

PROJECT BLUEPRINT

UPDATED: 3.24.2015
DOCUMENT OWNER JOHN CLARKSON

TO NOTE

Blueprint was envisioned as a thought experiment, the intention of which was to reduce existing systems to their core components/actions and rebuild them within the context of a ubiquitous, seamless user experience.

The wireframes presented here should be viewed as a catalyst for discussion. As such, we urge the consumer of this document to focus on the broader concepts and recommendations, and not so much specific labels or mechanisms.

There is much documented here that may not be obvious. A guided walk-through is recommended for those who are new to Blueprint.

Fee free to reach out to John Clarkson, Lori Parsons, or John Crotty with questions and comments.



P1 / PROJECT BLUEPRINT

UPDATED: 3.24.2015 JOHN CLARKSON
DRAFT -- FOR DISCUSSION ONLY

PROJECT BLUEPRINT GUIDING PRINCIPLES

WORKFLOW-BASED UX

Concentrate on task-based workflows with seamless transition from one task to the next. Where possible, the UX should adapt itself to persona and past behavior.

P1 should be aware of the user and their needs at all times. Different users have different roles, have different workflows, and work at different paces. The experience should accommodate that.

BASIC VS ADVANCED

Understand that an experience can be simplified and still serve the majority of users. Advanced features should be accessible and optional, but should not impede successful completion of the core task.

SCALABILITY AND ACCESSABILITY

Create a framework that can effortlessly evolve and grow with Neustar and the customer, while retaining ease-of-use and high performance.

As customers require deeper/wider functionality and as Neustar develops new experiences, the foundation of P1 will scale to accommodate, without impacting the existing experience.

CONSISTENCY

One of the central pillars of PlatformOne is the consistency of experience: no matter where the user is in their lifecycle, no matter how great or small the task they are tackling, the environment will be familiar.

The Neustar UX toolkit (NUX) enables this: NUX is a consistent and dependable UX architecture that can be easily leveraged to create full-featured workflows.

DATA UP FRONT AND CENTER

Users should be able to access data quickly and easily. Where contextually feasible, P1 should proactively present data associated with an item/workflow, or make it easily accessible.

KEEP DATA OPEN & AGNOSTIC

A customer should be able to move their data effortlessly throughout P1, as well as in and out.

COOPER'S DESIGN PRINCIPLES

At the beginning of the Red Book, Cooper sets out eight design principles. Those principles can be applied to the Blueprint vision of P1. There is overlap the principles laid out above.

In short, they are:

- Ubiquitous Search
- Automate, Automate, Automate
- Always Promote the Next Step
- Don't Play the Blame Game
- Sell Our Secret Sauce
- Set the Data Free
- Answers Up Front
- Save and Communicate State

For a more detailed look at these principles (and more), please download the Red Book, available here:

