Situation	Archetype	Logged In?	Goals	Key Content Required	User Flow and Interaction Points	Search?	Call to Action?	Interaction Solutions	Editorial Needs
What kind of site user is this?		*Is the user logged in?*	*What does the user hope to achieve?*	*What content will solve their goal?*	*How might this user find/interact with this content?*	*Is there a potential the user tries site search in this situation?*	*Is there a call to action for this specific situation?*	*What objects and connections can the content platform provide?*	*What additional non-modeled content needs are present?*
Non-client user discovers Client	Anyone	No	Determine who Client is. / Determine what Client provides.	About and vision content / General marketing content	Browsing through site at high level / Navigating to About or Services pages or landing pages	No	Generic discovery (Learn more about Client)	**Home page** content template / **General use page** content template / **Landing page** content template / **Unique design components** tied to easy identification (graphics, diagrams, fast-fact columns)	Focus on high-level identification / Focus on brand / Focus on explaining product offerings in human terms
Non-client user has heard of Client, is determining viability	Physician / Operations Manager / Laboratory Manager / Decision Maker / Decision Influencer	No, but may create account as they look for more information	Determine the scope of Client's services. / Determine the potential success of a relationship. / Confirm assumptions about Client.	Description and benefits of Client services / Description and benefits of Client thought leadership / Benefits of Client services / Benefits of Client partnership / Lab text content / Directed marketing content (based on Lead Rating)	Browsing through site at high level / Navigating to Services pages or landing pages / Viewing Client content to better understand text mix / Viewing support content to better understand policies	Not to start; but will begin searching if interest grows.	Reach out to inquire about partnership / Log in to view deeper content	**Home page** content template / **General use page** content template / **Landing page** content template / **Unique design components** tied to easy identification (graphics, diagrams, fast-fact columns) / **Lab text category (landing page)** template / **Lab text** template / **Support question / FAQ** template / **Marketing item** template - potentially presented as a result of lead rating / Personalization based on Lead Rating if user has visited enough pages	Focus on alignment with brand / Focus on explaining product offerings in human terms / Focus on explaining what makes Client different from other similar organizations
Non-client user is thinking of choosing or short-listing Client / due diligence	Physician / Operations Manager / Laboratory Manager / Decision Maker / Decision Influencer	Potentially. Chance of creating account raises as their interest in deeper information grows.	Confirm the scope of Client's services matches client needs. / Determine the potential success of a relationship. / Confirm assumptions about Client. / Confirm quality about Client. / Learn about industry differentiation.	Benefits of Client services / Benefits of Client partnership / Lab text content / Detailed support content to help match requirements / Case studies and testimonials / Directed marketing content (based on Lead Rating)	Viewing Client content to better understand text mix / Viewing support content to better understand policies, potentially sent directly by sales / Viewing case studies sent by sales	Yes	Reach out to inquire about partnership / Log in to view deeper content	**Lab text category** template / **Lab text** template / **Support question** template / **Case study** template / **Marketing item** template - potentially presented as a result of lead rating / Personalization based on Lead Rating if user has visited enough pages	Focus on explaining what makes Client different from other similar organizations / Case studies can be tied to an individual text, or to a category, allowing them to be re-used in areas across the site as relevant. / The value of case studies will be tied to well-known names and fast results
Non-client user encounters Client through a specific test	Physician / Specimen Processor / Lab Staff	Probably not	Find details of the test / Find more information about the test / Purchase the test	Lab text content / Connections to related content / Connections to order a test	Arrives via search or as a regular visitor / Site search / Searches or browses lab test catalog	Yes	Log in to view deeper content / Order the test / Read more about the test category / Read more about though leadership in a category / View education opportunities related to this test	**Lab text** template / Lab tests are assigned a category for various areas within taxonomy / Articles are assigned to a lab test, allowing them to show on the lab page itself / Education opportunities are assigned to a lab text, allowing them to show on the test page itself / Lab tests include an alias field. This alias field should be public and user-facing to allow terms to be searchable. / Other individual lab tests are assigned as "related." / Support questions are assigned to a test, allowing them to show on the test page itself	Test categories are tied to the larger lab test catalog needs. / Lab tests may include references to specific content chunks, such as "specimen required" content, to lead more heavily on re-use.
