

## AI Discovery: Tools & Technology Selection Framework

### Executive Overview

This framework provides comprehensive guidance for selecting appropriate tools, software, hardware, and facilities to support AI Discovery activities across different engagement modes (in-person, remote, hybrid) and discovery phases. The framework ensures optimal tool selection for workshop facilitation, investigation techniques, communication, ideation, documentation, artifact creation, deliverable production, review processes, sign-off procedures, and co-creation activities.

*This framework should be customized based on organizational context, discovery scope, and stakeholder requirements. Regular review and updates ensure optimal tool selection as technology evolves and discovery practices mature.*

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### Tool Selection Decision Matrix

#### Engagement Mode Assessment

| Factor                   | In-Person              | Remote                  | Hybrid              | Weight |
|--------------------------|------------------------|-------------------------|---------------------|--------|
| Stakeholder Distribution | Local/Regional         | Global/Distributed      | Mixed               | 25%    |
| Collaboration Complexity | High-touch ideation    | Structured facilitation | Flexible formats    | 20%    |
| Technical Investigation  | Hands-on access        | Screen sharing focus    | Multi-modal         | 20%    |
| Cultural Considerations  | Face-to-face preferred | Digital-native          | Accommodating both  | 15%    |
| Budget Constraints       | Travel + venue costs   | Tool licensing          | Balanced approach   | 10%    |
| Time Constraints         | Extended sessions      | Shorter, frequent       | Flexible scheduling | 10%    |

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### Workshop & Facilitation Tools

#### In-Person Workshop Tools

##### Facilitation Hardware

- **Interactive Whiteboards** (Microsoft Surface Hub, Google Jamboard)
  - *Purpose:* Visual collaboration, real-time ideation
  - *Selection Criteria:* Screen size (65"+), multi-touch, integration capabilities
  - *Use Cases:* Process mapping, user journey creation, stakeholder mapping
- **Presentation Systems** (Epson Interactive Projectors, Smart Boards)
  - *Purpose:* Content sharing, workshop presentations

- *Selection Criteria:* Resolution (4K+), wireless connectivity, annotation features
- *Use Cases:* Discovery findings presentation, technical architecture reviews
- **Audio/Visual Equipment** (Professional PA systems, Wireless microphones)
  - *Purpose:* Clear communication in large groups
  - *Selection Criteria:* Room coverage, clarity, easy setup
  - *Use Cases:* Large stakeholder sessions, recorded interviews

### Physical Collaboration Materials

- **Sticky Note Systems** (3M Post-it Super Sticky, Digital sticky note apps)
  - *Purpose:* Rapid ideation, affinity mapping
  - *Selection Criteria:* Adhesion quality, color variety, size options
  - *Use Cases:* Requirements gathering, pain point identification
- **Flip Charts & Markers** (Professional easel pads, Neuland markers)
  - *Purpose:* Process documentation, visual thinking
  - *Selection Criteria:* Paper quality, marker longevity, portability
  - *Use Cases:* Current state mapping, brainstorming sessions

### Facility Requirements

- **Workshop Spaces** (Configurable meeting rooms, Innovation labs)
  - *Selection Criteria:*
    - Flexible furniture arrangement
    - Natural lighting + adjustable artificial lighting
    - Multiple power outlets and charging stations
    - Writable wall surfaces
    - Acoustic design for clear communication
    - Breakout space availability
  - *Capacity Planning:* 6-8 participants for core sessions, 20+ for stakeholder reviews

### Remote Workshop Tools

#### Video Conferencing Platforms

- **Enterprise Solutions** (Zoom Enterprise, Microsoft Teams, Google Meet)
  - *Selection Criteria:*

- Participant capacity (50+ users)
- Breakout room functionality
- Screen sharing and annotation
- Recording capabilities
- Integration with collaboration tools
- Security and compliance features
- *Use Cases:* All remote workshops, stakeholder interviews, review sessions

### **Digital Collaboration Platforms**

- **Visual Collaboration** (Miro, Mural, Conceptboard)
  - *Purpose:* Digital whiteboarding, process mapping, ideation
  - *Selection Criteria:*
    - Real-time collaboration (20+ concurrent users)
    - Template library for discovery activities
    - Integration capabilities
    - Export/import functionality
    - Version control and commenting
  - *Use Cases:* Service blueprinting, user journey mapping, stakeholder analysis
- **Interactive Workshops** (Mentimeter, Slido, Kahoot)
  - *Purpose:* Audience engagement, polling, Q&A
  - *Selection Criteria:* Anonymous participation, real-time results, integration
  - *Use Cases:* Requirements prioritization, consensus building, feedback collection

