Product Consolidation Study

2025

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Background & Key Findings

About This Research

Background

The product team aims to enhance how well the curated learning tools—'Collections', 'Plans', and 'Challenges'—meet the needs of users engaging on the platform.

To achieve this, a discovery and product walkthrough will be conducted to collect user feedback on these three experiences. The study will focus on understanding users' perceptions of these tools, their preferred methods for storing saved content, and the challenges and opportunities these tools provide.

The outcome of this research will include actionable research and design recommendations to streamline and simplify the user experience for Collections, 'Plans', and 'Challenges', making learning more accessible and intuitive.

Key Questions

- How do users expect to be able to store and access their content?
- Do users find it confusing to have multiple similar options for storing or saving their content?
- If users prefer only having one place to store their content, which experience do they prefer ('Collections' or 'Plans')?
- When engaging with 'Collections', 'Plans', and 'Challenges', what features and interactions do users prefer or find valuable?
- What are user's preferences and impressions regarding the design, layout, and features of 'Collections', 'Plans', and 'Challenges'?
- What do users propose to make storing and saving content more useful and valuable to them?
- Where/what entry points do users expect to access 'Collections', Plan, and 'Challenges'?

Participants

12 users
- 4 AI Developers
- 4 AI Startup Founders
- 4 AI Students
  - Has used site in past 3 months
  - Has created a 'Plan, Collection', or participated in a 'Challenge' within past 3 months
  - Has built towards or coded for AI solutions
  - Codes or debugs code weekly

Methodology

- 1:1 remote interviews / product walkthrough

- 60 minutes in length

- During the interviews, users were shown and had the opportunity to interact with 'Plans', 'Collections', and 'Challenges'.

- At the end of the study, users were asked to rank five features in order of importance, from most to least.

Key Findings

1. **Regarding consolidation, users want one centralized learning space** to store, organize, share, track, and engage with their saved learning content while maintaining flexible management options, regardless of what it is called (e.g., 'Plans' or 'Learning Playlist').

2. **Users perceive storing content on similarly to how they manage playlists on platforms like Spotify.** They see 'Collections' and 'Plans' as having overlapping features and functionality, reinforcing their expectation of a familiar and flexible way to organize and interact with learning content.

3. **Inconsistent icon usage and lack of context across the features related to product consolidation creates navigation challenges and hinders users from completing essential tasks efficiently.** For example, users questioned the inconsistency of the delete option, sometimes appearing as a trash can and other times as text. Several users found themselves guessing the meaning of icons or words, which led to frustration.

4. **'Challenges' are seen as a unique, gamified learning experience, distinct from 'Plans' and 'Collections'.** While users support a merger of 'Plans' and 'Collections', they believe 'Challenges' should remain separate.

5. **The location of saved content within the profile did not align with users' mental models,** as they expected to find it in the top navigation menu or account settings. Many users struggled to locate the saved content, often requiring guidance from the researcher.

6. **Progress tracking is essential to the learning process, as users find it helps hold themselves and others accountable.** Over half of the users who preferred 'Collections' still ranked progress tracking as the most important feature, despite 'Collections' lacking this functionality. This underscores the need to retain and prioritize progress tracking moving forward.

Full details in subsequent sections of this report.

Plans, Collections, and Challenges Screenshots

Detailed Findings & Recommendations

Features First: It's not about 'Plans' vs. 'Collections'

Users don't care what the learning container is called or named. Users desire control over their content - how its stored, accessed, and engaged with. They want flexibility over rigidity.

"I would like to have a public or private toggle over here." – *P6*

"I would like to be able to edit more from this page and have a better organization method as much as I want." – *P1*

"I would just click on the module directly instead of clicking 'Start.' That way, I can go at my own pace." – *P7*

"I like that I can organize learning materials in collections, but I wish I could arrange them more easily." – *P5*

"Whatever we want to edit, we can edit from the same page instead of going to another page and going back." – *P2*

"There's no way to sort them [saved content]. If I'm looking for something I saved earlier, I have to go one by one. – *P8*

Dashboard

Users expect a dedicated learning dashboard to be surfaced upon logging in, aligning more closely with their experiences on platforms like Udemy and Coursera

- Users expected to see a history of their learning content upon logging into their account and were surprised to not find anything related to 'Collections' or 'Plans' upon logging in.

- Many users spent time looking for 'Collections' on the dashboard, some even checked the account menu thinking they would find mention of there.

"When I was new to the site, I didn't know that I had to go to my profile to find collections. I was looking for it on the main page." - P7

"Like on other learning platforms, I expected a 'recently added' or 'recently purchased' section on the homepage." – P3

"It would be interesting, for example, to have a UI saying, look, you have started this plan or this collection. You have completed 3 out of 10 - do you want to continue? Or access your collection or plan here." – P4

Recommendations

- Explore design and engineering solutions to move the dashboard and its contents to a dedicated learning space that appears upon login, allowing users to start learning more seamlessly.

Pulse competitive analysis: Competitors commonly offer personalized dashboards that highlight relevant learning content

- As part of the study, the researcher performed a lightweight competitive analysis of only the dashboards, not the platform.

- In the industry, platforms like Udemy and Coursera display learning content immediately upon user login.

- Users expect to follow this approach to better align with their mental models.

Udemy: Dashboard after signing in
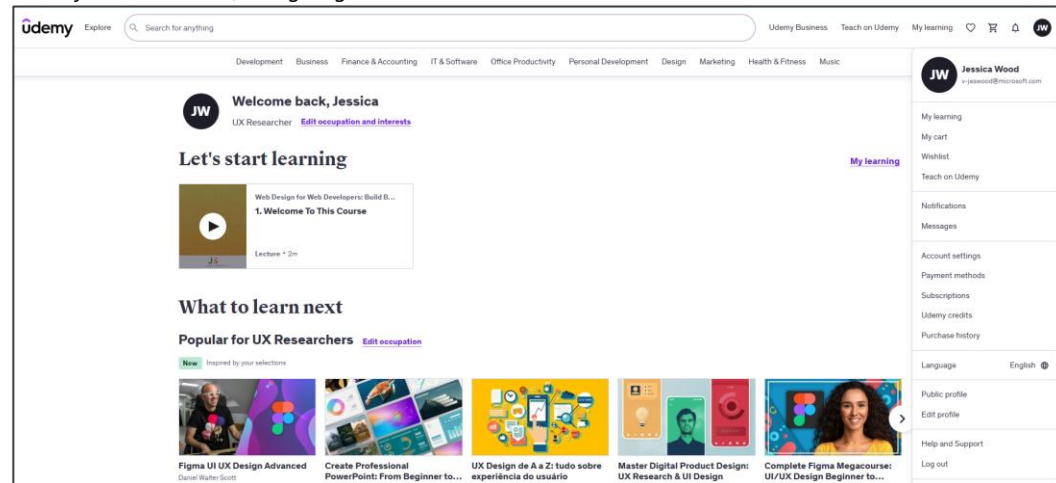
Coursera: Dashboard after signing in
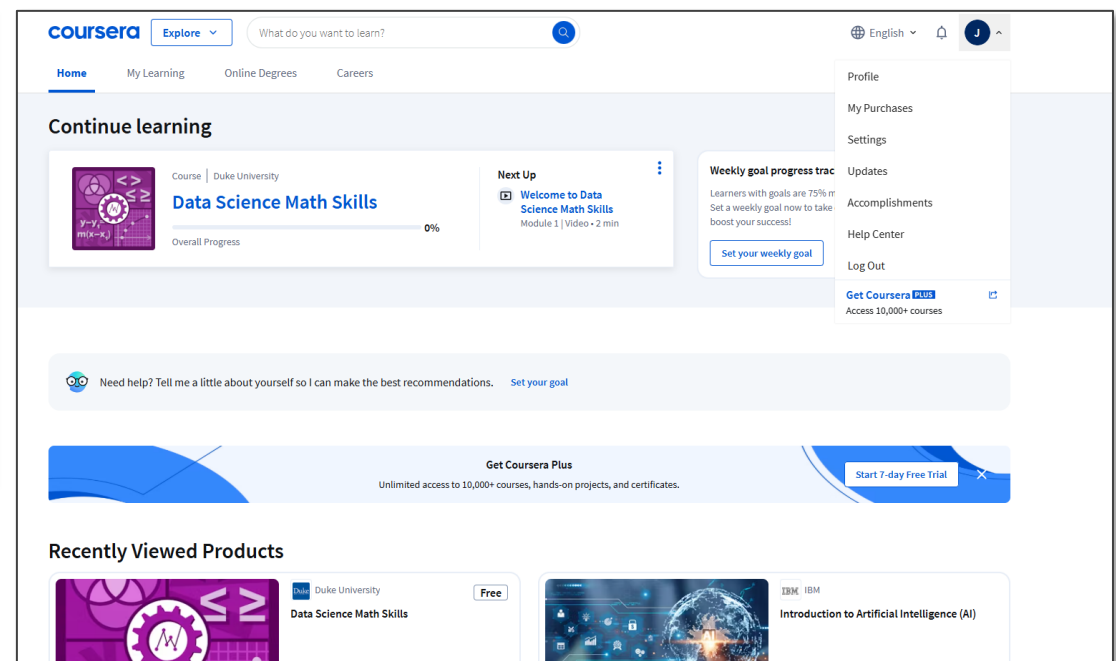
# The current learning dashboard is nested within the profile, causing navigation confusion when users attempt to locate it

- When searching for existing 'Collections', users either checked the account icon menu for terms like 'Collections' or My Learnings', explored the dropdown menus in the top navigation bar, and a couple used the search bar.

- After discovering—or being shown—that the dashboard is housed within the profile, users felt it was too nested and misplaced, as profiles are not meant for storing saved learning content.

