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Elders-Up!: Adaptive system for enabling the elderly collaborative knowledge transference to small companies

AAL-2013-6-131

Deliverable
D.2.2 Scenario Story Board

Public

VERSION HISTORY

Version	Edited by	Date	Description
01.	Andy Bleaden	2/12/2014	First Draft
02.	Rachel Cobley	05/01/2015	First issue
03.	ISOIN	04/02/2015	First review
04.	Rachel Cobley	17/02/2015	Second version
05.	GEO	26/02/2015	Second review
06.	Rachel Cobley	26/02/2015	Final version

Abreviations

Abbreviations	Meaning
WP	Work Package
e.g.	Example
UK	United Kingdom
DoW	Description of Work
SME	Small-Medium Enterprise
MS	Microsoft
PC	Personal Computer

Table of Contents

1.   Introduction

The Elders Up! Project is concerned with bringing the valuable experience of the elderly to start-ups and small companies, addressing intergenerational knowledge transfer to use skills and competencies based on experience. The Elders-Up! project will build an ecosystem for collaboration on which the start-up companies and the elders are the main actors thus strengthening the European experts' workforce and maintaining their productivity and usefulness to the society. Small companies, struggle to create their own products, to sell them and to become more consolidated and bigger businesses. However, due to the fact that their workforce usually consists of a few employees, they cannot cover all the areas of knowledge that a company needs to bring their products to the market (legal, administrative, technical and many more). In small and medium sized enterprises, the support and knowledge transfer from experienced employees is vital because they have more limited resources and capacity to contract the services or experts or take over their tasks when they retire.

One of the main challenges which Elders-Up! project aims to reach is to provide the elderly a tool which enables them to team up and create work teams. A *work team* is a multidisciplinary group of elderly which works collaboratively by means of the *Elders-Up! workspace* and, by using it, elders are able to provide counselling and support to small companies. The main *innovation* of the Elders-Up! system is that it will *monitor the end user state through its interaction with the collaborative Elders-Up! workspace* in order to:

- *Adapt* the interface and content of the workspace *to the cognitive conditions of the user* applying the necessary changes to provide them an easy interaction and usage.
- *Engage and motivate the elderly in optimal collaboration in the work team* for a prolonged period of time.
- *Protect the elderly from falling into apathy and frailty* after their retirement *by providing them with the means to keep their minds active and to transfer their valuable knowledge.*

The Elders-Up! project follows a user-centric system design methodology, in which participatory design techniques are throughout the project. In the first phase of the project, user studies (task 2.1) are conducted in the three pilot countries: UK, Cyprus and The Netherlands. This intermediate report described the methodology and the findings for the UK user study and was presented in Deliverable 2.1

The user studies are used to define the requirements for the Elders-Up! platform. By mapping the needs and preferences of the two targeted end-user groups, the seniors and the companies, we get to understand what would motivate these parties to use the platform and what is needed to ensure a pleasant and adoption of the Elders-Up! platform. The very open and unbiased approach that has been taken enables us to confirm the assumptions from the project plan, and if needed to adjust the system requirements to the real needs from the end users.

That document gave an overview of what questions were to be answered by the user study, how the user study has been conducted, what results were collected and how these results have been interpreted.

To add to the value of this the Elders-Up! Platform also sought to develop 4 real life scenarios using the information contained within D2.1 to present what the variety of uses for the platform could be. This was from both the standpoint of the elderly end user and also from that of an SME from the information supplied from the various SME's within the study.

This will help to develop an analysis of use for the development of the tools as well as to develop a clearer eye of the potential exploitation potential of the Elders-Up! platform in the future.

In these Scenarios we have attempted to show how the platform would help two elderly people by elaborating on three sectors:

- what their immediate needs are
- how the platform would enable them to assist and get involved with an SME
- what the benefits of that interaction would be for them and the SME involved as well.

In addition we have looked at this from the point of view of the SME and tried to expose what their needs would be, how Elders-Up! could interact with them, what the resulting benefit of that would be for the companies to be involved with the elderly people and finally, how the usage of the Elders-Up! platform could assist their business.

