O. SET THE STAGE For details, check out thesprintbook.com/remote

DESIGN SPRINT

Sponsor Center Refresh

To reimagine a more unified Sponsor Center valuable to Advisors and Sponsor C-Suite and

TEAM

1. Decider	2. Facilitator	3.UX Design	4.DC Segment	5.Marketing	6.CR & BD
Michael O'Sullivan & Michael Guzzi	John Consigli & Caryn Gallis	Jude Niosi & Ron Seidel	Anne Thibeault	Dean Houldcroft	Scott Taylor
7. Sales	8. Technology				
Sheena McConal	Ashu Yadav				

1. Advisors Sales Support 2. Technology

Michael Mcatamney & Deepak Maruvapalli William Evans, Michael Clyde Rosencrance, Meris Muminovic (CSM Front Lines) Schueller

3.Key Accounts 4.CSM Front Lines

Mccann, Karla Nedder, Melissa Chiumento, Sandra Jansen, & Carla Sarah Beckley, Pamela Herkes, & Christoph Lilienfein

EXPERTS

SCHEDULE

9:30–11:00am 11:15am–12:30pm 1:30–3:00pm 3:15–4:30pm

AGENDA

1. MAP Introductions Sprint Questions
Ask the Experts
How Might We 2. SKETCH

Kick off research sprint Divide or Swarm The Four-Step Sketch

Art Museum Straw Poll Supervote Winners & Maybe-Laters Rumble or All-in-One Fake Brand Names Storyboard

3. DECIDE

4. PROTOTYPE

5. TEST

Pick the right tools Divide and Conquer Build the Prototype Do a trial run

Customer Interviews Taking Notes / Keeping Score

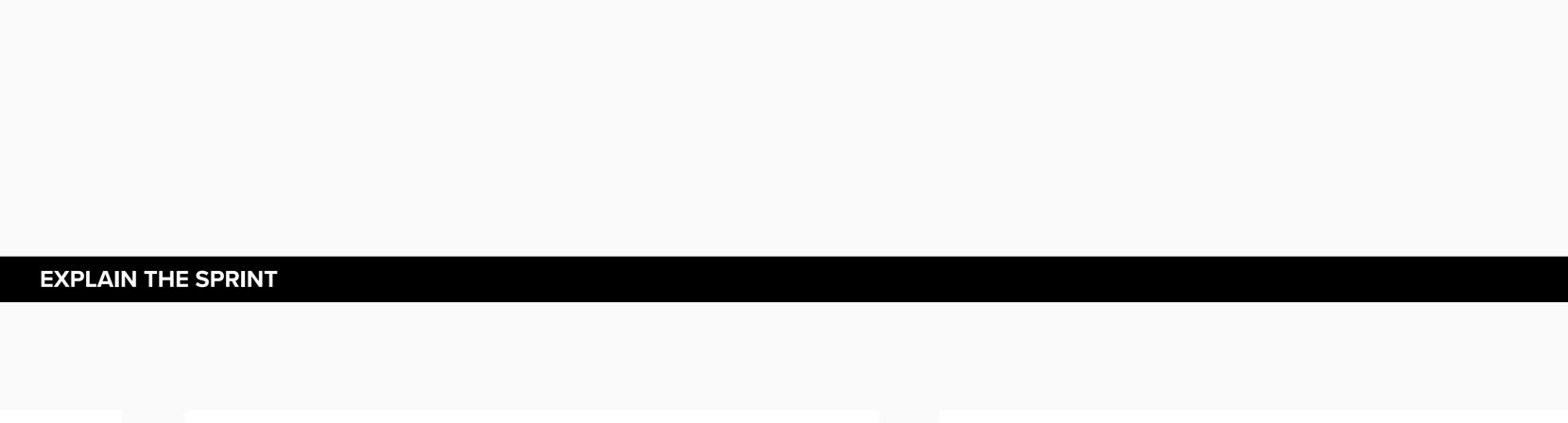
BACKGROUND MATERIAL

personal/john_consigli_prudential_com/ EnWvjyjwdLdNrkAP00UrF-MB13GzFvJw4vDVMg4vaPinDg?e=phcuO4

https://prudential.webex.com/prudential/ldr.php? RCID=ad151716fe024998aa9a33592387661c



MAP



4 2. SKETCH

Liam

McKanna

My, Sterious

BOA Vina

Home Equity Line of Credit .