Recommendations

- Explore design and engineering solutions to make saved content easily accessible without requiring users to navigate through their profile.

Learning landing page: Account Menu

Q   JW

JW

Profile

Settin

Sign out
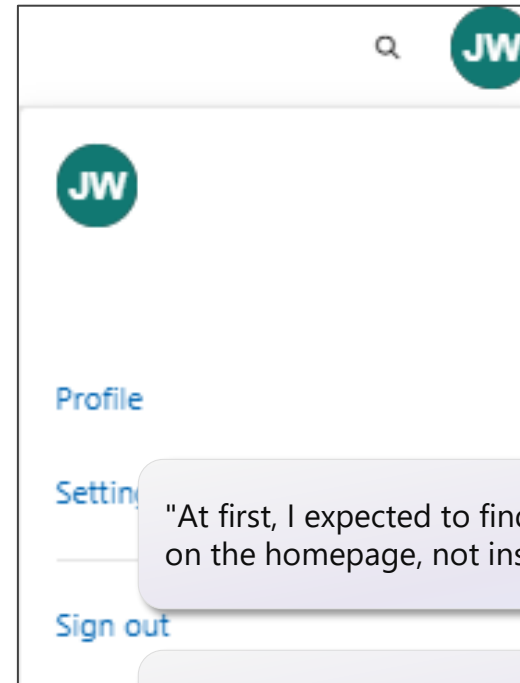
"At first, I expected to find Collections somewhere on the homepage, not inside my profile." – *P7*

"I thought the profile view was just my browser login, so I didn't click there at first." – *P3*
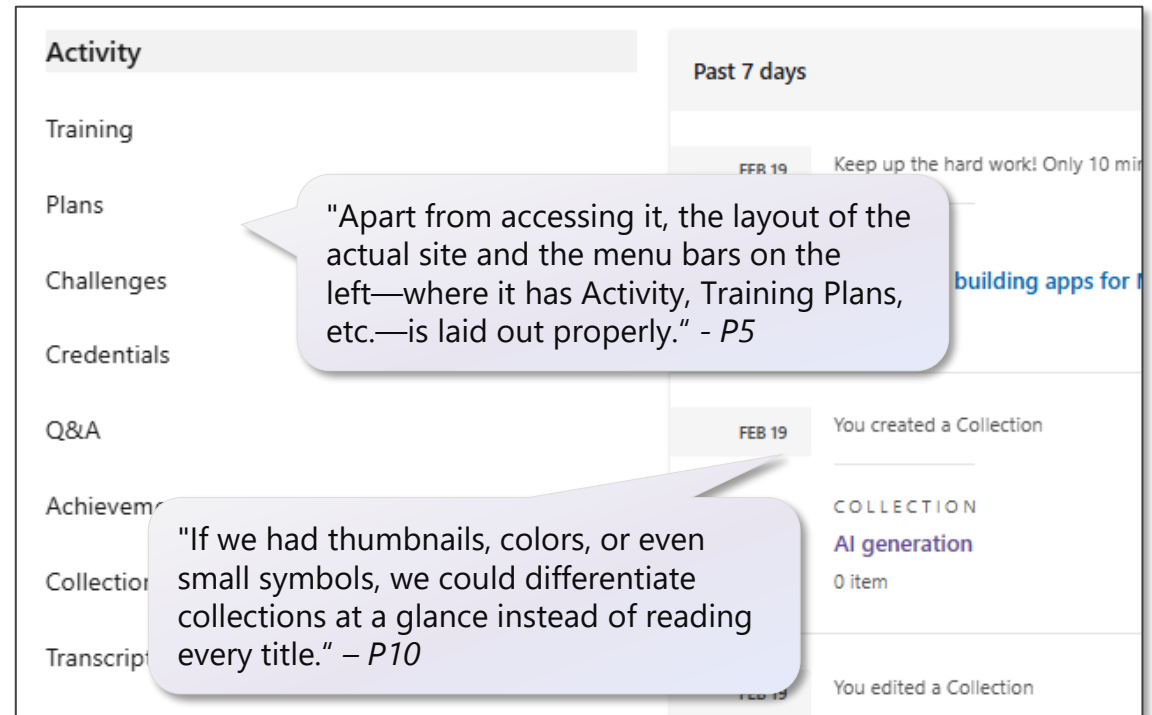
Overall, users found the dashboard intuitive and easy to use, but many suggested enhancements to improve the experience

- While the dashboard was well-received, users felt the overall design could be improved by adding/showing the descriptions, using icons, and alphabetizing the different activities.

- Users found it easy to navigate between sections to locate previously created 'Collections' and 'Plans'.

- Users expected the sort option to be interactive but found it inactive, leading to confusion and frustration when they couldn't rearrange content as anticipated.

Recommendations

- Explore design ideas to improve the look, feel, and consistency of the dashboard by adding icons and alphabetizing the list of activities.

- Consider displaying user-provided descriptions for a 'Plan' or 'Collection' alongside the title and date to provide better context when users skim their content.

Dashboard within Profile

"Apart from accessing it, the layout of the actual site and the menu bars on the left—where it has Activity, Training Plans, etc.—is laid out properly." - P5

"If we had thumbnails, colors, or even small symbols, we could differentiate collections at a glance instead of reading every title." – P10

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Plans

"As a startup founder, I need to assign learning materials to my team. Plans let me track their progress and make sure they're actually completing the work."

Users who preferred 'Plans' highlighted their ability to define milestones, track progress, and achieve objectives—features not available in 'Collections'

- Users find value in being able to track their progress and define milestones and were drawn to 'Plans' because of these features.

- Many expressed that plans create a sense of direction and a clear end goal which is valuable to them.

- Many users felt 'Plans' are structured for more team-based learning whereas collections only allows for passive sharing.

Recommendations

- Ensure these features remain accessible to users in future designs.

"I like that I can track my progress, see all the milestones in order, and understand the learning outcomes at a glance." – P1

"Plans help me create my own roadmap according to my use case and follow it until I complete the project." – P3

"I would select plans because they are structured, and they have capabilities like being able to share and track progress. If I'm a manager, making sure that everyone in my team is on par with learning, that gives a slight edge over collections." – P8

"In plans, we can invite learners as well. So, if I'm working with a team of four, and we want to learn some skills, we can start it together, and you know, collaboration makes it better every time." – P10
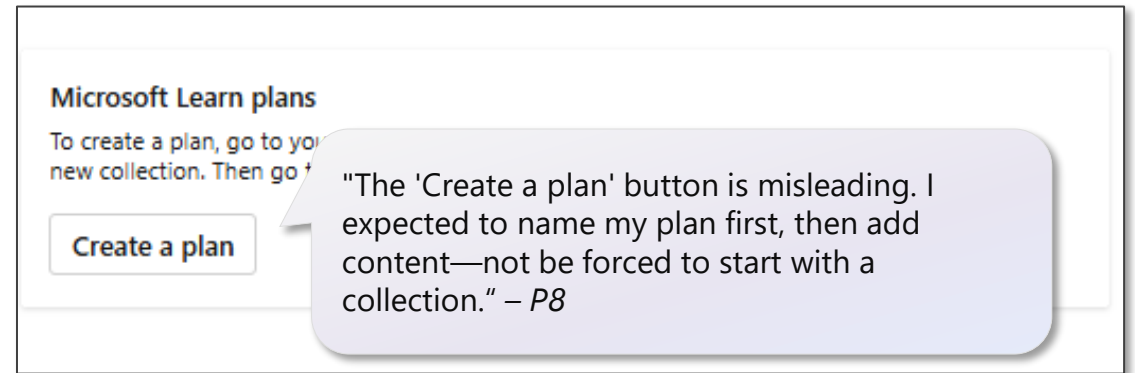
Having to create a 'Collection' first in order to 'Create a plan' resulted in significant confusion to users

- Manually creating a 'Plan' is confusing to users; as the CTA prompts them to 'Create a plan', but the process requires them to create a 'Collection' first.

- Several users noted they should be able to create a Plan and add content in the same way they do for 'Collections'.

- A couple of users familiar with 'Plans' understood the concept but felt the process would be difficult for beginners to grasp and should be simplified.

Recommendations

- Explore design and engineering solutions to make 'Plan' creation as seamless and intuitive as creating 'Collections'.

Manual Plan Creation: Plans tab in dashboard

Microsoft Learn plans

To create a plan, go to yo[...]
new collection. Then go [...]