1.1 Scope of this deliverable

This document gives details on the scenarios that will be used as a backbone for much of the work in the project. The scenarios are used in multiple work packages for helping determine functionality requirements, designing hardware and software, and evaluating prototypes.

We have designed the scenarios without specifying the exact technology that is used or the implementation details of how things work. The hope is that this makes the scenarios flexible enough to be used regardless of what sort of technology is selected or other discoveries that are made during the course of this project.

This document refers to people that are described in deliverable D2.1. A brief introduction to the characters is made in each section with further information available regarding their skills, needs and challenges.

2. Scenario story boards

2.1   What is a storyboard

Storyboards are a useful tool to enable developers and other wider team members visualise the intended end result. By using a story board experts can discuss what a team wants a story board to say by structuring it with images. Story boards encourage a top down approach due to the detail being brief.

Users can more easily follow a storyboard rather than a lengthy report, in this instance the storyboard will be used by web developers to make sense of how a person and company will use the Elders up platform in their daily business.

The stories described in this document are created from a series of personas that were developed during the data collection phase. It will describe how both a senior and a company will be matched together and how they will use the site. The use of a story board will allow for body language, feelings and attitude to be taken into consideration during the development of the Elders-Up! platform.

2.2   Scenarios

The scenarios used in this piece of work are created as an output of previous deliverables from the project. Personas for both seniors and companies have been designed in line with deliverable 2.1 and the subsequent story was then created based on the data collected during the interviews and questionnaires which were included in the deliverable.

3.   Senior A - Derek
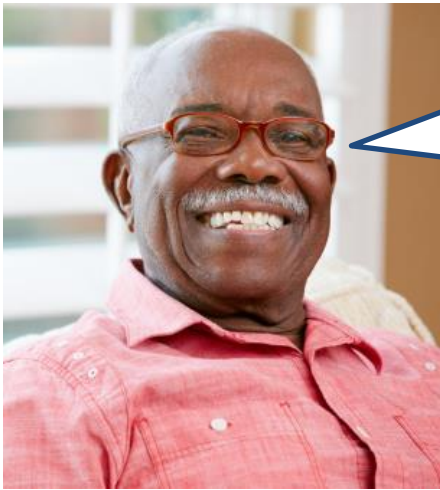
> *I like the idea of helping a company, it'd be good to keep my skills fresht however I'm a bit nervous about having to be part of an online community. How will I know if the people/companies I'm interacting with are genuine?*

3.1   Background

Derek retired from working in the finance section of a SME 8 years ago. He had been a qualified accountant for over 30 years. He keeps himself busy with an active social life, singing in a men's Choir and is a member of a walking group. He volunteers in a young person's activity centre taking young disadvantaged people out on hikes and helping in the kitchen serving meals. He is keen to keep in touch with the finance sector as he is aware that if he doesn't use his skills he'll forget them. His income is good due to his pension however he feels that his expertise is valuable so would appreciate some financial recognition.

Getting out of the house is important to Derek so he would be happy to provide support to small companies online but also in person. A regular commitment to a company would suit him and enable him to build up relationships with people.

3.1   Skills

Derek has been using computers throughout his working life. He is particularly skilled in MS Excel and is able to use Windows and MS Office sufficiently. Web browsing is something he does most days and he feels he can confidently navigate around most websites. At home he uses a PC. His professional skills lie in accountancy and it is in this area that he would like to help a small company.

3.3   Challenges

While Derek is a confident computer and web user he is nervous about entering personal information online. He isn't a member of any online social networking communities and doesn't use internet banking due to worries around security.

Using a smart phone is something that Derek doesn't do and he currently has no plans to upgrade his phone. All communication would need to be done using the PC, with which he feels comfortable.

3.4   Needs

Physical Health – Derek is physically able and the only issue he has is poor eye sight however this is currently corrected with glasses. Sometimes he does find websites with lots of information on the page difficult to see so he increases the magnification of the page to assist with this.