2000

Rewards

Debit card charge made online, by phone, or mail

Ceneral & Security

Debit card transaction outside the 50 states
(U.S.)

Wellness Therapeutic value

Wellness Therapeutic value

Fun/ Attractiveness Provides access

Fun/ Attractiveness Provides access

Reduces time

Reduces money

Reduces Avoids Reduces cost

PayPail is for everyonce who pays or gets paid.

| Foliability | Foliabi

MAP > SKETCH > DECIDE > PROTOTYPE > TEST

2. Please show up on time (we have a tight schedule) 3. The sprint is about focus (no multitasking/email/news/social media please) 4. There will be plenty of breaks 5. Keep your video on as much as possible! Ready? Let's go 🔗

HMW HMW HMW HMW HMW

LONG-TERM GOAL SPRINT QUESTIONS for all users (Sponsors, Intermediaries and internal users) resulting in 97% retention of profitable business and \$20m growth in annual revenue (from \$40m-60m)

There's one big goal for each day of the sprint

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

Prototype

Rumble

experts

Target

THURSDAY

FRIDAY

FRIDAY

FRIDAY

ASK THE EXPERTS + HOW MIGHT WE Mike Guzzi Mike O'Sullivan How might we...?

HMW do better reporting

HMW better show what's going on in the industry

HMW have a mobile app /way to interact via mobile app lans efficient, save money

HMW show a better finance view that helps make plans efficient, save money HMW - Visualize the most important information for C-suite folks

HMW - Make sure the data we show is timely and accurate

HMW - Create a best of class experience on all devices

HMW - Learn from usage which data is most important/relevant

HMW - Bring reporting data to the forefront

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HMW - Make certain data as close to real-time as possible

HMW - Improve interactive graphs (when it's useful)

HMW - Show Advisors an experience that helps information that is important HMW - Show Advisors an experience that helps them prove that we're helping them save and grow

HMW - Provide executives the tools to understand why we're helping them save and grow

HMW - Leverage the data we have to show comparative info/data

HMW - Stand a part from out competition in showing industry data

HMW - Create the ability to iterate after going live with new features/functionality

The comparative info/data

HMW - Leverage the data we have to show comparative info/data

HMW - Leverage keyboard short-cuts to allow power users to navigate

The comparative info/data

HMW - Create the ability to iterate after going live with new features/functionality

HMW - Concentrate on users - current and future - who will realistically use the site

HMW - Create an experience that delights while still being inclusive and accessible

HMW - Create best of class interfaces that set us apart

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Stars (SP?)

HMW show selective product information based on client needs

HMW get more traction with HR and benefits managers in terms of using the sponsor site

HMW show insights from STARS on employee servicing

HMW show enriched content like we do for pru today page and FW sites that is personalized and a external data

HMW show elactive and intuitive information

HMW show educational material where clients can also add their own content

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HMW show selective and intuitive information

HMW show more personalized content things front and center

HMW bring qualified and non qual information together on sponsor site

HMW bring funding information for non qual plans

HMW bring invoice payments functionallity for DB

HMW give clients ability to subscribe to webinars and forward to others

HMW give clients ability to setup alerts for meeting the plan thresholds and take actions HMW - Provide essential information for different audeinces (Cares Act etc.)

HMW - best show benchmarking and industry trends

HMW - become a "feed" about relevant industry news

HMW - address different audeinces: active employees, terminated employees, etc.? Sheena Sales View:
Reporting and asset value

Sales View:
Regulatory news
Regulatory news

Sales View; Basic view on Mobile device

Sponsor Center:
Avoid the hardsell growth insights and growth insights and inactivity HMW - stand out in terms of value in a very competitive environment

HMW - serve both plan sponsors and advisors:

HMW - create relevant and timely not stale information?

HMW - appeal to the C-Suite's desire to see numbers?

HMW - provide fresh, actionable insights to customers? HMW - make life easier for the administrators (mobile)

HMW - make it easier to access (mobile)

HMW - market the site to the C- suite

HMW - market the site to the C- suite

HMW - include more insights and market trends

HMW - make the advisor center more of a value add HMW - focus conversations toward acting on relevant, new information instead of the everyday recordiscepting.

etc.

