

ProjectWE

Capita3

Discussion Summary & Next Steps

Date: October 15, 2024





Capita3 Summary

Capita3's Intentions

Capita3 aims to launch a comprehensive platform that will replace their current structure for recruiting, onboarding, engaging, and delivering their Capita3 Leader Launch program.

Their current setup includes:

- **Communication and Engagement:** Using Slack for communications, instructions, and student engagement/feedback.
- **Assignments and Instructions:** Utilizing Microsoft Office templates.
- **Surveys:** Conducting before and after surveys via Google.
- **Initial Setup Communications:** Managed through Gmail.
- **Live Courses:** Conducted over Zoom.
- **Feedback Mechanism:** Human beings reading assignments and providing feedback for growth and progress.
- **1:1 Meetings:** Conducting individual meetings with participants.

Goals

Capita3 has outlined several key goals for their new platform:

1. **Create a Branded "One Stop Shop":** A centralized platform for all Capita3 activities.
2. **User-Friendly Navigation:** Ensure the platform is easy to use for both staff and students.
3. **Increase Efficiency and Productivity:** Streamline processes for both the organization and participants.
4. **Automation:** Automate processes wherever possible to reduce manual effort.



5. **Data Collection and Analysis:** Integrate tools for effective data collection and analysis.
6. **Integration of Algorithms and Databases:** Utilize algorithms to enhance functionality.
7. **AI/ML Utilization:** Implement AI and machine learning to reduce human interaction, improve recommendations, and provide a personalized experience.*

Platforms Under Consideration

Capita3 is currently exploring several other LMS platforms as part of their research, including:

- [Acorn](#)
- [Absorb](#)
- [360 Learning](#)

These platforms are being evaluated for their capabilities in meeting Capita3's needs for a robust learning management system.

Summary of Client Questions and Thoughts from the Call on 10.14.24

1. Understanding the Offering:

- Capita3 is seeking a clearer understanding of the unique value your platform adds compared to other LMS and AI applications in the market.
- They want to know how your platform can help them achieve their goals more efficiently than their current methods.

2. Customization and Personalization:

- There is a strong emphasis on the need for personalized experiences in their transformational leadership development program.



- They are interested in how algorithms can be applied to provide personalized feedback while maintaining the human element of coaching.

3. Scalability Challenges:

- The client expressed concerns about the labor-intensive nature of their current program and how to scale it effectively without losing the quality of personalized feedback.
- They spend a lot of time providing personalized feedback on client reflections (20 min - 60 min per person per reflection).
- They are looking for solutions that can automate some of the repetitive tasks while still providing meaningful interactions.

4. AI Integration:

- Capita3 is exploring the potential of AI to enhance their program but is cautious about losing the personal touch that is crucial to their success.
- They are interested in how AI can be used to identify patterns in feedback and improve the overall learning experience.

5. Data and Feedback:

- They have a wealth of unstructured data from past cohorts and are curious about how this data can be utilized in AI models.
- They conduct pre and post surveys to assess learning outcomes and are interested in how this data can inform AI-driven insights.

6. Cost and Implementation:

- There are concerns about the potential high costs associated with implementing a new platform and the ongoing management of data.
- They are looking for clarity on pricing structures and what to expect in terms of costs as they scale.

7. Specific Request from Jason (AI consultant):



- Jason requested examples of client pricing, data size, and other relevant metrics to help them understand the potential costs and resource requirements associated with implementing the platform.
- He emphasized the need for a breakdown of different types of customers (small, medium, large) and the associated data input, processing time, and costs.

8. **Timeline for Implementation:**

- Capita3 is aiming to implement a solution within a year but acknowledges that they have internal work to do before moving forward.

9. **Demonstration of Value:**

- They expressed a need to see a demonstration of how your platform works and how it can specifically address their needs.
- They are interested in understanding the unique aspects of your offering that differentiate it from competitors.

What Capita3 Needs from You

To support their objectives, Capita3 has specified several key areas where they require information and clarity:

1. **Understanding Your Offerings:** Ensure that your team comprehensively understands what you provide.
2. **Value Proposition:** Clearly articulate your unique value proposition.
3. **Competitive Analysis:** Identify your competition and explain how you differentiate from them, including reasons for choosing your solution over others.
4. **Development Status:** Provide an update on the current status of your platform's development, including any risks and challenges.
5. **Effort and Timeline:** Outline the level of effort required and the timeline for creating and launching their platform with you.



6. **Cost Structure:** Prepare a transparent cost breakdown that includes initial implementation costs, ongoing operational costs, and potential future upgrades.
7. **Getting Started:** Clarify what Capita3 needs to initiate the project.
8. **Business Model:** Provide insights into your business model and how it aligns with their needs.

Suggested Preparations for the Next Conversation

1. **Comprehensive Overview:** Prepare a detailed overview of your offerings, including features, benefits, and how they align with Capita3's goals.
2. **Value Proposition Presentation:** Develop a clear and compelling presentation of your value proposition, emphasizing how your platform can meet their specific needs.
3. **Competitive Landscape Analysis:** Create a competitive analysis that highlights your differentiators and why your solution is the best fit for Capita3.
4. **Development and Risk Assessment:** Provide a status update on your platform's development, including any potential risks and challenges, along with mitigation strategies.
5. **Implementation Plan:** Outline a detailed implementation plan that includes timelines, milestones, and resource requirements.
6. **Cost Breakdown:** Prepare a transparent cost breakdown that includes initial implementation costs, ongoing operational costs, and potential future upgrades, along with examples of client pricing and data size.
7. **Initial Steps:** Clearly define the initial steps Capita3 needs to take to get started, including any information or resources you require from them.
8. **Business Model Explanation:** Be ready to discuss your business model and how it supports a long-term partnership with Capita3.