L&D Portal Product Visioning Workshop July 10, 2018

Target Group	Needs	Product	Value
Customer & Marketing Studio Specialist Traditional, levels A – SM	Approval to go to training/conference Understanding when to use the portal Guidance for selecting conference options Understanding of options Managing my own budget Support Ease of use Delegation/organization for groups	Workflow and visible progress; see who is approving your request A landing page with upfront clarity: context and guidance on the portal, what types of trainings you should use this for, ask if you've talked to counselor Rating system Different workflows for different choices Dashboard displaying how much you've spent to date Budget wizard	Ownership of their career Understanding of approval process to improve their skills Clearer and more streamlined process Empowerment
Operations/L&D team SLL Offering lead Offering portfolio leads Offering portfolio chief of staff Offering portfolio COO	Approval workflow Budget analysis (roll up and break down) Reporting analytics Understand actions and responsibilities Follow up with approvers Delegation (if someone is on PTO and they are the approver)	Review comments Notifications Views of per capita spend (offerings, competencies, studio, per person, etc.) Follow up budget reporting Way to import expense information	Make smarter decisions faster Better control of expenses to hit EBA (earnings before allocation) target

Visioning Statement

General User – For Customer & Marketing practitioners who are focused on learning and development, our product is a tool that provides transparency and guidance into getting approval for the learning opportunities they desire to advance their career.

Admin – For leadership who must make informed decisions, our product is a workflow and dashboard solution that provides insight into how to make the best use of the limited fiscal and temporal resources afforded to Customer & Marketing.