

Design Document

Investment Dream Process

Course Structure	Discussed ideas/takeaways
<i>Business Purpose</i>	<p>Canella Financial Group uses a unique plan (DREAM) to achieve their client's investment needs. Currently the website has only a brief summary of the process. Client wants a video explaining the DREAM process.</p> <p>The purpose of the training is to explain the DREAM process.</p>
<i>Business Goal</i>	<p>Using the DREAM process, Canella Financial Group will develop a unique plan to achieve their client's individual investment goals.</p>
<i>Target Audience</i>	<p>Future and current clients</p>
<i>Training Time</i>	<p>2 minutes</p>
<i>Training Recommendation</i>	<ul style="list-style-type: none">• Camtasia video
<i>Deliverables</i>	<ul style="list-style-type: none">• Design Document• Storyboard• Camtasia video
<i>Intended Outcomes</i>	<p>The purpose of the training is to explain the DREAM process.</p>
<i>Training Outline</i>	<ul style="list-style-type: none">• What are your dreams?• DREAM Process<ul style="list-style-type: none">○ Discover○ Research○ Empower○ Action○ Monitor• Contact information
<i>Evaluation Plan</i>	<ul style="list-style-type: none">• Survey clients for understanding of the DREAM process after reviewing video.