

# 2024-07-11 Product & Program Delivery Agenda

**Jul 11, 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

### Agenda

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

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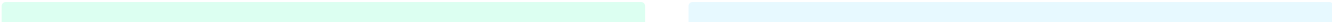
[Hello Alice Delivery & Marketing](#)

[Hello Alice Core](#)

## Company Updates

- Login and welcome
- Carolyn opens the meeting
- Launched: Updated content cards & card bands <https://app.helloalice.com/>
  - Updated & consolidated content cards allow for more space for titles & copy to improve user experience, engagement and retention to inform & build trust, ultimately increasing conversion.
  - Published grants will now appear on Dashboard Recommended for You section when set to Featured (no more creating separate resource cards to promote grants in-app)
  -

## Product Delivery






## Sprint Goals

- Implementation of new image cropper for Mad Hatter
  - Grant Editor
- Backend support for updated categories across all content
- Base category component for Mad Hatter

## What's next

- Continue implementation of image cropper across the other Mad Hatter editors
- Implement new category component across Mad Hatter editors

<b>Initiative / OKR</b>	 G2024-26: HA Core - Card Consolidation & Upd ate	OKR #1 OKR #2 OKR #3
<b>Stakeholder</b>	@LaToya Ratlieff @Marianne Masculino Bethel	
<b>Feature Epic &amp; stories</b>	 HAC-14567: Image uploader for Mad Hatter <span>DONE</span>  HAC-14672: 1. [MH] Add new image uploader to Grant editor <span>DONE</span> <b>Business/Use case:</b> Updates the image uploader across all content to use the same constraints & specs. support admin users uploading images to resize & optimize images so they have less blockers/delays to publishing content.	
<b>Notes/Feedback</b>		

## Hello Alice Programs Delivery

### Delivery Goals


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### In Progress & What's next

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<b>Grant Programs</b>	<ul style="list-style-type: none"> <li>• eBay (in review)</li> <li>• Bacardi (in review)</li> <li>• BGE (apps close tomorrow)</li> <li>• Doordash (apps close 9/3)</li> <li>• PepCo (apps open 8/19)</li> <li>• Venmo (recipients announced publicly 7/16)</li> </ul>	OKR #1 OKR #2 OKR #3
<b>Program Manager + Stakeholder(s)</b>		
<b>Feature Epic &amp; stories</b>		
<b>Notes/Feedback</b>		

<b>Events</b>	<p>7/31: Virtual Forum: Small Business Virtual Forum: Uplifting Professional Business Service Entrepreneurs with Dell</p> <p>9/10: Charolette Listening Tour with Mastercard &amp; Bank of America</p>	OKR #1 OKR #2 OKR #3
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<b>Program Manager + Stakeholder(s)</b>		
<b>Feature Epic &amp; stories</b> 		
<b>Notes/Feedback</b>		

<b>Business Health Engine (Offers, Credit, Loans)</b>	<ul style="list-style-type: none"> <li>• Dell</li> <li>• Progressive</li> <li>• Chase</li> </ul>	OKR #1 OKR #2 OKR #3
<b>Program Manager + Stakeholder(s)</b>	<p>@Sarah Lowrie @julia.hanson @Natalie Diamond @sarah engel @shannen.smith @Tino Capone</p>	
<b>Feature Epic &amp; stories</b> 	<ul style="list-style-type: none"> <li>✓ HADM-1872: [Progressive BHE] MHM Asset for Approval <b>DONE</b></li> <li>✓ HADM-2090: Mad Hatter Monday Email 7/8/24 Chase <b>DONE</b></li> <li>✓ HADM-2145: Mad Hatter Monday Email 7/15/24 DELL <b>DONE</b></li> <li>✓ DMG-512: Progressive Reporting <b>DONE</b></li> <li>✓ DMG-525: BHE V1 Reporting Requirements <b>DONE</b></li> </ul> <p>Updated Newsletter Template</p> <ul style="list-style-type: none"> <li>✗ HADM-2097: HA Credit Card (BHE) <b>OPEN</b></li> <li>✗ HADM-2098: HA Small Business Loan (BHE) <b>OPEN</b></li> </ul>	
<b>Notes/Feedback</b>		

<b>Educational Programs</b>	<ul style="list-style-type: none"> <li>• US Bank (launching 7/26)</li> <li>• Antares (review ends 7/19, recipients notified 7/22)</li> <li>• Comcast (next webinar 7/25; 2024-2025 program planning underway)</li> <li>• Etsy (recipients notified 7/22)</li> <li>• FedEx (application opens 11/4)</li> <li>• Strive (featured owner event happening 7/30; August webinar planning underway; new programming rolling out in July)</li> <li>• PepsiCo (grant application opens 8/20)</li> <li>• Progressive (review ends 7/12; recipients notified 8/13)</li> <li>• TGIV (meeting with team on Monday to nail down timing)</li> <li>• Wells Fargo (application opens 7/22)</li> </ul>	OKR #1 OKR #2 OKR #3
<b>Program Manager + Stakeholder(s)</b>		

Feature Epic & stories



Notes/Feedback

## What's Coming

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# Release Notes

## Product Release Notes

Product Release Notes

Type	Status	Priority	Key	Summary
	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	[food s

27 items

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## Marketing Release Notes

Marketing Release Notes

Type	Status	Due date	Key	Summary
	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

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