

Jean Rogers

Occupation

Senior Marketing Account Manager in EduTech Incorporated

Personal Description

- *Age:* 30 years old
- *Work Hours:* 50-60 hours a week on projects
- *Marital/Parental Status:* Married, One five year old son
- *Personality Traits:* Introverted, Organized, Creative

Technology Use

- Jean prefers to use MacIntosh computers, but she considers herself to be a technology minimalist relying only on her MacBook Pro and an iPhone as her main technologies

Role

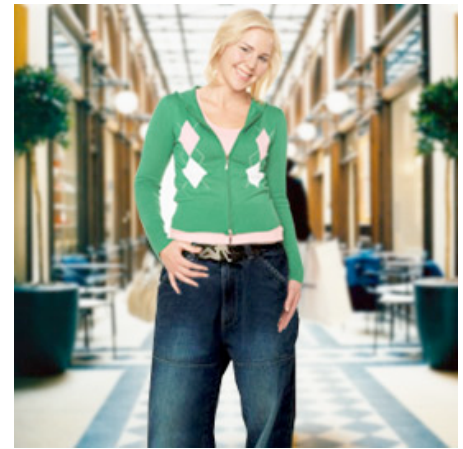
- Jean supervises 8 junior marketing account managers ages 25-28. She is supposed to make decisions for her department and allot assignments to her subordinates.
- Attend cross-functional meetings to contribute ideas representing her department.

Tasks

- Cooperated efficiently with cross-functional teams to bring new products to market
- Lead her team to developing marketing campaigns for products

Goals

- Make sure meetings of marketing team are organized and efficient
 - Make sure that questions and voice of Marketing team do not get “lost” in larger, collaborative cross-functional team meetings
 - Keep staff who miss meetings abreast of key information
- Jean meets in 5-12 person groups 3 times a week. Two of these meetings are cross-functional across EduTech around projects and 1 is a regular Marketing Team meeting that Jean organizes and facilitates. In her Marketing Team meeting, she distributes an agenda before hand by email and the meeting always ends on time.



- Her cross-functional meetings are much less structured due to the collaborative nature of the groups involved. These meetings are often tiring for Jean who prefers the structured meetings where everyone's voice is heard systematically. In her cross-functional meetings, she usually tries to wait for a break in the conversation, but often relies on her more vocal junior Marketing colleagues to bring her questions to the group based on their previous conversations. This can be awkward for Jean since she is supposed to be the manager of her group, but it is the only strategy that has worked for her and her team.

Scenarios

Can you help me stay organized and contribute to meetings where there is a lot of information being shared by a lot of dominant people?

Jean is tired. This is the fifth meeting that she has been to related to the upcoming launch of WhizKid Online Virtual Tutor. Normally, she would at least try to jump into the conversation with her peers, but she feels that she only has a few new points to add to the discussion. She opens her laptop and double-clicks on the MeetingBytes icon. She quickly navigates to the WhizKid Project Folder and immediately accesses whiteboard sketches of layouts, agendas from past meetings, and note transcripts from past meetings. She clicks the Capture New Meeting Associated with this Project Button. Immediately, a note-taking chatroom opens and Jean is able to type notes quickly into the display.

She types a note for Charlie so that he remembers to send her the marketing plan for the upcoming launch. She opens the previous questions and comments archive and sees that her questions on Giveaways and incentives for K-12 schoolteachers is first on the agenda today since it did not get asked last time. She sits back, relaxes and enjoys the meeting.

Can you help me share information with colleagues after the meeting including those who might have missed the meeting?

After the meeting, Jean uploads her notes to the MeetingBytes server where they are integrated with other meeting participant notes and audio-recording for collaborative use.

Nellie from Finance pops in to ask her if she can give her a quick recap of the meeting including any action items. Jean re-opens the WhizKid Project Folder and accesses the note transcript from the past meeting. She chooses Publish Tasks and then selects Nellie Smith under Assigned To and Pulls up and prints a list of 6 action items tagged as Tasks for Jean. This list includes 2 tasks tagged by Jean and 1 task tagged by John Howard in Sales. Nellie looks at the list and indicates that she does not understand task 2, "Run numbers for 2011 Whiz Kid Sales Cycle. Jean uses Find this Note feature of MeetingBytes to jump to the part of the audio-recording in the meeting when John Howard took that note.

Jean and Nellie hear another colleague, Dan from Sales discussing the initial feedback he received from K-12 test group on the audio-recording. Neither Jean nor Nellie can decipher the

note so they choose Get Context for this Note and Dan is immediately sent a request for context for the note. Nellie leaves and Jean emails her the list of published tasks for her to have. The email contains a link to the meeting on the MeetingBytes server as well as the list that Jean prepared. A few days later, Jean receives a note from Nellie letting her know that John provided context for the note and now she understands it