Create a plan

"The 'Create a plan' button is misleading. I expected to name my plan first, then add content—not be forced to start with a collection." – P8

"Instead of adding content to a Collection and then making it a Plan, I want to just add it directly to the Plan." – P3

"Okay, so it is basically saying I need to go to collections first? I thought I could just create a plan directly." – P7
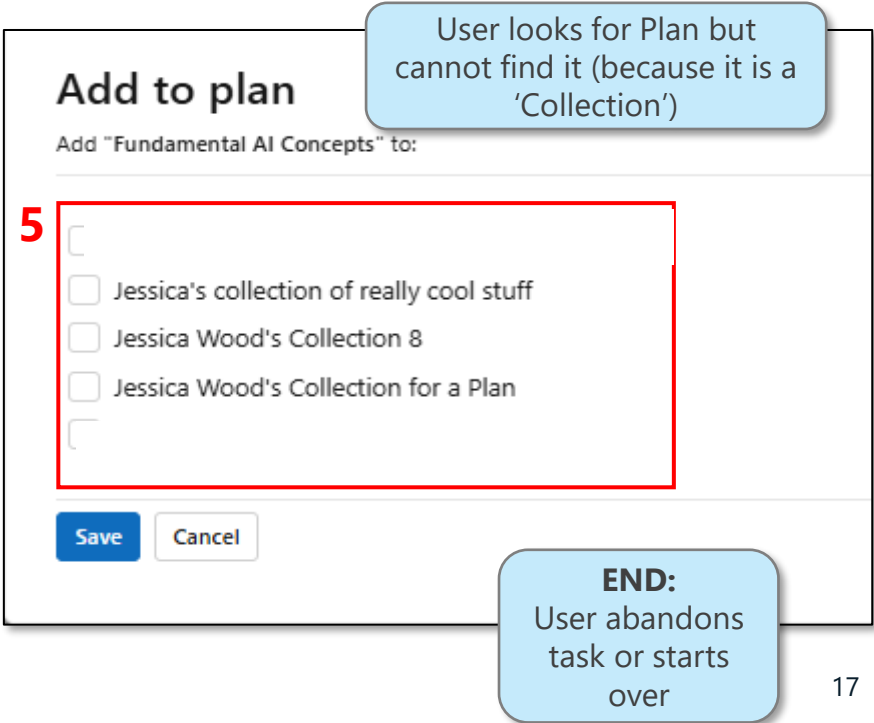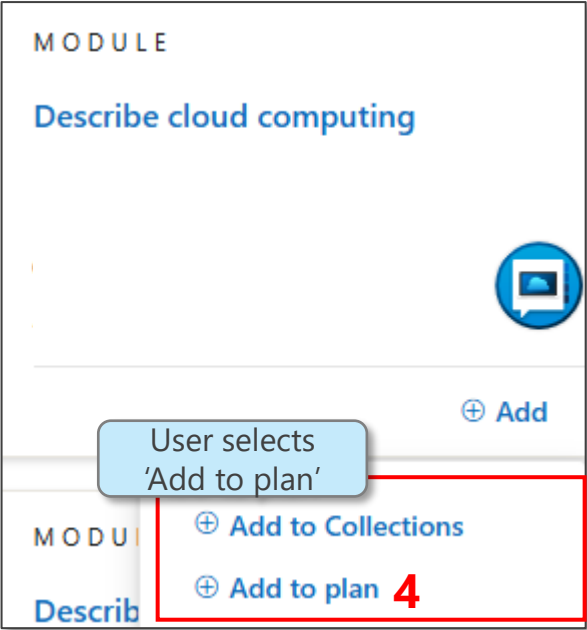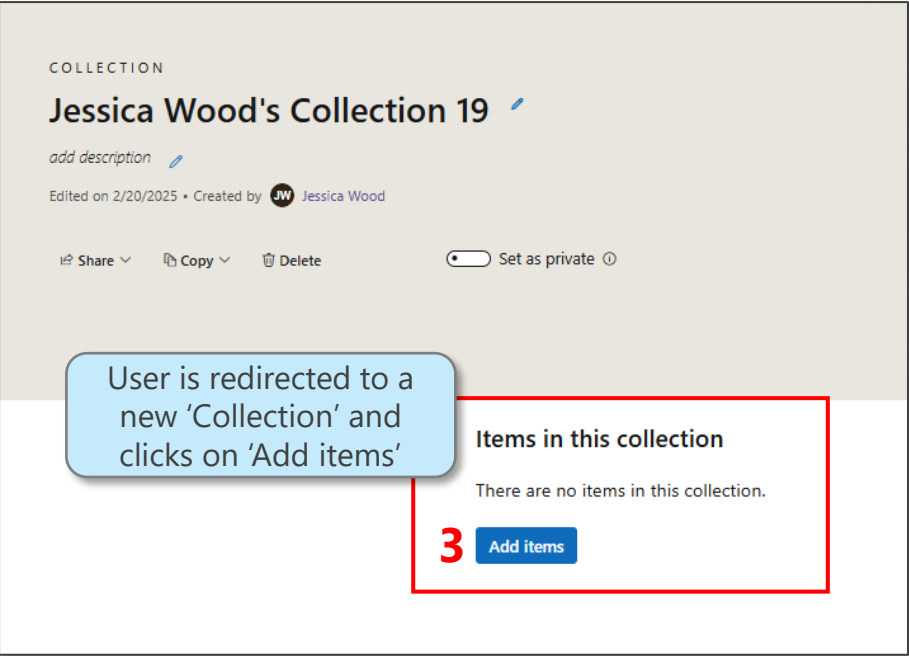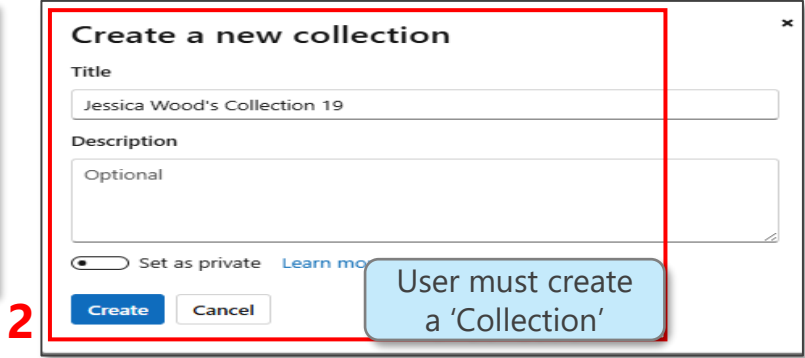
Plan Creation Workflow

Current process of creating a manual plan from the dashboard entails the following steps.

Plans

A plan allows learners to progress through a set of milestones to achieve learning outcomes and track their progress.

AI-generated plans

We use AI to help you create a tailored learning plan that considers your unique needs and provides the most relevant content.

[✨ Create plan with AI]

Microsoft Learn plans

To create a plan, go to your collections page and either select an existing collection or create a new collection. Then go to that collection's page and you can save that collection as a plan.

[Create a plan] **1**

> User goes to 'Create a plan'

Create a new collection ✕

Title

[Jessica Wood's Collection 19]

Description

[Optional]

◯ Set as private   Learn mo...

[Create] [Cancel] **2**

> User must create a 'Collection'

COLLECTION

Jessica Wood's Collection 19 ✏

add description ✏

Edited on 2/20/2025 • Created by 🄹🅆 Jessica Wood

↪ Share ⌄   ⧉ Copy ⌄   🗑 Delete   ◯ Set as private ⓘ

> User is redirected to a new 'Collection' and clicks on 'Add items'

Items in this collection

There are no items in this collection.

3 [Add items]

MODULE

Describe cloud computing

⊕ Add

> User selects 'Add to plan'

MODU...

⊕ Add to Collections

⊕ Add to plan **4**

Describ...

Add to plan

Add "Fundamental AI Concepts" to:

> User looks for Plan but cannot find it (because it is a 'Collection')

5
☐
☐ Jessica's collection of really cool stuff
☐ Jessica Wood's Collection 8
☐ Jessica Wood's Collection for a Plan
☐

[Save] [Cancel]

> **END:** User abandons task or starts over

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The numerous steps and confusing instructions when creating a 'Plan' led to user confusion and frustration, causing some to abandon the process altogether

- First users initially click on 'Create a Plan' but then encounter a modal that says, 'Create a New Collection,' causing hesitation and confusion.

- Next, users are directed to a new 'Collection' and prompted to 'Add items,' even though they believe they are creating a 'Plan', leading to more confusion.

- Finally, when users attempt to add items to their 'Plan' and can't find one they just created, they either restart the process, assuming they made a mistake, or abandon it altogether.

Recommendations

- Consider streamlining the steps and instructions for manually creating a 'Plan' to prevent users from abandoning the process.

Plan Creation screenshots: Slide 17

"I thought I clicked on the right thing... wait, no... I clicked on the plan or collection? I forget. Oh, first I have to create a collection. Then I can create a plan?" – *P11*

"To create a plan, go to the collections page... but I just clicked on the create plan button instead of that. I just created a collection earlier, but why is it not here?" – *P12*

Requiring users to 'Publish' a Plan before they can start progress tracking creates an unnecessary barrier that disrupts their learning workflow

- When asked how they would begin working on their plan, most users overlooked the inactive start button and clicked directly on the module link instead.

- Upon the researcher pointing out that tracking isn't possible until the plan is published, users noted that they found little value in publishing a plan unless they were sharing it.

- Many users found the 'Publish' [A] confusing and misleading, suggesting that alternatives like "Finalize Plan" would be more intuitive, as it better reflects the action they are taking.

- Additionally, the inability to edit a 'Plan' after publishing was viewed as too restrictive. They only expected this limitation when sharing a Plan, but for personal 'Plans', they wanted the flexibility to edit at any time.

Recommendations

- Consider design and engineering solutions that would allow users to start their plan without having to publish it.

- Consider enabling users to edit their 'Plans' after publishing, providing greater flexibility in managing their learning content.

- If publishing is required to initiate progress tracking, consider updating the CTA to "Finalize Plan" to better communicate its purpose to users.