HMW - Model plans and provide accurate reports

HMW - highlight what's happening in the industry - compliance, etc.

HMW - create a great mobile experience desired by the audience?

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Savings opportunity,
data insight

Store
communications

Personalize to
relevant content

Quick link to
commonly used tool

Challenges: role
based limitations

Assisted guidance /
Chatbot on what
you want to do
today HMW - streamline content to advisors using the advisor center HMW - simplify the site to make info easy to find depending on needs (personalized dashboard?)

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HMW - migrate everything to the new experience (off of legacy)

HMW - reduce clicks analytics to identify patterns Machine learning on what data user commonly is looking at on site.

What are the client needs and have them front and center

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Trustee looking for benchmark information

Trustee looking for benchmark information HMW - Push did you know? (case study)
AND Pull - act on opportunity

HMW - provide - not statistics - but industry trend to act to retain and opportunity

HMW - communicate effectively to Advisors - not too much - and valuable?

HMW predict the insights clients are looking for and have them ready on the homepage so they don't have to run a report. HMW - give them additional access to things like STARs HMW - give more transparency HMW - rollup more data on the landing page HMW - make the home page more impactful TRS clients HMW - have a consistent the MYS into the experience for TRS customers

HMW - incorporate the MYS into the website thought leadership thought leade Trustees, would lower benefit consultant the cost be beneficial?

Gov't - need more high-level data overview Quarter over Quarter data

Gov't - need more high-level data overview Quarter at login

NQ: integrated experience with TRS at login

NQ funding level (Payroll) Capture takeaways from committee meeting and drip solutions

More content on future development, product and case studies

Capture from user what they want to see or do

Capture from user what they want to see or do

Set alert when they participant site data hit a goal

ORGANIZE HMWs

NOTE-N-MAP (L) 15 min Mike Guzzi Mike O'Sullivan DISCOVER LEARN START USING DISCOVER LEARN START USING DISCOVER LEARN START USING Sheena DISCOVER LEARN START USING END GOAL

Call to alert about new changes catered to them

Setup Zoom meeting to screenshare

Point out the Multiyear Strategy

Show Benchmarking against competitors

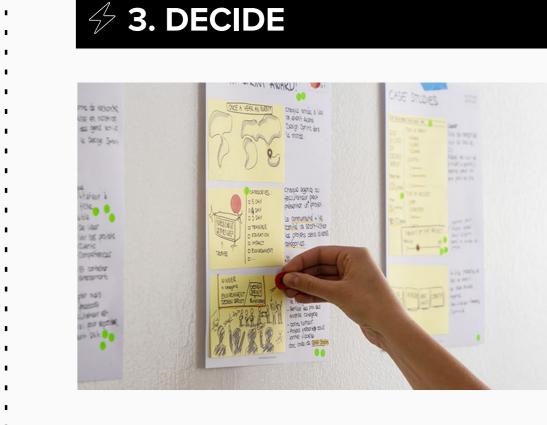
Show Pru articles section that help plans and their participants

Ask if there are other information they'd like to see

Which insighte are the which insight are the which insight

Target

MAP > SKETCH > DECIDE > PROTOTYPE > TEST SKETCH



DECIDE

5 min

Straw poll is a non-binding vote to gauge the group's opinion.

Each team member (but the Decider!) gets one or two votes.

