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M-RETS

STAKEHOLDER SUMMIT

OCTOBER 17, 2017

TODAY'S AGENDA

NOW

- ☐ WHAT IS GOKART LABS & WHY US?
- ☐ APPROACH TO REDESIGN & BUILD
- ☐ RESEARCH METHODS & FINDINGS
- ☐ USER SCENARIOS
- ☐ NEW PLATFORM TOUR

LATER

- ☐ OPEN EXPLORATION
- ☐ KEY USER TASKS WORKSHOP
- ☐ PLATFORM TRANSITION DETAILS
- ☐ Q&A AND FEEDBACK

gokart

L A B S

**WE'RE A DIGITAL INNOVATION LAB THAT HELPS
COMPANIES INVENT, MAKE, MARKET AND
TRANSFORM.**

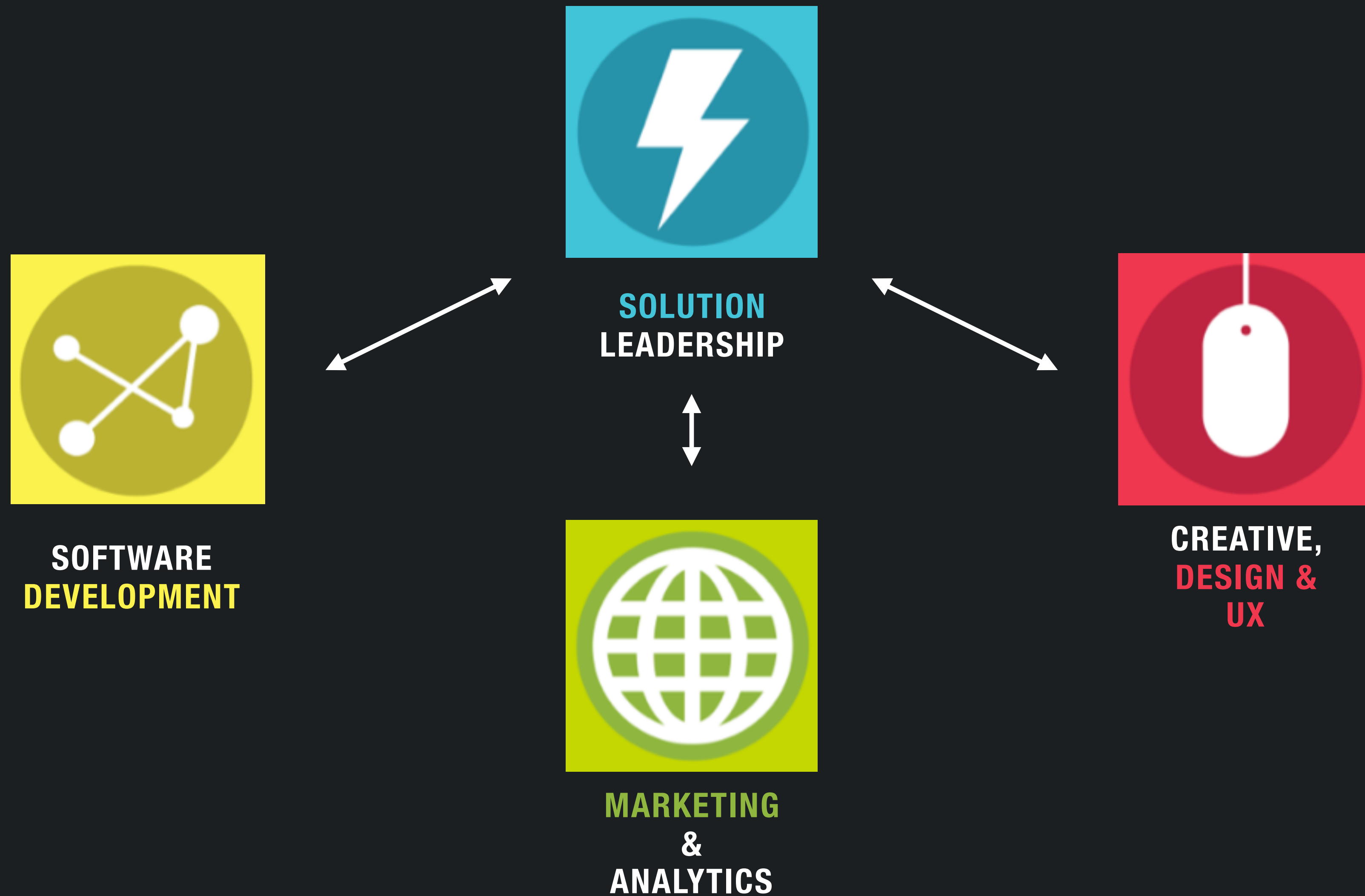
**OUR CLIENTS HIRE US TO HELP
ON BOTH SIDES.**