3.5　　Usage of Elders-Up! platform

With some online safety training Derek could be helped to feel safe in the Elders-Up! platform. He would be able to register his accountancy, finance and Excel skills on the site and the type of support he could offer. The ability to interact with companies would enable Derek to feel that he wasn't becoming deskilled and removed from the finance sector.

4.   Senior B - Janet
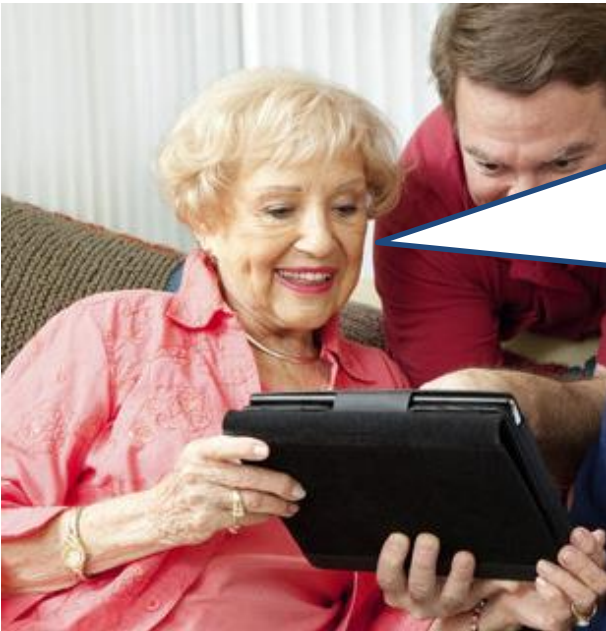
> *I loved my job and didn't want to retire however I was struggling to complete my job. Retirement has been fun so far however I'm still relatively young and I've worked through all the immediate personal goals I initially had. I don't want to go back into the world of work either full or part time but I do like the idea of helping out a small company on an informal basis.*

4.1   Background

Janet retired from working for a large multinational marketing company 3 years ago. She had to retire early due to early onset arthritis. She has had many corporate roles during her career most revolving round project management. She feels that she has plenty of report writing and project management skills that she would be willing to share. Since retiring, she has been spending a lot of time with her family and enjoyed sorting out her garden and house. The joy of retiring and choosing to spend her time as she wishes has worn off and Janet now misses using the skills she built up during her career.

4.2   Skills

Janet is an experienced computer user, who has used internet shopping but never sold anything online. She has a little experience using social networking. She has used video calling to keep in touch with friends abroad.

Janet would like to help small companies in an advisory capacity. She feels that she could help small companies develop skills that would help them win bids/get more work. Writing reports, facilitation of meetings and project management are the areas she would like to help companies with.

4.3   Challenges

Although Janet is a skilled computer user due to arthritis she finds using a keyboard difficult and a tablet device is much easier for her. Anything that involves a lot of typing is problematic however the ability to select from lists and predictive textual keyboards makes life much easier.

4.4   Needs

Physical – Using a keyboard and mouse is difficult for Janet, she finds tablets easier and is starting to experiment with voice recognition. She is familiar with video calling and would be happy to interact with companies this way.

4.5   Usage of Elders-Up! platform

By registering her skills with Elders-Up! Janet will be able to be matched with a company that needs her guidance. The ability to be involved and help companies will enable her keep in touch with the career she misses. Using the Elders-Up! environment she will be able to interact with suitable companies using her tablet to video call.

5.   Company A: Clear Web Design
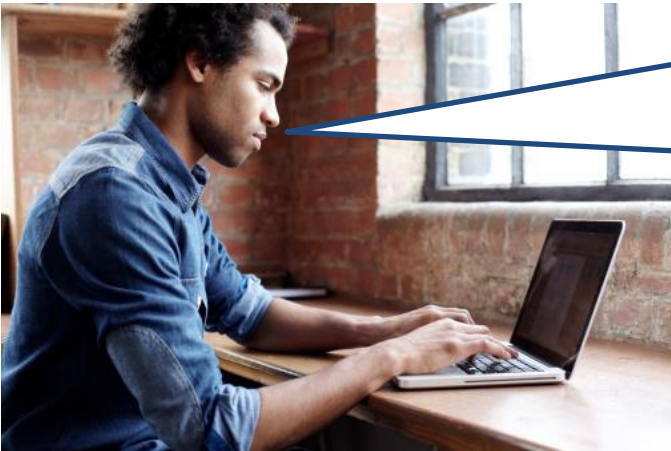
> *We are a small company, we're all web designers and on the whole we manage pretty well but we're still learning about all the other office functions we need to provide to employees. It'd be fantastic to have an expert that we can draw on as required.*