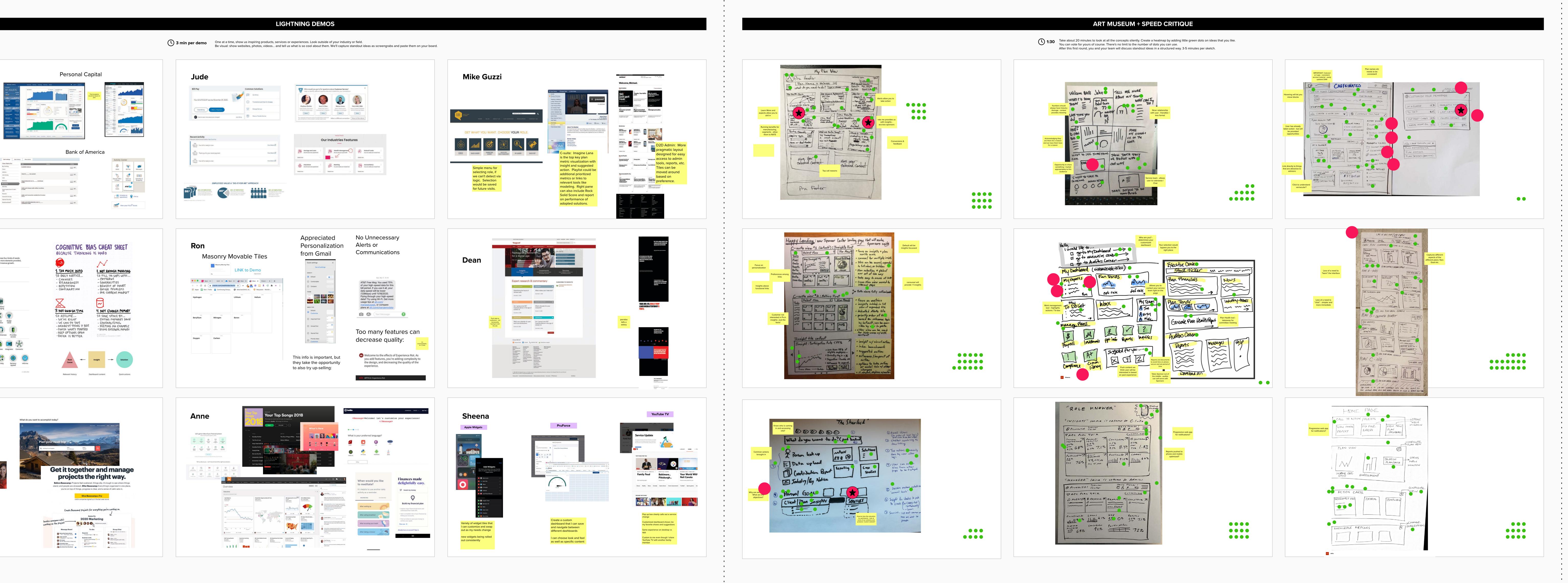
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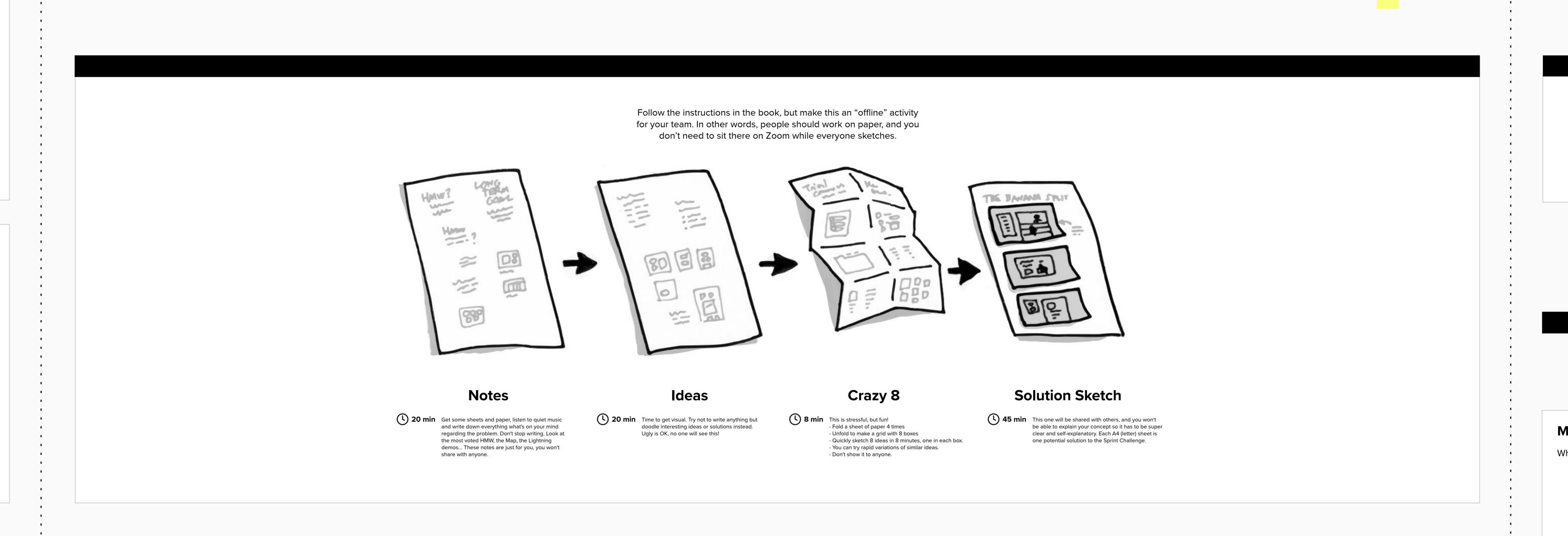
Each team member (but the Decider!) gets one or two votes.