### **Hybrid Workshop Tools**

#### **Integrated Collaboration Systems**

- **All-in-One Platforms** (Microsoft Viva Engage, Slack with integrations)
  - *Purpose:* Seamless in-person/remote collaboration
  - *Selection Criteria:* Cross-platform compatibility, mobile access, persistent workspaces
  - *Use Cases:* Ongoing collaboration, asynchronous ideation, document sharing

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## Investigation & Research Tools

### User Research & Investigation

#### Interview & Observation Tools

- **Recording Software** (Otter.ai, Rev.com, Grain.co)
  - *Purpose:* Interview transcription, analysis, insight extraction
  - *Selection Criteria:* Accuracy rates (95%+), speaker identification, integration with analysis tools
  - *Use Cases:* Stakeholder interviews, user research sessions, expert consultations
- **User Research Platforms** (UserTesting, Lookback, Maze)
  - *Purpose:* Remote user testing, behavior observation
  - *Selection Criteria:* Screen recording, participant management, analysis features
  - *Use Cases:* Current system evaluation, prototype testing, workflow analysis

#### Survey & Data Collection

- **Survey Platforms** (Typeform, SurveyMonkey, Microsoft Forms)
  - *Purpose:* Stakeholder feedback, requirements gathering
  - *Selection Criteria:* Logic branching, data export, integration capabilities
  - *Use Cases:* Stakeholder analysis, requirements validation, satisfaction measurement
- **Analytics Tools** (Google Analytics, Hotjar, Mixpanel)
  - *Purpose:* Current system usage analysis
  - *Selection Criteria:* Real-time data, customizable dashboards, API access
  - *Use Cases:* User behavior analysis, system performance evaluation

### Technical Investigation Tools

#### System Analysis Software

- **Architecture Diagramming** (Lucidchart, Draw.io, Visio)
  - *Purpose:* Current state technical documentation
  - *Selection Criteria:* Collaboration features, template libraries, export formats
  - *Use Cases:* System architecture mapping, integration planning
- **API Testing Tools** (Postman, Insomnia, Swagger)
  - *Purpose:* Technical feasibility assessment
  - *Selection Criteria:* Collaboration features, automation capabilities, documentation

- *Use Cases:* Integration capability assessment, technical constraint identification
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## **Communication & Collaboration Tools**

### **Stakeholder Communication**

#### **Communication Management**

- **Project Communication** (Slack, Microsoft Teams, Discord)
  - *Purpose:* Ongoing team and stakeholder communication
  - *Selection Criteria:* Channel organization, file sharing, integration ecosystem
  - *Use Cases:* Daily coordination, quick decisions, informal consultation
- **Email Management** (Office 365, Gmail with Boomerang, Mailchimp)
  - *Purpose:* Formal communication, update distribution
  - *Selection Criteria:* Template support, scheduling, tracking capabilities
  - *Use Cases:* Stakeholder updates, formal approvals, document distribution

#### **Presentation & Reporting**

- **Presentation Software** (PowerPoint, Google Slides, Prezi)
    - *Purpose:* Stakeholder presentations, findings communication
    - *Selection Criteria:* Collaboration features, template quality, export options
    - *Use Cases:* Executive briefings, technical presentations, workshop summaries
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## **Ideation & Co-Creation Tools**

### **Creative Collaboration**

#### **Brainstorming Platforms**

- **Digital Brainstorming** (IdeaBoardz, Stormboard, Padlet)
  - *Purpose:* Collaborative idea generation and organization
  - *Selection Criteria:* Anonymous contributions, voting mechanisms, export capabilities
  - *Use Cases:* Solution ideation, problem definition, opportunity identification
- **Mind Mapping** (MindMeister, XMind, Coggle)
  - *Purpose:* Visual thinking, concept development
  - *Selection Criteria:* Real-time collaboration, template variety, integration options
  - *Use Cases:* Stakeholder relationship mapping, solution architecture planning

#### **Design Thinking Tools**

- **Journey Mapping** (Smaply, UXPressia, Custelligence)
    - *Purpose*: User experience visualization and analysis
    - *Selection Criteria*: Template library, persona integration, sharing capabilities
    - *Use Cases*: Current state journey analysis, future state design
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## Documentation & Artifact Creation