5.1   Background/Needs

Small web design company with a lack of skilled back office functions in HR, finance and legal advice. The company is still very much developing and only employs 4 people with an average age of 37. The company was founded 4 years ago and specialises in producing websites for retail customers who would like to move their company to selling products online. They offer a package including mapping the process for how the business will work to designing the website. Currently most of their customers have been based in Spain however they would like to expand to other European countries.

They don't need any full time employees offering these types of skills however feel they would benefit from the experience of someone who could help steer their business and develop them further. They are able to provide a small financial reward for the services that they received however this might not be a full market rate.

5.2   Usage of Elders-Up! platform

By registering their required needs with Elders-Up! they can be matched with a senior who has a breadth of experience in the areas they need.

They might need the assistance of a variety of elders in different areas. They would appreciate being able to draw on the skills as required. As they are a tech company they would ideally like to interact with people online, they feel this offers people flexibility and convenience to offer support at a time easily suitable for both sides with little time taken travelling.

6.   Company B: Relish Café/Deli

> *I started my café on my own and I am proud to say that I now run a busy café/deli that employs 3 people. I should be able to expand my business this year however I'm nervous about doing this the right way. I only have a small budget and would like to make sure I spend it wisely. I'd really appreciate the help of someone who has worked in marketing or has had their own similar business.*

6.1   Background/Needs

Company B is a café/deli located in a busy town centre. They have been open for just over a year and the business seems to be going well, and is profitable. The café/deli is owned by Matt who is running it on his own with just 3 other employees. If the business continues on its current projections he hopes that he will be able to extend into the shop next door when the current business leaves towards the end of the year. Matt would like to promote his business more, however he isn't sure what the best way would be to do this. He doesn't have a huge budget to spend so he would like to use it wisely. He would welcome the advice of someone who has worked in marketing or has had their own similar business and can offer support.

6.2   Usage of Elders-Up! platform

Matt would like to register his café/deli business as a small company on Elders Up! as a business that would benefit from the advice from an elder who has run their own company or worked in the same industry. He would like to get ideas about how best to market himself and how to grow his business at the right time.

Elders-Up! could match Matt up with a few potential seniors that would be able to offer advice.

7.   Story 1: Derek and Clear View Web Design

7.1   Introduction

This story will address the use of the Elders-Up! platform by Derek, a recently retired accountant and his match with Tim the owner of a small web design business that needs support developing their back office finance situation.

7.2   Story

Derek visits a local group explaining what is happening in his area for recently retired people, while there he sees some information about the Elders Up website that interests him

Back home Derek sits at his PC/laptop in his home office and starts to complete his profile. He likes the fact that Elders up is a simple site to complete. The site explains to him that all his personal information will be treated confidentially.

When attending a local small business network group Tim from Clear web design hears a short talk about Elders-up! from a local representative.

The owner of Clear Web design (Tim) feels frustrated at his lack of understanding about his company's finances. He sits in his modern office feeling overwhelmed at the prospect of completing tax returns and financial reports for his bank. Perhaps he needs to complete a course, but he doesn't know where to start.

Tim decides to register with Elders-Up! to see if there are any opportunities of being matched with someone who could help him develop the skills he's missing to develop and progress his business.

Elders-Up! matches Derek and Tim from Clear web design. The platform works by firstly completing an automatic matching process, however, before this is sent to both the senior and the business an Elders-Up! representative checks all the information to ensure that the match is sensible.