MAP - SKETCH - DECIDE - PROTOTYPE - TEST

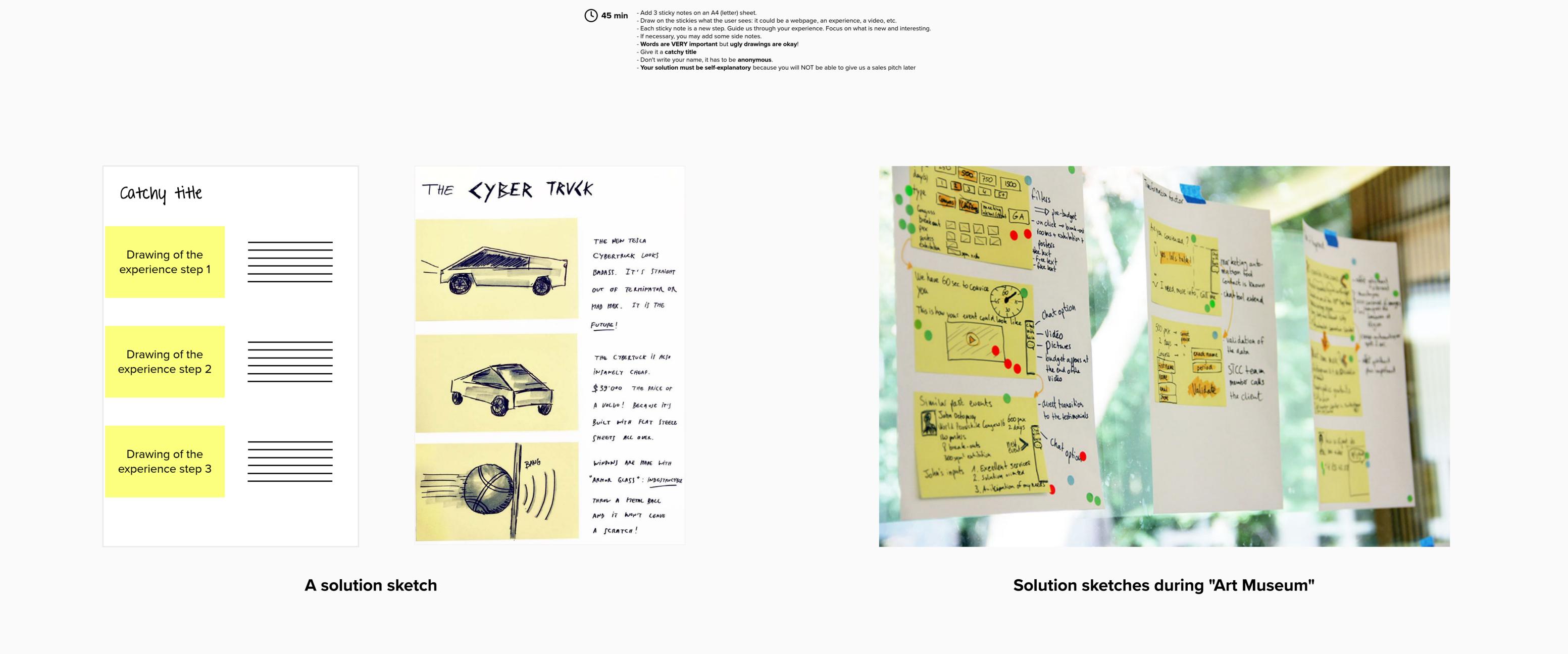
5 min The Decider makes the ultimate decision about which solutions to test. Whatever they choose, we will prototype!

