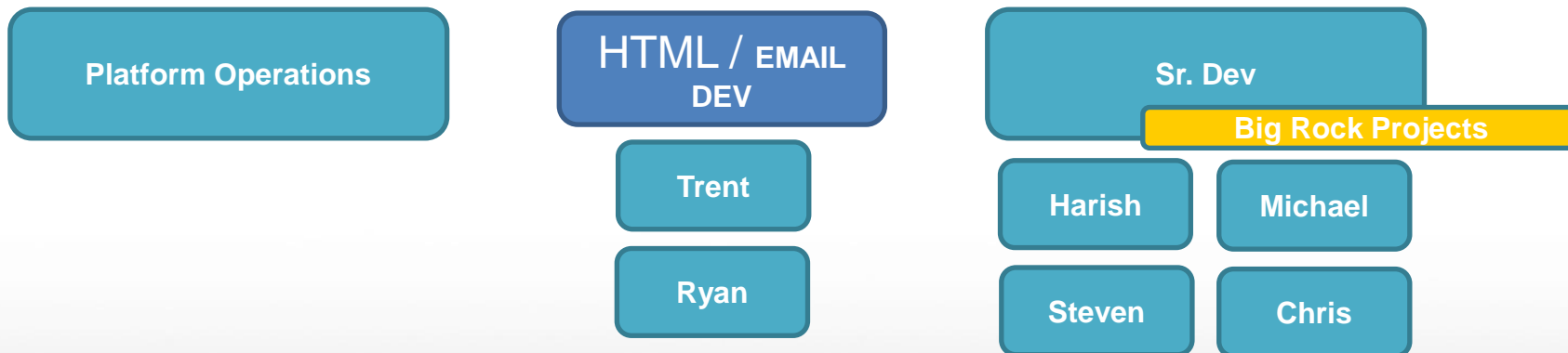
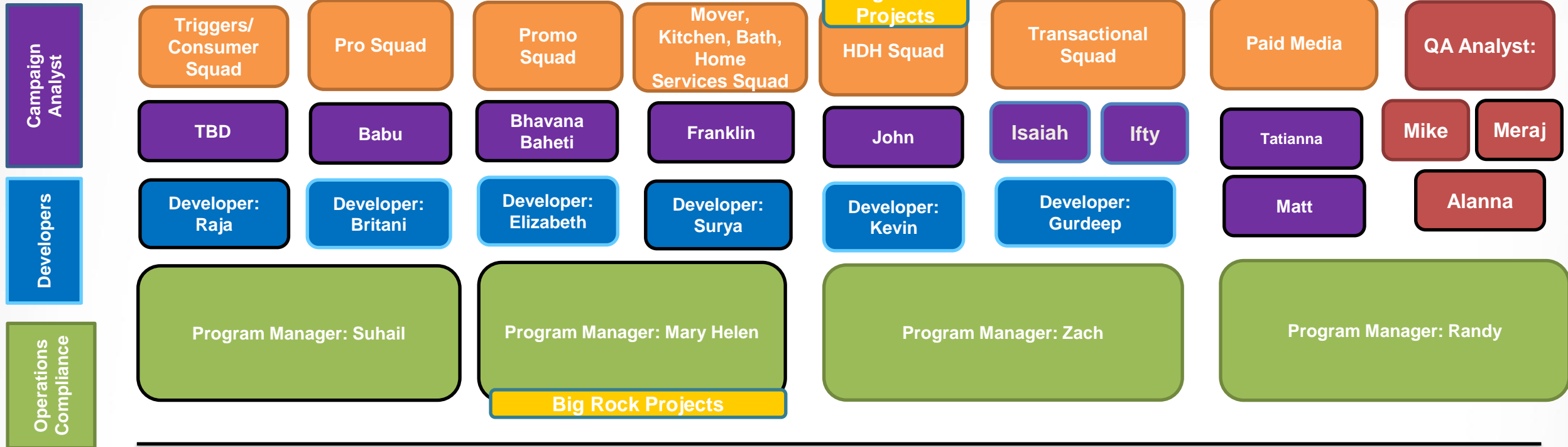


# Marketing Operations 2023

# Team Roles & Responsibilities- Squads



# Your Team- getting started



## Campaign Analyst

- Liaison between CRM COE, Creative Ops, Creative, Audience Pods, Data Science, Data Engineering and Measurement
  - Meet with these teams and understand where their requests generate from, what their plan and expectation is for the quarter.
  - Decide how you want them to kick off a project with you
  - Decide how you can plan in advance to know what is coming down the pipeline
  - Establish requirements for requests
- Run Daily Operations on Campaign
  - Kick off the full cycle with creative, strategy and creative ops to set up the master matrix, get version determinants correctly into the matrix and get campaigns out the door
  - Run proofs on Campaigns
  - Get the email out the door

### Plan out when and how you will build bigger rock items into your campaigns-

- Define the Goals for your campaigns by Quarter

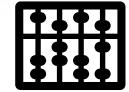
What's the plan for my Campaign for the year?



