

2024-07-25 Product & Program Delivery Agenda

Jul 25, 2024

Meeting link:

Recording Link :

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

How to Join:

- Google Meet
- Video meeting: camera on

Purpose & Outcome:

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

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<ul style="list-style-type: none">• 10% of <180 day active owners make ≤ 1 transaction per month

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[Hello Alice Delivery & Marketing](#)

[Hello Alice Core](#)

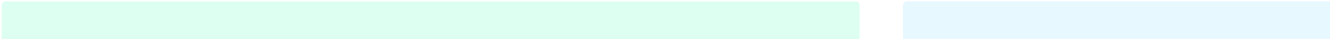
Company Updates/Announcements

- @Carolyn Rodz

- OKRs @Tino Capone

- @Kelsey Ruger

Product Delivery



 **Sprint Goals**

 **What's next**

- Implement new image uploader across Mad Hatter editors
- Implement new categories component across Mad Hatter editors
- Update Recommended for You on Dashboard with new card components
- Application type on BE to differentiate between Grant or Boost Camp

Initiative / OKR	G2024-26: HA Core - Card Consolidation & Upd ate	OKR #2 OKR #3
Stakeholder	@Marianne Masculino Bethel @Kelsey Ruger	
Feature Epic & stories	HAC-14567: Image uploader for Mad Hatter DONE	
	@Sal Capone	
Notes/Feedback		

Initiative / OKR	G2024-19: Business Solution Center Revision	OKR #2 OKR #3
Stakeholder	@Marianne Masculino Bethel @Kelsey Ruger	
Feature Epic & stories	HAC-14742: Category Remapping & Implementation IN PROGRESS	
	Business/Use case:	
	@Sal Capone	
Notes/Feedback		

Initiative / OKR	G2024-26: HA Core - Card Consolidation & Upd ate	OKR #2 OKR #3
Stakeholder	@Marianne Masculino Bethel @Kelsey Ruger	
Feature Epic & stories	HAC-14764: Update Program helpful resources tab with new card component DONE	
	HAC-15045: Update Dashboard: BHS Recommendations with new card components & card band TO DO	
	@Sumer	
Notes/Feedback		

Initiative / OKR	G2024-41: Boost Camp Application Support	OKR #2 OKR #3
Stakeholder	@LaToya Ratlieff @Tino Capone	

Feature Epic & stories	<input checked="" type="checkbox"/> HAC-15185: BE - Add Application Type to DB to Allow for Classification DONE
@Dominique Crowther	
Notes/Feedback	

Program Delivery


Delivery Goals

In Progress & What's next


Grant Programs		OKR #1 OKR #2 OKR #3
Program Manager + Stakeholder(s)		
Feature Epic & stories		
Notes/Feedback		


Events		OKR #1 OKR #2 OKR #3
Program Manager + Stakeholder(s)		
Feature Epic & stories		
Notes/Feedback		

Business Health Engine (Offers, Credit, Loans)	<input checked="" type="checkbox"/> G2024-42: Active Program Clean-up V1	OKR #1 OKR #2 OKR #3
Program Manager + Stakeholder(s)	@julia.hanson @shannen.smith @Natalie Diamond @moises.zamarripa	
Feature Epic & stories	<input checked="" type="checkbox"/> HADM-2097: HA Credit Card (BHE) OPEN <input checked="" type="checkbox"/> HADM-2098: HA Small Business Loan (BHE) OPEN <input checked="" type="checkbox"/> HADM-2039: BHE Full Toolkit Template Creation IN PROGRESS <input checked="" type="checkbox"/> HADM-1963: Business Health Engine Social Templates DONE	

	<input checked="" type="checkbox"/> HADM-1690: Audit of Establish Brand Guidelines Program TO DO	
Notes/Feedback		
Educational Programs		OKR #1 OKR #2 OKR #3
Program Manager + Stakeholder(s)		
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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