Non-client user encounters Client through an Client-only test	Physician / Specimen Processor / Lab Staff	Probably not	Find details of the test / Find more information about the test / Purchase the test	Lab text content / Connections to related content / Connections to order a test	Arrives via search or as a regular visitor / Site search / Searches or browses lab test catalog	Yes	View additional list of Client-only tests / Log in to view deeper content / Order the test / Read more about the test category / Read more about though leadership in a category / View education opportunities related to this test	**Lab text** template / Same as above, but with addition of "Client-only" designation / Client-only designation allows for unique **marketing item** to show promoting the benefit and reach of Client as a premier test provider.	
Non-client user encounters Client through a specific article	Physician / Specimen Processor / Lab Staff	Probably not	Read the article / Find related content to this article / Find proper content (if this one is not the right target)	Article / Article / Insights Search / Connections to related content	Arrives via search or as a regular visitor / Site search / Searches or browses Insight	Yes	Read more within this article category / View education opportunities related to this article / View texts related to this article	**Article** template / **Article feed** and **article search** templates / Articles are assigned a category, which allows for unique content lists based on those categories / Articles are assigned texts, which allows the tests to show as related content / Education opportunities within the same categories are assigned to the article	Article category could be related to specialty, disease state, unique text, article type
Non-client user encounters Client through a specific education opportunity	Physician / Specimen Processor / Lab Staff	Probably not	View or interact with the education opportunity / Interact with the education opportunity	Education opportunity / Education Search / Connections to related content / Log-in, certification, or registration content	Arrives via search or as a regular visitor	Yes	Log in to interact with the education opportunity / View education opportunities related to this page / Sign-up for education opportunity (conference, webinar) / View texts related to this education opportunity / View articles related to this education opportunity	**Education** template / **Education feed** and **education search** templates / Education items are assigned a category, which allows for unique content lists based on those categories / Education items are assigned texts, which allows the tests to show as related content	Education category could be related to specialty, disease state, unique text, education type
Non-client user encounters / needs an algorithm	Physician / Specimen Processor / Lab Staff	Probably not	View or download an algorithm to help make a test decision / Algorithm (.pdf)	Lab text content	Arrives via search or as a regular visitor / Finds algorithm while reviewing/researching a text / Has algorithm saved	Yes	Log in to interact with the algorithm (if decision is made to place behind paywall) / Links as a part of the PDF content object to join Client to see content (if decision is made to place behind login) / Links to view full suite of algorithms	**Lab text** template / **Algorithm object**, tied to an individual or multiple lab text profiles / Algorithm object can include need for login or not, depending on business rules.	Editorial issue: how often does an algorithm get downloaded and never updated?
New client is learning the ordering process	Physician / Physician Assistant / Nurse / Specimen Processor / Lab Staff	Yes	Get an overview of how to walk through the ordering and account process / Find answers to questions about process, including shipping, billing, and results / Pass along answers to questions about process	Answers to common and uncommon support questions / Guides to helping potential secondary users sign up for accounts / Guides to understanding the ordering interface / Guides for understanding packing, shipping, etc / Quick access to account representatives	Site search / Browses to support / Unique new client FAQ section	Potentially, if answer is not easily found	Log in to find client-specific support questions / Log in to find client-specific onboarding videos / View answer to question / Contact representative with further questions	**Support question** template / **FAQ section** template (to include a set of support questions based either on category or curated) / Log in to access a customized new user account section / Individual pages can be assigned support questions for at-the-point-of-need answers based on step in workflow / Individual pages can be assigned support questions based on age of account to provide additional information for new clients or logins / **Education template** and **education feed** template for onboarding content	Allow for some editorial control over timing of a support question.
