

2024-08-08 All-Hands & Delivery Agenda

📢 Agenda Aug 8, 2024

- Introduction of new team members - @Kelsey
- Carolyn's Notes & Comments
- Operational Note
 - Slack & Meeting clean-up - @Kelsey
 - Community Activity - @jillian
- Program & Product Updates - @Kelsey
 - Flow of Work
 - Program Updates
 - Product Updates
- Company Announcements

Objective: This review is an opportunity for us to reflect on our latest accomplishments, gather valuable insights from our team and stakeholders, and ensure our product development and program delivery are in sync harmony with our company's goals. By actively participating, you're directly contributing to our collective success and helping steer us towards our ambitious goals. Your feedback is invaluable in refining our approach and keeping us on track to deliver exceptional results. Together, we'll use this time to assess our completed work, guide our product and program direction, and align our strategies for maximum impact.

- Important Links
- Program Delivery
 - Boost Camp & Educational Programs (What Is It?)
 - High Touch Events (What Is It?)
 - Business Health Engine
 - Grant Programs
 - Affiliates & Offers
- Product Delivery
 - Production Release
 - 🚧 Staging release for UAT
 - 📺 What's Next
- What's Coming
- Company Updates
 - Release Notes

Important Links

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 	<ul style="list-style-type: none"> 🔗 Hello Alice Governance All ideas 📊 Program Dashboard All Programs 📌 Hello Alice Delivery & Marketing 🔗 Hello Alice Core
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 	

Program Delivery

Boost Camp & Educational Programs (What Is It?)

Inflight Programs	<ul style="list-style-type: none"> • Wells Fargo Boost Camp (📌 HADM-1899: Wells Fargo 2024-2025 Boost Camps - Group 1 IN PROGRESS) • Antares REACH Boost Camp (📌 HADM-1686: Antares REACH 2024: Grant & Boost Camp IN PROGRESS) • The Creative Business Boost Initiative (📌 HADM-1167: Etsy Creative Business Grant & Boost Camp 2024 IN PROGRESS) • Progressive @Driving Small Business Forward (2024) (📌 HADM-1307: Progressive - Driving Small Business Forward 2024 IN PROGRESS)
Upcoming Programs	<ul style="list-style-type: none"> • PepsiCo Juntos Creemos Program (📌 HADM-969: PepsiCo Juntos Creemos Grant & Boost Camp IN PROGRESS) <i>Launching 8/20</i> • Tiger Global Boost Camp (📌 HADM-1697: Tiger Global 2024: Boost Camps, Group 1 IN PROGRESS) <i>Launching TBD</i>

Notes/Insights	<ul style="list-style-type: none"> • Overall Status: A concise summary of the program's health (on track, at risk, delayed, etc.) • Key Highlights: 2-3 major accomplishments or milestones achieved during the reporting period. • Key Challenges: 2-3 major obstacles or risks encountered during the reporting period.
Action Items/Next Steps	<ul style="list-style-type: none"> • Immediate Priorities: List the top 3-5 actions that need to be taken in the next reporting period. • Long-Term Focus: Identify 1-2 key areas of focus for the remainder of the program. • Dependencies: Any actions or decisions that are dependent on external factors or other teams.

High Touch Events (What Is It?)

Recently Wrapped Up!	<ul style="list-style-type: none"> • July 30th • Mastercard Strive: How I Built My Biz: Tisa Clark (Link to Epic) • July 31st • Video Conferencing, Web Conferencing, Webinars, Screen Sharing Uplifting Professional Service Entrepreneurs with Dell (HADM-1967: [Dell Virtual Forum July 2024] - Uplifting Professional Business Service Entrepreneurs with Dell IN PROGRESS) <ul style="list-style-type: none"> • RSVP's: 2,372 • Attendees: 647
Inflight Programs	<ol style="list-style-type: none"> 1. August 28th • Mastercard Strive x Hello Alice: Inclusive Innovation and AI for Small Business HADM-2328: Mastercard Strive AI Webinar August 2024 IN PROGRESS 2. August 29th • Hello Alice x Comcast RISE: Successful Storytelling for Grants Success HADM-932: Comcast Business Health Webinars DONE 3. Sept. 10th • Charlotte, NC Listening Tour with Mastercard & Bank of America HADM-1864: Mastercard & Bank of America September Event IN PROGRESS 4. Sept. 24th • Mastercard Strive: How I Built My Biz: Jessica Payano (HADM-2415: [Mastercard Strive Communities: 2024 Comms] Sept. How I Built My Biz Webinar with Jessica Payano IN PROGRESS) 5. Oct. 22nd • Mastercard Strive x Hello Alice: (Jira) 6. Oct. 23rd • Small Business Virtual Forum: Seasonal Strategies: How Retail Businesses Can Leverage Holiday Momentum HADM-2148: Virtual Forum - October 23, 2024 with Dell IN PROGRESS 7. Nov. 19th • Mastercard Strive: How I Built My Biz: Ayisha Thompson
Upcoming Programs	<ol style="list-style-type: none"> 1. Dec. 10th • Mastercard Strive: How I Built My Biz: Owner TBC 2. Jan. 28th • Mastercard Strive: How I Built My Biz: Owner TBC 3. Feb. 25th • Mastercard Strive: How I Built My Biz: Owner TBC
Notes/Insights	<ul style="list-style-type: none"> • Overall Status: A busy second half of the year with 10 events currently slated, and talks for more being added (on track, at risk, delayed, etc.) • Key Highlights: Virtual Forums are well received, RSVP'd, and attended!