<http://nux.neustar.biz/#!/examples/index.html>

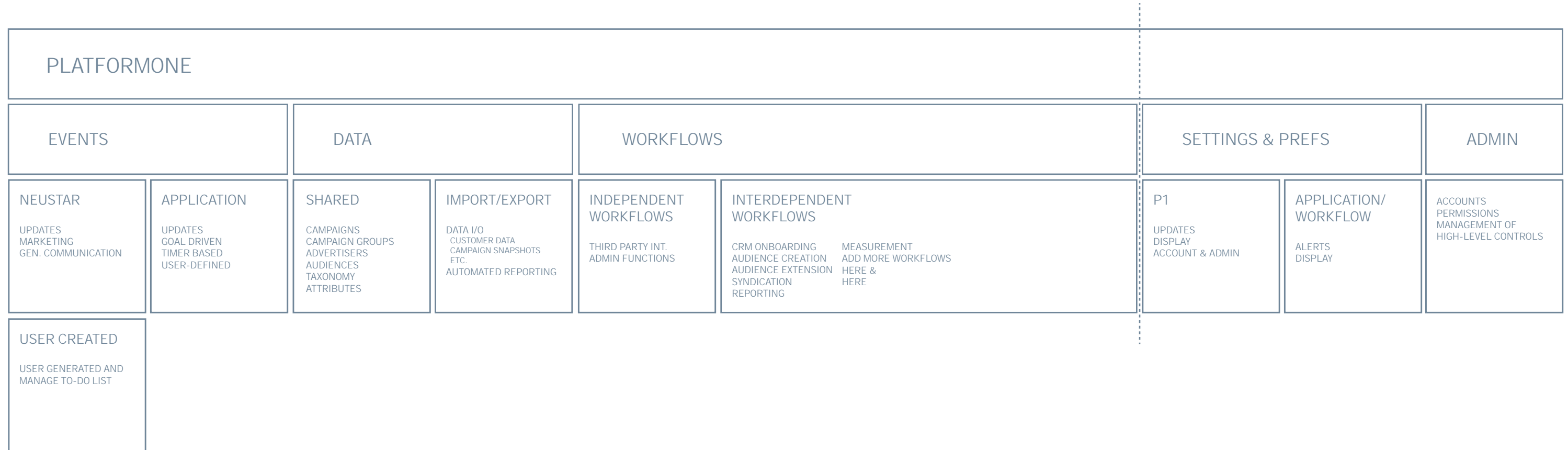


P1 / PROJECT BLUEPRINT

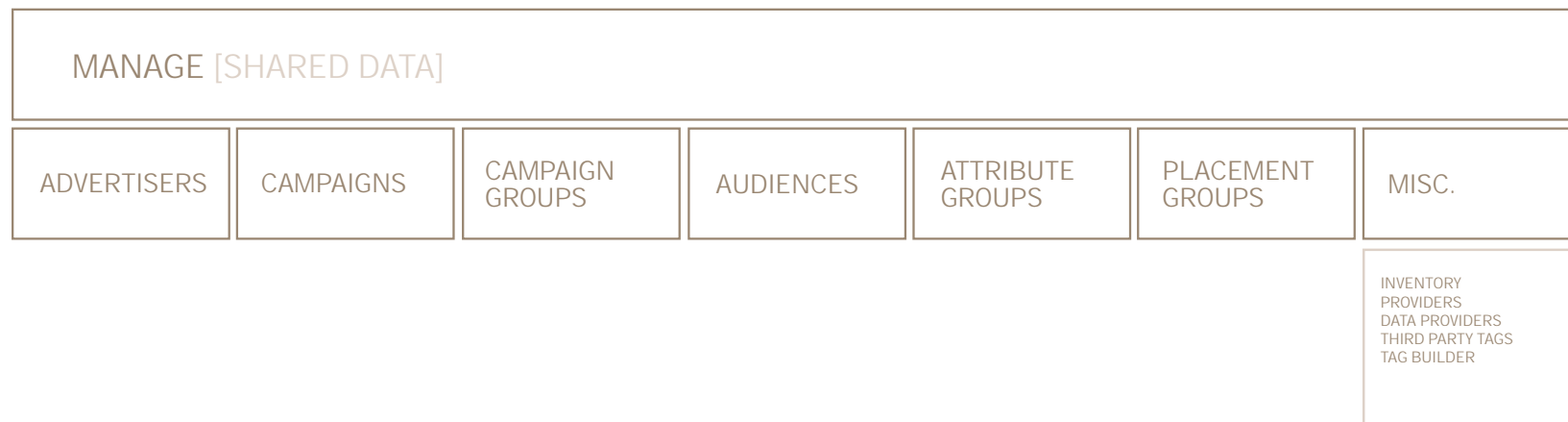
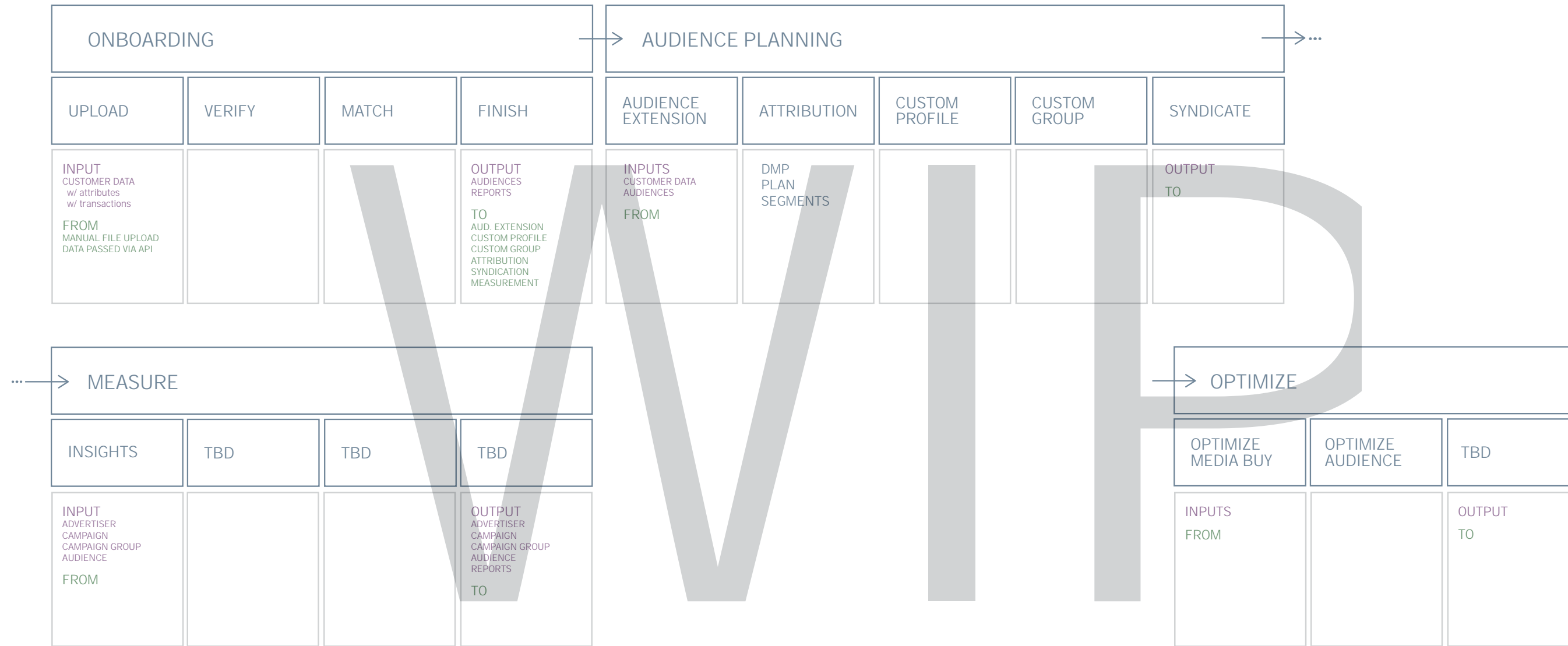
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OVERVIEW