Client is logging in to access portal for daily work	Anyone logged in	Yes	Navigate to common tasks / Get information on individual account	User authentication for role / Information from past	Logging in directly from login form / Logging in via a bookmarked page, triggering authentication	Not likely, as they're looking for common tasks, not discovering new ones.	Individual custom links are the call to action / Update your links	Custom "fast links" based on role / Custom "fast links" based on traffic history / Custom categories based on user preferences, such as specialty.	May need to allow for the opportunity to edit - to balance curated links with automated links.
Client is ordering	Physician / Specimen Processor / Lab Staff	Yes	Find a test / Order a test / Understand the products and supplies related to a test / Understand use and process around the test / Understand specimen needs for a test	Lab text information / Standard packing and shipping information / Lab text related objects	Site search / Individual lab text item / Lab text catalog / Storefront	Yes	Order this text / Add these items to the test	**Lab text** template / **Text handling** as unique template (potential) / **Test questions** as unique template (potential) / **Prior Authorization Requirements (PAR)** as unique template (potential) / Lab text connect via ID all text handling, test questions, and PAR as connected objects / User can order directly from Lab Text Catalog (requires tying into larger portal, potentially phase 2) / Order requires users to answer test questions tied to items within order / Order requires users to confirm all PAR text to items within order / Order pulls all test handling pages and combines for a shipping/handling manifest / Related items are presented within the order and tied to either categories or text IDs	
Client is engaging with a specific text	Physician / Specimen Processor / Lab Staff	Yes	Find details of the test, including shipping and management / Order the test / Understand the additional needs of an individual test	Lab text content / Connections to related content / Connections to order a text / Connections to related products / Information on larger text profiles	Site search / Searches or browses lab test catalog / Selects details from storefront	Yes	Order the test / Read more about the test category / Read more about though leadership in a category / View education opportunities related to this test / View items commonly related to this text / View items within a test profile	**Lab text** template / Lab tests are assigned a category for various areas within taxonomy (specialty, disease state, usage) / Articles are assigned to a lab test, allowing them to show on the test page itself / Education opportunities are assigned to a lab text, allowing them to show on the test page itself / Other individual lab tests are assigned as "related." / Support questions are assigned to a test, allowing them to show on the test page itself / **Product** template for add-ons and non-text order items. / Next step contact information tied to individual lab text / **Test profile** template	
Client is engaging with the lab test catalog as a whole	Physician / Specimen Processor / Lab Staff	Yes	Browse a text specialty / Search for a specific text / Find details of a specific text, including shipping and management / Order the test	Lab text content / Lab text catalog content / Categorization and filtering of catalog content browsing and search	Browsing or searching within the lab test catalog itself	No (this situation is specific to browsing/searching within the lab test catalog itself)	Filtering tests / Searching tests	Lab text catalog search functionality / Include ID as searchable field within Lab Text Catalog / Code assignment is searchable, including aliases for tests that have similar codes / Results automatically filtered for preferred categories, with expansion to full catalog easily accessible / Support questions are assigned to the lab test catalog re: how it works, which appear as help along the side. / Faceted filtering allows for finer control / Option to filter by "previously ordered" is available for clients who have ordered in the past / Tests employ type-ahead terms to speed up test catalog search	
Client is engaging with a specific article	Physician / Physician Assistant / Nurse / Specimen Processor / Lab Staff	Yes	Read the article / Find related content to this article / Find proper content (if this one is not the right target)	Article / Article / Insights Search / Connections to related content	Site search / Searches or browses Insights / Arrives via user article feed	Yes	Read more within this article category / View education opportunities related to this article / View texts related to this article	**Article** template / **Article feed** and **article search** templates / **User article feed** template / Articles are assigned a category, which allows for unique content lists based on those categories / Articles are assigned texts, which allows the tests to show as related content / Education opportunities within the same categories are assigned to the article	
Client is engaging with a specific education opportunity	Physician / Physician Assistant / Nurse / Specimen Processor / Lab Staff	Yes	View or interact with the education opportunity / Interact with the education opportunity	Education opportunity / Education Search / Connections to related content / Log-in, certification, or registration content	Site search / Searches or browses education section / Arrives via user education feed	Yes	View education opportunities related to this page / Sign-up for education opportunity (conference, webinar) / View texts related to this education opportunity / View articles related to this education opportunity	**Education** template / **Education feed** and **education search** templates / Education items are assigned a category, which allows for unique content lists based on those categories / Education items are assigned texts, which allows the tests to show as related content	Education category could be related to specialty, disease state, unique text, education type
Client has a question about a specific process, such as shipping	Physician Assistant / Nurse / Send Out / Lab Tech	Yes	Find answer to question about process, including shipping, billing, and results / Pass along answer to question about process	Answers to common and uncommon support questions	Site search / Browses to support	Potentially, if answer not easily found	View answer to question / Contact related support staff with further questions	**Support question** template / **FAQ section** template (to include a set of support questions based either on category or curated) / Support questions can include a video / **Contact** component/template (allows for editors to tie contact info to a specific text or page)	For support questions that require deeper contact or follow-up, editorially an email or contact person can be added at the support question level. / Support questions can include a video / Support questions should involve some kind of feedback, allowing for users to say "yes, this helped" or "no, this was not helpful." This will fuel a metric for providing easily accessible help and operations content.
