

6/27/2024 Product & Program Delivery Review

Jun 27, 2024
 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

Objective: Assess completed increment, gather feedback to guide product & marketing direction, and ensure alignment between product development and program delivery 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

Company Updates

- Intro - @Carolyn Rodz
 - May Profitability 📊
 - Day after 4th of July holiday - Company off 🇺🇸
- OKRs @Tino Capone 6.25.24 - Bi-Weekly Analytics Report, OKRs & Op Metrics v2
- Product Delivery @Marianne Masculino Bethel
- Program Delivery @Amy Wise (Unlicensed)

Product Delivery

Sprint Goals

- Implement new card component across the Hello Alice platform


What's next

- Update Dashboard with new card components & bands
- Implement image uploader component across all editors in Mad Hatter
- Support for categories & metadata across all content types

Initiative / OKR	G2024-26: HA Core - Card Consolidation & Upd ate	OKR #2 OKR #3
Stakeholder	@Marianne Masculino Bethel @Kelsey Ruger	
Feature Epic & stories @Sumer	HAC-14635: HA Core - Card Consolidation & Update DONE HAC-14639: New Resource/BSC Card implementation DONE HAC-14636: New Program Card Implementation DONE HAC-14638: New Grant Card Implementation DONE HAC-14634: New Guide Card Implementation DONE	
Business/Use case	By creating a standardized visual structure for content types cards, ensuring prominent placement of CTAs, and leveraging better user understanding, Hello Alice can significantly improve user engagement and retention, build trust, and increase conversions.	
Notes/Feedback	Supports Solutions v2.0 with updated card components across all content types and their respective landing pages (offers, events, tools, guides, programs and grants)	

Initiative / OKR	G2024-41: Boost Camp Application Support	OKR #2 OKR #3
Stakeholder	@LaToya Ratlieff	
Feature Epic & stories @Sumer	<input checked="" type="checkbox"/> HAC-14924: Update copy on Grants pages to reflect new program initiatives DONE	

Business/Use case	Supports Boost Camp applications being included alongside Grants under the Funding area of the application
Notes/Feedback	

Initiative / OKR	HAC-14150: FNBO Support IN PROGRESS OKR #2 OKR #3
Stakeholder	@Sarah Lowrie
Feature Epic & stories	<input checked="" type="checkbox"/> HAC-14910: FNBO Request Updates Compliance DONE  @Sumer
Business/Use case	Compliance updates requested by FNBO to updates offer copy for applying for a Hello Alice credit card
Notes/Feedback	<ul style="list-style-type: none"> Required a code change in WordPress to accommodate the specify copy & format requested by FNBO's compliance team

📖 Hello Alice Programs Delivery

📖 Launched

• BOOST CAMP PROGRAMS

- Progressive
- Antares
- Etsy
- Tiger Global
- PepsiCo
- Wells Fargo
- FedEx

NON-BOOST CAMP PROGRAMS

- Mastercard Strive
- Dell BHE
- Dell virtual event
- DoorDash grant
- Chase BHE
- Pepco grant

➡ In Progress & What's next

-

Business Health Engine (Offers, Credit, Loans)	G2024-39: Playbook - Business Health Engine (BHE) OKR #1 OKR #2 OKR #3
	G2024-12: Salesforce Email Journey (US Bank)
	G2024-38: BHE - Marketing Toolkit
	G2024-42: Active Program Clean-up V1

	G2024-43: Program Management & Partner Reporting Initiative	
Program Manager + Stakeholder(s)	@Sarah Lowrie @julia.hanson @Tino Capone @sarah engel	
Feature Epic & stories	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> HAC-14910: FNBO Request Updates Compliance DONE OKR #1 <input checked="" type="checkbox"/> HADM-1871: Loan Marketing Emails - Lendflow 2024 DONE OKR #1 OKR #3 <input checked="" type="checkbox"/> HADM-2039: BHE Full Toolkit Template Creation IN PROGRESS OKR #1 OKR #3 <input checked="" type="checkbox"/> HADM-1926: DELL Business Health Engine (BHE) IN PROGRESS OKR #1 OKR #3 <input checked="" type="checkbox"/> HADM-2059: BHE MHM Asset for Approval Chase DONE OKR #1 OKR #3 <input checked="" type="checkbox"/> HADM-1872: [Progressive BHE] MHM Asset for Approval DONE OKR #1 OKR #3 <input checked="" type="checkbox"/> DMG-525: BHE V1 Reporting Requirements DONE OKR #1 OKR #2 <input checked="" type="checkbox"/> DMG-512: Progressive Reporting DONE OKR #2 	
Notes/Feedback	Upcoming: Epics going in for BHE asset creation for both HA Card and Loan products! User Journey and Email Journey work in collaboration with Lendflow to improve communication and experience for all product generated emails.	