Tim at Clear web design receives the information about Derek including a short synopsis of his career, qualifications and experience and thinks that he could be a real help to his business. In the first instance Tim emails Derek from his office desk in the afternoon using Elders up to explain what his business does and the problems he's been having.

Derek receives the email that evening while sitting in his front room using his tablet device. He is interested in the web design business as he really feels that he could support Tim to develop his

own understanding of his companies finance and perhaps suggest a financial course for him to attend. He immediately emails Tim back to say he would be happy to help.

Following a few days of email exchanges Derek and Tim decide to start chatting online in real time through Elders-Up! platform. Derek is able to help Tim quickly, get his finances in order and start speaking with him about what courses would be suitable to attend.

Once Derek and Tim build up a relationship they start to collaborate using the online white board to make plans and share documents. During these conversations Tim explains to Derek how online security works and gives Derek some websites to look at that should make him feel more secure about being online.

Tim registers with a local college to start a finance course.

Derek continues to mentor Tim helping him with his assignments over Elders up.

7.3   Story Board
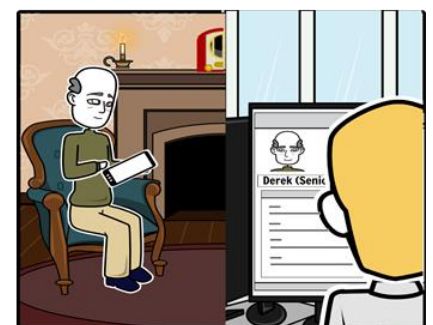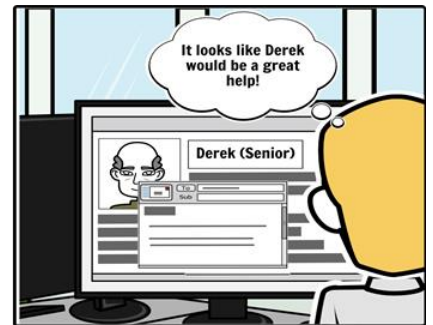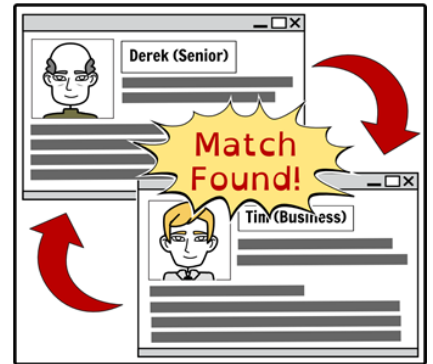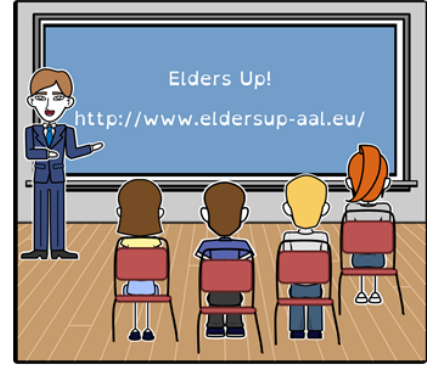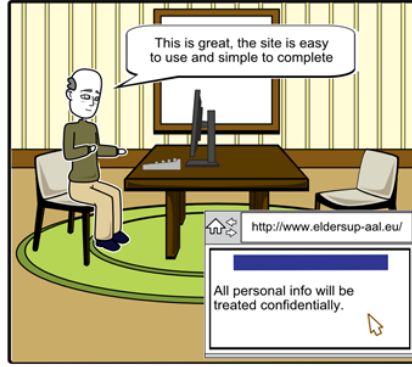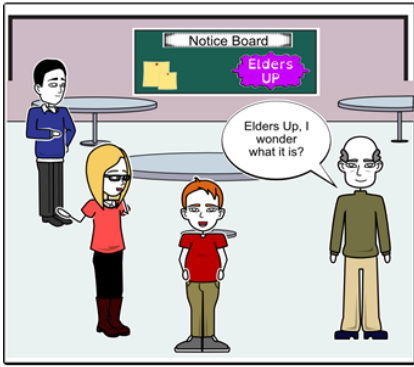
8. Story 2: Janet and Relish Café/Deli

8.1   Introduction

This story will address the match of Janet who retired early due to early onset arthritis and Matt the owner of a growing café/deli.