### Document Management

#### Collaborative Writing

- **Document Platforms** (Notion, Confluence, Google Workspace)
  - *Purpose*: Collaborative document creation and management
  - *Selection Criteria*:
    - Real-time collaboration (10+ concurrent editors)
    - Version control and change tracking
    - Template and structure support
    - Integration with other tools
    - Permission and access control
  - *Use Cases*: Requirements documentation, process documentation, knowledge base
- **Structured Documentation** (GitBook, Bookstack, DokuWiki)
  - *Purpose*: Formal deliverable creation
  - *Selection Criteria*: Export formats (PDF, HTML), search functionality, organization
  - *Use Cases*: Final reports, technical specifications, user guides

#### Visual Documentation

- **Diagramming Software** (Lucidchart, Visio, Draw.io)
  - *Purpose*: Process flows, system diagrams, architectural documentation
  - *Selection Criteria*: Collaboration, template library, integration capabilities
  - *Use Cases*: Service blueprints, system architecture, workflow documentation

### Deliverable Creation Tools

#### Report Generation

- **Business Intelligence** (Power BI, Tableau, Looker)

- *Purpose:* Data visualization and dashboard creation
  - *Selection Criteria:* Data source connectivity, collaboration features, embedding options
  - *Use Cases:* Analytics reports, KPI dashboards, trend analysis
  - **Template Management** (Templafy, Guru, PandaDoc)
    - *Purpose:* Consistent deliverable formatting
    - *Selection Criteria:* Brand compliance, approval workflows, version control
    - *Use Cases:* Standardized reports, proposal creation, presentation consistency
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## Review, Sign-off & Approval Tools

### Review Management

#### Document Review Platforms

- **Review & Approval** (ReviewBoard, Filestage, GoVisually)
  - *Purpose:* Structured review processes with stakeholder feedback
  - *Selection Criteria:*
    - Multi-stakeholder review workflows
    - Comment threading and resolution tracking
    - Approval status tracking
    - Version comparison capabilities
    - Notification and reminder systems
  - *Use Cases:* Deliverable reviews, stakeholder sign-offs, quality assurance
- **Digital Signature** (DocuSign, Adobe Sign, HelloSign)
  - *Purpose:* Formal approvals and sign-offs
  - *Selection Criteria:* Legal compliance, integration capabilities, audit trails
  - *Use Cases:* Final deliverable approval, stakeholder agreements, formal sign-offs

### Quality Assurance Tools

- **Content Review** (Grammarly Business, Hemingway Editor, ProWritingAid)
  - *Purpose:* Document quality and consistency
  - *Selection Criteria:* Team features, style guide compliance, integration

- *Use Cases:* Report editing, presentation review, communication quality
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## Hardware & Infrastructure Requirements

### Computing Infrastructure

#### Individual Workstations

- **Laptops/Desktops** (Minimum specifications)
  - *Processor:* Intel i7/AMD Ryzen 7 or equivalent
  - *Memory:* 16GB RAM minimum, 32GB preferred
  - *Storage:* 512GB SSD minimum
  - *Display:* Dual monitor support, 27" minimum for primary
  - *Camera/Audio:* HD webcam, noise-canceling headset
  - *Use Cases:* All discovery activities, tool operation, content creation

#### Mobile Technology

- **Tablet Devices** (iPad Pro, Surface Pro, high-end Android tablets)
  - *Purpose:* Field research, mobile interviews, note-taking
  - *Selection Criteria:* Stylus support, long battery life, quality cameras
  - *Use Cases:* On-site observations, mobile stakeholder interviews

### Network & Connectivity

#### Internet Infrastructure

- **Bandwidth Requirements**
  - *Minimum:* 25 Mbps upload/download per concurrent user
  - *Recommended:* 100 Mbps symmetrical for teams of 5+
  - *Backup:* Mobile hotspot capabilities for redundancy
  - *Use Cases:* Video conferencing, real-time collaboration, large file sharing

#### Security Infrastructure

- **VPN Solutions** (Enterprise-grade with split tunneling)
  - **Multi-Factor Authentication** (Hardware tokens, authenticator apps)
  - **Data Encryption** (End-to-end encryption for sensitive discovery data)
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## Tool Selection Criteria Framework

### Evaluation Matrix

| Criteria Category | Weight | Evaluation Factors                                                |
|-------------------|--------|-------------------------------------------------------------------|
| Functionality     | 25%    | Feature completeness, customization options, scalability          |
| Usability         | 20%    | Learning curve, user interface quality, accessibility             |
| Integration       | 20%    | API availability, existing tool compatibility, data export/import |
| Collaboration     | 15%    | Real-time capabilities, multi-user support, sharing features      |
| Security          | 10%    | Data protection, compliance certifications, access controls       |
| Cost              | 5%     | Licensing costs, implementation costs, ongoing maintenance        |
| Support           | 5%     | Vendor support quality, community resources, documentation        |