The components that comprise the P1 experience.



HIGH-LEVEL WORKFLOWS (WIP)



FUTURE VISION – CRM ONBOARDING FLOW (WIP)

CRM ONBOARDING						
UPLOAD 				→ MANAGE 		→ BUILD
SELECT A FILE BASIC ACTIONS select table type select file name table ADV ACTIONS delimiter type text qualifier first row has field names transfer mode file preview	FILE PREVIEW BASIC ACTIONS preview incoming data add'l options geocode spatially enable append E1 code ADV ACTIONS preview column mapping skip import (columns) encrypt	UPLOAD BASIC ACTIONS progress bar(s) ADV ACTIONS statistics	CONFIRMATION BASIC ACTIONS confirm upload next steps	DATA MANAGER new modify append reload update build delete search recent bulk edit	VIEW BASIC ACTIONS overview ADV ACTIONS details design data history dependency permissions profiles	TBD

BASIC ACTIONS

An action on part of the user that is core and thus essential to the completion of the task. Also, the action is straightforward or familiar enough that it is understood and completed by a non-Neustar user, and cannot be automated.

ADVANCED ACTIONS

Two criteria determine if an action is considered advanced:

- 1) The action is not essential to the completion of the task at hand.
- 2) The action is too complicated (the process / ask is difficult for a user to understand).

Moving forward, we need to determine if an **ADVANCED ACTION** is necessary for the workflow, and if so, how to simplify it so that a 'common' user is comfortable completing the action, or find a way to automate it. If the **ADV ACTION** is not necessary for the workflow, it should be removed.

AUTOMATED ACTIONS

Actions that are currently reliant on user input, but could be completed by the system. For instance, auto setting delimiter type and checking first row for field names.

REQUIREMENTS

FUTURE VISION – CRM ONBOARDING FLOW (WIP)

neustar // PlatformOne

SEARCH

John Clarkson ▾

★ DATA MANAGEMENT
Good morning, John ? ⚙

ONBOARDING
MANAGE
EXPORT

SELECT

VERIFY

UPLOAD

FINISH

NEXT

CANCEL

▲ Verify that your data is formatted and mapped properly. *indicates required field

FORMATTING PREVIEW ?