Vote Decider only. Please explain your votes to the team and your strategy about prototyping!

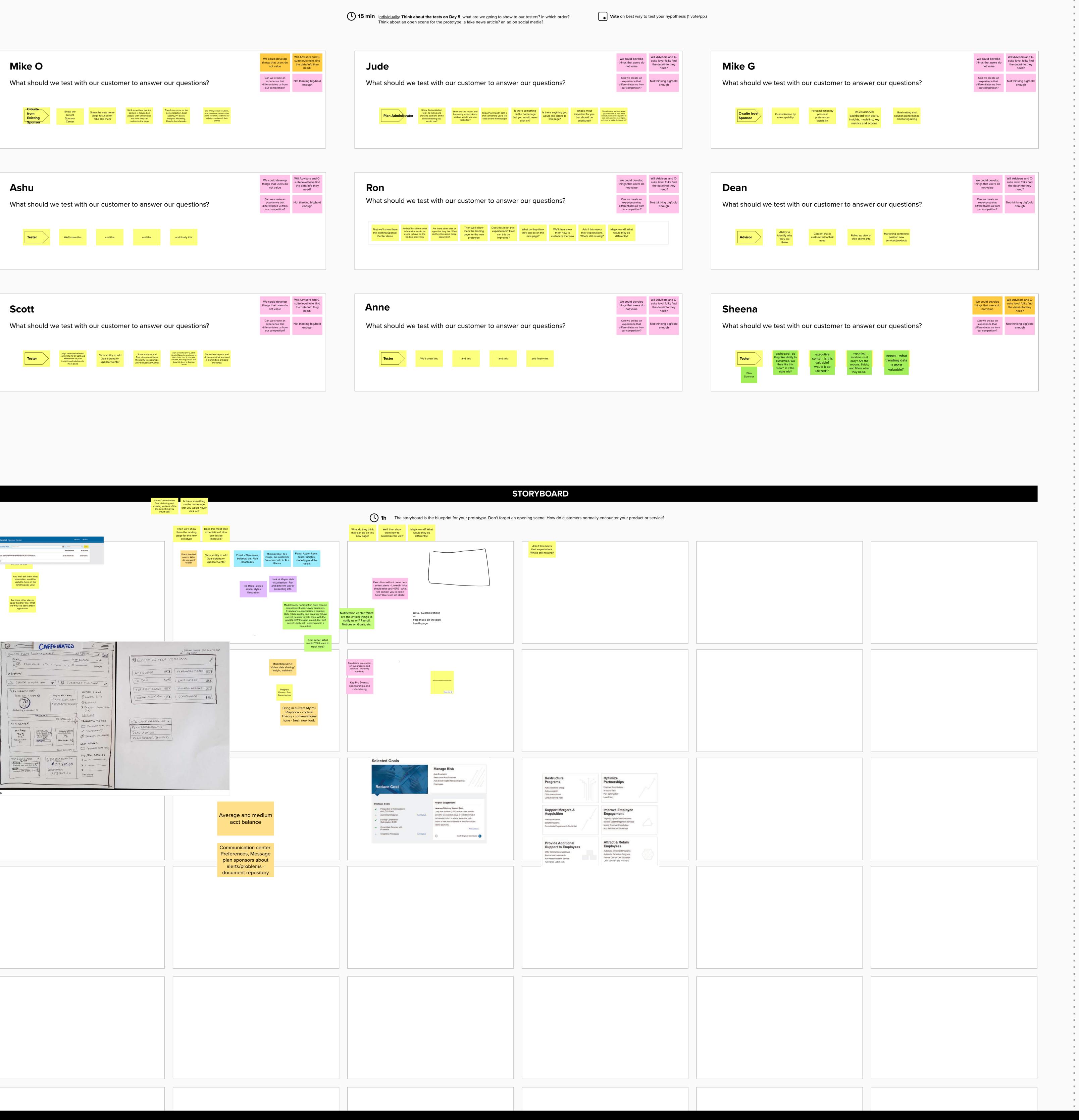




SOLUTION SKETCHES



When you're finished with your Solution Sketch, take a photograph and email/text it to the facilitator (973-250-4251)



START STORYBOARD