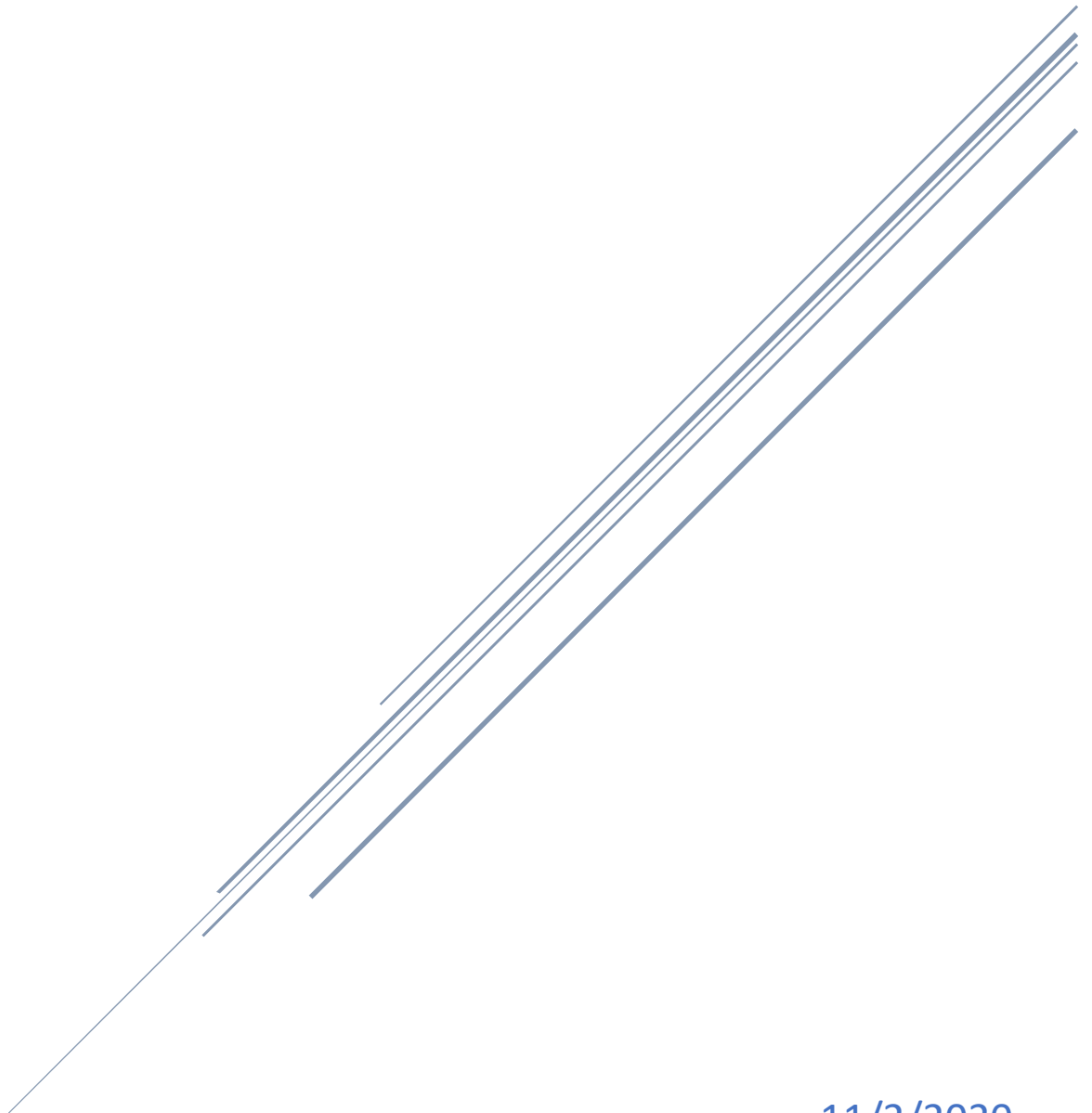


# USER AND TASK ANALYSIS FINAL

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# 1. User Persona, Goals, and Macro Tasks

## User Persona

### Bonnie - Elderly Persona



*"I am strong-willed and like to do things on my own. I just need a bit of help sometimes."*

**Age:** 73  
**Work:** Retired  
**Family:** Widowed, kids, grandkids, cousins  
**Location:** Denver, CO  
**Character:** Creative Learner

#### Personality

Introvert	Extrovert
Thinking	Feeling
Sensing	Intuition
Judging	Perceiving

Independent Intelligent Driven Stubborn

#### Goals

- Minimize interruptions to my life.
- Maintain independence while still getting help.
- Remain connected to my family, friends, community.

