Reporting Discovery Research

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- Purpose & Goals
- Methodology
- Participants
- Key Findings
- Conclusions

The purpose of this research is to understand our customer's reporting needs within the platform.

Requestor: Jeff Wright

ADMINISTRATE

Our Goals

The goals of this research included collecting and understanding the needs of the Reporting platform across verticals. We wanted to identify if there were commonalities in the needs across verticals. Lastly, we want to ideate and strategize about how to address the expressed needs shared by the customers in the various verticals.

Collect

Collect data to make connections across the verticals to identify common pain points for customers in the reporting space.

Highlight

This report aims to call out those common pain points.

Ideate

Reveal suggestions for changes that address the pain points.

Purpose & Goals

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Primary Research

Interviewed in 1:1 format with several internal Relias employees to discuss our reporting platforms, previous research, themes in customer concerns, and short and long terms needs in their vertical space.

Secondary Research

Deep dive into Reporting in the LMS. Reviewed all of the reports, and resources for reporting in Connect. Participated in new hire training and Reports webinar to better understand customer experience as they get started with Relias.

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PARTICIPANTS NEEDED

Participants:

(4) Sr. Product Managers

(3) Product Managers

(2) Data Analysts

(1) Engineering Manager

(1) Technical Trainer

Purpose & Goals

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Infrastructure.

Pain Point: Slow loading reports
Or
Reports that time out

New Reports / New Functionality

Proactive Monitoring reports
Audit reports

Real time Data Manipulation
Additional Visual Aids
More Collapsing / Expanding data
Interoperability between reports

Resource Materials.

Create / revise self help resources.
Easy button.

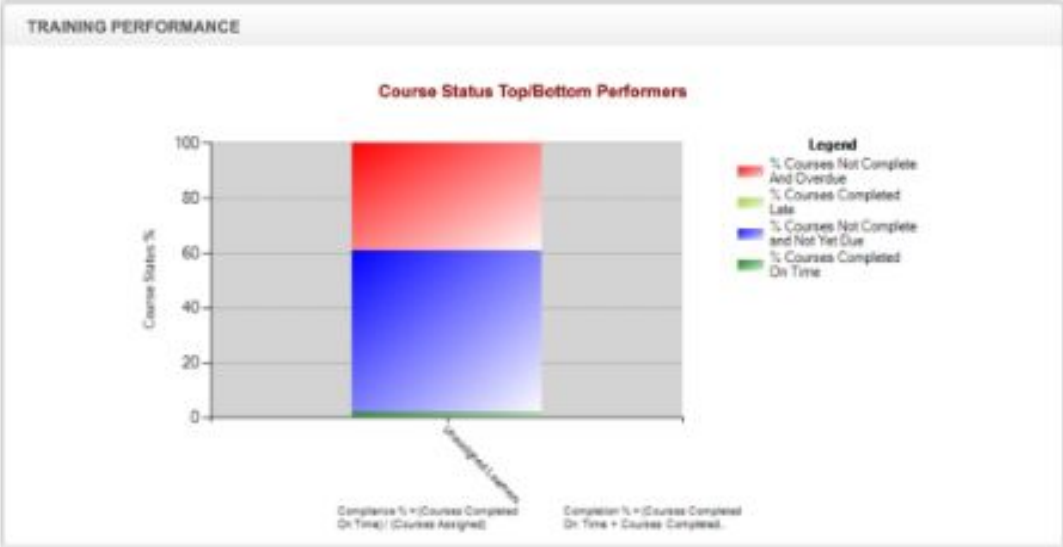
Infrastructure

RELIAS

New Reports

Research identified the need for additional reports.

Proactive Management Reports.



New Reports

Audit reports.