Client has a question about a recent email or notification	Physician Assistant / Nurse / Send Out / Lab Tech	Yes	Better understand the email or notification / Become confident in the nature of the notification and how it affects their order or process	Answer to understand purpose and nature of process or account change	Site search / Browses to support / Response to Client account manager / Log-in to find answer within account management	Potentially, if answer not easily found	View answer to question / Contact related support staff with further questions / View more detail to notification within account manager	**Support question** template / Support questions are available as a searchable term / Support questions given unique code for ease in search / Support question flagged for inclusion on user's account management messages / Unique support question can be added to any FAQ section page listing, allowing for it to live on a page (including a text page) dedicated to any changes / Unique support question can be automatically added to a Lab Text Page via Lab Text code assigned to support question / Single source of support question content for maximum re-use. / Search allows for best bets for unique combinations of terms you'd like surfaced	For support questions that require deeper contact or follow-up, editorially an email or contact person can be added at the support question level. / Messaging potentially focused on one of two things: to make this change, do THIS. To understand this change, READ MORE. / Editorial Trigger: If a "change" in process is created, set up steps for managing that change across the content platform, including creating unique FAQ, assigning new FAQ to texts or other pages, and adding unique search terms as "best bets" with a specific time limit
Client views test results	Physician / Physician Assistant / Nurse / Specimen Processor / Lab Staff	Yes	View test results / View tracking, handling, and other supplemental information about results / Release results	The test result itself / Articles about interpretation of this test and results / Associated articles or education opportunities about the tests within a result / Answers to questions about viewing, releasing, or handling results and other related issues / Product content tied to individual texts	Log-in to view a test result / Log-in to view a set of recent test results / Site search (for finding answers to questions)	Potentially, if answer not easily found	View associated content based on the test / View associated content based on recently ordered tests	Text ID content relationship used to pull related education and thought leadership into a place where this relevant within test results / Text ID content relationship used to pull specific articles about result interpretation / **Support questions** template / Support questions are available as a searchable term / Support questions given unique code for ease in search	Similar to questions coming from email, results can be given a support question that ties to specific FAQ content, such as if a test is commonly flagged as false, a code can be given to find the explanation.

Situation	Archetype	Logged In?	Goals	Key Content Required	User Flow and Interaction Points	Search?	Call to Action?	Interaction Solutions	Editorial Needs		
	What kind of site user is this?	Is the user logged in?	What does the user hope to achieve?	What content will solve their goal?	How might the user find/interact with this content?	Is there a potential the user tries site search in this situation?	Is there a call to action for this specific situation?	What objects and connections can the content platform provide?	What additional non-modeled content needs are present?		
Client is unaware of a recent notification	Physician Assistant	Yes	Discover recent urgent notifications	Information on the notification	Logged-on but not in the user management area	No	Icon indicating there are new messages	User-related alerts telling the user that there is a new urgent message regarding their account or order.			
	Nurse			Display of the notification beyond the messages list			Banner / alert indicating an urgent new message	**Site-wide alerts** for all users.			