#### Frustrations

- Needing help with certain daily activities.
- Have trouble remembering things.
- Not as independent as I used to be.

#### Bio

Bonnie used to work as a IT manager for several big name companies. Her technical skills were at expert level, but memory loss has affected her skills and independence. She has also had several surgeries and has found her body to be weakened. She needs help with daily activities including pet care, appointments, medications, transportation, exercise, and house cleaning. She is able to cook, bathe, and dress herself. She also keeps in close touch with family, friends, and members of the church. She is social and enjoys being involved with the community. She also enjoys puzzles and classes to keep her mind preoccupied.

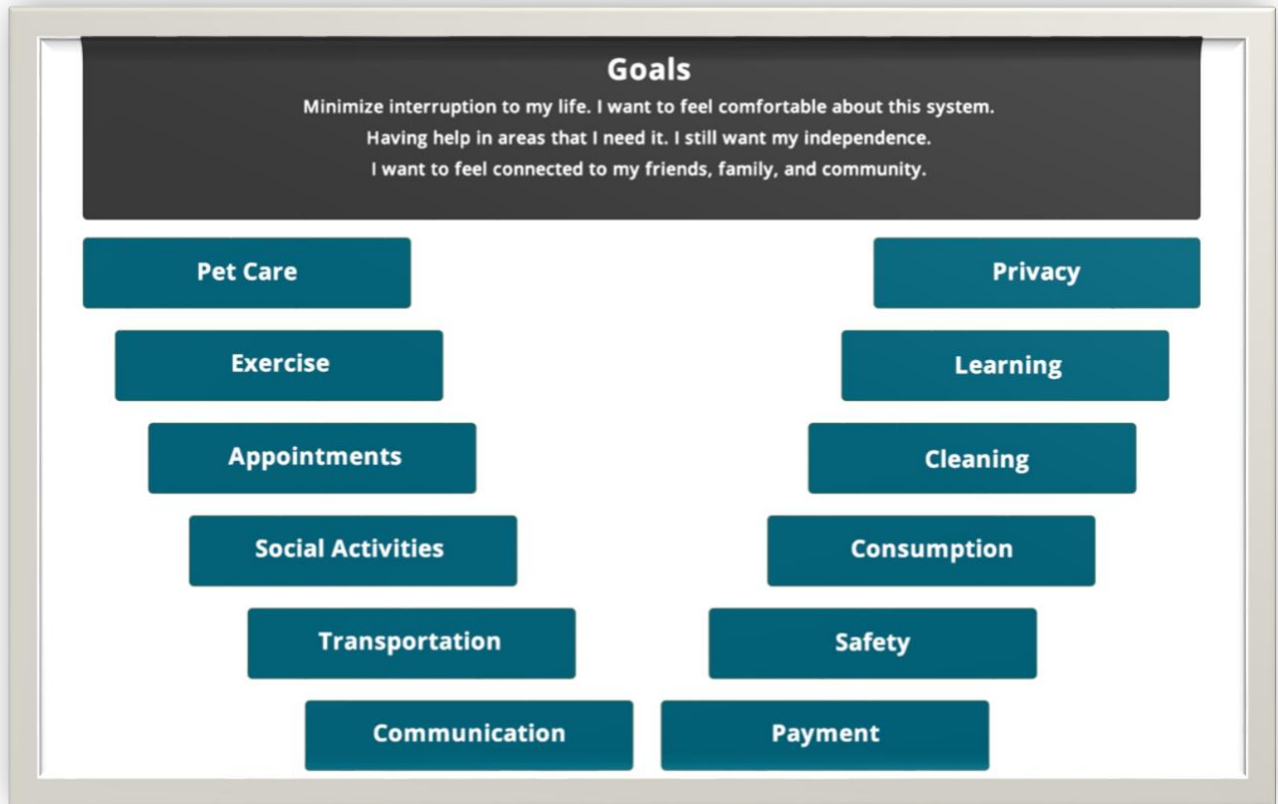
#### Motivation

Incentive	██████████
Fear	██████████
Growth	██████████
Power	██████████
Social	██████████