Unpublished Plan
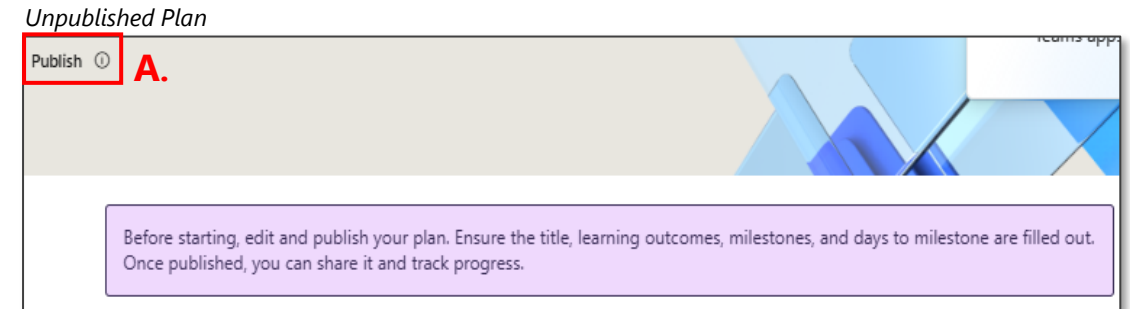
"I should be able to edit it after publishing." – *P5*

"Why do I have to publish? I just want to start learning. And can I still change it after I publish?" – P2
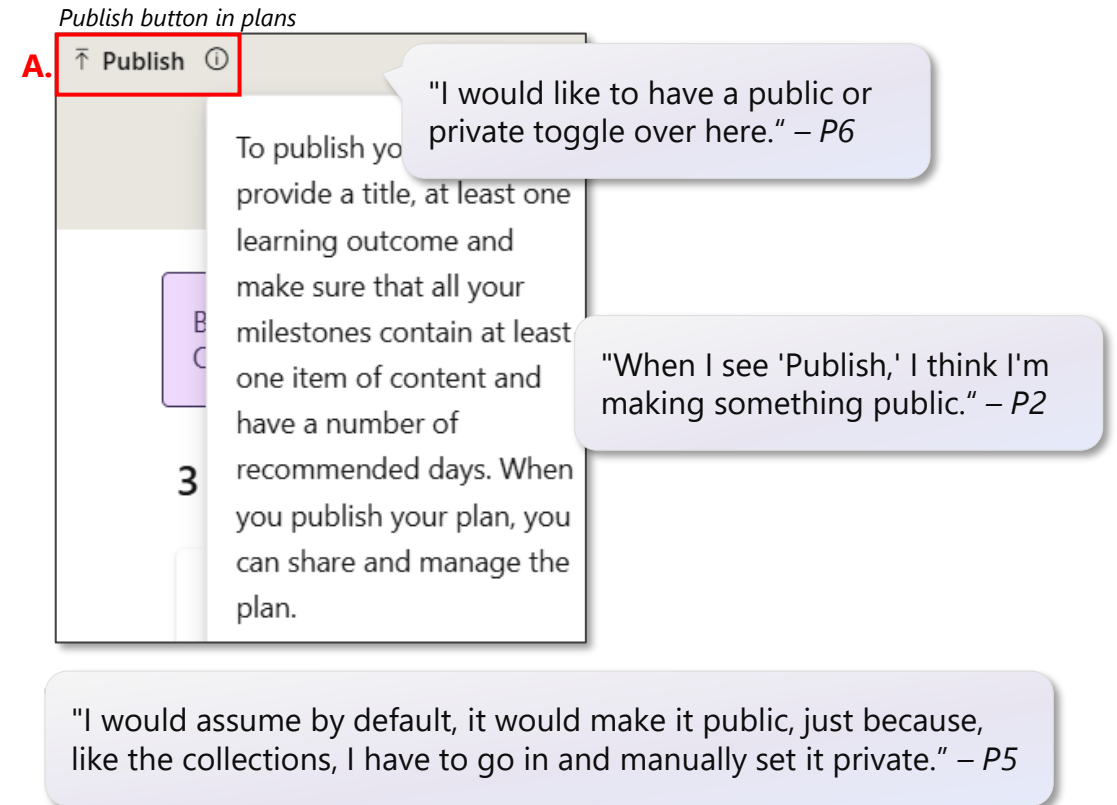
"I didn't expect that publishing a plan meant I couldn't modify it anymore. I thought I could still make small changes if needed." – *P7*

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Users were uncertain whether their plan was private due to the lack of clear visual indicators or language specifying if publishing makes it public

- Many users questioned whether publishing [A] a 'Plan' would make it public, as there was no clear indication on the page.

- Several users noted that 'Collections' has a private/public toggle and felt that 'Plans' should offer the same feature/functionality.

- Users expect information to appear when hovering over the 'Publish' info icon, rather than having to click it to view the details.

Recommendations

- Repeat: Consider design and engineering solutions that would allow users to start, edit, and share their plan without having to publish it.

- Consider adding a toggle that allows users to set a plan as public or private.

- Consider enabling users to view details by hovering instead of requiring them to click in and out.

Publish button in plans

A. ⤒ Publish ⓘ

"I would like to have a public or private toggle over here." – *P6*

To publish yo... provide a title, at least one learning outcome and make sure that all your milestones contain at least one item of content and have a number of recommended days. When you publish your plan, you can share and manage the plan.

"When I see 'Publish,' I think I'm making something public." – *P2*

"I would assume by default, it would make it public, just because, like the collections, I have to go in and manually set it private." – *P5*

Users associate 'Manage' button with admin tasks like editing or toggling settings, making the label misleading

- Users were surprised to find sharing options under 'Manage' [A] and suggested consolidating all sharing features within the Share dropdown for consistency.

- Many users associated the gear icon with settings, which added to their confusion about the purpose of the 'Manage' option.

- While users value progress tracking, they associate it with sharing and believe it should be integrated into the Share menu.

- Additionally, some users were confused by the distinction between Email sharing and Invite Learners, as both involve sharing the plan via email.

Recommendations

- Consider merging the 'Manage' options into the 'Share' menu and clarifying the differences between sharing options.

Published plan: Banner
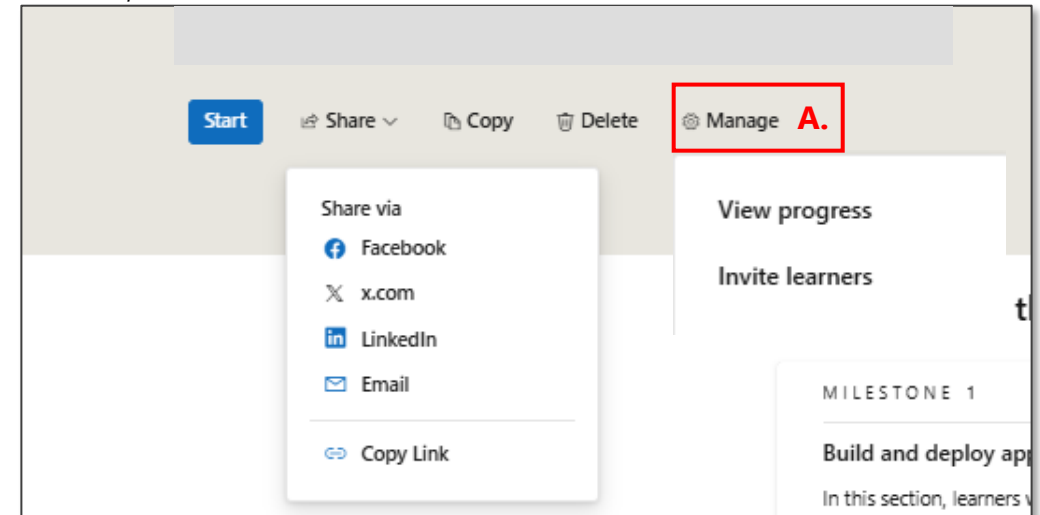
"I thought Manage would let me change settings, but it's just tracking and inviting people." – *P2*

"The 'Invite Learners' and 'Share' buttons feel like they do the same thing. Why are they separate? It's confusing." – *P8*

All users expected drag-and-drop functionality for reorganizing content and found the up-and-down arrows cumbersome

- When asked to organize or move content, users instinctively attempted to drag-and-drop before noticing the arrow-based controls [A].

- Users organically suggested that drag-and-drop functionality would make reorganizing milestones easier and more efficient, as it aligns with common UI patterns they expect.

Editing sidecar in plans

Milestone 2   **A.** ↑ ↓ 🗑
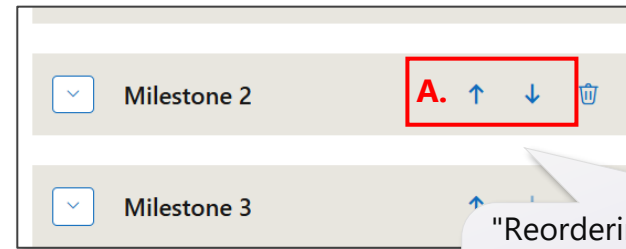
Milestone 3

"Reordering milestones is frustrating. I expected to just drag-and-drop them, but instead, I have to use these tiny up/down arrows. It's really tedious, especially for long plans." – *P8*

"I wish I could just move milestones around easily. Right now, it feels too rigid—there should be a simple way to rearrange them without so many clicks." – *P1*

Recommendations

- Consider implementing drag-and-drop functionality, making content organization more intuitive and aligned with users' mental models.

Collections

"Collections let me organize content my way without forcing structure on me."

The flexibility of features such as privacy toggle, and no restrictions on content type was seen as valuable and essential for storing and engaging with learning content

- Users like the ability to easily add any type of content to 'Collections' without restrictions.

- Many expressed a preference to 'Collections' because it was viewed as a more flexible way of learning since it doesn't require start and end dates.

- Users valued the ability to set a 'Collection' as private or public and appreciated the option to share it with others.

Recommendations

- When designing a learning content container, explore engineering solutions that enable users to save, organize, and access their learning materials without restrictions, providing greater flexibility and control.