THE RIGHT IDEAS + THE RIGHT CONDITIONS

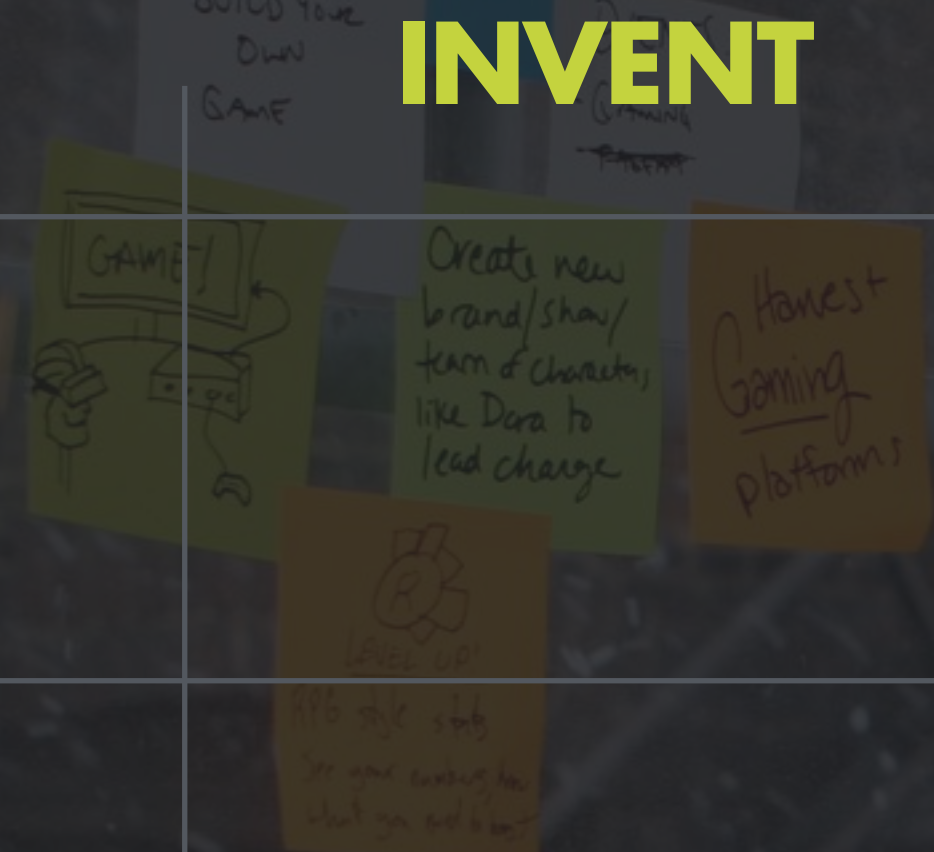
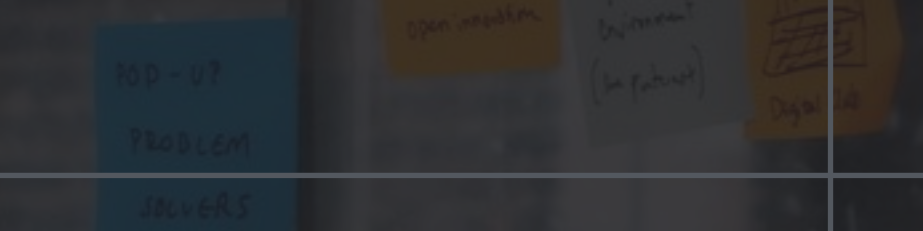
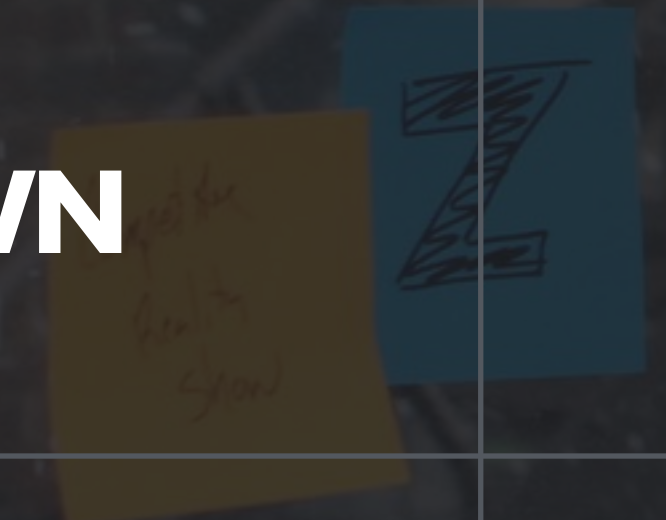
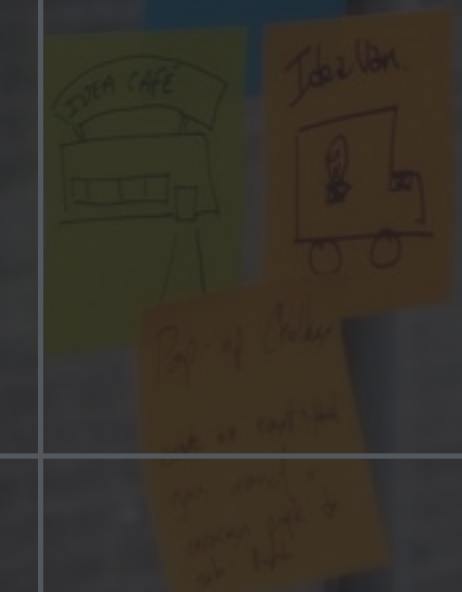
**HUMAN-CENTERED
DESIGN THINKING
DEEP DIGITAL EXPERTISE
CATEGORY EXPERTISE**

