



Operational Efficiency Workstream Tracker

Operational Efficiency Weekly Workstream Tracker

Workstreams	Status	What we've done	What's next	Required Support
Salesforce Retirement	OnTrack	<ul style="list-style-type: none"> • Home Services: <ul style="list-style-type: none"> • Discovery on Data and waiting on CRM COE. CRM cut off EOW FW18. • Design and Architecture on data pipeline in progress. • Brand Affinity- <ul style="list-style-type: none"> • Weekly/ Daily- Identified blocks we want to look at. Mapping completed and included header data. Raja to review and provide logic for rec ID's. • Decommissioning Legacy Jobs for Daily • Brand Affinity Touch 3: additional engineering and mapping needed. Rebuild on emails needed. Cannot lift & shift due to data differences. Email Devs are assessing what still needs to be done and next steps • Post Purchase Product Review: <ul style="list-style-type: none"> • Review to new customers by tomorrow afternoon. 	<ul style="list-style-type: none"> • Audit of triggers that are unowned still on Salesforce • Connect creatives into modular trigger's Brand Affinity slots and begin testing • MessageGears team to converts Installation Services emails as well as Brand Affinity Touch 3 <ul style="list-style-type: none"> • Begin creating MI blocks for standalone emails • Begin creating MM template for standalone emails • Installation Services Migration <ul style="list-style-type: none"> • <i>Continued conversation with CRM COE on Lift-and-Shift due to misalignment and what new strategies can be implemented by end of Q2</i> • Sample Trigger to Modular Trigger- <ul style="list-style-type: none"> • HTML Development in Progress 	<ul style="list-style-type: none"> • Awaiting CRM COE strategy documentation for HomeServices. • Awaiting Data Science to provide their logic on suppressions to complete end to end view of logic • Awaiting MarkOps Devs to provide their logic on suppressions to complete end to end view of logic • Awaiting Digital Additive for documentation for Home Services triggers and email suppression logic to complete end to end view of logic
PAM Unification	On Track	<ul style="list-style-type: none"> • Architecture Design has kicked off for PAM Unification Long Term Plans: <ul style="list-style-type: none"> • Design decision sessions completed. Template for PAM being solidified. • Architectural Diagram for PAM unification Started. • Consolidating and improving magic determinants Logic. • PAM Quick Wins: All PAM Campaigns began the phased rollout of PAM Quick Wins. <ul style="list-style-type: none"> • Efficiency Automation- In Progress 	<ul style="list-style-type: none"> • Working through the list of PAM Quick Wins: <ul style="list-style-type: none"> • AB Testing Capabilities –roll out testing features in current framework • Operational Code Enhancement- Eliminate load on IT servers for cost savings • Specific Automated Error Messaging- will lead to larger clarity for squads and stakeholders 	<ul style="list-style-type: none"> • Marking Operations Squad Support on development and implementation PAM Unification for Quick Wins in channel programs • Additional PAM Quick Wins: <ul style="list-style-type: none"> • Automated Count Delivery • Block Positioning Capabilities • QA Standards and Processes
Experimentation Capabilities	On Track	<ul style="list-style-type: none"> • Work in progress Experimentation Intake. <ul style="list-style-type: none"> • Building form and dashboard in TMM , GCP ingestion for has commenced. Minitab work, QA will stress test in progress. • API Assessment & Ingestion Framework: Discovery and design In progress • Work on Supply Chain Dashboard has kicked off in the discovery and design phase. • Shift to MTA- Multi touch attribution. Sunsetting our processes on DS and our part. Kick off next week. Auditing our jobs next week. Additional audience being taken 	<ul style="list-style-type: none"> • Architectural Design will kick off on the Supply Chain Dashboard in Tableau. Wireframe & planning in process. • Modular Trigger Logic Modification is in development. Integrated Brand Affinity to existing hero logic in modular template. Moveable Ink lookup process initial steps to pass brand affinity is complete. • Untangle Brand Affinity and Shopper Browser to form separate data jobs and implement test runs. 	<ul style="list-style-type: none"> • Calibrated Model Experimentation Awaiting support from Data Science to build models in order to start development on .

Workstream task to tackle collaboratively

Workstream

Key Task Descriptions

Leads

1

CRM System Retirement

- a. **Discovery & Planning:** Identify program nuances, template design and creative requirements, business stakeholder (Home Services), and/or technical gaps required to complete this rapid migration.
- b. **Brand Affinity Migration:** Incorporate Brand Affinity logic into modular trigger design and standalone templates. Modify MI blocks, as needed.
- c.
- d. **Post Purchase Product Reviews:** Build in-email capture capability. Migrate the UGC campaign - Product Review campaign to MessageGears and adjust MI blocks, as needed.
- e. **Installation Services Migration:** Incorporate Installation Services logic into modular trigger design and adjust MI blocks, as needed.
- f. **Home Services Assessment & Migration:** Identify a template strategy for all campaigns and build new templates, update code-base, and/or setup new Smartsheet.
- g. **Samples Triggers:** Incorporate Samples logic into modular trigger design and adjust MI blocks, as needed.
- h. **Modular Code-base Assessment & Clean-up:** Remove all outdated code and setup logic as reusable objects to seamlessly implement new logic/modules.
- i. **Build module level reporting framework:** As more campaigns are consolidated into modules rather than stand-alone campaigns, we require a reporting structure that supports module level measurement.