#### Preferred Channels

In Person	██████████
Online & Social Media	██████████
Phone Calls	██████████
Texting	██████████

## Goals and Macro Tasks



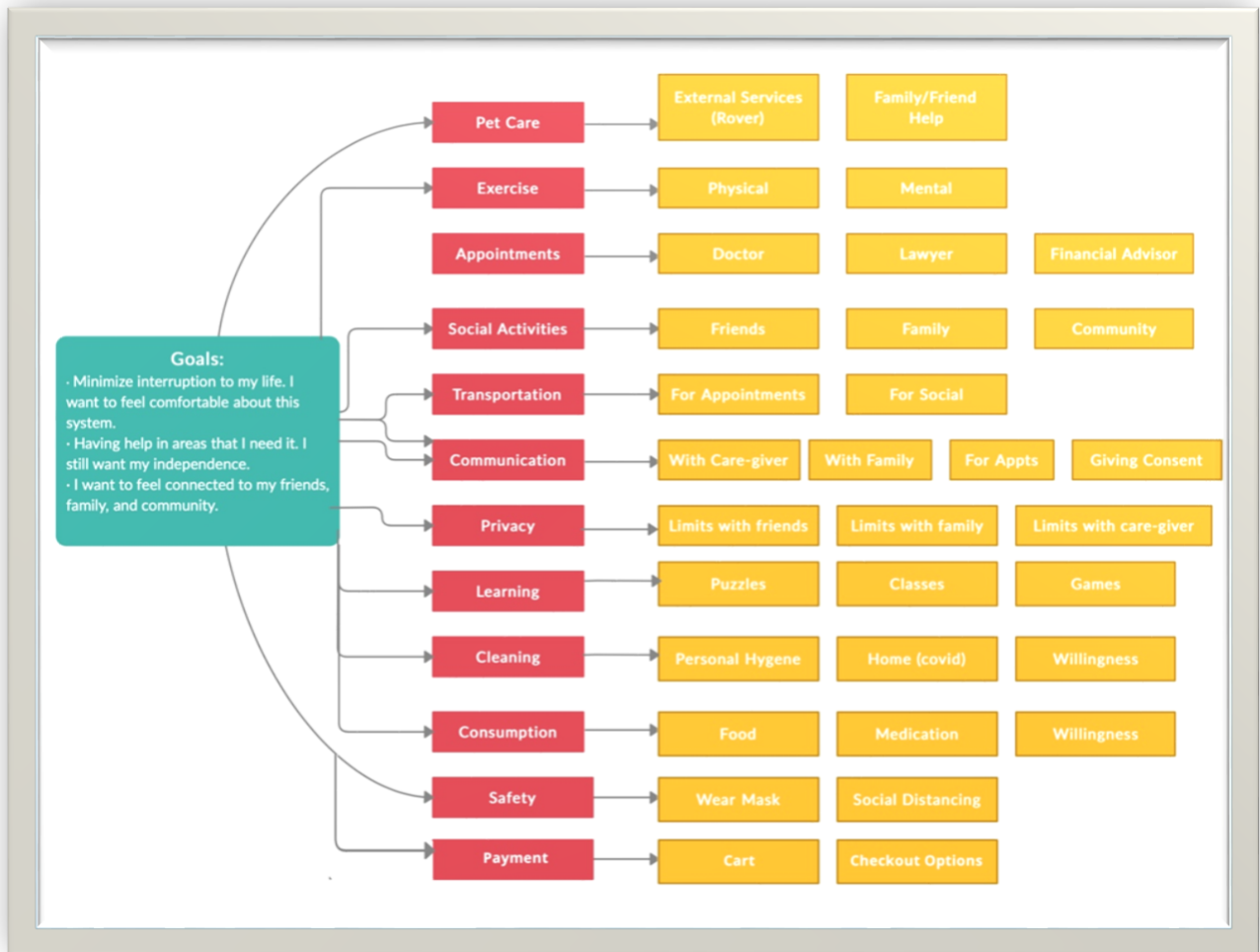
### Goals

- Minimize interruption to my life. I want to feel comfortable about this system.
- Having help in areas that I need it. I still want my independence.
- I want to feel connected to my friends, family, and community.