	<ul style="list-style-type: none"> • Key Challenges: With the quantity of events on the calendar, my focus has been execution vs strategy.
Action Items/Next Steps	<ul style="list-style-type: none"> • Immediate Priorities: Execute Charlotte in person and see if in person is as valuable as virtual. • Long-Term Focus: Get the different events in a repeatable fashion. • Dependencies: Partner approvals tend to be slower than we work. I'd like to work through this better.

Business Health Engine

Inflight Programs	<ul style="list-style-type: none"> • Progressive BHE (HADM-2111: Progressive Business Health Engine IN PROGRESS) • DELL BHE (HADM-1926: DELL Business Health Engine IN PROGRESS) • Chase (HADM-1325: Chase Business Banking Business Health Engine DONE) • US Bank (HADM-843: US Bank Cohort Delivery Business Health Engine IN PROGRESS) • BSC Affiliate (HADM-2361: BSC Affiliate Publications 2024 IN PROGRESS)
Upcoming Programs	<ul style="list-style-type: none"> • HA Card BHE (HADM-2097: HA Credit Card Business Health Engine OPEN) • HA Loan BHE (HADM-2098: HA Small Business Financing Business Health Engine OPEN) • Salesforce & Lili Bank Pilots
Notes/Insights	<ul style="list-style-type: none"> • Overall Status: The BHE program is showing progress with consistent offers generated through established tools (Newsletter, MHM, BSC, Email Journey, Strategic Resource Placement) and a solid reporting base. On-demand email reporting in Metabase is near completion, with only one milestone remaining. The main area for improvement lies in operationalizing, scheduling, and prioritizing variable content, which is currently a manual process. • Key Highlights: Positive Feedback from meeting with Chase - looking to sign onto longer BHE contract Finalized Pricing in the Playbook Multiple Affiliate Partners looking for "more" Full Audit of Category Designation in BSC • Key Challenges: Not being able to link click data back to user level Strategy to convert Affiliate Partners to BHE
Action Items/Next Steps	<ul style="list-style-type: none"> • Immediate Priorities: Epic Automation for Onboarding, Gather Requirements for V2 Reporting, Style Guide for Toolkit, Social Strategy, Finalizing remaining Templates with Marketcatch • Long-Term Focus: Incorporating Insights into Reporting, including tracking of placements & Automation of dynamic content placement in BHE Templates • Dependencies: Program Audit Completion (HADM-1677: Full Program Audit OPEN) so we can weave in more strategic offer placements and secure an improved user experience, including incorporation into Boostcamp Guides

Grant Programs

Inflight Programs	<ul style="list-style-type: none"> • DoorDash Restaurant Disaster Relief Fund (Summer 2024) (HADM-1792: DoorDash Summer 2024 Grant IN PROGRESS) • BGE Energizing Small Business Grants (2024) (HADM-1659: BGE Energizing Small Business 2024 IN PROGRESS) • eBay Up & Running (2024) (HADM-1433: eBay Up & Running 2024 IN PROGRESS) • Backing the B.A.R (NAACP)
Upcoming Programs	<ul style="list-style-type: none"> • Pepco Energizing Small Business Grants (HADM-2268: PepCo (NOT PepsiCo) Grant 2024 IN PROGRESS) <i>Launching 8/26</i>
Notes/Insights	<ul style="list-style-type: none"> • Overall Status: A concise summary of the program's health (on track, at risk, delayed, etc.) <ul style="list-style-type: none"> ◦ DoorDash open until 9/3. Applications are currently a little low but the program was recently shared in the newsletter and another dedicated email sent. Will be doing additional outreach to ecosystem partners considering recent natural disasters in Florida, Texas, Iowa, etc. ◦ BGE is currently in the second round of review, with the announcement planned for 10/1 ◦ eBay is pending final selection and will begin zoom and in-person announcements the week of 8/26. • Key Challenges: Bandwidth to promote programs to ecosystem partners, currently finalizing the layout for a ecosystem partner newsletter but still sometimes require individual engagement to

	educate about programs and our products.
Action Items/Next Steps	<ul style="list-style-type: none"> • Immediate Priorities: <ul style="list-style-type: none"> ◦ Increase application #s for DoorDash, targeting priority locations based on partner guidance ◦ Need volunteers for eBay Zoom calls on 8/26 & 8/27 • Long-Term Focus: <ul style="list-style-type: none"> ◦ Finalize ecosystem partner Newsletter to regularly promote programs, owner spotlights, BHS and relevant state of small business data, highlights, etc.

Affiliates & Offers




Inflight Programs	<ul style="list-style-type: none"> • Program (Link to Epic) • Program (Link to Epic) • Program (Link to Epic)
Upcoming Programs	<ul style="list-style-type: none"> • Program (Link to Epic) • Program (Link to Epic) • Program (Link to Epic)
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Product Delivery

Production Release

- Image uploaders across all content editors in Mad Hatter
- Category tagging across all content editors in Mad Hatter

Staging release for UAT

Initiative / OKR	 G2024-53: Targeting - Band Definition
Stakeholder	@Kelsey Ruger @Marianne Masculino Bethel
Presenter	 n/a
Feature Epic & stories	 HAC-15188: Content Collection Management IN PROGRESS Business/Use case: Empower marketing and content teams to create, manage, and schedule pre-defined collections of cards, allowing for dynamic, targeted content presentation. By implementing this solution, we anticipate significant improvements in user engagement, content relevance, and overall platform effectiveness. The Card Band Management system aligns perfectly with our strategic goals of delivering personalized, valuable resources to our users and enhancing the overall user experience of the Hello Alice platform.
Notes/Feedback	Backend work to support card band management (Content Collection Management)

What's Next

Initiative / OKR	
Stakeholder	
Presenter	
Feature Epic & stories	
Notes/Feedback	

What's Coming

TBD

Company Updates

TBD

Release Notes

TBD