Grant and Boost Camp Programs		OKR #1 OKR #2 OKR #3
Program Manager + Stakeholder(s)	@LaToya Rattieff	
Feature Epic & stories	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> HADM-1659: BGE Energizing Small Business 2024 IN PROGRESS <input checked="" type="checkbox"/> HADM-1167: Etsy Creative Business Grant & Boost Camp 2024 IN PROGRESS <input checked="" type="checkbox"/> HADM-1792: DoorDash Summer 2024 Grant IN PROGRESS <input checked="" type="checkbox"/> HADM-1307: Progressive - Driving Small Business Forward 2024 IN PROGRESS <input checked="" type="checkbox"/> HADM-1686: Antares REACH 2024: Grant & Boost Camp IN PROGRESS 	
Notes/Feedback	<ul style="list-style-type: none"> • https://drive.google.com/drive/folders/1-0oNQbSOZaBqsVxVfg6gkTFL7OsRuLC4 Connect your Google account • <input checked="" type="checkbox"/> HADM-1926: DELL Business Health Engine (BHE) IN PROGRESS • <input checked="" type="checkbox"/> HADM-1967: [Dell Virtual Forum July 2024] - Uplifting Professional Business Service Entrepreneurs with Dell IN PROGRESS • <input checked="" type="checkbox"/> HADM-1792: DoorDash Summer 2024 Grant IN PROGRESS • <input checked="" type="checkbox"/> HADM-1325: Chase Business Banking - Preferred Affiliate 2024 IN PROGRESS • https://drive.google.com/drive/folders/1XvOmc-JTIZiW0ua8JdHmKwAlhTJSd5ks Connect your Google account 	

Events	Jillian is Out of Office, but left a detailed document	OKR #1 OKR #2 OKR #3
---------------	--	---

Program Manager + Stakeholder(s)	@Jillian Benvenuti
Feature Epic & stories	
Notes/Feedback	

Educational Programs	OKR #1 OKR #2 OKR #3
Program Manager + Stakeholder(s)	@Danielle Telleria (Unlicensed)
Feature Epic & stories	
Notes/Feedback	

What's Coming

Governance 2024 | All ideas



Log in to Jira to access this content

To view this content you need access to helloalice. Log in and refresh this page.

[Log in](#)

Release Notes

Product Release Notes

Product Release Notes

Type	Status	Priority	Key	Summ
	DONE	==	HAC-15244	[card co
	IN REVIEW	==	HAC-15240	[progran
	NOT DOING	==	HAC-15237	[MH] gu
	DONE	==	HAC-15235	[applica
	IN PROGRESS	==	HAC-15234	Spike B
	IN PROGRESS	==	HAC-15214	Extend
	TO DO	==	HAC-15212	(Due 8/1
	TO DO	==	HAC-15211	(due 8/1
	TO DO	==	HAC-15197	Update
	IN PROGRESS	==	HAC-15196	[WR] Co
	BLOCKED	==	HAC-15195	[WR] Cr
	TO DO	==	HAC-15176	[WR] W
	HAC-15154	...

27 items

Synced just now

Marketing Release Notes

Marketing Release Notes

Type	Status	Due date	Key	S
	IN PROGR...	Jul 30, 2024	HADM-23...	H
	TO DO	Jul 26, 2024	HADM-22...	[E
	TO DO	Jul 26, 2024	HADM-22...	[A
	TO DO	Jul 26, 2024	HADM-22...	[A
	TO DO	Jul 31, 2024	HADM-22...	[A
	DONE	Jul 22, 2024	HADM-22...	[V
	DONE	Jul 25, 2024	HADM-22...	[E
	DONE	Jul 26, 2024	HADM-21...	[E
	DONE	Jul 18, 2024	HADM-21...	[E
	DONE	Jul 15, 2024	HADM-21...	P
	TO DO	Jul 30, 2024	HADM-21...	D
	TO DO	Jul 30, 2024	HADM-21...	D
	IN PROGR	Jul 29, 2024	HADM-21	D

151 items

Synced just now