### Macro Tasks (All macro level tasks vary based on individual needs.)

- Pet Care
- Exercise
- Appointments
- Social Activities
- Transportation
- Communication
- Safety
- Consumption
- Cleaning
- Learning (Education/Entertainment)
- Privacy
- Payment

## 2. Micro Task Analysis (All micro level tasks vary based on individual needs.)



- Pet Care
  - External pet services (Rover/Wag)
    - Walking services
    - Day or night sitting services
    - In-home or out of home services
    - Cleaning needs (bathing, cat box clean-up)
    - Vet needs
    - Feeding needs
    - Variation depending on client capabilities
  - Internal Family/friend pet help
    - Walking services
    - Day or night sitting services
    - Home or out of home services
    - Cleaning needs (bathing, cat box clean-up)

- Vet needs
  - Feeding needs
  - Variation depending on client capabilities
  - Variation depending on closeness/willingness of friend or family member
- Exercise
  - Mental/Mindfulness
    - Variation depending on client's mental capacity
    - Variation depending on client's personal believe system
    - Meditation classes to help with anxiety and stress
    - General breathing exercises
    - Relaxing music
    - Mind strengthening games/puzzles
  - Physical
    - Variation depending on client's physical capabilities
    - Yoga classes or other workout classes
    - Walking/jogging
    - PT exercises
    - Stretching
    - Gym machines or weight lifting
- Appointments
  - Doctor
    - Scheduling
    - Getting familiar with background information to properly relay needs
    - Quick consultation over the phone
    - Needs would vary depending on client capabilities
    - Caregiver would need to be careful with confidential client information (would be included in privacy agreement)
    - Variation depending on medical needs
  - Lawyer
    - Scheduling
    - Getting familiar with background information to properly relay needs
    - Quick consultation over the phone
    - Needs would vary depending on client capabilities
    - Caregiver would need to be careful with confidential client information (would be included in privacy agreement)
    - Variation depending on legal needs
  - Financial Consultant
    - Scheduling
    - Getting familiar with background information to properly relay needs
    - Quick consultation over the phone
    - Needs would vary depending on client capabilities
    - Caregiver would need to be careful with confidential client information (would be included in privacy agreement)
    - Variation depending on financial needs

- Social Activities
  - Friends
    - Holidays
    - Birthdays
    - Special celebrations
    - Personal visits
    - Variation depending on closeness of friend
  - Family
    - Holidays
    - Birthdays
    - Special celebrations
    - Personal visits
    - Variation depending on closeness of family member
  - Community
    - Church
    - Senior Center
    - Volunteer work
    - Special events
    - Variation depending on community involvement
- Transportation
  - Appointments
    - To/from doctor's appointments
    - To/from financial appointments
    - To/from legal appointments
  - Social activities
    - To/from meet-ups with friends
    - To/from meet-ups with family
    - To/from meet-ups with classmates
    - To/from meet-ups with church
    - To/from meet-ups with Senior Center activities
- Communication
  - With caregiver
    - By client or family member when services or information is needed
  - With family
    - By caregiver or client, when information or social activities are needed
  - With friends
    - By caregiver or client, when information or social activities are needed
  - For appointments
    - Scheduling appointments
    - Make agency or caregiver aware an appointment is needed
  - Giving consent
    - Signing and verbally giving consent by the client for personal and confident items, electronically and in-person during services
    - Electronic form available through online account