"Collections are good because I can just work on them without worrying about tracking or deadlines." – *P11*

"Collections are a way to organize and save learning modules without extra steps." – *P6*

"Collections was pretty easy, you know. It was user-friendly, and it was easy. But the plan? I don't think it's that user-friendly. It's just too much work." – *P9*

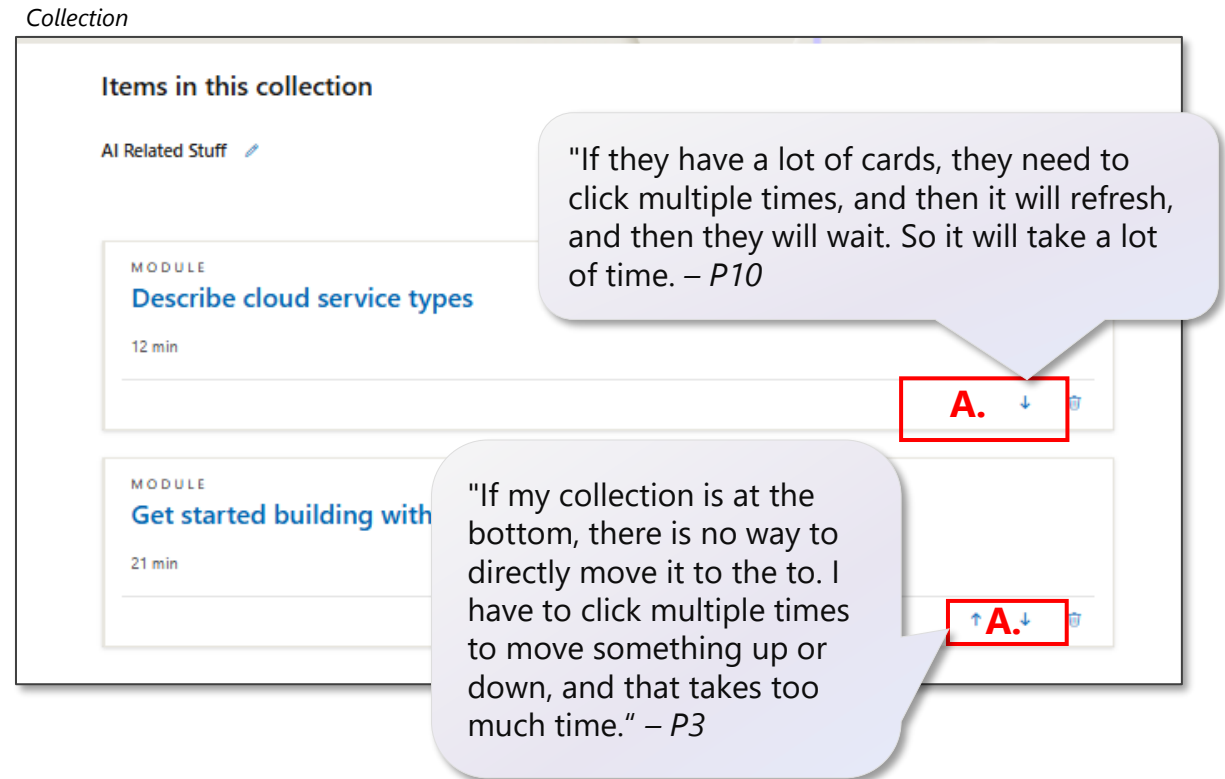"I like that in collections, I can save everything I need in one spot and add more whenever I want." – *P7*

The arrow-based method for rearranging content in a 'Collection' was seen as inefficient and time-consuming due to the excessive clicks required

- Users recognized that the up and down arrows [A] were for reorganizing content but found them highly inefficient, especially for managing large amounts of saved content.

- One user though the arrows were for downloading the content.

Recommendations

- Explore engineering and design solutions to allow users to move content more easily with drag-and-drop functionality to better align with their mental model.
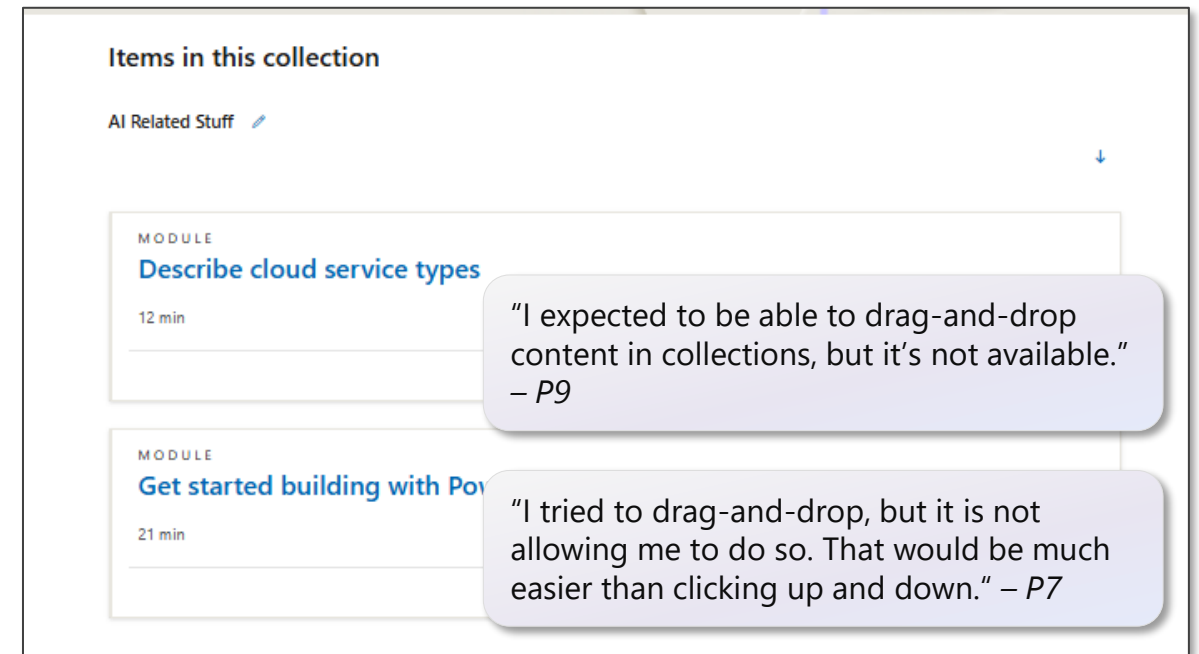
Collection

Items in this collection

AI Related Stuff ✏

MODULE
Describe cloud service types

12 min

"If they have a lot of cards, they need to click multiple times, and then it will refresh, and then they will wait. So it will take a lot of time. – *P10*

A. ↓

MODULE
Get started building with

21 min

"If my collection is at the bottom, there is no way to directly move it to the to. I have to click multiple times to move something up or down, and that takes too much time." – *P3*

↑**A.**↓

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All users expect a drag-and-drop functionality for organizing learning content, as it aligns with their mental model

- All users expected to have drag-and-drop functionality when moving sections and cards around within a 'Collection'.

- The ability to drag-and-drop was viewed to be more intuitive and would save the user time in organizing their content.

- Some users noted that the ability to sort content by type would be especially useful especially when managing a large amount of saved content.

Recommendations

- Explore engineering and design solutions to allow users to move content more easily with drag-and-drop to better align with their mental model.

- Consider offering UI options or filters that allow users to sort content by type.

Collection

Items in this collection

AI Related Stuff ✏

MODULE
Describe cloud service types

12 min

MODULE
Get started building with Po

21 min

"I expected to be able to drag-and-drop content in collections, but it's not available." – *P9*

"I tried to drag-and-drop, but it is not allowing me to do so. That would be much easier than clicking up and down." – *P7*

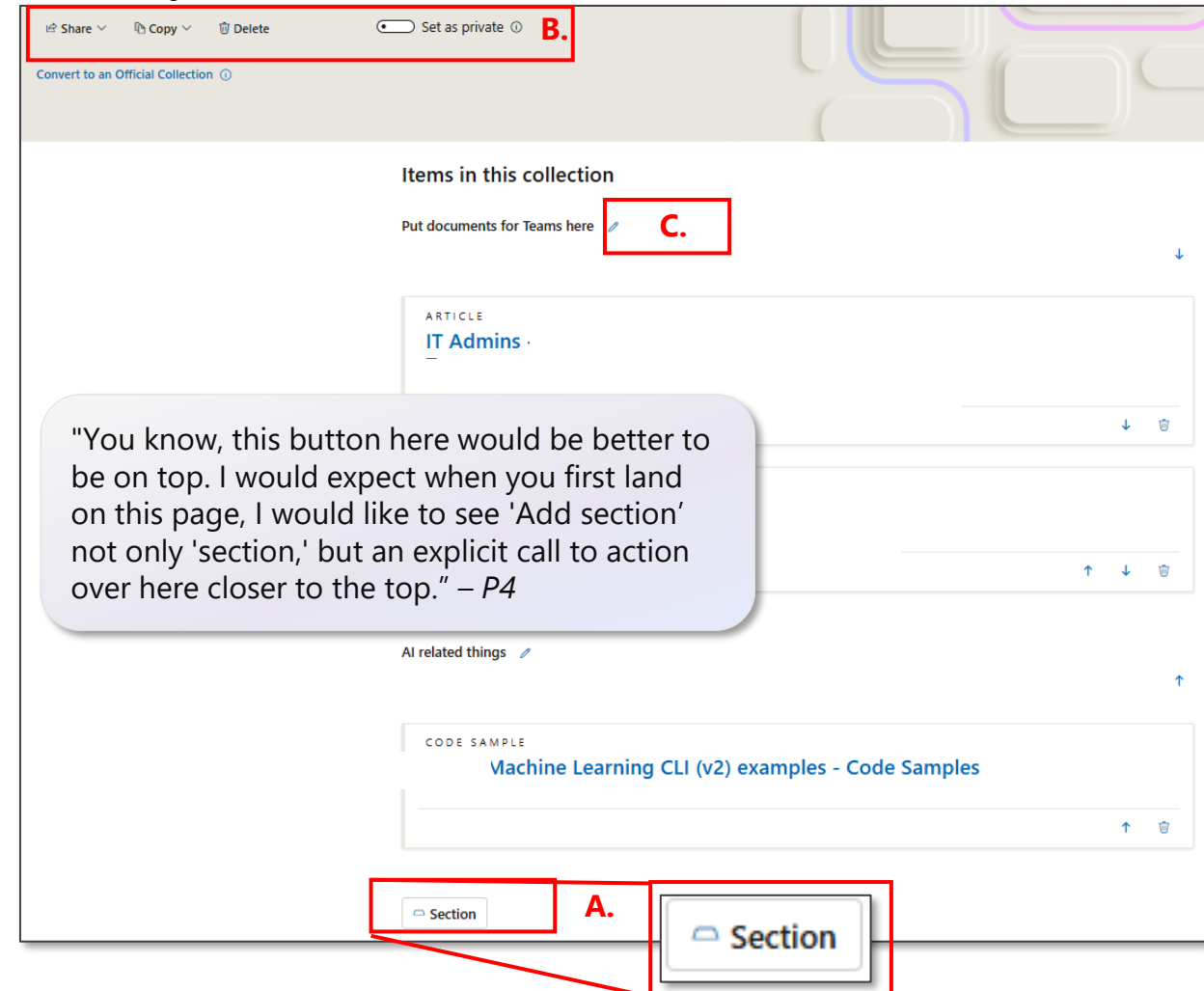"It would be easier if I could sort them, by type or the date I added them." – *P8*