8.2   Story

Janet is in her kitchen surrounded by her family (adults and children), she is happy however misses her busy career. Janet used to work in a large multinational company managing large advertising and marketing campaigns for businesses.

The next day she visits a friend for coffee who works at a local college. The friend tells her about a new website they are helping promote called Elders up that allows seniors to support small businesses.

That evening when she is at home Janet decides to take a look at Elders–Up!. Janet has problems with her hands and cannot easily use a mouse and keyboard. She navigates around the Elders-Up! site using her tablet while sitting on her sofa.

Matt the owner of Relish is feeling pleased with how well his café/deli is doing. He is always busy and has recently had to employ another person, which means thatthere is now himself and 3 other employees.

His shop is starting to feel small and the shop next door is empty…

Matt thinks he would like to expand into the next shop however he is not sure if it would be a sensible move and he is aware that if he did it would be important to have a plan about how he would promote his growing business.

Matt logs into the internet using the laptop in his café and looks at a local business portal. Elders-Up! comes up and he think that this might be something that could be interesting to him.

Matt completes his profile and asks for someone to help him form a business plan and also to think about how to better advertise his business.

The platform matches Janet and Matt firstly by completing an automatic matching process. However, before this is sent to both the senior and the business an EldersUp! representative checks all the information to ensure that the match is sensible.

Matt and Janet both receive an email detailing the match that has been made and both seem pleased with the suggestion.

Matt emails Janet first explaining his business and how he'd like to expand.

Upon receiving Matt's email, Janet types a brief email back on her tablet explaining that she'd like to help but typing is difficult for her. She suggests that they chat using the video calling functionality of Elders-Up!.

Matt and Janet arrange to speak in an evening when Matt's café is closed and Janet is free.

Following a few conversations Matt starts to draft up his plan and send a copy to Janet. Using the collaborative workspace and video calling they are able to discuss the document together.

8.3   Story Board
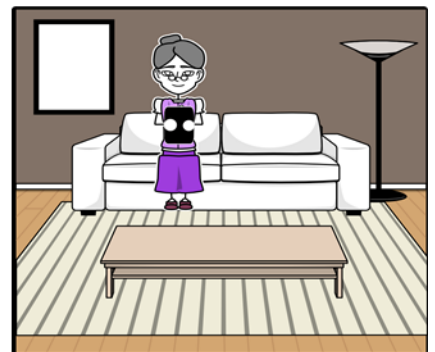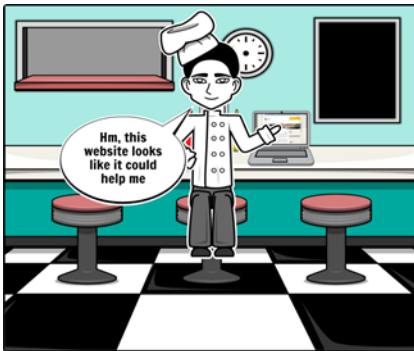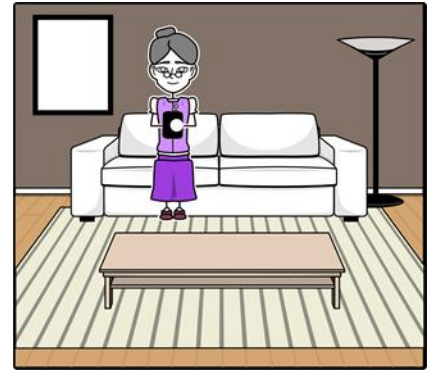
9. Conclusions

This deliverable has shown the scenario story board methodology that will be used to translate the user feedback into the development of Elders–Up!. Essential characteristics which derived from the analysis of deliverable D2.1 have been used in the scenarios and story boards to reflect properly the sequence of events that would lead up to and be involved in the use of Elders-Up! from both seniors and companies.