Chris D.,
Chris F.
Rajesh,
Mike M.,
Stacey,
Mary. Tron,
Maddie,
Kelly

2

Personalized Email Architecture

- a. **Discovery & Planning:** Assess suite of PAM templates to identify capability gaps and code-base clean-up opportunities.
- b. **Phase 1: Quick Win Capabilities - Implementation:** Begin implementation for capabilities already identified as PAM gaps - list caps, branding.
- c. **Phase 2: Implementation of Additional Capabilities:** Begin implementation of additional capability gaps identified from discovery & MI block cleanup
- d. **PAM code-base review, planning, & clean-up:** Remove all outdated code and setup logic as reusable objects to seamlessly implement new logic/modules changes
- e. **Phase 3: PAMOne Snippet review & clean-up:** Email template snippet standardization and centralization
- f. **Phase 4: PAM Campaign Data Mart planning & implementation:** Design and rollout of a standard "data mart" for the campaign data used across PAM campaigns (to be extended into other campaign later)
- g. **Phase 5: Experimentation Layer planning & implementation:** Connection with Experimentation workstream; creating a layer on top of the data mart

Kyle, Sam,
Stephanie,
John Chris
F., Mike
Hajan,
Victoria,
Tron, Chris
F.

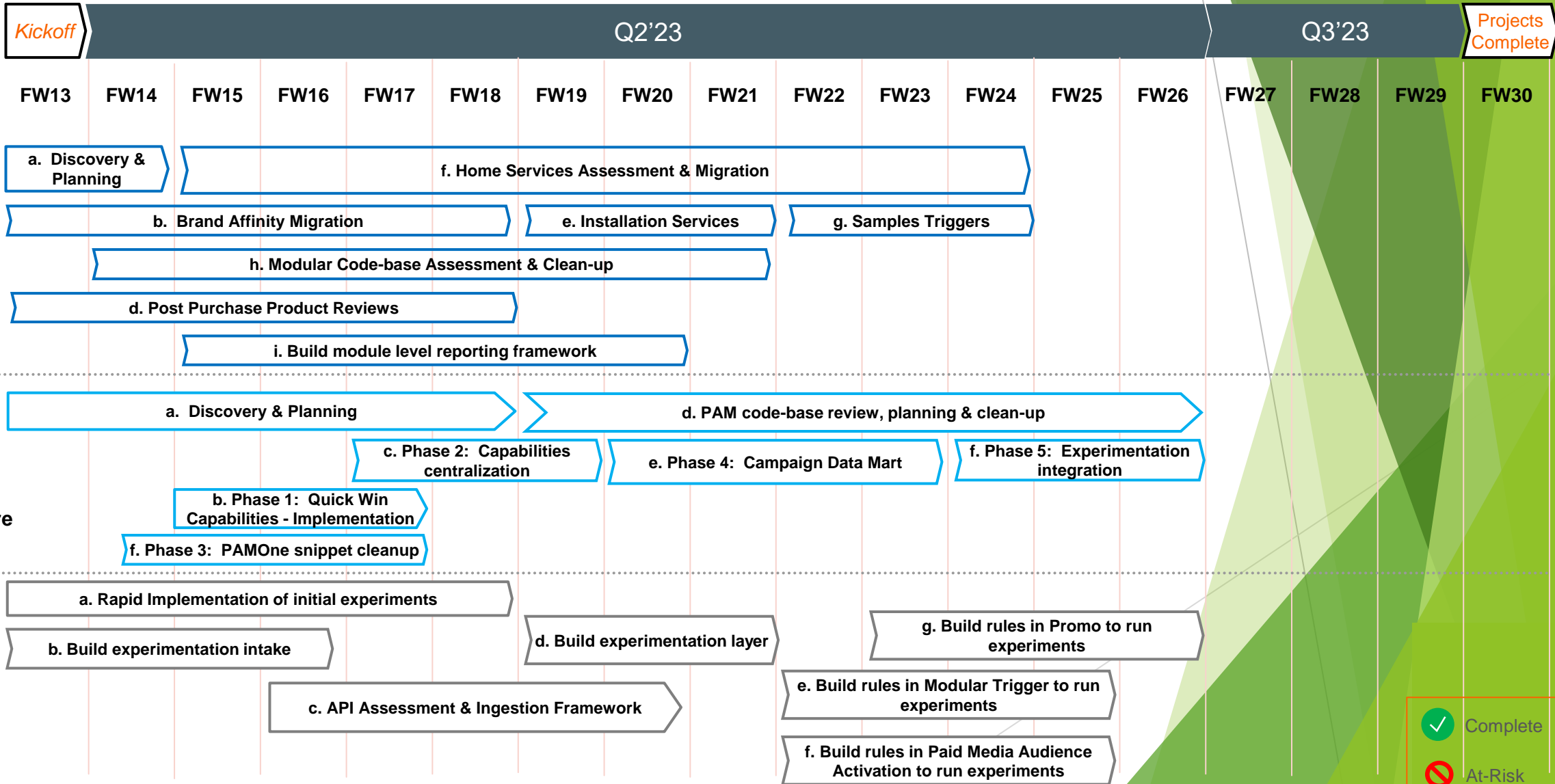
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Testing Capabilities