**CULTURE
STRUCTURE
CAPABILITY
TECHNOLOGY**

**STAFFED LIKE
A STARTUP**



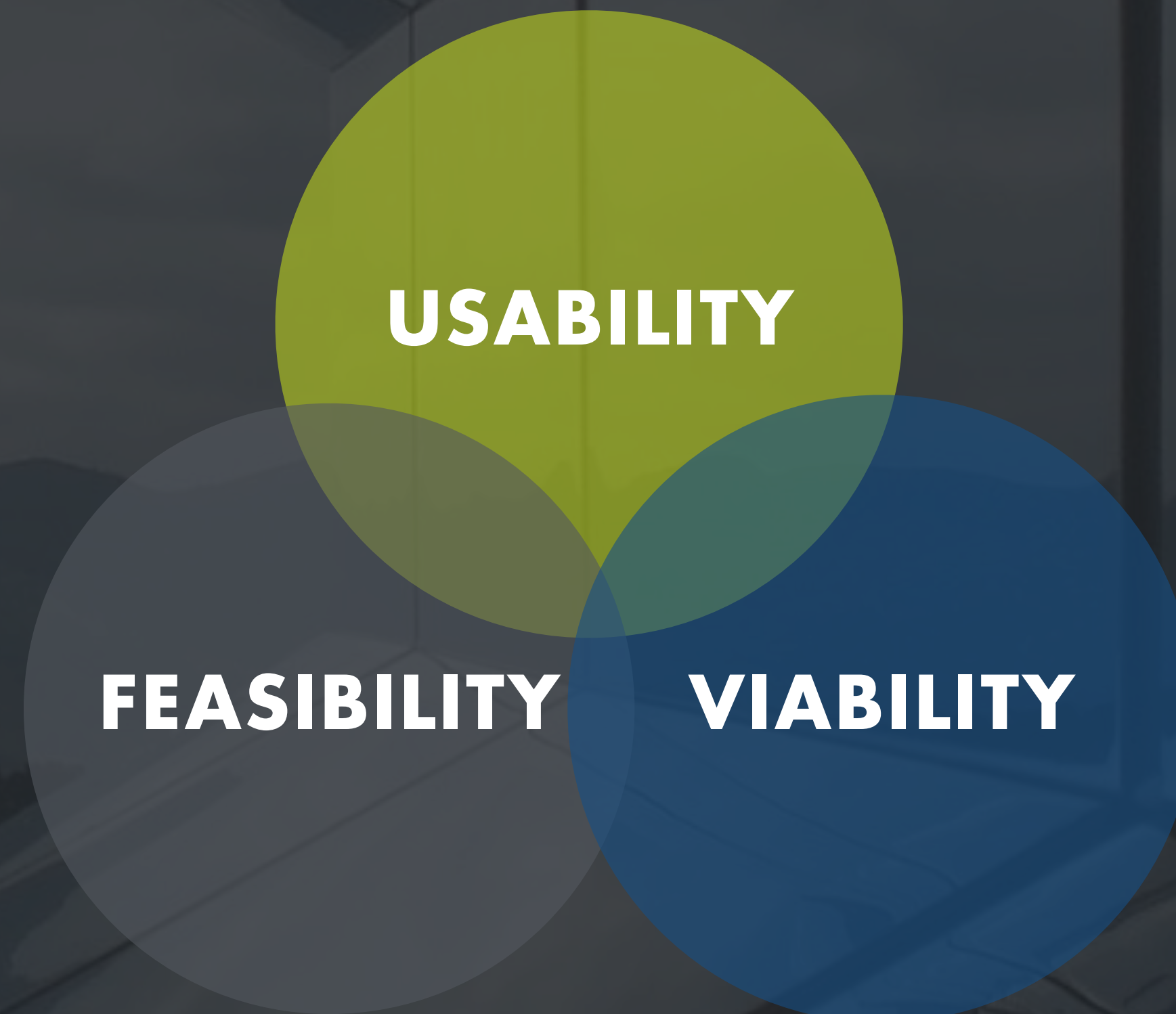
WE CHANGE WITH YOU OVER TIME.

	INVENT	MAKE	MARKET	TRANSFORM
LEAD				
SUPPORT				
OWN				

APPROACH

OUR SHARED VISION

TO CREATE A HOLISTIC TOOL TO MANAGE ENVIRONMENTAL COMMODITIES, INCLUDING REPORTING, FORECASTING, AND DATA INTEGRATION.



GUIDING PRINCIPLES

1. SECURE

SECURITY THROUGHOUT THE ENTERPRISE TO ENSURE CUSTOMER DATA SECURITY AND TRUST.

2. HUMAN-CENTERED

WE WILL START WITH THE USERS, DESIGNING BOTH THE EXPERIENCE AND TECHNOLOGY ACCORDING TO THEIR NEEDS.

3. STRATEGIC

ALIGNED WITH BUSINESS GOALS AND VALUES OF THE ORGANIZATION.

4. FLEXIBLE

ABILITY TO MOVE AT THE SPEED OF BUSINESS. DELIVER BUSINESS FUNCTIONALITY AS MODULAR, REUSABLE, LOOSELY-COUPLED SERVICES.

5. SUSTAINABLE ARCHITECTURE

SIMPLE. PRAGMATIC. BALANCE OF LONG-TERM BUSINESS NEEDS WITH COST-EFFECTIVE SOLUTIONS THAT ARE MAINTAINABLE.

6. COMPLIANT

FOLLOW INDUSTRY COMPLIANCE STANDARDS. STANDARDIZE TO ENSURE CONSISTENCY & MAINTAINABILITY.

7. SCALABLE

SCALABLE CODE, INFRASTRUCTURE, AND PROCESS AUTOMATION.

8. RELIABLE

AVOID SINGLE POINTS OF FAILURE AND DESIGN FOR FAULT TOLERANCE.

