PRAGMATIC INSTITUTE CASE STUDY

Fidelity Investments

Introduction

This case study of Fidelity Investments is based on an August 2020 survey of Pragmatic Institute customers by TechValidate, a 3rd-party research service.

> "Being able to quantify customer problems in terms of their business impact and their pervasiveness in the market."
>
> "Being able to now create better, more impactful product road maps that communicate the product strategy to a variety of audiences."

Challenges

The business challenges that led the profiled company to evaluate and ultimately select Pragmatic Institute:

- Took training courses with Pragmatic Institute for the following reasons:
  - Increase strategic focus
  - Align with internal departments
- Experienced the following challenges with the corresponding frequency:
  - Delays in product launches: somewhat often
  - Roadmaps that were guided by opinions and not market facts: very often
  - Delivered features that weren't being used by customers: very often
  - Important features that were dropped from each new release: very often
  - Revenue goals that were not being hit: uncommon
  - deals that were being heavily discounted: somewhat often

Use Case

The key features and functionalities of Pragmatic Institute that the surveyed company uses:

- Employees have taken training classes in the following areas:
  - Foundations
  - Focus
  - Build
- Had the following groups attend the Pragmatic Marketing training:
  - Immediate team
- Has offered Pragmatic Institute training to its employees for 1-2 years.

Results

The surveyed company achieved the following results with Pragmatic Institute:

- Has been able to realize the following benefits by taking the courses:
  - Increase the number of releases in a given year
  - Increased confidence in the roadmap
  - Better align with internal teams
- Estimates their level of improvement to be as follows for each of the corresponding areas since taking Pragmatic Institute training:
  - Product/feature usage: 50-74%
  - Reduced time to market: 50-74%
  - Reduced rework: 25-49%
  - Product sales: 25-49%
  - Customer satisfaction/NPS: 50-74%
  - Their understanding of the market and its relevant problems: 50-74%

Company Profile

Company:
Fidelity Investments

Company Size:
Large Enterprise

Industry:
Financial Services

About Pragmatic Institute

Pragmatic Institute is committed to providing great education to product leaders, business professionals and data scientists. Become market- and data-driven, and enhance your products, your business and your career with Pragmatic Institute.

Learn More:

 Pragmatic Institute

Source: Ryan Griffin, Product Manager, Fidelity Investments