First_Name	Last_Name	Title	Suffix	Nickname	Company	Job_Title	Dept	Work_Street_Address
First_Name 1	Last_Name 1			Stimpy	Company 1			
First_Name 2	Last_Name 2				Company 2			
First_Name 3	Last_Name 3			Ren	Company 3			
First_Name 4	Last_Name 4				Company 4			
First_Name 5	Last_Name 5				Company 5			
First_Name 6	Last_Name 6				Company 6			
First_Name 7	Last_Name 7				Company 7			

GEOCODE OPTIONS ? Add geocodes to table Spacially enable table

▲ Advanced Options
Change column mappings, naming, and other advanced table actions.

EDIT TABLE CONTENT ?

File Column Names	Recommended Names	Include in Table	Content Type	Encrypt Values
First_Name 1	Last_Name 1	<input checked="" type="checkbox"/>	NONE ▾	<input checked="" type="checkbox"/>
First_Name 2	Last_Name 2	<input checked="" type="checkbox"/>	NONE ▾	<input checked="" type="checkbox"/>
First_Name 3	Last_Name 3	<input checked="" type="checkbox"/>	NONE ▾	<input checked="" type="checkbox"/>
First_Name 4	Last_Name 4	<input checked="" type="checkbox"/>	NONE ▾	<input checked="" type="checkbox"/>
First_Name 5	Last_Name 5	<input checked="" type="checkbox"/>	NONE ▾	<input checked="" type="checkbox"/>



FUTURE VISION – CRM ONBOARDING FLOW (WIP)

neustar // PlatformOne SEARCH Q John Clarkson ▼

★ MY P1 ≡ DATA MANAGEMENT Good morning, John ? ⚙

ONBOARDING	MANAGE	EXPORT	
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SELECTVERIFYUPLOADFINISH

▲ Uploading and creating Table 'AcmeUni 14Q3'.

This process could take several minutes. You don't have to stay here if you don't want to. We'll let you know when AcmeUni 14Q3 is ready.

Creating individual georecords...

72% COMPLETE



FUTURE VISION – CRM ONBOARDING FLOW (WIP)

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SEARCH

John Clarkson ▾

★ MY P1 ☰ DATA MANAGEMENT
Good morning, John ? ⚙

ONBOARDING
MANAGE
EXPORT

SELECT

VERIFY

UPLOAD

FINISH

▲ The new CRM Table 'AcmeUni 14Q3' was successfully created. What would you like to do next?

EXTEND THE AUDIENCE
Donec tempus orci tortor, eu gravida magna ultricies sit amet. Maecenas id enim a eros mollis aliquam eu a orci. Vestibulum nulla tortor, semper a sollicitudin quis, tristique vitae velit.

SAVE AS A CUSTOM GROUP
Donec tempus orci tortor, eu gravida magna ultricies sit amet. Maecenas id enim a eros mollis aliquam eu a orci.

SAVE AS A CUSTOM PROFILE
Donec tempus orci tortor, eu gravida magna ultricies sit amet. Maecenas id enim a eros mollis aliquam eu a orci. Vestibulum nulla tortor, semper a sollicitudin quis, tristique vitae velit. Cras aliquet libero ut nibh dignissim, a ultricies dolor cursus.

DEFINE ATTRIBUTIONS
Donec tempus orci tortor, eu gravida magna ultricies sit amet. Maecenas id enim a eros mollis aliquam eu a orci.

MEASURE
Donec tempus orci tortor, eu gravida magna ultricies sit amet. Maecenas id enim a eros mollis aliquam eu a orci. Vestibulum nulla tortor, semper a sollicitudin quis, tristique vitae velit.

SYNDICATE
Donec tempus orci tortor, eu gravida magna ultricies sit amet. Maecenas id enim a eros mollis aliquam eu a orci. Vestibulum nulla tortor, semper a sollicitudin quis, tristique vitae velit. Cras aliquet libero ut nibh dignissim, a ultricies dolor cursus.