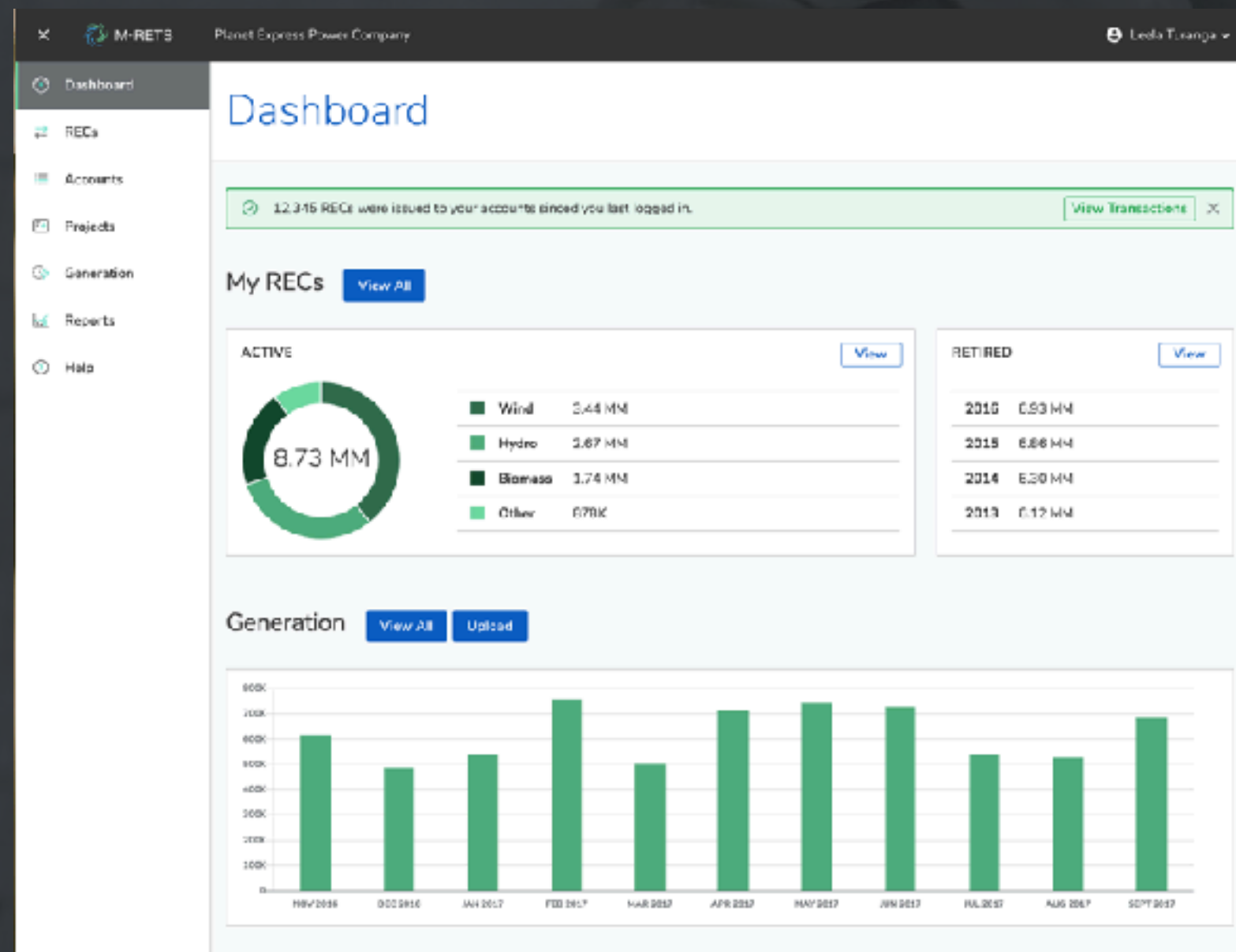
AGILE PRODUCT DEVELOPMENT

THE FIRST RELEASE WILL FOCUS ON THE MOST FUNDAMENTAL USER NEEDS,
AND THEN WE WILL CONTINUE TO BUILD & EVOLVE CONTINUOUSLY BASED
ON USER FEEDBACK & PLATFORM DATA.