The 'Section' button was not easily discoverable, as users expected it to be positioned at the top of the page, consistent with the other editing features

- When asked to add a section [A], users struggled to find the option, often looking in the top banner [B]or clicking the 'Edit' icon [C] next to existing sections, as that aligned with their expectations.

- Once users located the option, they found the process of adding a section to be simple and intuitive.

- Additionally, most users felt that the term 'Section' did not clearly indicate adding a new section. They recommended changing the text to "Add Section" or including a plus sign icon alongside the word.

- The ability to add new sections is highly valuable to users, as it gives them greater control over content organization and allows them to group similar items more effectively.

Recommendations

- Consider moving the 'Section' option up to the top of the page to align more with users' mental model.

- Consider pairing the add icon with the 'Add Section' label to maintain consistency across site.

Collections: Single collection

"You know, this button here would be better to be on top. I would expect when you first land on this page, I would like to see 'Add section' not only 'section,' but an explicit call to action over here closer to the top." – *P4*
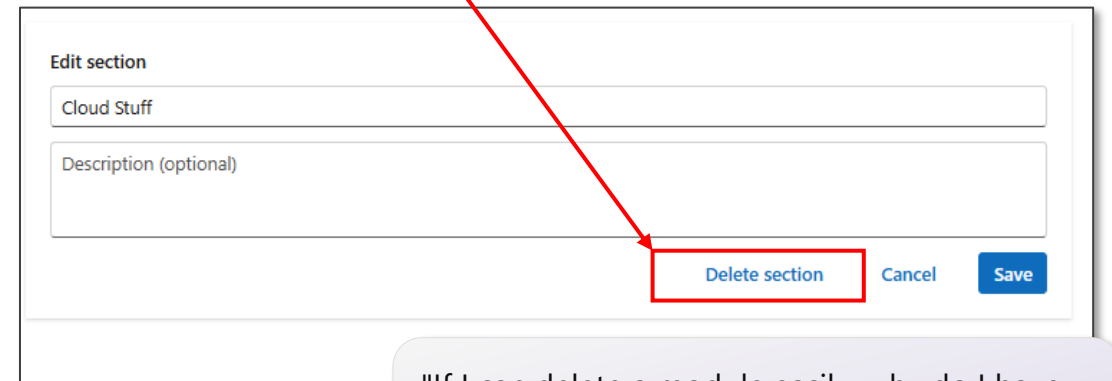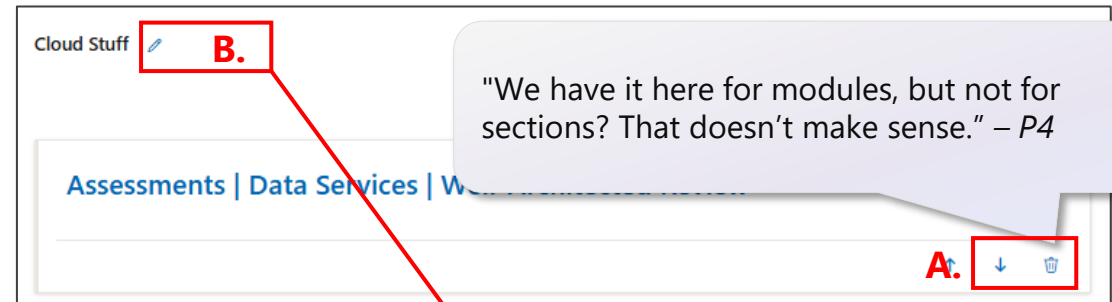
The 'Delete section' option is nested within 'Editing' making it difficult for users to locate as they expected it be in-line with the 'edit' icon

- Users searched the page for a trash can [A] icon to delete sections, with some noting it felt inconsistent to allow adding a section but not easily deleting one.

- After finding 'Delete section' within the Edit button [B], several users expressed it should be surfaced directly to be in-line with 'edit' icon.

- Additionally, a couple of users were unsure what 'Delete Section' meant, questioning whether it removed only the section or all the content within it.

Recommendations

- Explore design solutions to move the deletion option out of the editing feature so it is more accessible to users.

- Consider providing context for the "Delete section" action upfront so users understand its function without needing to click on it.

Collection: Edit button into delete section card

"We have it here for modules, but not for sections? That doesn't make sense." – *P4*

"If I can delete a module easily, why do I have to go into Edit just to delete a section? It should be the same." – *P6*

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Challenges

 "For challenges, I think the leaderboard is a cool thing to have. If we're competing against coworkers or friends, it's nice to showcase achievements."

Users view 'Challenges' as a distinct feature that promotes competition, motivation, and skill validation rather than passive learning

- Users view 'Challenges' as a fun and competitive, team-based activity distinct from 'Plans', which focus on shared milestones.

- Many users see 'Challenge's as a way to earn points, badges, or rewards rather than as assessments of personal learning.

- The leaderboard is valuable to users as it reinforces the gamified nature of the experience.

Recommendations

- Consider maintaining 'Challenges' as a separate entity from 'Plans' and 'Collections'.

Challenges Landing page
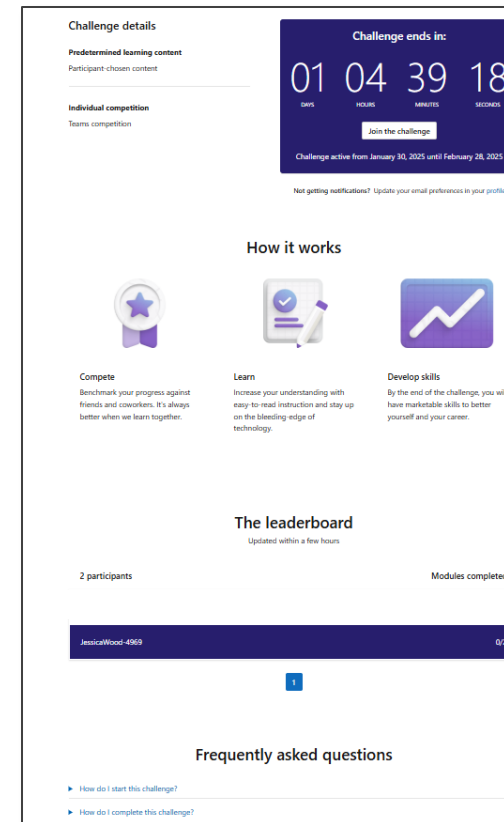
"When we talk about challenges, It's gamified learning." - *P11*

"Challenges are gamified learning experiences that encourage me to complete a task and test my skills." – *P3*

"'Challenges' feel like a little game of competition. You can create a challenge for students or employees, and people will want to complete it as soon as they can." – *P5*

User feedback on 'Challenges' focused on UI and usability improvements, as they felt there was room for enhancement

- Users found the FAQ section valuable, especially for first-time users, but some suggested making it a collapsible dropdown to save space or replacing it with an AI chatbot.

- After joining a 'Challenge', users expected the 'See Challenge' button to display 'Challenge' details, but instead, it unexpectedly redirects them to the previous page.

- One user pointed out that the timer font differs from the rest of the page's typography.
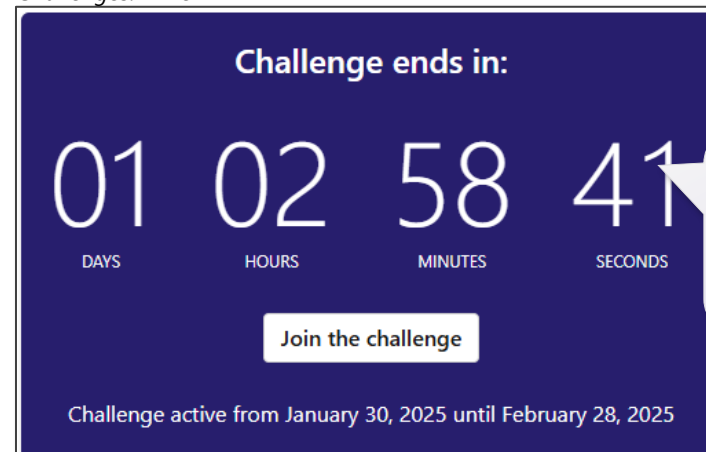
Recommendations

- Explore design solutions to convert the FAQ into a collapsible menu or AI chatbot for better usability.

- Consider adjusting the font to ensure consistency with the page's overall typography.

