

User Profile

Name

Years Using
Resource
Advisor

About You

What is your
role and
background?

Define
Success:

What is
success for
your role/
program?

Stakeholders:

Who are the key
stakeholders
involved with
Resource
Advisor?

What keeps
you up at
night?

What are the
significant
challenges
faced where
technology
could
support?

Requirements

What
Works:

List the top 3
ways your firm
benefits from
Resource
Advisor.

- 1.
- 2.
- 3.

Three
Wishes:

List the areas
where you
want Resource
Advisor to add
more value.

- 1.
- 2.
- 3.

Crystal Ball:

As your firm
changes over
the next 5
years, where
should we
focus to best
support that
evolution?