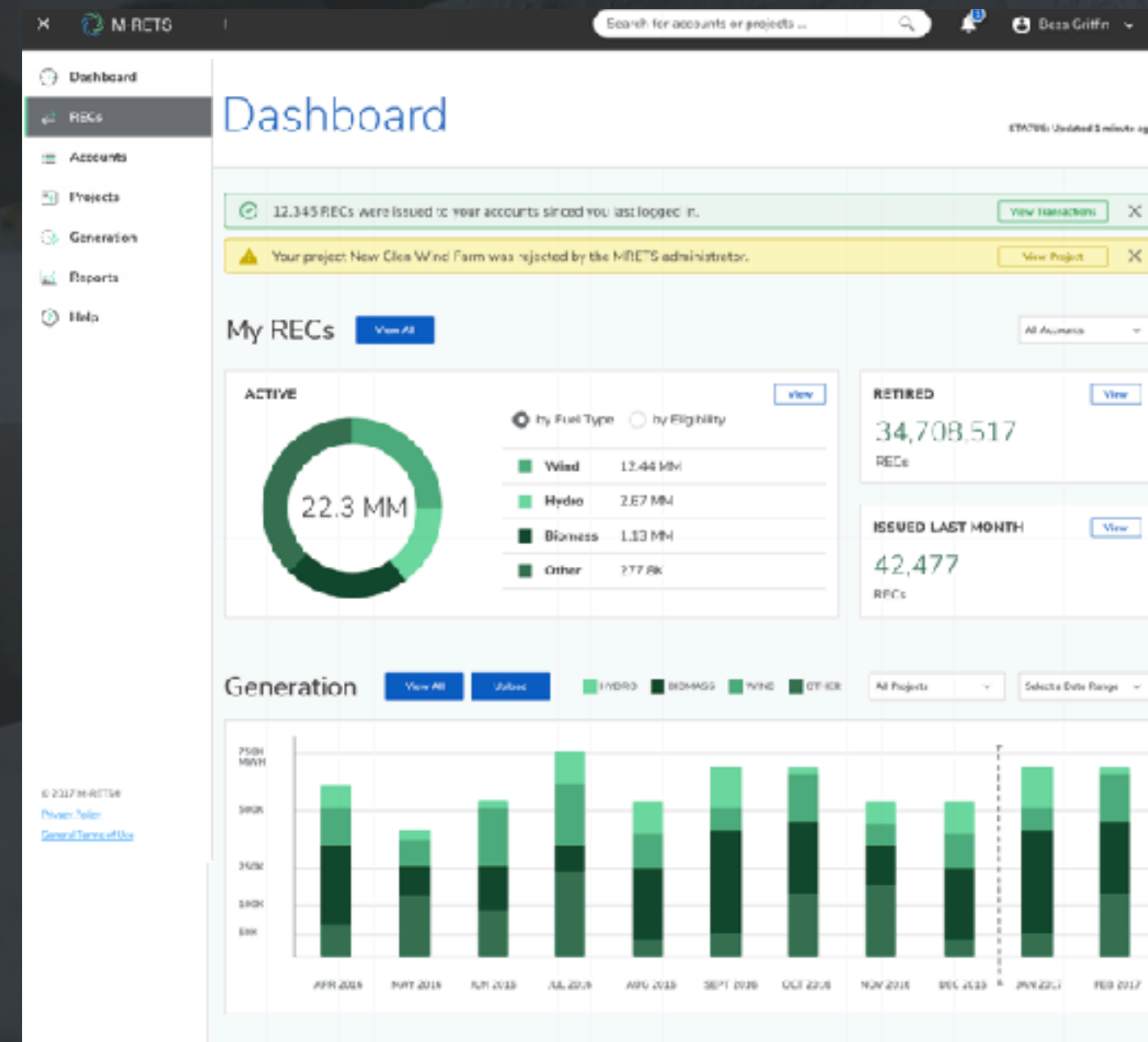


EXPERIENCE CONTINUES TO EVOLVE

THE CONTINUOUS, INCREMENTAL IMPROVEMENTS WILL ALWAYS SERVE THE LARGER LONG-TERM PLATFORM VISION.



VERSION 1.0



VERSION 1.1



VERSION 1.2

RESEARCH METHODS & FINDINGS

DESIGN & BUILD TACTICS

USER INTERVIEWS

Conducted 13 in-depth interviews with current users to understand most common tasks, task motivations, biggest challenges and biggest opportunities to improve efficiency of tasks.

USER SURVEY

Distributed quantitative survey to all M-RETS users to validate or invalidate common themes and key insights from User Interviews.

