

Delivery Review 2024-04-18

i Apr 18, 2024

17 Meeting link:

👤 Recording Link :

How to Join:

- Google Meet
- Video meeting: camera on

Purpose & Outcome:

- Every 2 weeks on Thursday
- 1 hour
- 10am PT start

i **Objective:** Assess completed increment, gather feedback to guide product & marketing direction, and ensure alignment between product development and marketing strategies.

- ▼ View outline & format
- **Product (15-20mins)**
 - **Product Owner** recaps sprint goals and highlights any key objectives achieved or missed
 - Product development team showcases the completed product increment.
 - Product design/UX showcases any design work that informs future product increment
 - Focus on user-facing features, changes, and improvements.
 - Explain technical choices, trade-offs, and any known challenges or limitations.
 - **Stakeholders:** Offer feedback from a business and user perspective.
 - **Marketing & Enterprise (15-20mins)**
 - **Marketing Coordinator** recaps past month/2 weeks' goals and highlights any key objectives achieved or missed
 - Marketing delivery team showcases current marketing campaigns, performance, and adjustments.
 - Planned messaging and promotional strategies for the upcoming launches
 - Explain decisions, trade-offs, and any known challenges or limitations
 - **Stakeholders:** Offer feedback from a business and user perspective.
 - **Q&A and Open Discussion (5-10mins)**
 - Address any remaining questions or concerns.
 - Capture ideas or opportunities for future collaboration.
 - **Action Items and Next Steps (2mins)**
 - Summarize key takeaways and actionable items for both teams.

Agenda

OKR #1	<ul style="list-style-type: none"> ▼ Increase enterprise contracts by increasing lifetime value of SMB contracts <ul style="list-style-type: none"> • 90% of enterprise contracts renew • Achieve \$8.5M in enterprise revenue recognition by year end
OKR #2	<ul style="list-style-type: none"> ▼ Strengthen our database by increasing data quality, quantity and richness <ul style="list-style-type: none"> • 10% of owners retake Business Health Score™ • 60% of owners retaking BHS improve their score in 180 days
OKR #3	<ul style="list-style-type: none"> ▼ Increase owner transactions by increasing value & stickiness of our offering

[Governance 2024 | All ideas](#)

[Hello Alice Delivery & Marketing](#)

[Hello Alice Core](#)

- 10% of <180 day active owners make ≤ 1 transaction per month

Introduction

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Company Updates


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Product Delivery

Sprint Goals

What's next

Initiative / OKR		OKR #1 OKR #2 OKR #3
Stakeholder		
Feature Epic & stories	<input checked="" type="checkbox"/> HAC-14346: Remove H1 or H2 options in CKEditor in Resources, Guides, and Programs DONE	
		
Business/Use case		
Notes/Feedback		

Initiative / OKR		OKR #1 OKR #2 OKR #3
Stakeholder		
Feature Epic & stories	<input checked="" type="checkbox"/> HAC-14457: Embed lendflow borrower portal to app DONE	
		
Business/Use case		
Notes/Feedback		

Marketing & Enterprise Delivery

Current Initiatives

- Esty June Virtual Event
- Money Mindset - LA In person Event
- Post Mastercard Strive Dedicated Marketing Efforts

What's next

- Chase Affiliate Offer
- eBay Up and Running

FedEx Boost Camp - Ending Tasks

Progressive Driving Small Business Forward (dedicated email #1 delivery due date is end of April)

Nextstreet (End of June)

What's Coming

Governance Item		OKR #1 OKR #2 OKR #3
Stakeholder		
Feature Epic & stories		
Design		
Business/Use case		
Notes/Feedback		

Initiative / OKR		OKR #1 OKR #2 OKR #3
Stakeholder		
Feature Epic & stories		
Business/Use case		
Notes/Feedback		

Release Notes

Product Release Notes

Product Release Notes

Type	Status	Priority	Key	Summary
	TO DO		HAC-14602	[WR] Err
	DONE		HAC-14600	[HF] afte
	TO DO		HAC-14587	Update b
	DEFINE SCOPE		HAC-14577	Update A
	TO DO		HAC-14565	Base car
	TO DO		HAC-14543	[stub] Ne
	DONE		HAC-14521	add poin
	IN PROGRESS		HAC-14504	Global A
	IN REVIEW		HAC-14502	[WR] Up
	DONE		HAC-14500	[WR] Up


Marketing Release Notes

Marketing Release Notes

Type	Status	Due date	Key	S
	TO DO	Apr 19, 2024	HADM-15...	Cr
	TO DO	Apr 24, 2024	HADM-15...	[C]
	TO DO	Apr 18, 2024	HADM-15...	[C]
	TO DO	Apr 29, 2024	HADM-15...	[C]
	TO DO	Apr 19, 2024	HADM-15...	[C]
	DONE	Apr 19, 2024	HADM-15...	[U]
	TO DO	Apr 19, 2024	HADM-15...	[U]
	TO DO	Apr 24, 2024	HADM-15...	[N]
	TO DO	Apr 22, 2024	HADM-15...	[M]
	TO DO	Apr 19, 2024	HADM-15...	Et
	TO DO	Apr 24, 2024	HADM-15...	Et

Type	Status	Priority	Key	Summary
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21 items

Synced just now 

Type	Status	Due date	Key	S
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127 items

Synced just now 