

Product & Program Delivery Review 2024-06-13

Jun 13, 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"> ✓ 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

- [Governance 2024 | All ideas](#)
- [Hello Alice Delivery & Marketing](#)
- [Hello Alice Core](#)

Introduction

- @Matt Brewster

Company Updates

- Mastercard Small Business Summit in NYC - @Matt Brewster
- Small Business Listening Tour: Chicago - @Ashley Singer
- Continued excitement and support of the lawsuit dismissal
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Product Delivery

Sprint Goals

- Complete card consolidation support
- Complete Card band/carousel component
- Complete image uploader component

What's next

- Apply new card component and carousel/card bands to platform
- Updates for copy to support Grant + Boost Camp program initiative

Initiative / OKR	G2024-26: HA Core - Card Consolidation & Update OKR #2 OKR #3
Stakeholder	@Marianne Masculino Bethel @Kelsey Ruger
Feature Epic & stories	HAC-14635: HA Core - Card Consolidation & Update DONE HAC-14426: Base Card Component DONE HAC-14727: Card carousel component DONE HAC-14629: Fallback image repository to pull for legacy content 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	<p>Supports card consolidation efforts by:</p> <ul style="list-style-type: none"> • building a new carousel/card band component for new card format • updating model & logic for all content types to new card format • implement fallback repository of images for content types that currently do not have featured images • Preview link used in demo: Hello Alice

Initiative / OKR	HAC-14635: HA Core - Card Consolidation & Update OKR #2 OKR #3
Stakeholder	@Marianne Masculino Bethel @Kelsey Ruger
Feature Epic & stories	HAC-14567: Image uploader for Mad Hatter DONE HAC-14674: New Image uploader component 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	<p>Enables admin user to resize and optimize featured images when publishing content</p> <p>Supports images across all content type cards on platform: events, offers, guides, programs, resources and grants</p>

Hello Alice Programs Delivery


Programs & Initiatives

What's next

- **Grant Program + Boost Camp**
 - Progressive (closes June 14th)
 - Etsy (closes June 21st)
 - Antares (closes June 28th)
- **Grant Program (no Boost Camp)**
 - BGE (closes July 12th)
- **Community programming**
 - Comcast RISE (2023-2024 program ends in August 2024)
 - Mastercard Strive (ongoing)
- **Events**
 - [Small Business Virtual Forum with Etsy \(Yesterday\)](#)
 - Small Business Virtual Forum with Dell (July 31st)
- **Business Health Engine (Offers, Credit, Loans)**
 - Mad Hatter Monday Revival
 - BHE Asset Template Creation
 - Chase for Business
- **Email**
 - Bamboo HR (newsletters)
 - Verizon (newsletters)
 - JPMC (newsletters)
 - Ueni (dedicated emails)
- **Grant Program + Boost Camp**
 - Wells Fargo group 1 (launches July 22)
 - PepCo (launches August 19)
 - FedEx (launching fall 2024)
 - PepsiCo (timing TBD)
- **Grant Program (no Boost Camp)**
 - DoorDash (launches June 17th)
- **Boost Camp (no grant funding)**
 - Tiger Global Impact Ventures groups 1+2 (application launches 7/1)
- **Boost Camp Accelerator Execution**
 - Currently working to build out Antares as the first Antares session is August 8, quickly followed by:
 - Etsy sessions begin August 15
 - Tiger Global, Group 1 sessions begin Sept. 4
 - Progressive sessions begin September 10
 - Wells Fargo, Group 1 sessions begins Oct. 1
 - Tiger Global, Group 2 sessions begin Oct. 15
 - Wells Fargo, Group 2 sessions begins Oct. 16
- **Events**
 - Small Business Virtual Forum with Dell (2 events Q3 2024)
 - Venmo (onboarding session in August)
 - Bank of America (timing TBD)
- **Business Health Engine (Offers, Credit, Loans)**
 - Dell pilot program
 - US Bank
- **Community programming**
 - Comcast RISE (2024-2025 program launching in October)
 - Mastercard Strive (new programming rolling out in July)

Initiative / OKR	Grant badge for grant recipients	OKR #1
Stakeholder	@LaToya Ratlieff	
Feature Epic & stories	<input checked="" type="checkbox"/> HADM-1765: Hello Alice Promo Kits: Grant Badge DONE	
Notes/Feedback	New badge for grant recipients to use on their social channels or in community. Here are the final versions . American Dream Awards was used as placeholder, but we can change the company name if needed.	

Initiative / OKR	
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Stakeholder	
Feature Epic & stories 	
Notes/Feedback	

What's Coming

 Governance 2024 | All ideas



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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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