## Developers

- Understand the fundamentals of your campaign
- Start a backlog on what could be automated or corrected on your campaign
- Analyze common errors
- Set a timeline with your squad and help define requirements for a project
- Get with your Data Science Contacts, Data engineering, Measurement contacts to understand how they work with the team, and what processes they rely on
- Define the monitoring that will be needed on your squad
- Build out Test plan for our QA Team based on creative output

How do I code better to make the plan more efficient?



## Program Manager

- Analyze what is already in the backlog for your squad
- Define ways of working between the team
- Define how you would like to manage incoming requests
- Establish new backlog items for your squad
- Look at capacity planning and timelines on what your squad can take on
- Develop a view in Monday.com to approach stakeholders and leadership with to define the scope of work for your squad

How do we execute the plan?

# Key Objectives for Each Role



## Campaign Analyst

- CA's make the call for how to handle stakeholders
- CA's Communicate with stakeholders to build roadmaps
- CA's Tell your developer what to prioritize
- CA's make the call on how to design the solution
- CA's make the call for what work is done
- CA's hold the approval on if a Campaign Launches

### Daily Operations

- How can you work smarter, not harder to get these campaigns launched with less manual effort?
- Lay out a plan for your developer to automate processes?
- Can you consolidate meetings with stakeholders, or ask them to plan further out?
- Can you set SLA's and requirements with your stakeholders before we accept a project?

### Product Enhancements

- Can you set requirements and SLA's before you take the work?  
How are you Teeing up the work for the other members on our team?
- What enhancements does our team have that your product is not using?

Idea Originators | Solution Designers | Squad Goal Setters



## Developers

- Developers enhance their code so that it runs more efficiently
- Developers understand the "Why" behind the data
- Developers help their squad with conversations around the data
- Developers create backlog tasks for campaign and daily operations improvements
- Developers take plan from the CA and enact them

### Daily Operations

Can my campaign run faster?

What are the newest capabilities, does my campaign run this?  
How do I give my campaign Analyst better visibility into this campaign?

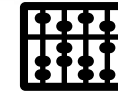
How does data run on this campaign; can it be improved?

### Product Enhancements

How can I build this so that it helps our squad in the future?

Is there a better solution, more requirements I need to get an enhancement done?

What should be in our Backlog to add to the campaign for improvements



## Program Manager

- PM's enable the Roadmap for their Squad's
- PM's do "Pre-discovery work" on intakes
- PM's Tee-up tasks for their squads
- PM's Set backlogs for their squads, and plan timelines
- PM's capacity plan for their squad
- PM's facilitate teamwork, and squad communication

### Daily Operations

How can we improve Visibility on projects with stakeholders?

Are we keeping to timelines? Do we have the right resources?

How many projects can the team handle on top of daily operations?

How do we communicate to leadership on project status?

What "Pre-investigation" can I do to help enable my squad to move efficiently on intakes?

### Product Enhancements

What are the project plans and requirements for typical enhancements?

How can we get ahead of last-minute enhancement requests?

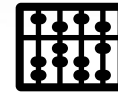
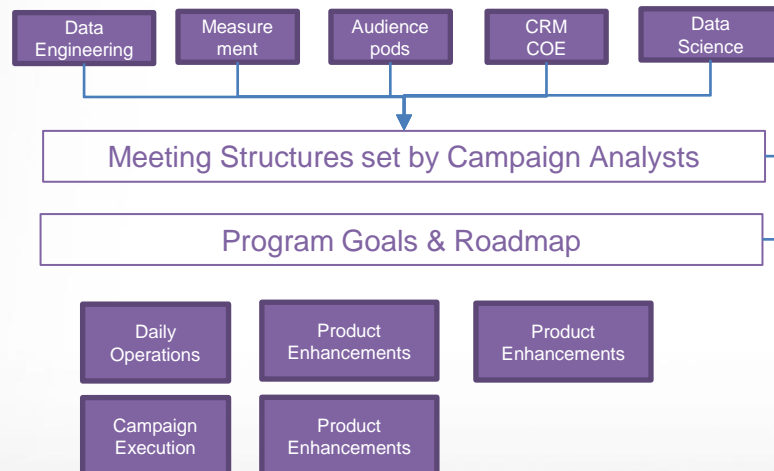
How do we celebrate wins, and address issues on our squad?

