Product Certification Framework Messaging

Vision + Goals	**Vision for Certification Program** Everlaw's product certification is a comprehensive role based learning experience that combines curated learning resources, self-guided practice, and exam verification to ensure that the learner has the knowledge to: 1. Design and build workflows on Everlaw. 2. Perform and troubleshoot tasks requiring Everlaw mastery. 3. Successfully support other users through their Everlaw usage. **Business Goals** Customer Retention ● Product and workflow knowledge leads to better user experience and increased usage of the platform (less confusion, fewer support interactions), which improves retention for both individuals and their organization at large. ● When users are confident in their product knowledge, they are able to build efficient workflows that leverage the full product scope. (Users get the most out of the platform.) ● Understanding all product offerings highlights key Everlaw features and use cases they may not have had previous exposure to. ● Building expertise to be able to support org users Brand Advocacy ● Turns users into internal advocates that are trusted ● Users can brand themselves as Everlaw experts, helping with career growth and demonstrating worth to higher-ups ● Users are invested in their product knowledge growth and will want to bring that expertise with them as they change roles or organizations ● Promotes best practice sharing Better Partnership ● A direct feedback loop between our Users ⇔ Everlaw ● Drives engagement with the rest of our knowledge & training resources ● Ties Everlaw into their career story (e.g., Everlaw Accredited)
Value proposition	**An educational, empowering, and validating learning experience built by ediscovery experts.**

Word	Goals	Meaning
Educational	Customer retention and loyalty	We teach customers how to get the most out of the platform, incentivizing them to stay.
Empowering	Brand advocacy	We help turn customers into Everlaw/ediscovery experts that are able to work independently,work more successfully with their legal teams, and train others to become experts themselves.
Validating	Better Partnerships	We validate users through the accreditation process.
Built by ediscovery experts	Built by Everlaw's Product Team	The Product Certification Program was developed and curated by Everlaw's most knowledgeable ediscovery experts with our users in mind.

Audience	We expect two audiences for the mapped certifications.
	    (1) **Role-Based**: Users who are currently, or would like to in the future, fulfilling workflows that relate to specific professional roles.
	    (2) **Specialized**: Users that would like to become experts in specialized workflows that complement their professional responsibilities.
	
	We currently expect the audience to attract users at customer accounts across all segments. However, we expect users from larger organizations to be more interested in role-based certifications as an investment in their adoption of the tool. Individual users are more likely to be attracted to specialized certifications, unless they are working at small/mid-size organizations where they are responsible for multiple workflows.
	
	Role Based:
	    1. **Reviewer**- Users who perform document review and basic search on the platform. These users typically have restricted permissions.
	        a. This group includes a subset of users that are contracted out for

document review. This means that their ramp time is limited, and it is often a professional advantage to demonstrate expertise across a range of doc review tools.

2. **Data Operations** - Users who manage their organization's data, typically from collection to production.
    a. Data operations are seen as a high risk workflow. These users are generally very trusted by their organization and often are responsible for uploads and productions across several or all of the matters that their organization is using Everlaw for.
    b. These workflows are generally time sensitive and have a financial weight which increases the value of expertise in this workflow (ability to troubleshoot, etc.)
    c. Users with this responsibility generally have Database Admin permissions, and can often have PA or OA permissions as well.
    d. At larger organizations, this can be a role in and of itself.
    e. At smaller or mid-size organizations, this responsibility is often wrapped up in additional project management responsibilities handled by paralegals, lit support specialists, project managers, and (sometimes, but rarely,) attorneys.

3. **Project Managers**- Users who are managing the workspaces for their organization's matters. This typically means that they are responsible for project set up, review management, and post-review workflows.
    a. These users are generally Project Admins and are often also OAs.
    b. We expect this offering to be a catch-up for users that are often responsible for their organization's adoption of Everlaw, and are building new workflows or translating existing workflows into Everlaw.
    c. Users that support organizations through their use of Everlaw (training attorneys at their organization on the tool, consultants, managed service providers.)

Specialized:
- **Example:** Storybuilder (to be available with general release) This specialization is valuable for attorneys that are primarily leveraging Storybuilder.

Elevator pitch	Navigating new technology is difficult; learning how to use a new ediscovery platform is even more so. Legal teams often find themselves in the unenviable position of adopting complicated technology, receiving minimal technical support, and trying to prove their worth to their organization.

	We're here to change that. The Everlaw Product Certification Program combines learning, guided practice, and verification to ensure that the users can leverage Everlaw to optimize their user of the product for expertly designed/efficient workflows, become ediscovery experts, and become a trusted product expert for their organization. Through a self-guided learning experience, Everlaw accredited users are empowered to become true ediscovery experts and to share their expertise with those in their organization.		
Long description	The Everlaw Product Certification Program is a modularized, self-guided learning experience on the platform built with specific product learning workflows. It combines learning, practice, and verification to ensure that the users can leverage Everlaw to the highest levels, become ediscovery experts, and prove their worth to those in their network.		
Supporting pillars **(Customer goals)**	**Pillar #1** To become an Everlaw expert. (Learn through a comprehensive and self-guided course built by experts.)	**Pillar #2** Become a trusted Everlaw expert within my organization. Enable my organization's success with the tool. (Share your newfound expertise with those within your organization.)	**Pillar #3** Demonstrate your ediscovery expertise through accreditation.
Pain point(s)	- There is so much to learn and I don't know where to begin. - I want to build workflows that are efficient, but I don't know the scope of offering or the best way to build a new workflow on Everlaw. - I've used [another platform/on-prem] for a long time and	- I need to quickly troubleshoot questions on the product or key workflows. - I need to train many people in my org on the platform - I need to get buy-in from internal stakeholders in order to prioritize our ediscovery process	- I want to be able to highlight my accreditation to make myself more desirable to potential employers. - I want to be able to demonstrate my Everlaw expertise to my current employer.

	expect [Everlaw/the cloud] to work in a way that it doesn't. - I'm intimidated by [the platform/the cloud] and process - I want to learn innovative ideas and shortcuts from my peers. - I am being tasked with building workflows/ moving existing workflows onto Everlaw and don't know the best way to do that.		