Challenges: FAQ
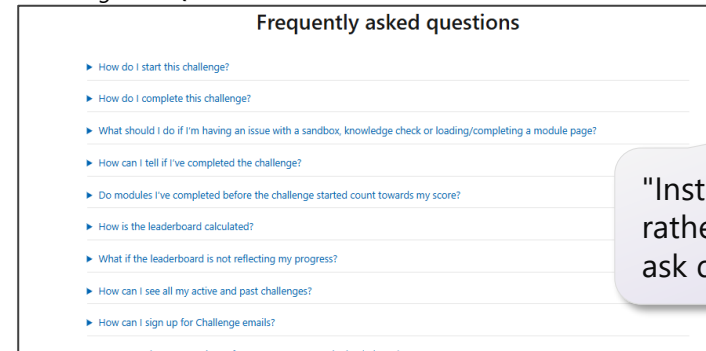
"Instead of an FAQ, I'd rather have a chatbot I can ask questions to." – *P3*

Challenges: Timer

"This font style doesn't match the rest of the page." - *P4*

Feature Rankings

Users were presented with five features and asked to rank them based on their perceived importance / value when storing content.

Ranking: 1 - most important / 5 - least important

P7 was unable to complete the ranking as the video call was disconnected
P12 was only able to rank 3 items and then the call was disconnected

Feature Ranking Activity

Prompt: Now that you've explored and shared feedback on 'Collections' and 'Plans', please rank the following features in order of importance or value, with 1 being the most important to 5 being the least.

1 Tracking one's progress

2 Edit a collection/plan

3 Reorder/ Reorder saved content

4 Share a collection/plan

5 Copy a collection/plan

"This would be my first. I need to see my progress." – *P2*

"Editing is important because it is flexible and good for updating learning paths." – *P11*

"Move or reorder saved content will be a number 3. Having to click several times to move something up—that is annoying. Please change that." – *P4*

Additional Findings

Inconsistent Icon Usage

Inconsistent usage and general lack of context across the site presents an opportunity to reduce cognitive load and minimize user confusion

'Collections'

Delete module   Delete 'Collection   Delete section

Privacy toggles

Edit section   Add a section

Copy option in banner

'Plans'

Add option nested in editing

+ Add Milestone

Both within Create a plan' process

Editing options within a 'Plan'

Banner options in a 'Plan'

Other areas of site

Browse page to add content

Documents page   Shows page

Storing Learning Content

Throughout the research, several users likened storing learning content to organizing music in apps like Spotify, drawing direct comparisons between the two experiences.
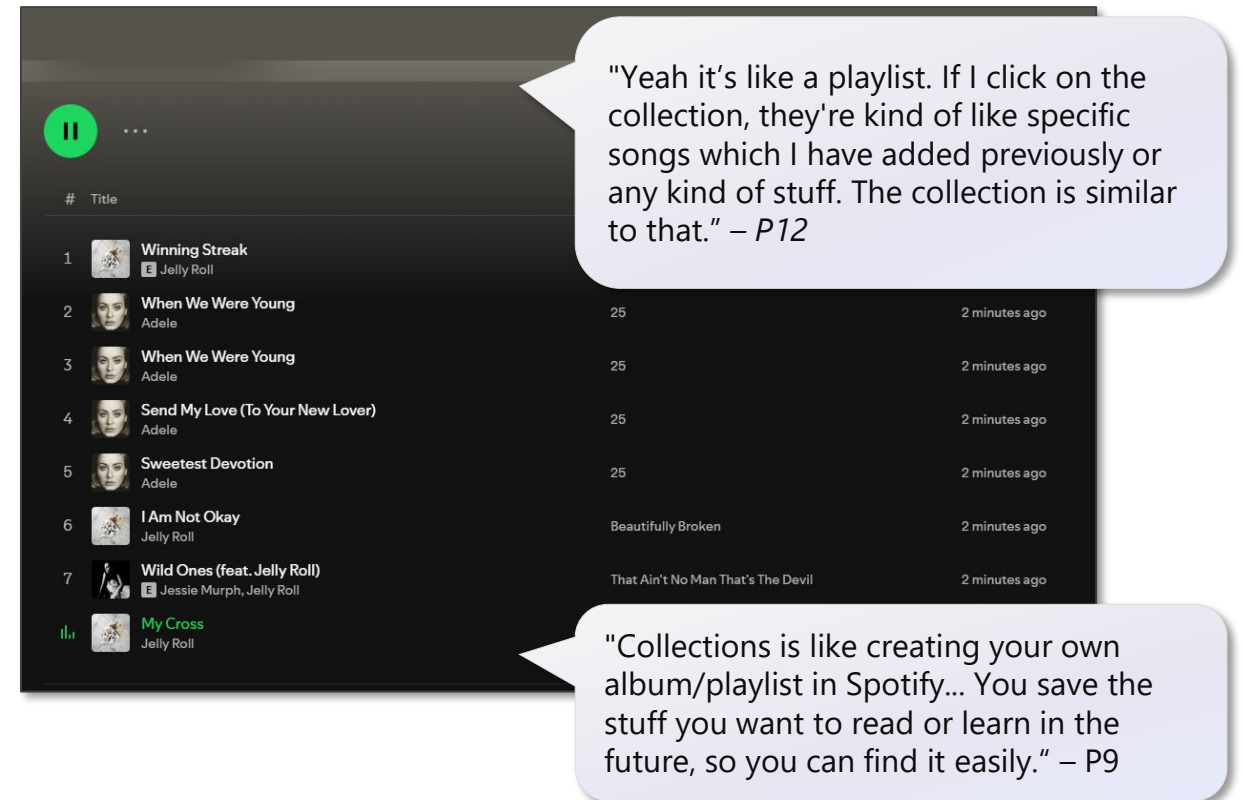
Users describe storing and managing content like a playlist, suggesting future design concepts should draw inspiration from playlist functionality to better align with users' mental model

- Users compare storing content to music playlists, where they can group and store relevant courses, videos, and code samples, much like organizing songs, albums, and stations.

- Users appreciate the ability to organize their content similar to a playlist, enabling them to go through it at their own pace and in their preferred or shuffled order.

- 'Collections' specifically functions as a centralized learning hub, making it easy for managers to share curated content with their teams, much like sharing a playlist with friends and family.

Recommendations

- Consider exploring designs that operate similarly to playlists.

Spotify Playlist

"Yeah it's like a playlist. If I click on the collection, they're kind of like specific songs which I have added previously or any kind of stuff. The collection is similar to that." – *P12*

"Collections is like creating your own album/playlist in Spotify... You save the stuff you want to read or learn in the future, so you can find it easily." – P9
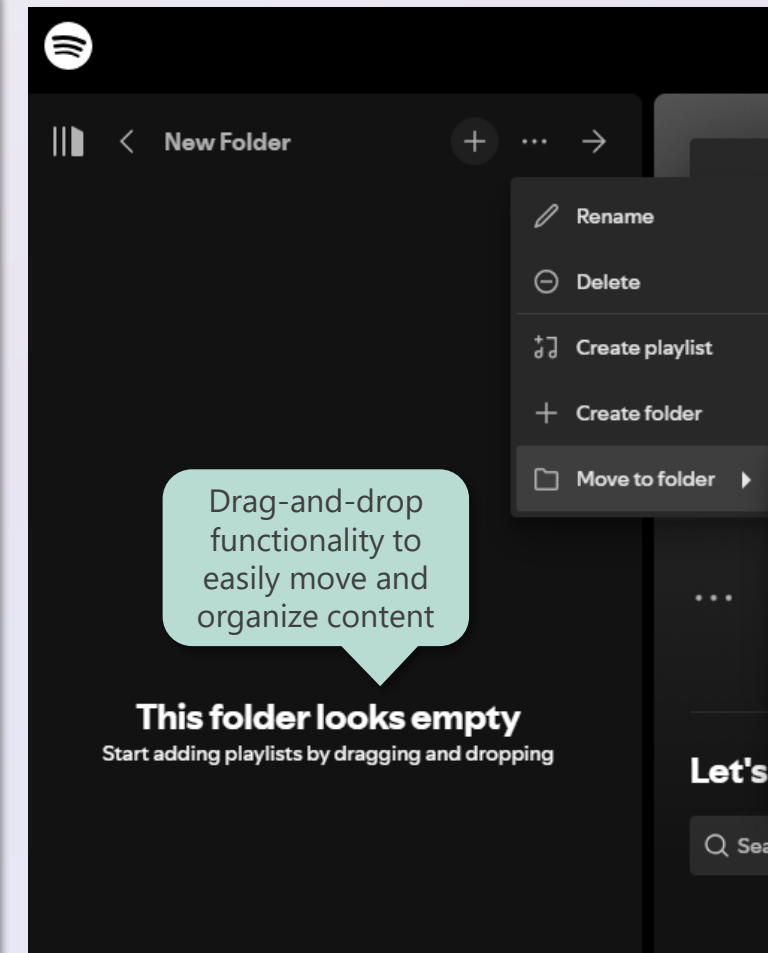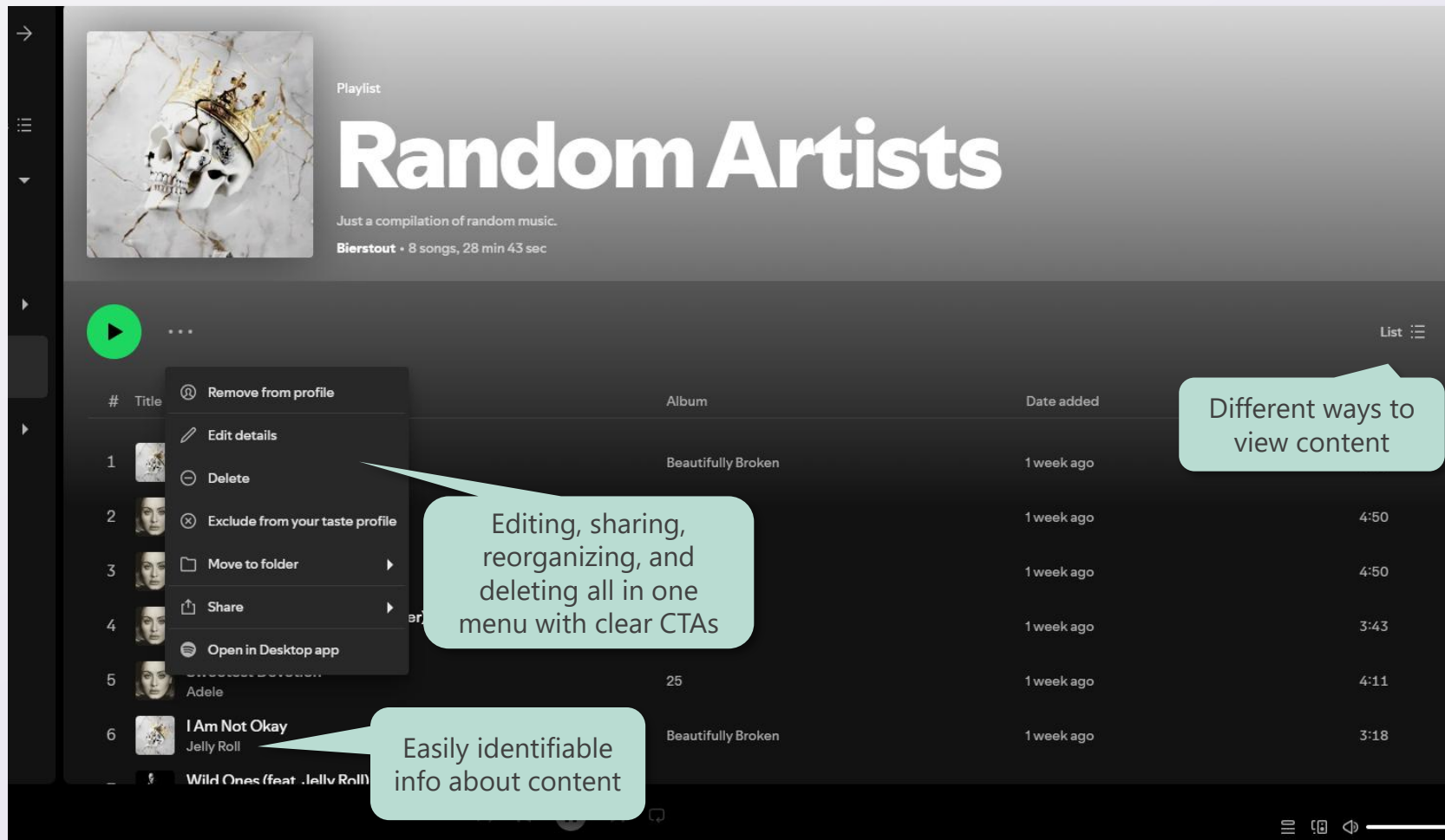
Spotify: Dashboard

