

Advisor Transition Hub | Transitions Management Dashboard

1 Advisor Transition Hub

The dashboard features a top navigation bar with links for All Transitions, My Workspace, Travel, Reports, and Admin Console. A search bar and user profile are also present. Below the header is a summary section for current search results, including a quick filter panel (2) with categories like Pulse at Risk, Health at Risk, Escalations, Critical Milestone Overdue, and Transitions Awaiting Response. It also includes a map of the United States titled "Transition by Location" and two donut charts showing "Overdue by Business Unit" and "Status". The main content area (3) displays a table of transitions with columns for Pulse, Overall Progress, Status, Transition Name, Target Join Date, Transition Type, Division, Lead Advisor, Consultant, Region, State, Privacy, and # of Accounts. Each row in the table includes an inline action button (4) for specific actions.

1 Transitions Management Dashboard

Dashboard for day-to-day users to quickly access active and completed transitions. Badging helps surface transitions requiring attention.

2 Dashboard Filters

Filters are available to quickly narrow transitions down to by type, status, region, etc.

3 Transition List

View each transition, including supporting data to identify it and quickly understand progress or if any attention is needed.

4 Inline Actions

Quick actions related to specific transitions will be quickly accessible within the list (e.g., access ARC case).

Note: This design is being updated to incorporate additional and more impactful metrics to help filter transitions. This view is meant for day-to-day users, while “Reporting” is intended to host an inventory of executive-level reporting.