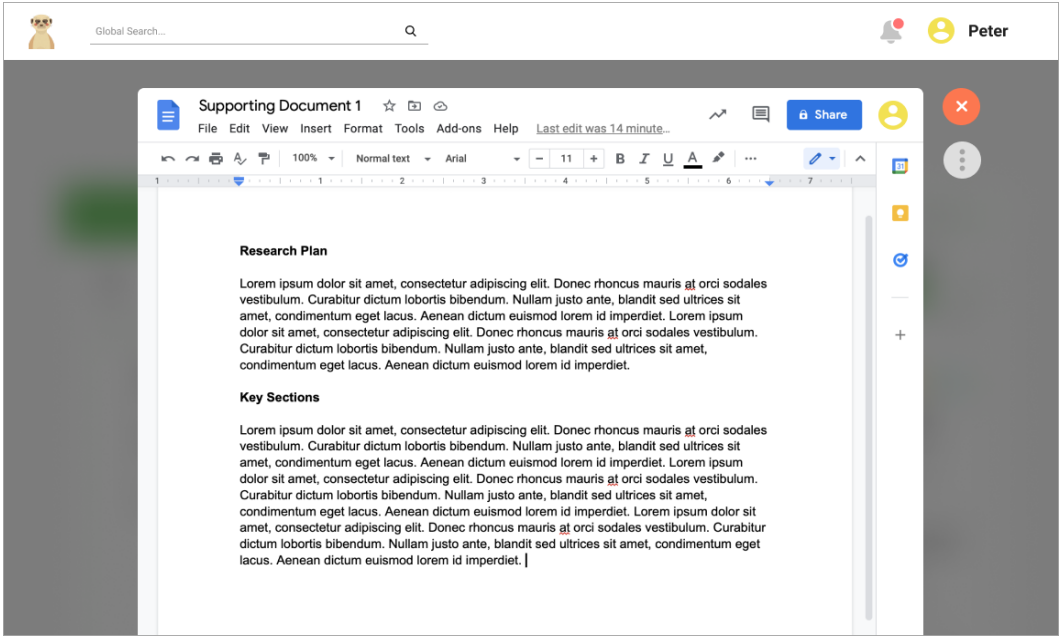
He is brought to Phase 2.1 Research Synthesis and clicks in on Activity 1: Data Categorization & Mapping. Each activity has a due date and a lead.



Going one level deeper, is is able to see the objective for this activity. Wanting to learn more about Data Categories he clicks the dropdown.

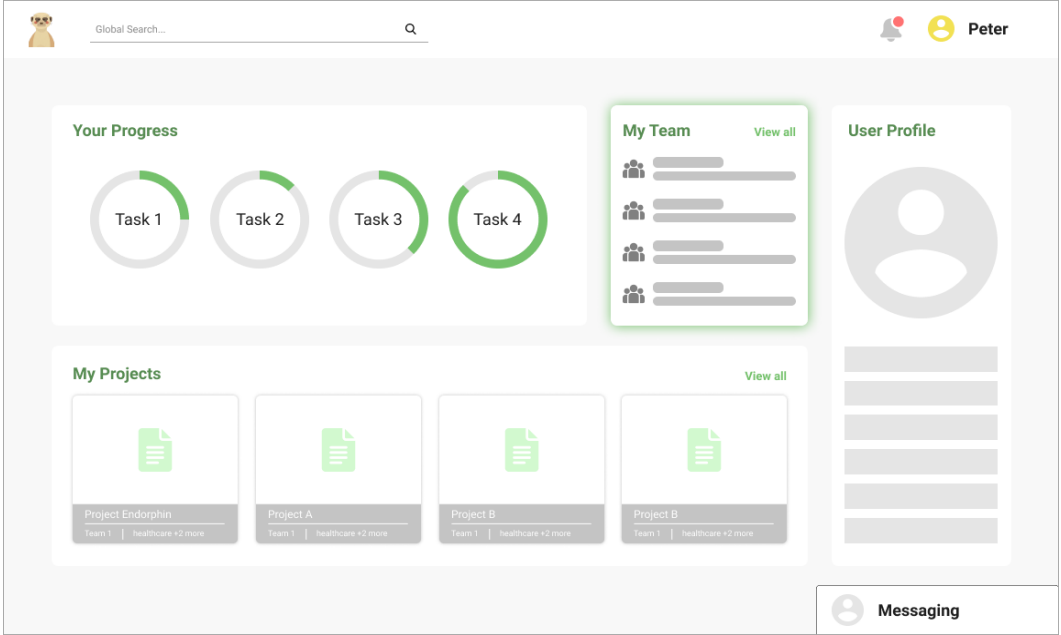


Here he sees the linked supporting documents from Mural and Google Drive.