- Safety
  - Wearing a mask
    - When interacting with the client, family, friends, co-workers
    - Make sure it is covering your nose and mouth at all times
    - Make sure it is an N-95 mask or better
    - All parties must sign an agreement through online account
  - Practicing social distancing when possible
    - Stay up to date and follow all Covid-19 guidelines
    - Keep distance from client, when possible
    - Limit how many people are in the room at a time
    - Limit who is allowed to visit the client based on the severity of their condition
    - All parties must sign an agreement through online account
- Consumption
  - Daily meals
    - Meal prep/cooking
    - Feeding clients when needed
  - Daily meds
    - Organization of pills/meds
    - Familiarity with schedule
    - Filling out checklist of time received for each client by caregiver through online account
  - Willingness to eat/take meds
    - Establish trust through consent and communication
    - Document any skipped meals/meds due to resistant client through online account
- Cleaning
  - Daily hygiene
    - Showering
    - Getting dressed
    - Brushing teeth
    - Any additional preferences the client requires
    - Have a system to document and record each completed task for each visit, by the caregiver (through online caregiver account)
  - Willingness to allow hygiene services
    - Thorough communication from caregiver on what they are doing
    - Ask for consent while performing services to make the client comfortable
    - If the client is resistant, all for passes on certain things
    - Have a system to document and record each completed task for each visit, by the caregiver (through online caregiver account)
  - Home care/cleaning (Extra cleaning/caution during Covid-19)
    - Vacuuming
    - Laundry
    - Dishes

- Dusting
  - Item pick-up/reorganization
  - Disinfection of all areas with Lysol type products during
  - Strict use of gloves, antibacterial soap, clothing covers while cleaning
  - Have a system to document and record each completed task for each visit, by the caregiver (through online caregiver account)
- Learning (Education/Entertainment)
  - Puzzles
    - Online puzzles
    - Physical puzzles in home
    - Puzzles recommendations page
    - Online forum to discuss with others
    - Certificate of completion
  - Classes
    - Online classes
    - Classes recommendations page
    - Online forum to discuss with others
    - Tutors
    - Certificate of completion
  - Games
    - Online games
    - Physical games in home
    - Games recommendations page
    - Online forum to discuss with others
    - Certificate of completion
- Privacy
  - Setting boundaries with health care workers
    - Set visiting hours
    - Establish rules based around the needs requested
    - Get to know and understand client's personality to better interact with them
    - Both parties sign electronic agreement through online account
  - Setting boundaries with family
    - Set visiting hours
    - Establish rules
    - All will vary depending on relationship between the client and family member (close or distance relative)
    - Both parties sign electronic agreement through online account
  - Setting boundaries with friends
    - Set visiting hours
    - Establish rules
    - Both parties sign electronic agreement through online account
- Payment
  - Shopping cart



- View, edit cart
- Apply coupons/discounts
- Continue shopping
- Continue to payment
- Success rate by fewest clicks
- Checkout
  - Options such as PayPal, Apple Pay, credit card
  - Add, edit, store addresses
  - Success rate by time on page

### 3. Requirements Table for Future App/Website

User Requirement	Value	Success metric/Usability Requirement	Allocation Requirement	Rationale
Option to get help with scheduling pet care needs through system.	High	User must be able to log into their account and choose specific pet care needs. This information could be forwarded to partnered pet care service providers, such as Rover or Wag, to establish contact with the client.	User, System	Needs to be able to request and schedule pet needs. Pet needs/types can vary, so a pet specialist would be beneficial.
Option to get help signing up for exercise activities.	Medium	User must be able to log into their account and choose specific exercise needs. These selections must be optional or have a none option. Any selected needs will be sent to the agency to then be	User	User needs to have the option to sign-up for and schedule exercise activities, including mentally and physically. For example, yoga classes or meditation classes.

User Requirement	Value	Success metric/Usability Requirement	Allocation Requirement	Rationale
		coordinated with a caregiver.		
Option to get help scheduling appointments.	High	User must be able to log into their account and choose specific scheduling needs. These selections must be optional or have a none option. Any selected needs will be sent to the agency to then be coordinated with a caregiver.	User	User needs to be able to request help with doctor, lawyer, financial advisor appointments.
Option to get help setting up social activities.	Medium	User must be able to log into their account and choose specific social needs. These selections must be optional or have a none option. Any selected needs will be sent to the agency to then be coordinated with a caregiver.	User	User needs to be able to request help with scheduling free time with friends, family, and the community.
Option to get help with scheduling transportation needs.	Medium	User must be able to log into their account and choose specific social needs. These selections must be optional or have a none option. Any selected needs will be sent to the agency to then be	User, System	User needs to be able to request help with getting rides.