Onboard Another File | Manage Tables | Return to Home

Syndicate itself is broken into pieces online and offline
 Attribution is a Customer File with Transactions
 Measurement you can measure how this audience does against current campaigns

FUTURE VISION – CRM ONBOARDING FLOW (WIP) ALTERNATE CRM ONBOARDING FINAL STEP

neustar // PlatformOne SEARCH Q John Clarkson ▾

★ MY P1 ≡ LIBRARY Good morning, John ? ⚙

CRM AUDIENCES CAMPAIGNS

The audience "AcmeUni_USCust_2015" has been successfully created. What now? [Use It to Build an Audience](#) [Syndicate It](#) [Extend another CRM File](#) ✕

AUDIENCES SORT BY ▾

▾ Acme Universal
AcmeUni_USCust_2015 ▾
AcmeUni_USCust_2014
AcmeUni_USCust_2013
AcmeUni_USCust_2012
AcmeUni_USCust_2011
AcmeUni_USCust_2010
▾ Benthic Petroleum
▾ Nostromo, Inc.
▾ Weyland-Yutani
WY_Outposts_LV232
WY_Outposts_LV240

snapshot of the selected audience

'BEGINNER' UX

neustar // PlatformOne

SEARCH

Lucia Prado ▾

☰ HOME
○ MY P1
○ TO DO

Welcome, Vikram. What would you like to do today?

CRM ONBOARDING

Load a New CRM File | View CRM Files

MARKET ANALYTICS AND SEGMENTATION

Analyze Customers | Manage Maps

TARGETING

Build a New Audience | Edit Syndication | Review Reach & Overlap

Dec 22, 2014 – Jan 20, 2015 ▾

CAMPAIGNS

Campaign	Views/Imps	Uniques	Clicks	Actions	Gross Cost
BMW NEW YEAR	1.7 billion <small>6.7 Avg Freq</small>	253 million <small>4% of Uni</small>	6.3 million <small>0.37% CTR</small>	389,735 <small>0.2284 APM</small>	\$5.4 million <small>\$13.94 CPA</small>
Brand Mobile	749 million	120 million	2.8 million	177,478	\$2.8 million
Brand Tablet	531 million	73 million	1.8 million	61,001	\$831,456
Brand Facebook	222 million	42 million	812 k	84,846	\$703,996

Campaign	Views/Imps	Uniques	Clicks	Actions	Gross Cost
STANDARD MUTUAL INSURANCE Q1	1.7 billion <small>6.7 Avg Freq</small>	253 million <small>4% of Uni</small>	6.3 million <small>0.37% CTR</small>	389,735 <small>0.2284 APM</small>	\$5.4 million <small>\$13.94 CPA</small>

Campaign	Views/Imps	Uniques	Clicks	Actions	Gross Cost
ACME LOYALTY	980 million <small>8.8 Avg Freq</small>	109 million <small>6% of Uni</small>	2.3 million <small>0.37% CTR</small>	180,009 <small>0.2284 APM</small>	\$2.8 million <small>\$12.94 CPA</small>

Clicks

SYNERGY, INC
KINETIC BIOLOGY Q4

TO DO ALL ▾

ALERTS

- FujiFilm Tablet Campaign
Actions down 20% over the past 24 hours
- Vikram Shared an Audience
'Mid-Atlantic Audi Drivers' has been shared with you.

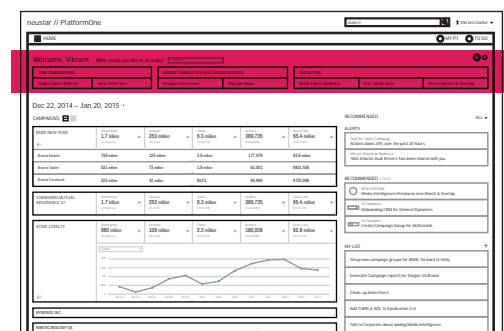
RECOMMENDED 3 NEW

- NEW FEATURE
Media Intelligence introduces new Reach & Overlap
- To Complete
Onboarding CRM for General Dynamics
- To Complete
Create Campaign Group for McDonalds

MY LIST +

- Setup new campaign groups for BMW; forward to Holly
- Generate Campaign reports for Diageo Q3 Brand
- Clean-up Advertisers
- Add TURN & AOL to Syndication List
- Talk to Corporate about adding Media Intelligence

ANNOTATIONS
WELCOME GROUP – BEGINNER UX



The functionality within the welcome group caters to newer users of P1, and focuses largely on surfacing functionality and quick-link type navigation. Why?

- Gives users action oriented labels that are easy to find, understand and act on.
- Encourages exploration.
- Surfaces a broad set of functions so the user will become familiar with terms and naming conventions, and the IA of the site (categories, subcategories)

As the user becomes more familiar with the system, this section can be removed, either by a user changing the display rules from Preferences, or by a system-level rule that presents the user the option to remove this group.