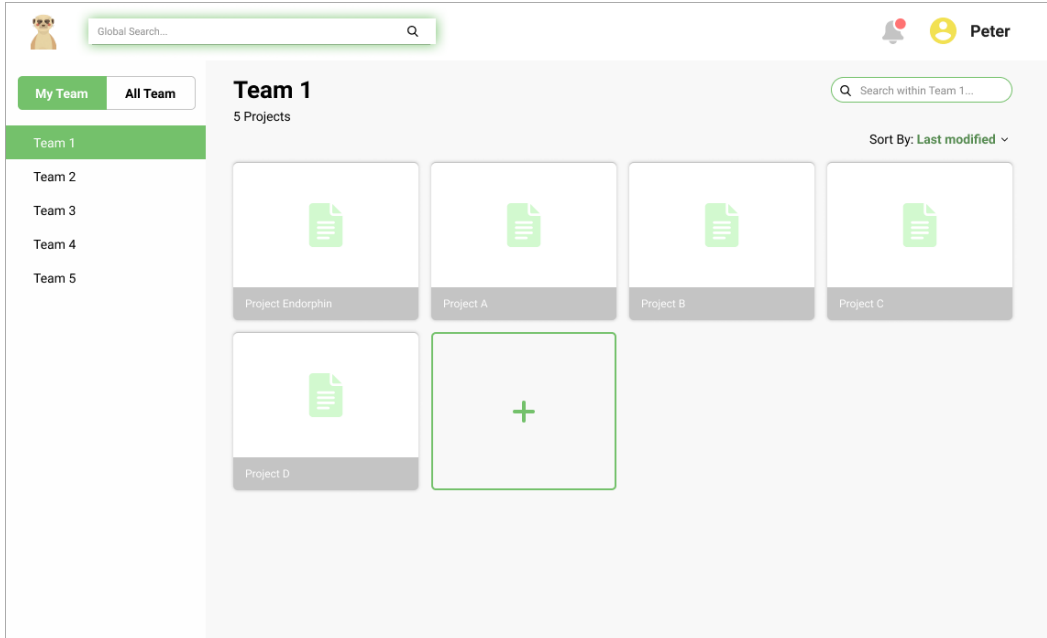


Clicking on Supporting Document 1, Peter is brought into a preview of the Google Docs. From here he can jump directly into Google Docs.