# Deliverables- Save all these documents in Squad folders



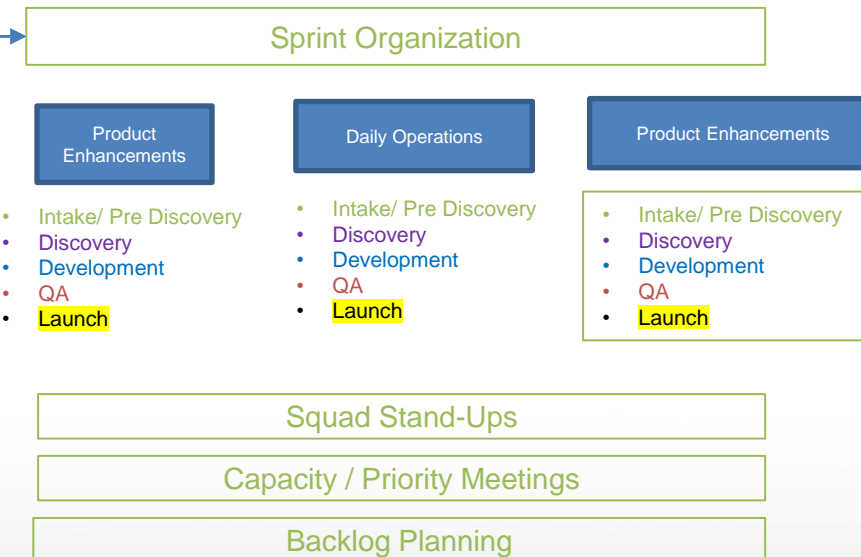
## Campaign Analyst

1. [Weekly Status Slides](#) to Stakeholders- *Due every Monday*
2. Meeting Cadence Set with Stakeholders- See slide Below
3. Issue logging document Updated
4. Squad Roadmap



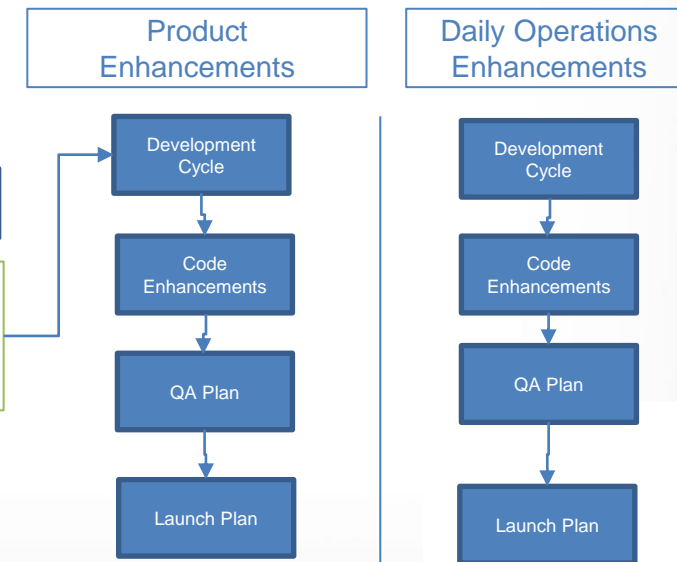
## Program Managers

1. [Project Template Documentation](#) Updated
2. [Squad Summary Report](#) *Due every Friday*
3. [Squad Backlog](#) in Monday.com
4. [Squad priority mapping](#) from Roadmap



## Developers








1. Code Review slides to Sr. Devs
2. Report out of enhancements
3. Documentation and Data Mapping



# Stakeholders

Marketing Operation enables marketing strategy by managing activities across core functions to support enterprise-wide priorities