	Send Out										
	Lab Tech										
Client is managing patient information	Physician Assistant	Yes	Manage and understand patient information	Answers to common information entry or patient management issues	While logged in, at the point of the entry issue	Yes	View answer to question	**Support question** template			
	Nurse		Find solutions for issues related to entering, saving, or adjusting patient information		Site search		Contact related support staff with further questions	**FAQ section** template (to include a set of support questions based either on category or curated)			
	Send Out										
	Lab Tech										
Client needs information on a test change	Physician	Yes	Understanding of a new test change	Test changes related to past orders	Site search for test	No (Users won't know about change until told, so they won't proactively search for the change itself)	View test change	**Test change** template	Upcoming test changes requires less of a technical need and more of an editorial need: can these be scheduled, with users given notice?		
	Specimen Processor / Lab Staff		A list of recent changes	Test changes in general	Log-in to find changes to tests in past orders			Test change inherits categories from main **lab test**			
			A list of upcoming changes		Lab test catalog feed of recent test changes			Test change includes link to main lab test			
			A list of tests that are down		Lab test catalog feed of upcoming test changes			Account login includes link to test changes related to any test ordered from current account			
					Lab test catalog feed of tests that are currently down			Additionally, the main site account login includes checkbox for "show only my recent orders" on the test change listing			
					Individual test with test change			Test changes can be filtered by date (ordered in last six months, etc.) or by category			
								Test changes can include an "upcoming change" field that flags the change for the future			
								Test changes can include a "test is down" flag that ties to the test itself and marks it as down.			
								Search alias allows for fast access to test change by searching "TEST ID change"			
Sales is in need of information for a potential client	Client Sales	Yes	A set of content for promoting and selling a feature or service	Existing marketing content	Site search, occasionally	Perhaps	View information	Standard content pages should be able	Currently, this is handled through a separate app/site that pulls updated content, though long-term this may be able to be handled within the site itself.		
	Decision Maker		Information to help them provide the highest level of confidence in Client	Support FAQ and answers	Browse to information		Download support materials	**Landing Page** templates			
	Decision Influencer			Unique sales materials	Saved information on a browser bookmark			Unique **Layout** component templates.			
				Lab test catalog				Landing Page template created as a sub-site to link to on-site solutions.			
								Sales-specific education and process opportunities			
								Case Study template			
								Case study templates include categories and disease states			
Require confirmation of a specific service	Client Sales	No	New potential customer looking for answers to questions about features	Product or feature landing page	Site search	Yes	Learn more about this feature	**Landing Page** template			
	Decision Maker		Better understanding of a single unique feature, rather than Client in general	Product or feature test page	Navigation from a custom campaign URL		Contact a representative/sales about this feature	Unique **Layout** component templates			
	Decision Influencer		More information on a specific part of a larger relationship	Article or education tied to this test page	Navigation through standard site links			Custom landing pages with custom URLs for campaigns			
Require confirmation of policy	Client Sales	No	New potential customer looking for answers to questions about process	Training content for support	Site search	Yes	Learn more about this policy	**Support question** template			
	Decision Maker		This is going to mirror content for existing customers, but be more general.	FAQ for support	Navigation through standard site links		Contact a representative/sales about this policy	**FAQ section** template (to include a set of support questions based either on category or curated)			
	Decision Influencer							Connection to sales app with all updated FAQ and policy content			
User is international	International User	Depends on whether client or non-client	Information translated to their language	Content translated for high-usage languages	Arrives on site in English	Yes		Content translation for key pages, depending upon the functionality of the CMS. Often, this content can be translated in a "second" version of the existing page, allowing for both pages to live at the same address	Specifically translated landing pages for unique languages providing insight into how or if Client is relevant		
			Information on ordering and shipping internationally	Information and regulations about international ordering and handling	Arrives with a browser set to a language other than English			Site flags for users who arrive with a browser set to a non-English language, prompting them with a language landing page if applicable	Translation of these pages should be handled by human translation. For non-essential and non-language-specific pages, a tool may suffice.		
					Site search for international information						