User Requirement	Value	Success metric/Usability Requirement	Allocation Requirement	Rationale
		coordinated with a caregiver or partnered ride provider, such as Lyft or Uber.		
Ensure user friendly platform to communicate with multiple parties through the system.	High	User must be able to log into their account and choose specific communication needs. These selections must be optional or have a none option. Any selected needs will be sent to the agency to then be coordinated with a caregiver.	System	User needs to be able to communicate with family, caregiver, for appointments, and giving consent. System email and messenger options would be needed.
Required Safety agreement to be provided by system and signed by user.	High	User must be able to log into their account and have access to the safety agreement. User must sign and agree electronically to specified terms, especially given the current Covid-19 guidelines.	User, System	User needs to follow and be reassured that others will follow Covid-19 safety guidelines by wearing masks and by keeping socially distant, when possible.
Option to request help with consumption needs.	High	User must be able to log into their account and choose specific consumption needs. These selections must be optional or have a none option. Any	User	User needs to be able to request help with daily meals, medications, and motivation. Options would be available

User Requirement	Value	Success metric/Usability Requirement	Allocation Requirement	Rationale
		selected needs will be sent to the agency to then be coordinated with a caregiver.		through a caregiver.
Option to request help with hygiene/cleaning needs.	High	User must be able to log into their account and choose specific cleaning needs. These selections must be optional or have a none option. Any selected needs will be sent to the agency to then be coordinated with a caregiver.	User	User needs to be able to request help with keeping themselves cleaning (daily hygiene) and their house clean. This could involve help with motivation. This would be an option through a caregiver.
Option to get help with learning needs.	Medium	User must be able to log into their account and choose specific learning needs. These selections must be optional or have a none option. Any selected needs will be sent to the agency to then be coordinated with a caregiver.	User	User needs to be able to request additional services for learning to keep the mind strong. This could involve puzzles, games, and classes. This would be an option through a caregiver.
Required checklist from elder on what is and isn't okay. Then have all parties sign a	High	User must be able to log into their account and access this checklist and then sign/give consent	User	User would be reassured that their privacy is important. Boundaries would be made

User Requirement	Value	Success metric/Usability Requirement	Allocation Requirement	Rationale
privacy agreement.		electronically. This would be required by all clients.		known among family, friends, and caregiver to respect user requests as much as possible. This could involve a questionnaire and agreement among involved parties.
Checkout and payment options for client	High	User must be able to log into their account and be able to checkout and pay for the selected services. Apple Pay and PayPal options would be convenient.	System	After selecting services provided by agency, the client would need a way to pay for these services.

With the possibility of each client having immense variation in their needs and needs changing over time, it is important that most segments of this application/website be optional to allow for flexibility. Checklist or drop down selections for desired services would not be required. However, the privacy policy and safety requirements will be mandatory and must be signed and agreed to by all clients and involved parties.

In addition to these user and system needs for this application/website, there could also be an option for further security/monitoring by providing a product similar to Ring and Nest systems. There is potential to market these additional services as a Gold Package option. Cameras, motion sensors, and contact sensors could be an option to add to a personal care package. A family member, friend, or caregiver may want to be able to check in on a client from time to time. For example, make sure they are taking their medication at a certain time, by checking a camera, when a person might not be present. The agency would have the ability to verify that caregivers are showing up during their scheduled time by using the cameras or sensors. Installing these options could bring up privacy issues, so there would need to be a contract/agreement signed with this addition and would carry restrictions on where they were installed.

#### 4. Alternate Persona Comparison

When considering a caregiver persona, communication would differ as far as main target audiences. The focus would more so be on the client and the agency. The scope of focus for the agency is based on job needs and the client focus is based on their personal needs. There may be some more limited communication with the client's friends, family, and community. There may also be communication with the client's doctors, lawyers, teachers, advisors, drivers, or any other additional services that could be required.

Whereas, with the elder persona or client, the communication would mainly be focused on the caregiver, family, friends, and community. Although, depending on the client's abilities, their communication could overlap with some of the caregiver responsibilities mentioned above. They may be able to take care of some of their own needs. The client, however, would rarely communicate with the agency directly, unless something wasn't going to their liking and they were capable of contacting them.