## Selection Process

### Phase 1: Requirements Analysis (1-2 weeks)

#### 1. Stakeholder Needs Assessment

- Interview key participants about tool preferences and constraints
- Identify technical requirements and integration needs
- Assess security and compliance requirements

#### 2. Use Case Definition

- Map discovery activities to tool requirements
- Define collaboration patterns and workflow needs
- Identify critical success factors for tool adoption

### Phase 2: Market Research (1-2 weeks)

#### 1. Tool Landscape Analysis

- Research available solutions in each category
- Gather vendor information and capability summaries
- Collect user reviews and case studies

#### 2. Initial Screening

- Apply must-have criteria to eliminate unsuitable options
- Create shortlist of 3-5 options per category
- Validate availability and licensing terms

### Phase 3: Evaluation & Testing (2-3 weeks)

#### 1. Proof of Concept Testing

- Set up trial accounts for shortlisted tools

- Conduct specific use case testing with team members
- Evaluate integration capabilities with existing systems

## 2. Stakeholder Validation

- Demonstrate tools to key stakeholders
- Gather feedback on usability and fit
- Confirm acceptance and adoption likelihood

## Phase 4: Decision & Implementation (1-2 weeks)

### 1. Final Selection

- Score options using evaluation matrix
- Consider stakeholder feedback and preferences
- Make final tool selections for each category

### 2. Implementation Planning

- Develop tool rollout and training plan
- Configure selected tools and establish governance
- Create user guides and best practices documentation

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## Tool Configuration & Best Practices

### Implementation Guidelines

#### Tool Integration Strategy

- **Single Sign-On (SSO)** implementation across all selected tools
- **Data consistency** protocols for information shared across platforms
- **Workflow automation** using integration platforms (Zapier, Microsoft Power Automate)
- **Backup and recovery** procedures for critical discovery data

#### User Adoption Framework

- **Training Programs:** Role-specific training for different tool categories
- **Change Management:** Communication plan for tool introduction and adoption
- **Support Structure:** Internal champions and help desk procedures
- **Success Metrics:** Adoption rates, user satisfaction, productivity measures

## Governance & Quality Control

### Tool Governance

- **Access Management:** Role-based permissions and access controls

- **Data Governance:** Classification, retention, and disposal policies
- **Version Control:** Document and artifact versioning procedures
- **Quality Standards:** Templates, naming conventions, and output standards

#### Continuous Improvement

- **Usage Analytics:** Regular review of tool utilization and effectiveness
  - **Feedback Loops:** Ongoing collection of user feedback and suggestions
  - **Tool Evolution:** Regular assessment of new tools and capabilities
  - **ROI Measurement:** Cost-benefit analysis of tool investments
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### Budget Planning Framework

#### Cost Categories

##### Software Licensing

- **Per-User Costs:** Monthly/annual subscription fees
- **Enterprise Licenses:** Volume discounts and enterprise features
- **Integration Costs:** API access fees and middleware licensing
- **Training Costs:** Vendor training programs and certification

##### Hardware Investment

- **Individual Equipment:** Laptops, monitors, audio/video equipment
- **Shared Infrastructure:** Interactive displays, conferencing equipment
- **Facility Upgrades:** Workshop spaces, networking infrastructure
- **Mobile Technology:** Tablets, portable equipment for field research

##### Implementation Services

- **Setup and Configuration:** Professional services for complex tools
- **Custom Integration:** Development costs for tool integration
- **Training and Adoption:** Change management and user training
- **Ongoing Support:** Help desk and technical support services

### ROI Calculation Framework

#### Benefits Quantification

- **Time Savings:** Reduced meeting time, faster documentation
- **Quality Improvement:** Better deliverables, fewer revisions
- **Stakeholder Satisfaction:** Improved engagement and participation

- **Risk Reduction:** Better communication, clearer requirements

#### **Cost-Benefit Analysis**

- **3-Year TCO:** Total cost of ownership including hidden costs
- **Productivity Gains:** Measured improvement in discovery efficiency
- **Quality Metrics:** Reduction in rework and stakeholder dissatisfaction
- **Strategic Value:** Enhanced capability and competitive advantage

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