Welcome Text

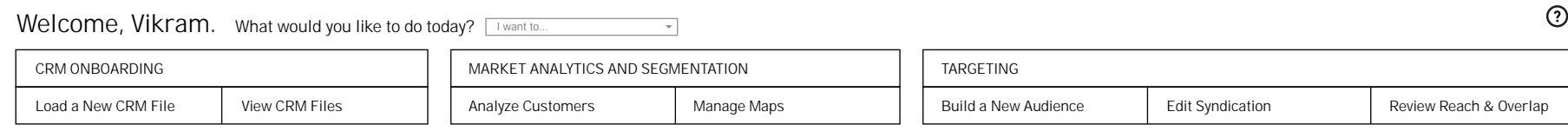
Uses the first name associated with the currently logged in account.

'What would you like to do today' and pull-down

The pull-down would house a variety of choices catered to the persona of the user, where they are in the user lifecycle (new, advanced). This pull-down should be variable, allowing choices to be updated by the system based on usage, and the mechanisms mentioned above.

Contextual Help and Settings icons

Contextual help would bring up a lightbox/page with additional information about the dashboard. Settings would open the settings page with the Dashboard settings in focus.



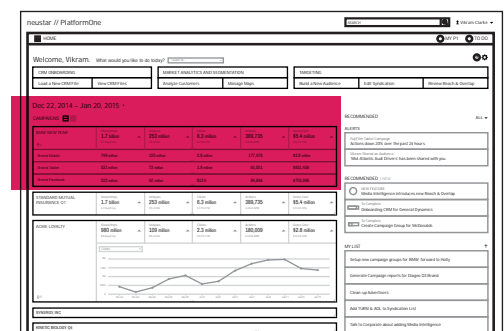
Category and Subcategory Navigation Blocks

Provides navigation links to core pieces of functionality. Reinforces the structure of the site while giving a new user quick access to key tasks. Depending on provisioning, an item can be 'locked'; clicking on a locked item will open a lightbox displaying more information on that product, and providing next steps.

These blocks can be configured per persona, per the lifecycle of the user, or by the system.

The user also has the option to remove them or add them to the experience.

ANNOTATIONS
DATA GROUP – BEGINNER UX



The main body of the Dashboard page can house a large variety of widgets, depending on persona, user configuration, or other factors, such as usage.

It is essential that the dashboard reflects the core values of the P1 design philosophy. First and foremost: meaningful, relevant and up-to-date data should be front and center and clearly articulated. A user should get, at a glance, high level feedback regarding their the performance of their P1 domain.

While there will be default experiences recommended for different types of personas at different levels of experience with P1, the system should allow for customization: modules can be added or deleted, or expanded and contracted to show deeper or shallower sets of data.

In this particular instance, the user is a heavy Media Intelligence user, possibly a Data Scientist (Scott) or more probably, due to the inclusion of onboarding and audience tools, Media Traffic Coordinator (Lucia).

Reporting Period

Will be sticky from session to session.

View Mode

Expanded 'verbose' mode, or list view for quick navigation and drilling down.

Dec 22, 2014 – Jan 20, 2015 ▾

CAMPAIGNS  

Campaign Group Name

Campaign Group

Toggles to expand/collapse

Campaigns w/in the Group

Campaign Group Name	Views/Imps	Uniques	Clicks	Actions	Gross Cost
BMW NEW YEAR	1.7 billion 6.7 Avg Freq	253 million 4% of Uni	6.3 million 0.37% CTR	389,735 0.2284 APM	\$5.4 million \$13.94 CPA
Brand Mobile	749 million	120 million	2.8 million	177,478	\$2.8 million
Brand Tablet	531 million	73 million	1.8 million	61,001	\$831,456
Brand Facebook	222 million	42 million	812 k	84,846	\$703,996

Module Order Dragger

On rollover. User can click to drag and reorder the modules on the page.

Generate a Report

With one click a user will be able to generate a report, contextual to the data where the button is located.

Within the 'generate a report' dialog, the user will be able to save the report as an automated re-occurring event, specify delivery methods, and add report recipients.