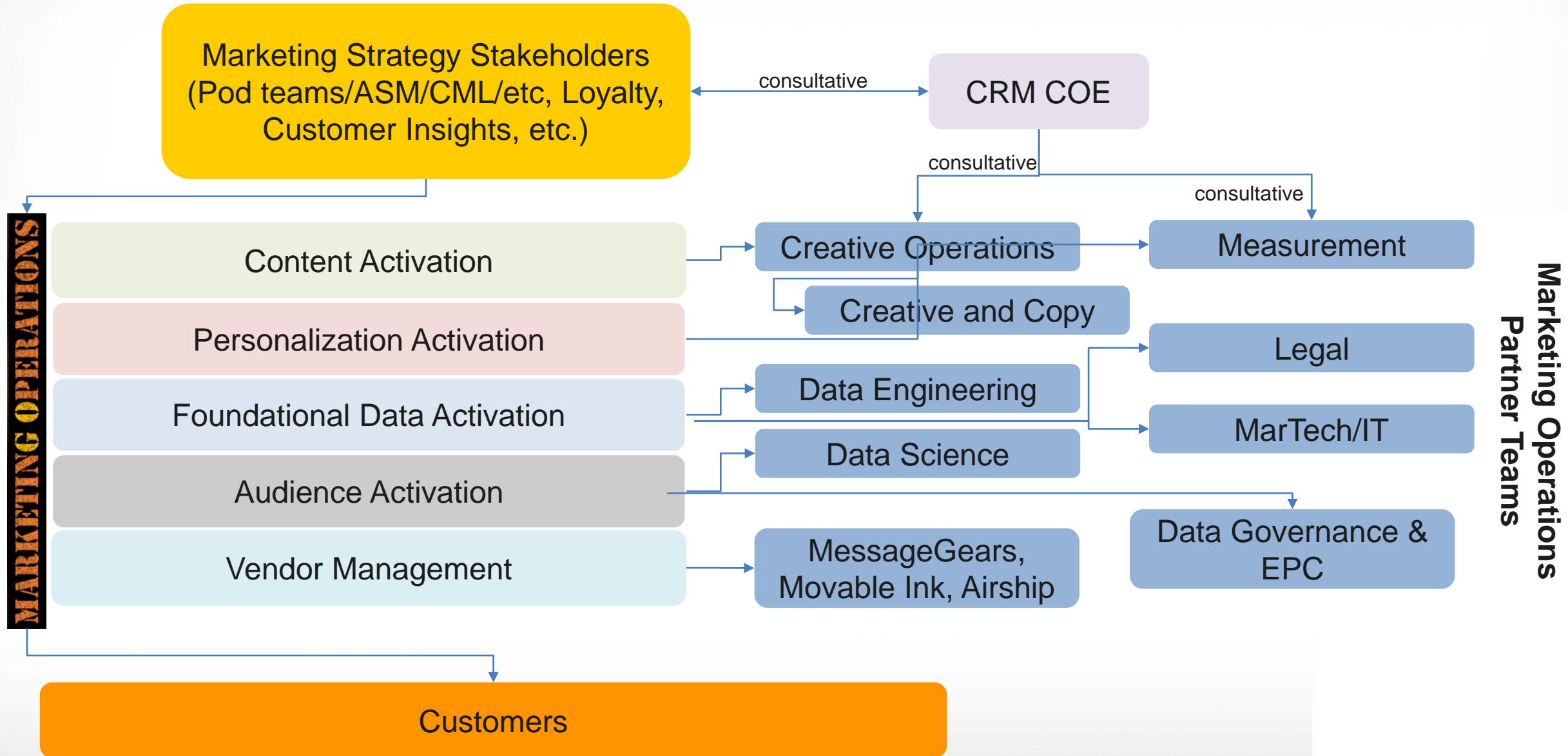
-  Execution
  -  Campaign Planning
  -  Creative
  -  Process
  -  Measurement
  -  Tools & Capabilities
- 

2



Your Squad's "Stakeholders" are people who work in every one of these areas.

# Integrated Media Layout – CRM Enablement Org Context



# Campaign Analyst Roles & Responsibilities

## What is a Campaign Analyst ?



A Campaign Analyst is the owner of their designated area of business.



They are responsible for the strategy, daily operations, stakeholder relationships, and reporting.



They own the success of the campaign and are expected to be the subject matter experts of what goes into their campaign, enhancements on the campaign and capabilities