- a. **Rapid Implementation of initial experiments:** Quick, manual, implementation of Data Science and BCGs requested experiments, which include new calibrated model experiment and NPP API experiment.
- b. **Build experimentation intake:** Implement self-service request form to consume experimentation request and push to GCP as inputs to campaigns. - Phase 1 will only support subject line, API, copy/text, and Paid Media (Small M) experiments.
- c. **API Assessment & Ingestion Framework:** Review current options for consuming item reco APIs and implement standardized approach for retrieving product recos (real-time vs batch)
- d. **Build experimentation layer:** Setup foundation to consume inputs from request form, create centralized experimentation view, and push to appropriate campaigns for use.
- e. **Build rules in Modular Trigger to run test:** Incorporate experimentation view into modular trigger to execute on experimentation request.
- f. **Build rules in Paid Media Audience Activation to run test:** Incorporate experimentation view into audience activation to execute on experimentation request - prerequisite for retiring Small M as the final shift to MTA.
- g. **Build rules in Promo to run test:** Incorporate experimentation view into Promo to execute on experimentation request.

Chris S.,
Rajesh,
Matt,
Jordan,
Hajan Mike,
Victoria,
Ron

We will simultaneously tackle three workstreams as we kickoff...



- ✓ Complete
- ⊘ At-Risk

Appendix- Milestone Updates

Operational Efficiency Weekly Workstream Tracker FWXX

Workstreams	Status	What we've done	What's next	Required Support
1) Salesforce Retirement	OnTrack	<ul style="list-style-type: none"> Home Services: Discovery on Data and waiting on CRM COE. CRM cut off EOW FW18. Brand Affinity- <ul style="list-style-type: none"> Weekly/ Daily- working on the job re-write. Need the mapping from MI blocks and info. Decommissioning Legacy Jobs for Daily Brand Affinity Touch 3: HTML with MG on that. Need the MI blocks Post Purchase Product Review: <ul style="list-style-type: none"> Started the phased roll out earlier this week. 1500 reviews came in within 1 day. Migrated 10% online audience and 5% store audience for testing of PPC through sampling 	<ul style="list-style-type: none"> Review of triggers unowned still on Salesforce Connect creatives into modular trigger's Brand Affinity slots and begin testing MessageGears team to converts Installation Services emails as well as Brand Affinity Touch 3 <ul style="list-style-type: none"> Begin creating MI blocks for standalone emails Installation Services Migration <ul style="list-style-type: none"> Sample Trigger to Modular Trigger- Chris Gathering all the email dev details 	<ul style="list-style-type: none"> Waiting for documentation of triggers emails' content information From Digital Additive (URLs, click URLs, copy/text) Need decision from CRM/HS Audience team for HS email consolidation and requirements
2) PAM Unification	On Track	<ul style="list-style-type: none"> Discovery has Kicked off for PAM Unification. PAM Quick Wins are kicking off this week. We will work on highest priority programs first. <ul style="list-style-type: none"> Background functionality on MI Blocks in HDH and Pro 	<ul style="list-style-type: none"> More organization on the long term plan for PAM. Est. end of next week. Working through the list of PAM Quick Wins: <ul style="list-style-type: none"> Efficiency Automation- cutting down level of effort on daily operations A/B Testing Capabilities - roll out testing features in current framework Operational Code Enhancement- Eliminate load on IT servers for cost savings Specific Automated Error Messaging- will lead to larger clarity for squads and stakeholders 	<ul style="list-style-type: none"> Marking Operations Squad Support on development and implementation PAM Unification for Quick Wins in channel programs Additional PAM Quick Wins: <ul style="list-style-type: none"> Automated Count Delivery- enhancing stakeholder visibility to counts withing marketability logic Block Positioning Capabilities- rolling out new placement functionalities QA Standards and Processes across all PAM
3) Experimentation Capabilities	On Track	<ul style="list-style-type: none"> Work has kicked off on Experimentation intake. We are in the working through the design phase, and will move onto development next week. API Assessment & Ingestion Framework: Discovery and design has started on this. Work on Supply Chain Dashboard has kicked off in the discovery and design phase. Shift to MTA- Discovery and Design kicked off with a two phased approach. 	<ul style="list-style-type: none"> Architectural Design will kick off on the Supply Chain Dashboard and aligning data workflows and connection points. Modular Trigger Logic Modification is in development. Integrated Brand Affinity to existing hero logic in modular template. Moveable Ink lookup process initial steps to pass brand affinity is complete. Untangle Brand Affinity and Shopper Browser to form separate data jobs and implement test runs. 	<ul style="list-style-type: none"> Calibrated Model Experimentation Awaiting support from Data Science to build models in order to start development on