Micro Dragger

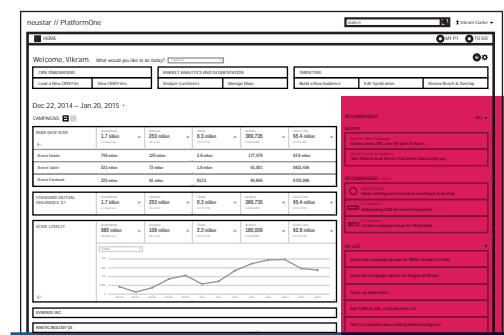
A powerful little mechanism. Allows the user to expand or contract the data widget. Predetermined configurations based on the size of the container, will show or hide data as the user resizes the container.

For instance, if the user wants more information to be displayed for Brand Tablet, they would click and drag that particular cell, and more information would appear.

Macro Dragger

Resizes the entire module proportionally, so all data sets are expanded or contracted at once.

ANNOTATIONS
TO DO GROUP – BEGINNER UX



Broken into three main tiers, Alerts, Recommended and My List, the To Do section is a stream of events that require the user's attention. The events can be system or user generated, either by the user signed in, or triggered by another user associated with the meta account [see Alerts description for details.]

Advanced users could choose to collapse this section altogether.

The To Do list functionality is replicated at the top right of the chrome, as a pulldown on the navigation bar, so the user always has a point of reference and is aware of new updates no matter where they are in the application.

TO DO ALL ▼

- ALERTS**
- FujiFilm Tablet Campaign
Actions down 20% over the past 24 hours
 - Vikram Shared an Audience
'Mid-Atlantic Audi Drivers' has been shared with you.

ALERTS

Alerts are messages triggered by events that require immediate attention, if not action. Events can be set by the system or by the user. Alerts can also be used to notify a user that someone else in the system has handed off a piece of functionality to them. For instance, Gina might craft 3 audiences and then pass them off to Vikram for syndication. Vikram would get an alert letting him know that the audiences were ready, and the alert itself would link off to the relevant part of the application for action.

- RECOMMENDED 3 NEW**
- NEW FEATURE
Media Intelligence introduces new Reach & Overlap
 - To Complete
Onboarding CRM for General Dynamics
 - To Complete
Create Campaign Group for McDonalds

RECOMMENDED

Less pressing than alerts, the recommended section represents actions that P1 feels the user should complete or know about. Events in this category would be incompleting actions, upgrade notices and notes, and other product information.

If the notice is a 'complete' notice, and the steps are known, then a progress bar should be shown so the user has a rough idea of how much further they have to go before the task is completed.

- MY LIST** +
- Setup new campaign groups for BMW; forward to Holly
 - Generate Campaign reports for Diageo Q3 Brand ▶
 - Clean-up Advertisers
 - Add TURN & AOL to Syndication List
 - Talk to Corporate about adding Media Intelligence

MY LIST

A user initiated and maintained list of to do items. Where the system can, the item should link off to the appropriate bit of functionality.

For instance, in the Generate Campaign reports for Diageo Q3 Brand, a generate report button is show. Since we know "report" and have a known campaign, it is assumed that the user wants to generate a report for that campaign. Adding a to-do item could be a powerful way to get simple tasks completed, sort of like a Siri for the P1 Dashboard.

'ADVANCED' UX

neustar // PlatformOne

SEARCH

Holly Sherman ▾

HOME
MY P1
5 TO DO

Jan 23, 2015 – Jan 25, 2015 ▾ ? ⚙

CAMPAIGNS +

- 5 BMW NEW YEAR
- General Market
- General Market Soc
- Consumer comScore
- Consumer Nielsen
- Email Outreach
- 8 CADBURY GENQ1
- 2 DIAGEO CAPT MORGAN
- MOBIL GAS CARD
- 4 XEROX CES15
- Brand Mobile
- Brand Tablet
- Brand Soc
- Brand Email (Existing)

CUSTOM +

- XEROX CES15 CUSTOM
- CTR Deep
- Demo Deep
- Xerox Audience Watcher
- MISC CUSTOM
- Total Spend Quick Monitor
- Alert Monitor
- Holly's Secret Widget

BMW NEW YEAR OVERVIEW 1 ⚠ 👤 ⌕

General Market

TOTAL (IN SCOPE)