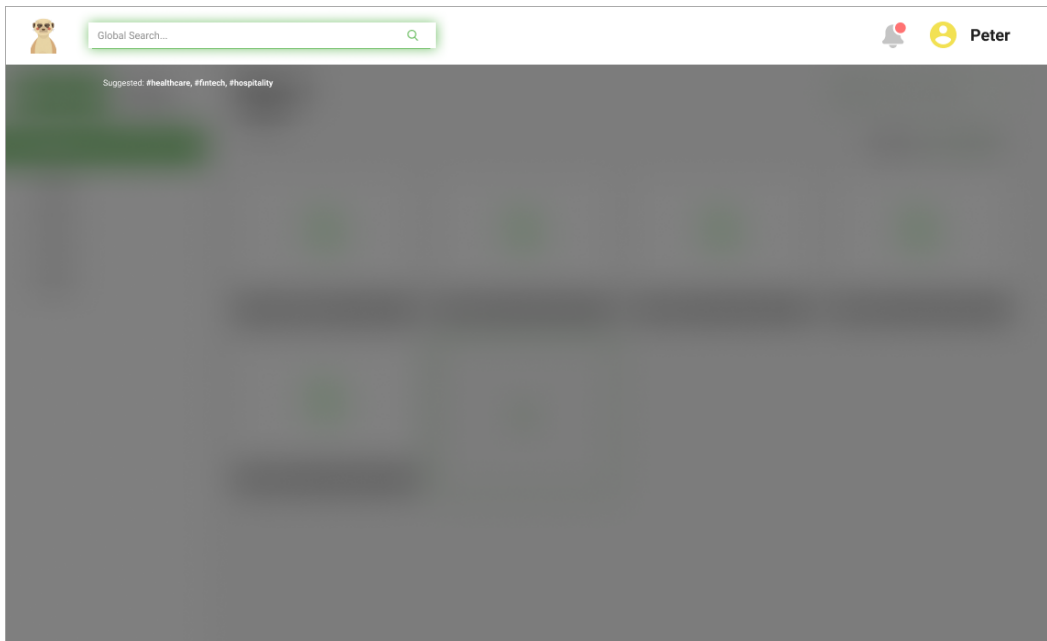
### User Flow #3: Global Search



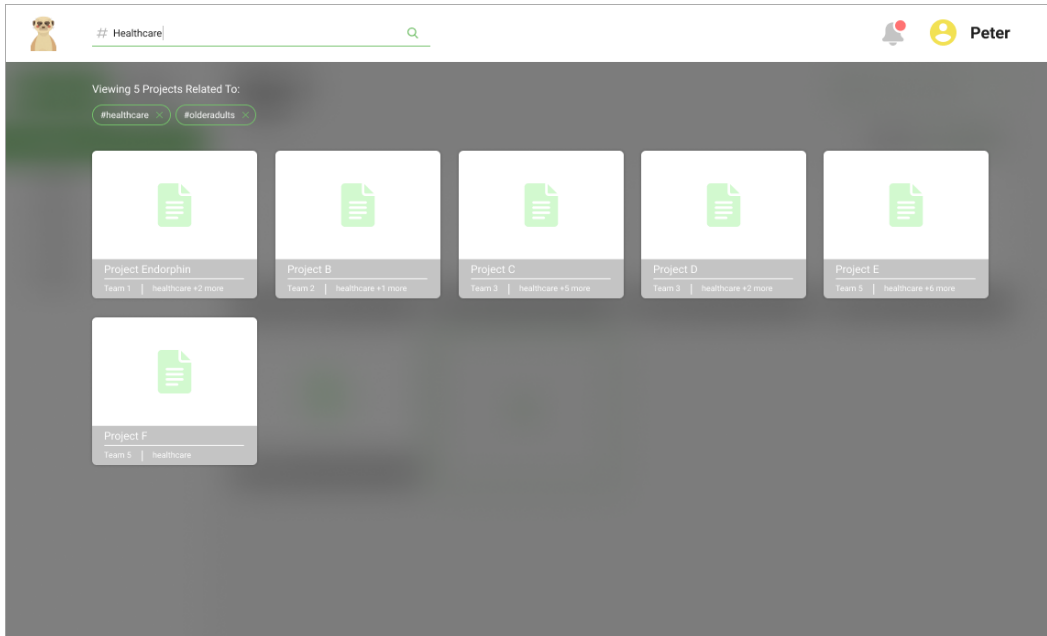
Peter has a couple of options for searching in Meerkat. If he wants to search within his team's projects he can do so by clicking view all on the My Team module.