PLATFORM UX AUDIT

Completed detailed audit of current APX platform, documenting all key properties and associated entities.

CO-CREATION SESSIONS

Held numerous collaboration sessions with M-RETS team to work through key questions and findings from interviews, survey and audit.

TOP USER FEEDBACK THEMES

CLEAN. ACCESSIBLE. SIMPLE.

EFFICIENT. RELIABLE.

USER SCENARIOS

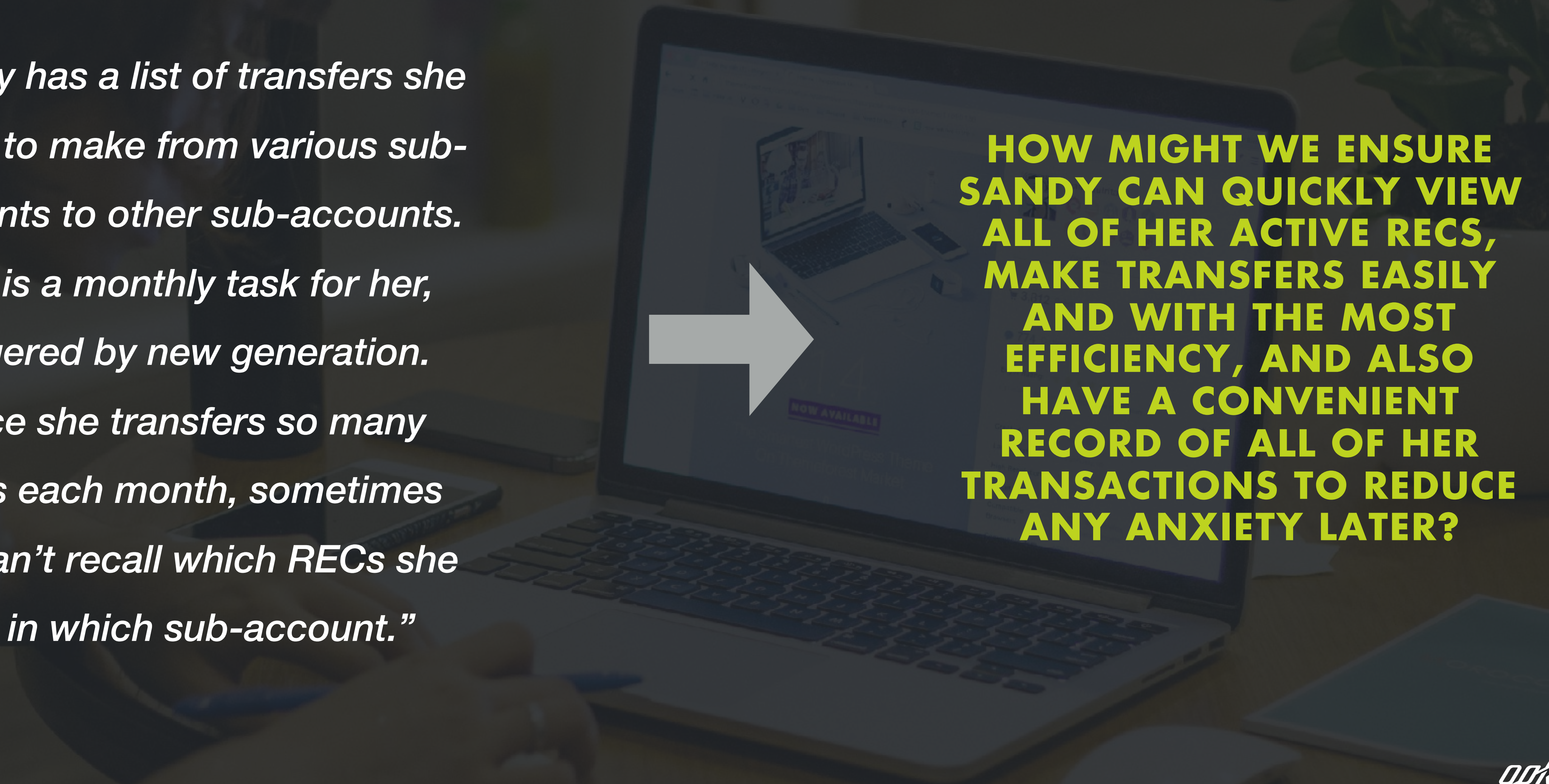
User Scenarios are detailed description of what users do with the product and more importantly, why they do it. They outline the motivation and main goal of the user for using your product, and keep both top of mind for designers and developers.

