

ROAMER MODEL[®] CANVAS

WORK TITLE:

START DATE:

SUMMARY:

1-1. ORIGIN

1-2. OUTCOME

2-7. REVIEW

2-2. RETRIEVE

2-6. EVALUATE

2-1. HUMAN

2-3. OBSERVE

2-5. MAKE

2-4. ANALYZE

3. HANDOFF

ROAMER Model® Canvas Guide

CANVAS HEADER

- **EFFORT TITLE:**
 - Provide a name for the work.
 - This can be the name of an individual task or an overarching project.
 - This will depend on the scale of the specific effort requested.
 - Be as succinct as possible, while communicating a view of the work.
- **START DATE:**
 - Enter the date the effort was brought to your attention.
 - When did you first see or hear about it?
 - Alternatively, enter a future date, if this is a single piece of work which is part of a larger effort.
- **SUMMARY:**
 - Write a summary of the work, as you understand it at the beginning.
 - You can revise this over time, but it is useful to document what your understanding is at the beginning.
 - Your summary should include as much detail is necessary, but you should focus on summarizing the request.

1. CANVAS BODY - TOP

- 1-1. **ORIGIN:**
 - Document who originated the work – who requested it?
 - Are there additional people who are involved or who are involved in the request?
 - Why did this work begin, or why was it requested?
 - Was something observed, or did somebody identify an opportunity?
 - What was that observation, or what was identified (and where/how)?
- 1-2. **OUTCOME:**
 - What is the desired outcome for doing this work?
 - What are the ways that success will be measured?
 - What is the desired outcome for the human(s) affected by the end result?
 - How will we know when this work is completed?

2. CANVAS BODY - MAIN

- 2-1. **HUMAN:**
 - Who is/are the human(s) affected by this work?
 - What do we know about their needs/wants/desires?
 - What are their tasks, goals, motivations, and frustrations?
 - Are there any other things we should know about them that will help drive better decisions?
- 2-2. **RETRIEVE:**
 - Who knows where existing knowledge or insights are stored/located?
 - What existing knowledge or insights are there for this work?
 - Where is this information located/stored?
 - Is there a process required to retrieve it? Who owns that process?
 - Is there information in more than one location?
 - What is the process for adding new knowledge and insights?
- 2-3. **OBSERVE:**
 - Is there an established way to gather observable humans for this effort?
 - Does someone own the process of engaging with them?
 - Is there a system, method, or rules for engagement?
 - Do we have a pool of willing participants already?
 - What is our recruitment method and/or constraints?
- 2-4. **ANALYZE:**
 - Does the existing knowledge and insights agree with what we observed with real humans?
 - What were the themes we were able to determine in our analysis?
 - What is prioritization of the tasks resulting from the analysis? (What should we make first?)
 - What is the problem statement, based on the analysis of the existing insights combined with the new insights?
 - What is our hypothesis?
- 2-5. **MAKE:**
 - What are we making?
 - How does what we are making support the desired outcome?
 - Are we documenting the output, so that it can be understood whether we are present or not?
 - Are we making something at the right level so that it can be challenged and iterated?
- 2-6. **EVALUATE:**
 - What are the testing protocols?
 - Do we have an audience to test with?
 - Is the output that was made documented? Are there steps identified for how to interact with it for evaluation?
 - Do we need more than one person to participate in the evaluation? If so, what is the team makeup?
 - Facilitator?
 - Observer?
 - Operator?
- 2-7. **REVIEW:**
 - Did we create something that supports our insights, meets the needs of the humans, and achieves the desired outcome?
 - Did we follow our own processes, or did we deviate?
 - If we deviated, does that mean our processes need to be revised?
 - What should we do more of, do less of, or begin doing next time?
 - What was the quality of our communication:
 - Within the working group
 - With the consumers of our outputs
 - With the person/people who requested the effort?
 - What is the quality of our documentation?

3. CANVAS BODY - BOTTOM

- **HANDOFF:**
 - What does it look like to hand off what we worked on?
 - Are we taking something to market?
 - Are we hoping for internal adoption?
 - Are we transferring work to a delivery team, such as marketing or engineering?
 - Is our output well-documented for the receivers of the work?
 - Did we get confirmation of receipt and understanding?

Notes on Using the ROAMER Model®

The ROAMER Model is described visually in the following order:

- Retrieve
- Observe
- Analyze
- Make
- Evaluate
- Review

However, you are empowered use your own judgement about where you need to start, and where you should go next – following the order is not what matters the most. Feel free to “Roam” about the model – just remember to keep the human at the center as your point of reference for the work.