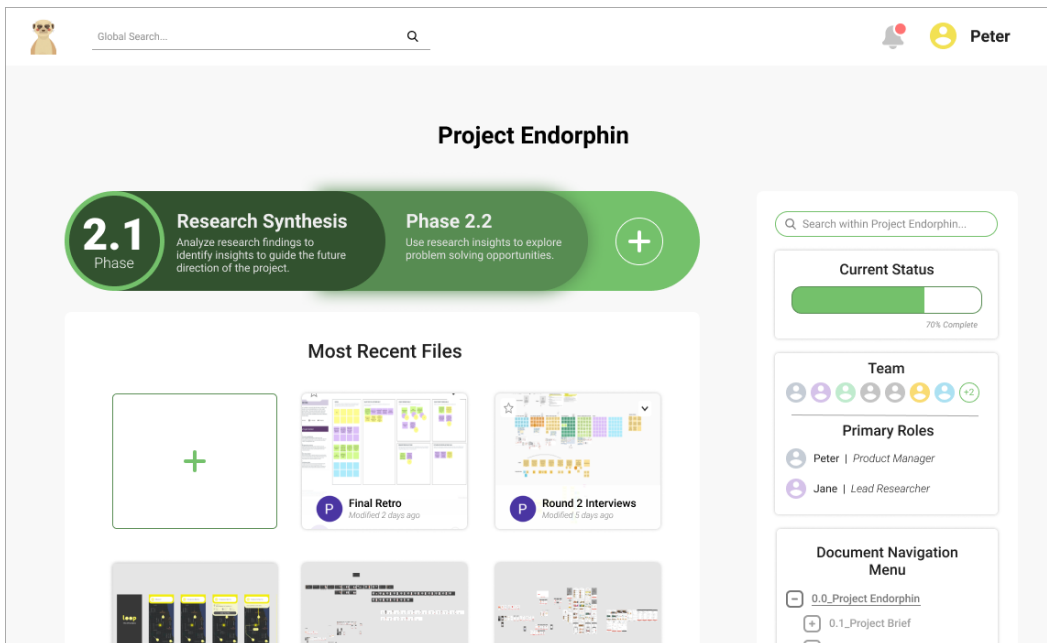
From here he can see his team's projects and search within his team. However, Peter is interested in understanding what other teams have done in healthcare. He clicks on Global Search which pops up on his screen.



As Peter begins to type in his search, he chooses to search using tags, or #



Looking up #Healthcare, and #Olderadults, 5 relevant projects come up. He clicks on project Endorphin.



From here, Peter is led to the Project Endorphin project page.

## Detailed Design & Features Description

## Design Principles

### Visual Design

- Clean
- Modern
- Non-Serif Typeface
- Simple and Intuitive
- Consistent
- Ease of Access
- Seamless

### Back End Design

- Modular
- Data Driven
- Scalable
- Low Maintenance
- Integration

## Suggested Information Architecture

Meerkat is a responsive web app designed for mobile phones, desktops, and tablets. The richest user experience is on a large screen but can also operate as a native mobile app for android and iOS. The MVC below describes the implementation.

<b>Model:</b> Database	<b>Controller:</b> Controlling UI	<b>View:</b> UI
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<p><b>User</b></p> <ul style="list-style-type: none"> <li>• Name</li> <li>• Title/Role</li> <li>• Team</li> <li>• Email</li> <li>• Phone Number</li> <li>• Status</li> </ul> <p><b>Platform</b></p> <ul style="list-style-type: none"> <li>• Local storage of integrations</li> <li>• Logos</li> <li>• Document Names</li> <li>• Document Contents</li> <li>• Account Credentials</li> </ul> <p><b>Local Document Storage</b></p> <ul style="list-style-type: none"> <li>• Text</li> <li>• Locations</li> <li>• Images</li> <li>• Figures</li> <li>• Tables</li> <li>• Last edit status</li> <li>• Owner</li> </ul> <p><b>Local Digital Whiteboard</b></p> <ul style="list-style-type: none"> <li>• Text</li> <li>• Shapes</li> <li>• Images</li> <li>• Locations</li> <li>• Last Edit Status</li> <li>• Owner</li> </ul> <p><b>Project Information</b></p> <ul style="list-style-type: none"> <li>• Timeline</li> <li>• Tags</li> <li>• Users</li> <li>• Owner</li> <li>• Project Stages</li> </ul> <p><b>Workspace Manager</b></p> <ul style="list-style-type: none"> <li>• Users</li> <li>• Roles</li> <li>• Project access</li> </ul>	<p><b>Log-in authenticator</b></p> <ul style="list-style-type: none"> <li>• Authentication</li> </ul> <p><b>Integration handshake authenticator</b></p> <ul style="list-style-type: none"> <li>• Confirm connection to integration</li> <li>• Log-in integration</li> <li>• Update integration content</li> </ul> <p><b>NLP Algorithm</b></p> <ul style="list-style-type: none"> <li>• Uncovering themes</li> <li>• Data trends</li> <li>• Text intent</li> </ul> <p><b>Project Manager</b></p> <ul style="list-style-type: none"> <li>• User roles</li> <li>• Share project</li> <li>• Create new</li> <li>• Link integrations</li> <li>• Updating content from integrations</li> <li>• Updating summary page</li> </ul> <p><b>Schedule Manager</b></p> <ul style="list-style-type: none"> <li>• Linking project artifacts to schedule</li> </ul> <p><b>Profile Manager</b></p> <ul style="list-style-type: none"> <li>• Edit user profile</li> <li>• Edit profile access</li> <li>• Delete profile</li> </ul> <p><b>Search</b></p> <ul style="list-style-type: none"> <li>• NLP algorithm</li> <li>• View results</li> <li>• Sort results (relevance, recent)</li> </ul> <p><b>Workspace Manager</b></p> <ul style="list-style-type: none"> <li>• Billing</li> <li>• Account creation</li> </ul>	<p><b>Login</b></p> <ul style="list-style-type: none"> <li>• User login</li> <li>• Workspace manager login</li> </ul> <p><b>Homepage View</b></p> <ul style="list-style-type: none"> <li>• See NLP insights</li> <li>• View recent project updates</li> <li>• Sort content</li> <li>• View active projects</li> </ul> <p><b>Project View</b></p> <ul style="list-style-type: none"> <li>• View linked integrations</li> <li>• View updated integration artifacts</li> <li>• View project team</li> <li>• Sort artifacts</li> <li>• Edit artifacts</li> <li>• “Finish” project</li> </ul> <p><b>Timeline View</b></p> <ul style="list-style-type: none"> <li>• View tasks</li> <li>• Filter tasks</li> <li>• Update task status</li> </ul> <p><b>User Profiles</b></p> <ul style="list-style-type: none"> <li>• View</li> <li>• Contact</li> </ul> <p><b>Search</b></p> <ul style="list-style-type: none"> <li>• List results</li> <li>• Sort results</li> <li>• See project team</li> </ul> <p><b>Workspace Manager</b></p> <ul style="list-style-type: none"> <li>• View members</li> <li>• Edit members</li> </ul>
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## Features