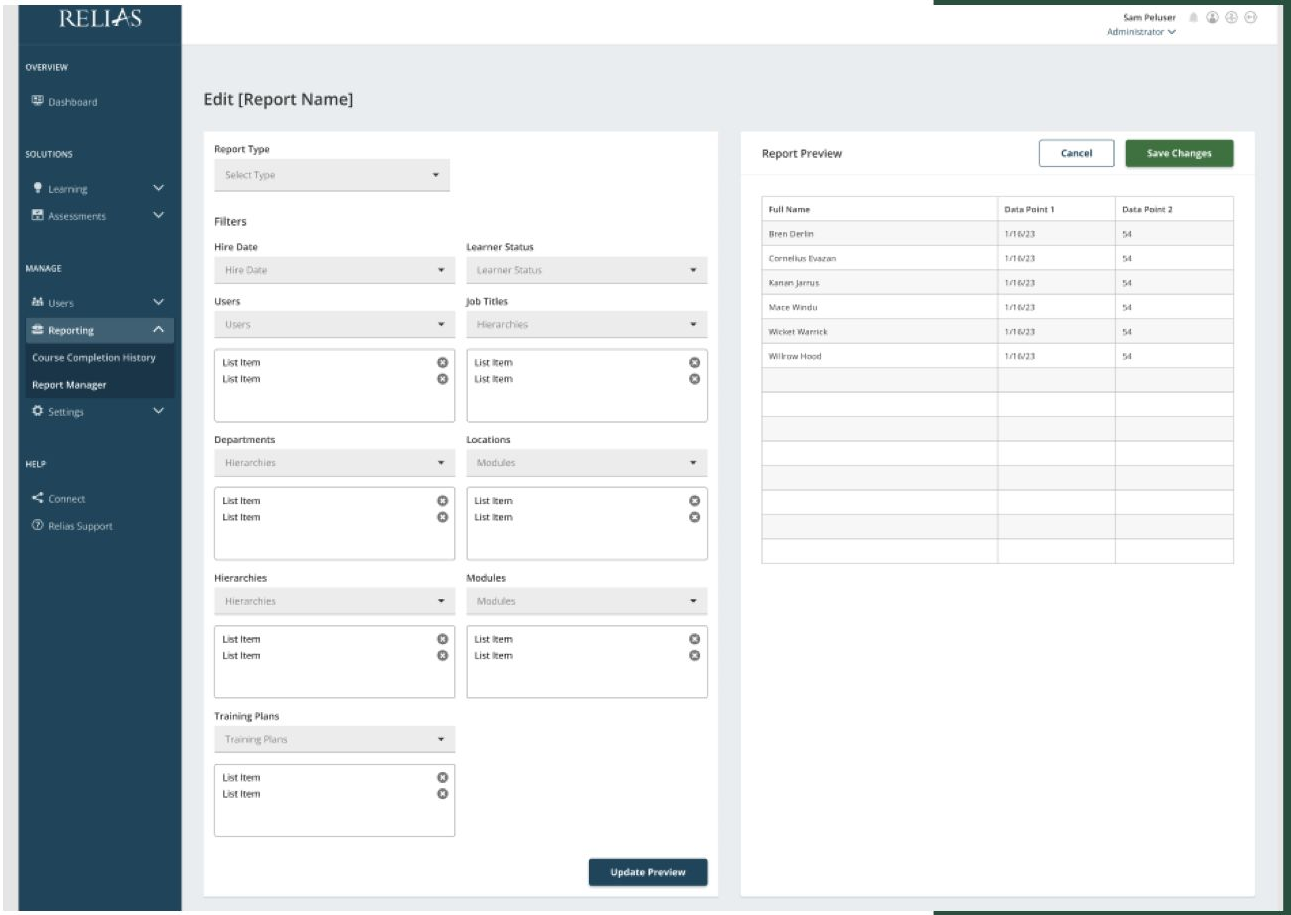
Research identified that we do not have reports specifically for auditing.

New Reports

Competency Evaluations and Compliance Management Reports.

Work is already underway with Sisence to develop reports for these verticals.

New Functionality



Real Time Data Manipulation

Switching views to visual aids or graphical representations.

Learner	Department	User Location	Job Title	Module	Status	Completed	Due Date	Final Exam Score	Completion Type
Abbott, Kirk	FC: Fair Futures Grant		Coach	Essentials of HIPAA	Completed	12/27/2022 8:57AM Central Standard Time CT	12/31/2022	100	Online completion
Abbott, Kirk	FC: Fair Futures Grant		Coach	HIPAA: Do's and Don'ts of Social Media and Electronic Communication	Completed	10/28/2022 3:03PM Central Standard Time CT	10/31/2022	100	Online completion
Abbott, Kirk	FC: Fair Futures Grant		Coach	HIPAA: Do's and Don'ts of Social Media and Electronic Communication	Completed	3/31/2023 2:58PM Central Standard Time CT	3/31/2023	100	Online completion
Abbott, Kirk	FC: Fair Futures Grant		Coach	Sexual Harassment- NY Mandatory Training	Completed	3/31/2023 2:39PM Central Standard Time CT	3/31/2023	93	Online completion
Abouhatab, Antoaneta Mirela	FIN: Finance		Temporary Worker	Abbott House Baseline Trauma - Live Training	Completed	3/16/2023 9:16AM Central Standard Time CT		100	Marked Complete By: Ingrid McKenzie, (IMcKenzie@abbotthouse.net)
Abouhatab, Antoaneta Mirela	FIN: Finance		Temporary Worker	Abbott House Corporate Compliance Training Program	Completed	2/12/2023 3:18PM Central Standard Time CT	3/4/2023	100	Online completion
Abouhatab, Antoaneta Mirela	FIN: Finance		Temporary Worker	Abbott House New Hire Orientation	Completed	2/1/2023 3:03PM Central Standard Time CT		100	Marked Complete By: Ingrid McKenzie, (IMcKenzie@abbotthouse.net)
Abouhatab, Antoaneta Mirela	FIN: Finance		Temporary Worker	Cyber Security Awareness Training	Completed	2/12/2023 3:56PM Central Standard Time CT	3/4/2023	87	Online completion
Abouhatab, Antoaneta Mirela	FIN: Finance		Temporary Worker	Essentials of HIPAA	Completed	2/12/2023 4:37PM Central Standard Time CT	3/4/2023	80	Online completion
Abouhatab, Antoaneta Mirela	FIN: Finance		Temporary Worker	HIPAA: Do's and Don'ts of Social Media and Electronic Communication	Completed	2/12/2023 5:01PM Central Standard Time CT	3/4/2023	80	Online completion
Abouhatab, Antoaneta Mirela	FIN: Finance		Temporary Worker	Sexual Harassment- NY Mandatory Training	Completed	2/5/2023 4:54PM Central Standard Time CT	3/4/2023	80	Online completion

Expanding and Collapsing Data.

Resources

RESOURCES

Update and add to our Self-Help resources.

01

Easy to find.

02

Easy to use.

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Modernization.

Our reports platform needs some modernization.

Additional Research.

Additional research is needed in a few key areas.

1. Additional Reports for Compliance Management and Competency Management – what do users still need?
2. Audit reports – what do auditors consistently request?
3. Revamp – What reports should we revamp first?

LIST SLIDE

Participants:

Thanks Relians!!

P. Goldy	G. Serbula	H. Underhill	J. Wolf
H. Eagle	J. Grib	M. Christian	E. Dickinson
S. Green	N. Hehl	M. Paul	T. Anthony

Questions?

Thank You!