SCENARIO 1: TRANSFER RECS

“Sandy has a list of transfers she needs to make from various sub-accounts to other sub-accounts.

This is a monthly task for her, triggered by new generation.

Since she transfers so many RECs each month, sometimes she can't recall which RECs she put in which sub-account.”



HOW MIGHT WE ENSURE SANDY CAN QUICKLY VIEW ALL OF HER ACTIVE RECS, MAKE TRANSFERS EASILY AND WITH THE MOST EFFICIENCY, AND ALSO HAVE A CONVENIENT RECORD OF ALL OF HER TRANSACTIONS TO REDUCE ANY ANXIETY LATER?

SCENARIO 2: RETIRE RECS

“It’s that time of year again for Alan - he likes to call it “REC Retirement Mania”. Every March, he goes through the frenzy of ensuring the correct number of RECs are retired across a multitude of accounts, as dictated by varying regulations across state lines. It’s critical the retirements are accurate and are documented correctly. With all of this needing to happen within a relatively short time period, it can get a bit stressful.”



HOW MIGHT WE MAKE THIS ANNUAL PROCESS FOR ALAN MORE STREAMLINED WHILE INCREASING HIS CONFIDENCE BY PROVIDING AFFIRMATION ALONG THE WAY AND A CLEAR TRANSACTION SUMMARY?

NEW PLATFORM TOUR



TIME TO EXPLORE!

KEY USER TASKS WORKSHOP

NEW PLATFORM TRANSITION DETAILS

LAUNCH TIMELINE



***ALL M-RETS USERS WILL RECEIVE AN EMAIL NOTIFYING THEM WHEN THE NEW SITE IS AVAILABLE, WITH A LINK TO THE NEW SITE AND INSTRUCTIONS FOR LOGGING IN.**

WHAT DOES THIS MEAN FOR YOU?

YES, YOU WILL...

- NEED TO PLAN FOR THE PLATFORM BEING UNAVAILABLE 12/6 - 12/12
- NEED TO KNOW YOUR EMAIL ID ASSOCIATED WITH YOUR OLD M-RETS PROFILE
- NEED TO CREATE A NEW PASSWORD WHEN YOU LOG IN FOR THE FIRST TIME
- NEED TO VALIDATE THAT ALL OF YOUR PROFILE AND ORGANIZATION INFORMATION IS CORRECT IN THE NEW PLATFORM

NO, YOU WON'T...

- NEED TO WORRY ABOUT ANY GENERATION DURING THIS TIMEFRAME - WE WILL CATCH IT IN THE NEW PLATFORM
- HAVE TO REMEMBER YOUR OLD USERNAME
- HAVE TO CALL M-RETS TO RESET YOUR PASSWORD
- BE RESPONSIBLE FOR MIGRATING ALL OF YOUR ACCOUNT OR ORGANIZATION DATA TO THE NEW PLATFORM - WE'RE DOING THAT FOR YOU

YOU DON'T NEED TO REMEMBER ALL OF THIS NOW - YOU WILL RECEIVE REMINDER EMAILS FROM M-RETS THROUGHOUT THE NEXT FEW MONTHS CONTAINING ALL NECESSARY INSTRUCTIONS!

COMMON QUESTIONS

WHAT IF I HAVE QUESTIONS AFTER I LOG IN TO THE PLATFORM?

WHAT IF I HAVE IDEAS FOR THE NEW PLATFORM?

WILL THERE STILL BE PUBLIC REPORTS AVAILABLE?

WILL THERE BE TRAINING AVAILABLE?

SO YOU'RE TELLING ME I DON'T HAVE TO ACCEPT MY RECS EVERY MONTH?

WHAT IF I FIND THAT MY DATA IS INACCURATE OR MISSING?



YOUR TURN!

QUESTIONS? FEEDBACK?

WE WANT TO HEAR IT ALL!



THANK YOU