Feature	Description	Dependencies	Priority Level
Log In	Users with an account can log in.	Web authentication, SQL, relational database	v1

Log Out	Users on a shared computer can log out.	Web authentication	v1
Forgot password	Users who forget their password can still gain access to their account.	Web authentication, SQL, relational database	v1
Account Settings (editable)	Users can change settings within their account as elements change/evolve.	Web authentication, SQL, relational database	v1
Productivity Tools Integrations	Users can integrate their productivity tools into Meerkat to analyze all of their information and work.	APIs with Google Drive, Microsoft Office, Miro, Mural, Figma, and others OAuth	v1
Global Navigation	Important product elements are accessible on all pages.	Back-end technology.	v1
Organize Files Across Platforms	Files from integrated productivity tools can be organized in one place.	SQL, relational database	v1
Global Search	Search for people, keywords, projects, and content based on project tagging.	IBM Cloud or AWS or Elastic Search	v1
Project To-Do's	To-do tasks can be listed out so project tasks are broken down into digestible pieces.	Java Script	v1
Assign Project To-Do's	To-do tasks can be assigned to specific individuals or teams.	Java Script	v2
Project Timeline	The project timeline can be viewed/analyzed at a high level or in specific detail. The timeline can evolve and change over time.	PHP/Firebase	v2
Profiles Live Within Larger Organization	User profiles are all under an organization's umbrella. This allows for seamless collaboration	PHP/Firebase	v2

	and communication.		
Notifications	Email notifications in specific scenarios dependent on a user's notification settings.	Twilio	
Video Transcription	Transcribe audio of videos to avoid having to watch/rewatch entire videos.	Otter	v3
Customize Project Pages	Project-specific pages can be organized visually based on the most relevant information and to-do's.	HTML and PHP/Firebase	v3
Platform Customization	Organizations can customize individuals' Meerkat platform for specific organization functions or seniority.	HTML and PHP/Firebase	v4
Meerkat Messaging	Communicate with coworkers within the platform.	API Slack / Microsoft Teams integration	v4
NLP Document Analysis	Pull out trends from documents.	Toloka	v4

## Roadmap

### v1 (aka Minimum Viable Product)

*What constitutes the minimum viable product for launch?*

- Users can login to Meerkat and will be authenticated by their organization's authentication system.
- Users can integrate select productivity tools in order to organize and view all of their work in a single platform.
- Users can perform a global search using keywords to find information quickly across projects.
- Users can generate and modify to-do lists to drive progress in the product development process.