Views/Imps: **1.7 billion** ▲
6.7 Avg Freq

Uniques: **253 million** ▲
4% of Uni

Clicks: **6.3 million** ▲
0.37% CTR

Actions: **389,735** ▲
0.2284 APM

Gross Cost: **\$5.4 million** ▲
\$13.94 CPA

General Market Soc

Clicks

Campaign ▾	Clicks	CTR	CPC	Unique Clicks	CPUC
General Market	1.5m	+1.7% ▲ 0.0384%	+1.7% ▲ \$3.95	+1.7% ▲ 1.1m	+1.7% ▲ \$4.73
General Market Soc	60k	+3.1% ▲ 0.1498%	+3.1% ▲ \$1.25	+3.1% ▲ 48k	+3.1% ▲ \$1.56
Consumer comScore	506k	-9% ▼ 0.02554%	-9% ▼ \$4.86	-9% ▼ 437k	-9% ▼ \$5.46
Consumer Nielsen	311k	+8.9% ▲ 0.0303%	+8.9% ▲ \$2.20	+8.9% ▲ 253k	+8.9% ▲ \$2.70
Email Outreach	313k	-1.2% ▼ 0.0798%	+1.7% ▲ \$6.28	+1.7% ▲ 244k	+1.7% ▲ \$8.06

XEROX CES15 CTR DEEP 👤

CTR by Market

CTR by Social Network

CTR by Demo

Brand Mobile 0.0384% +1.7% ▲ 4.6M	Brand Tablet 0.0561% +2.9% ▲ 3.8M
Brand Soc 0.0499% +2.2% ▲ 8.8M	Brand Email (Existing) 0.0308% -0.4% ▼ 2.0M

MCDONALDS GUARDIANS OF THE GALAXY UNIQUES 👤

AOL

Facebook

Google

TURN

TOTAL SPEND QUICK MONITOR

BMW NEW YEAR	\$933k	DIAGEO CAPT MORGAN	\$1.1M	NETFLIX XMAS PROMO	\$3.0M
CADBURY GENQ1	\$1.8M	MOBIL GAS CARD	\$210k	ACME BRAND	\$700k

Jan 23, 2015 – Jan 25, 2015



AUDIENCES

Sort by Advertiser

- 7 ACME
- AA Tablet Buyers
- Best Buy <1 Year
- Reg – Mount. All Demos
- Reg – MW All Demos
- Reg – NE All Demos
- Reg – NW All Demos
- Reg – SW All Demos
- 14 BMW
- 6 CADBURY
- 24 DIAGEO
- 3 MUTUAL INSURANCE
- 8 XEROX

CAMPAIGNS

A-Z

- 5 BMW NEW YEAR
- CADBURY GENQ1

ACME – AUDIENCE OVERVIEW

TOP ACTIVE USERS

SUMMARY TOP SOCIAL COMMUNICATORS TOP PRIVATE COMMUNICATORS TOP SOCIAL

DEMOGRAPHIC

Average HH Age	40	Race/Ethnicity	33% Hispanic 10% Asian
Average HH income	\$50,100	Marital Status	43%
Children in HH	65%	Employment	73% Full Time
Homeowners	27%	Top Industries	Accommodations/Food Services Health Care Social Service
Urbanicity	Suburban/Urban		
Education	28% graduated college or more		

BEHAVIORS AND ATTITUDES

SHOPPING VIEWS / BEHAVIOR

- Stores Forever 21 H&M Banana Republic Foot Locker Express Nordstrom Rack The Disney Store
- Games
Types Strategy Music/Dance Fighting Action/Adventure Arcade/Classic Kids/Family
- Attitudes Video games are more entertaining than TV Spend more money on video games than music/movies
Main source of entertainment Buy when cheaper
- Sports Interests
Interest Major League Soccer WWE/UFC NBA
- Attend NBA Basketball
- Social Media
Sites Facebook Twitter LinkedIn Tumblr Pinterest Yahoo!
- Activities Post ratings/reviews for others to read Like to Follow favorite brands/companies on social sites
Invite others to connect on social sites

Mobile Usage

- Phone Stream movies/TV Download/watch movies Download print media Banking
- Tablet Instant messaging Navigation Video chatting Steam movies/TV Banking Viewing work emails

Media Attitudes

- Ads help pick products for kids Magazines main source of entertainment Find TV ads interesting Enjoy TV with kids

MARKET SIZE	ElementOne Segments	US Households	Top Active Users
	42	20%	48.1%

KEY MARKETS

TIER1	TIER2	TIER3
New York	San Diego	El Paso
Los Angeles	San Francisco	Chicago
Laredo (TX)		Harington (TX)
Miami		Philadelphia



HEAVY USERS OF MAIN MEDIA CHANNELS