The screenshot below showcases the various features and functionalities users encounter upon logging into their account, many of which align with what users have expressed they'd like to see in their account.

Easily sort by different types of content

Accessible option to create a play list or new folder

Playlists for organizing individual songs/tracks, and folders for grouping playlists.

Recommendations based on what user has already listened to

Content user has previously listened to
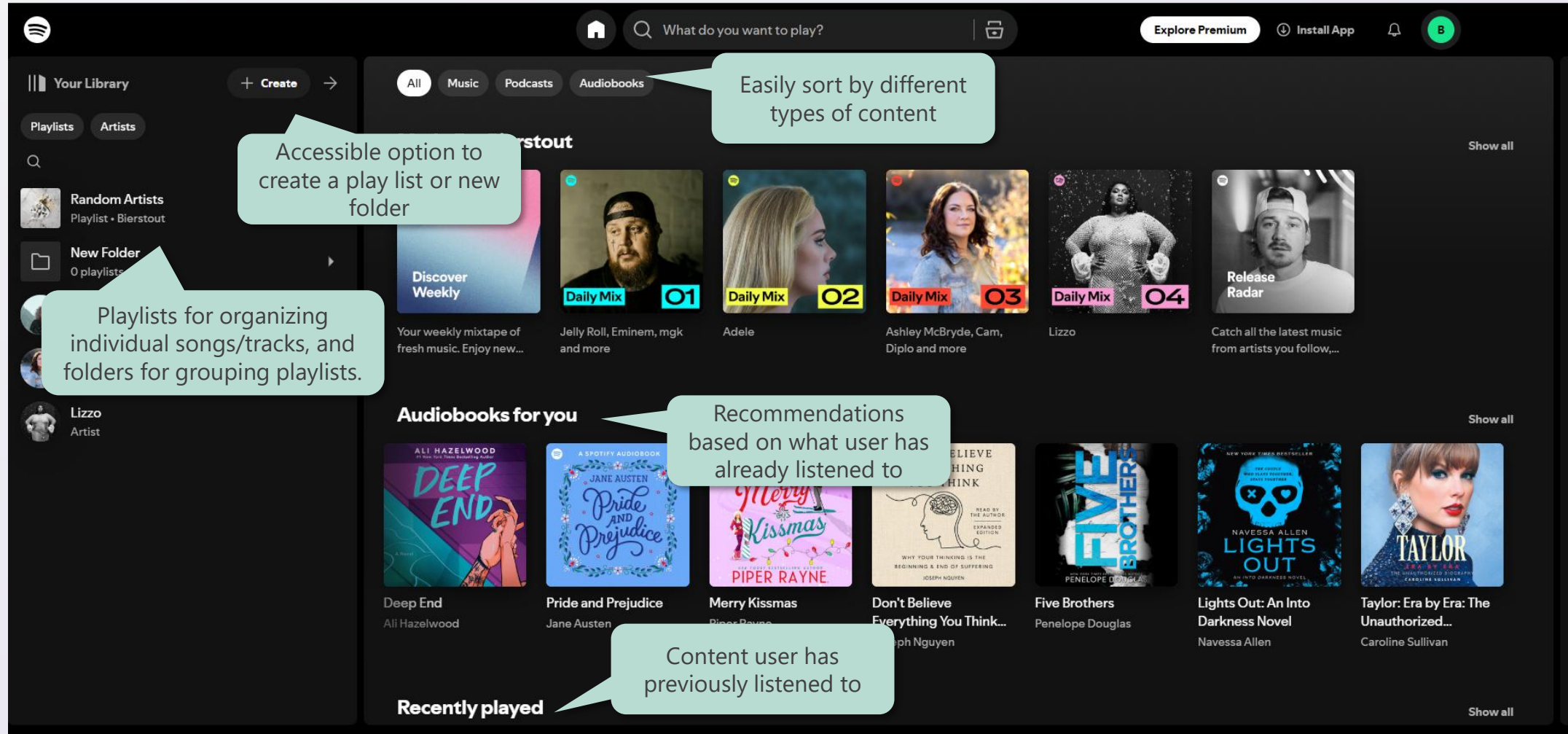
Spotify: Playlist

The screenshot below displays an individual playlist in Spotify, highlighting features and functionalities that closely align with what users want for managing their learning content in their account.

Different ways to view content

Editing, sharing, reorganizing, and deleting all in one menu with clear CTAs

Easily identifiable info about content

Drag-and-drop functionality to easily move and organize content

Key Recommendations & Next Steps

Key Recommendations

Near Term

1. **Prioritize consolidating 'Collections' and 'Plans' into a single, flexible learning container** that enables content management while integrating the most valued features from both experiences.

2. **Prioritize providing more opportunities for users to organize their saved content** by enabling sorting/filtering of content and drag-and-drop functionality.

3. **Consider incorporating additional optional settings**, such as privacy controls, start and end dates/milestones, and sharing options, to give users greater control over their saved content.

4. **Consider removing restrictions on publishing and editing** to allow users more flexibility in managing their saved content.

5. **Consider surfacing the learning dashboard sooner in the workflow** as opposed to having it nested within profile to ensure users can easily discover the content.

Longer Term

1. **Explore design concepts that adopt a playlist-style format** to better align with users' mental models and expectations and how they expect to interact with saved learning content.

2. **Prioritize conducting a comprehensive review of all CTAs and icons on the site**, to ensure consistency across the platform.

Next Steps

1. **Leverage available resources to develop a unified content storage experience** that integrates the design and research recommendations outlined in this deck.

2. **Perform a heuristic review on new designs** to identify potential pain points and usability issues that could impact the user experience.

3. **Conduct a concept design study to identify** key usability improvements, user needs and expectations, and optimal workflows.

4. **Conduct an exploratory study to understand how employees and vendors create and engage with Challenges**, identifying pain points, user confusion, and mental models.

5. **After the concept study, consider conducting a usability test** to uncover task-specific blockers, challenges, and any additional navigation issues.

THANK YOU

Appendix:

Pulse Competitive Analysis

As part of the study, the researcher performed a lightweight competitive analysis of only the dashboards, not platforms.

Dashboard features	Coursera	Udemy	Other site
Takes users directly to dashboard from website	✓	✓	User must click on Training to be taken to their personal dashboard
Collection of learning content is accessible from dashboard	✓	✓	To access all learning content user must click on account, then profile, then collections or plans
Progress tracking of current course	✓	✓	✓
Dashboard looks and feels personalized for user	✓	✓	Welcomes user, but it doesn't feel very personalized compared to the other platforms
Profile contains user information only	✓	✓	Profile contains learning content; user must click settings to update profile info
Recommended learning content	✓	✓	✓
Popular learning content	✓	✓	Site only offers new or recently updated, it lacks popular content or what others are learning

*Items from training dashboard are being compared to other platforms main dashboard