## **vNext**

*What functionality will your next version provide?*

- Users can assign tasks from the to-do lists to specific projects or individuals.
- Users can view a project timeline where they can track decisions and insights from different project phases.
- Users can view audio and video transcriptions to quickly find information in media uploads.

## **vLongterm**

*What functionality will the mature product provide that won't be available in your first two versions? This is likely just a bullet point list of placeholder features.*

- Users can view trends reports generated with Natural Language Processing document analysis.
- Users can message team members within the Meerkat platform.
- Project leaders can customize access for individuals based on their role or function.

## **Integrations Roadmap**

Core to our product and our differentiation is integrating with 3rd party productivity software. Based on our user interviews we have sorted these into priority groups. In the short term, before natively supporting an integration, we can partner with Zapier to allow our users to connect Meerkat with apps further down our roadmap.

Many of the applications we plan on integrating with have APIs purpose built for integrations while a few may require conversations with their teams to create such a connection. Examples of applications that have an existing integration API/SDK are Google Drive, Microsoft Office, Miro, Figma, and Trello. For these applications it is more a matter of connecting to the various APIs/SDKs through our application than the feasibility of creating such an integration.

### **V1 — Primary Priority**

*Month 0-9*

- Google Drive (Documents, Slides, Sheets, etc.)
- Microsoft Office (Word, PowerPoint, Excel, etc.)

### **V2 — Not Necessary Immediately**

*Month 9-18*

- Mural
- Miro
- Figma

### **V3 — To Further Consider or Low Priority**

*Month 18-36*

- Trello
- Gmail
- Google Calendar
- Microsoft Outlook
- Apple Productivity Suite (Pages, Keynote, Numbers, etc.)
- Slack
- Notion

## Milestones / Timing

Describe the planned timing of releases and key activities for your first release. What are your major milestones (internal demo, beta launch, full launch, etc.)? Are there natural points for reassessment? Consider linking to a spreadsheet with a PERT / gantt chart.

Describe the major elements of your Go-to-Market plan. What marketing methods do you plan to leverage, in what sequence, etc?

Major Milestones:

- Internal demo: June 27, 2022
- Beta launch: August 1, 2022
- Full launch: August 29, 2022

	1	2	3	4	5-31	32	33	34	35	36	37	38	39	40	41
Jobs to be done	Dec 6	Dec 13	Dec 20	Dec 27	Jan 3-Jun 20	Jun 27	Jul 4	Jul 11	Jul 18	Jul 25	Aug 1	Aug 8	Aug 15	Aug 22	Aug 29
Select platforms to integrate															
Find and brief a developer															
Approve quote and milestones															
Acquire API licenses for platform integration															
Flesh out UX, UI, and DB design details															
Code admin interface and backend															
Code project team member interface and backend															
Alpha testing															

Final modifications														
Beta launch and testing														
Full launch														

# Metrics

Metrics for Meerkat will be measured daily and tracked using Funnel.io, a marketing data source integrator. Sources for this data include Hotjar, Google Analytics, LinkedIn Ads amongst others. Metrics will be used to refine the UX of Meerkat, which features to prioritize for future versions, and understand how to personalize our Ad spend.

The key metrics of tracking success of Meerkat are:

1. CAC: Cost of customer acquisition, will be calculated by totaling ad spend and #of customers acquired over a time period (monthly) (Meerkat internal analytics)
2. LTV: Lifetime value, will be calculated by calculating average lifetime and average spend over lifetime (Meerkat internal analytics)
3. MAU: Calculated as an active individual user account (Meerkat internal)
4. NPS: Calculated through a likert scale, Internal Survey sent to users
5. Time in App: Calculated using internal metrics
6. Number of Active Accounts: Meerkat internal data - measure of use, validate hypothesis of integration

The key metrics for tracking success of marketing Meerkat are:

1. Ad Clicks: Computed through Google Analytics and LinkedIn Ads data - measure of effectiveness of ad campaigns
2. Ad Clicks/User Profile: Computed through Google Analytics and LinkedIn Ads data - measure of effectiveness of targeting specific user types/companies
3. New vs. Returning Visitor: Google Analytics - measure of success of product homepage page
4. New contacts/Subscribers: Meerkat internal data - measure of conversions and growth, effectiveness of pricing page
5. Company Statistics: Meerkat internal data - measure of company (size, industry, product) type to further refine product and target ads
6. Number of Integrations: Meerkat internal data - validate integration focus
7. Feature Clicks: Meerkat internal data - understand user workflows, use of integrations

# Projected Costs

## Engineering Costs

Based on our MVP feature set, our projected timeline for completion, and responses as well as quotes from Digitalya, Clockwise, and Oozoo, we estimate that the total cost of development will be roughly \$40,000 based on a lowest bid of \$36,000 and a highest bid of \$42,000 . This estimate is inclusive of the key features we hope to build out, including the homepage dashboard, integrations, and project activity feed. It also includes our key differentiator: our machine learning algorithm and advanced analytics which will understand and surface data that is meaningful to our user.

We expect the development to take roughly 1,100 hours, this includes 20 Designer days and 100 developer days. This estimate is based on a budget for \$200/hr salaries for the designer and developer. These numbers can go down if it is hired out to firms based outside the United States.

Monthly expenses incurred by the platform include maintenance & hosting at \$500/month.

## Marketing / other Costs

In order to reach enterprise customers we plan on delivering ads to professional platforms such as LinkedIn. We will also do specific targeted outreach to companies. For LinkedIn, we plan on utilizing two bidding options: cost per click and cost per send. We want to drive traffic to our pricing page and earn leads through CPC and CPS we will send information through sponsored InMail. LinkedIn has CPC minimum of \$2/ click and a CPS of \$0.80/send. We would aim to target 10 clicks/day and 20 sends/day at our beta, scaling over time. This would incur a marketing cost of \$1000/month.

# Operational Needs

Meerkat will be designed so users are capable of setting up their own personal and organization accounts. For organizations with 100 or more employees, organizations are encouraged to schedule time with Meerkat Customer Support. Members of the Customer Support team need to be trained to help open new accounts and improve current accounts of all sizes. Additionally, the Customer Support team needs to be trained to work with an organization's technology team as well as employees working on external client projects. There will likely be small issues in which the customer support team will help users with as well.

# Risks

Key Risks/Dependencies	Problem Description	Potential Mitigants	Level
Data Privacy	Companies will need to know that their data is safe from corruption or unauthorized access from external parties. The information that will be stored in our system will be product research insights that will inform a company's next 3-5 years of product development, so competitors and other bad actors may be incentivized to find ways to access this information.	To mitigate this risk, we could have companies using our technology to store their information on an integrated database. We could also use blockchain and other advanced technology security protocols, such as Single Sign-On (SSO), to ensure that our offering is as secure as possible.	
Systems Integrations	Companies will already be using existing digital products (such as Microsoft Office Suite) to generate, share, and store information that will need to be compatible with whatever system we create.	We could make sure that our solution is able to accept and store all types of files, and we could have an internal viewing system, so that people within companies could view files if they don't have access to the programs the files were created in.	
Process Integrations	Companies will likely have established processes in place for managing innovation projects that they may be unwilling to change.	We could integrate a project management/organization system into our storage solution to help companies make their organizations work	



		<p>more cross-functionally, like our software. Thus, if our software can also improve their teams' productivity, they may be more willing to adopt our solution.</p>	
Information Access	<p>Companies may want to have strict limitations on who is able to access and edit files related to potentially sensitive innovation projects.</p>	<p>Project managers would be to manage who in the organization has access to their project information (and who can give people access). Our system could also create an org chart based on system invitees or integrate with existing org charts to make it easier to decide who in an organization should have access to what information.</p>	
Data Stewardship	<p>Companies will need to have certain people who are responsible for updating and maintaining accuracy of project and research data.</p>	<p>Innovation projects already have different stakeholders who are responsible for different parts of the process, so we could assign roles with different abilities that are responsible for entering data, uploading files, and updating the database for certain phases and tasks in their innovation projects. The system could also have reminders for the responsible parties to ensure that the system is being used</p>	

		and updated properly.	
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# Group Members

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