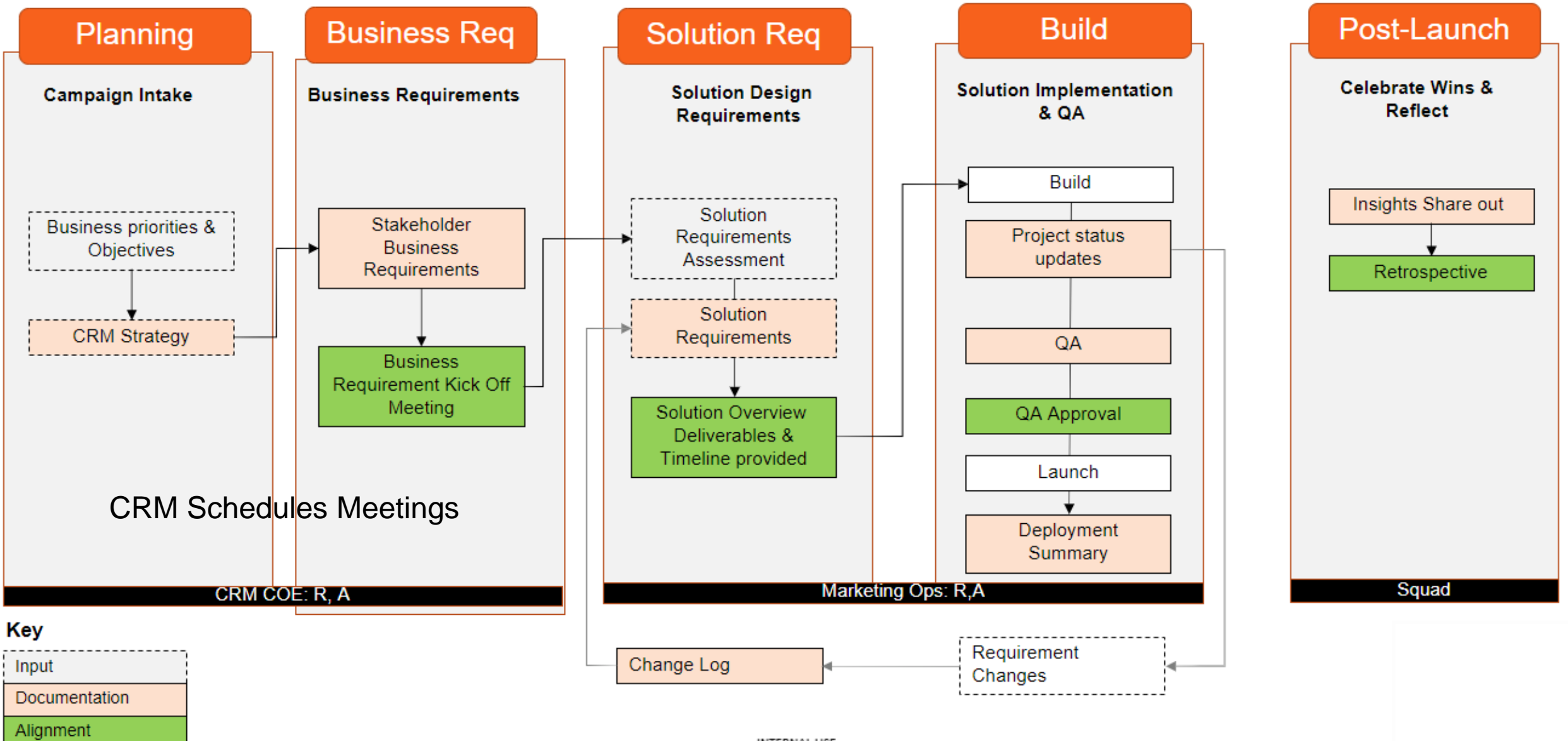
## Responsibilities of Campaign Analyst

- Owners of their campaigns
- Owners of technical components of your campaign
- Drivers of their squads
- Owners of stakeholder relationships
- Solution Designers and thought leaders of their campaigns
- Expert on the response data of their program
- Plan out Roadmaps to drive success of the campaign
- Subject matter experts of their program's capabilities, technical set-ups, interconnectivity with other programs
- Subject matter experts on the successes and shortcomings of their campaigns



# Process Overview

## Meeting Cadence for Campaign Analysts to Set with Stakeholders



# Developer Roles & Responsibilities

## What is a Developer?

A Developer writes the code for their campaigns and is responsible for the proper functioning of campaigns.

They design and develop software to meet the needs of their business partners.

A developer is responsible for continuous improvement of their code and campaigns.

Design each piece of an application or system and plan how the pieces will work together.

## Responsibilities

- Owners of continuous improvement methodologies in campaigns
- Thought leaders for code enhancement
- Drivers of automation and code simplification
- Driver of new capabilities for your program
- Assist in running the daily operations of squad related activities
- Coach and assist Campaign Analyst and Program Manager in road mapping, solution design, and knowledge of capabilities
- Design QA test plans and work with QA teams to establish excellence standards across your campaign
- Be the technical subject matter expert of your program, and tables up and downstream of

# Program Manager Roles and Responsibilities

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## What is a Program Manager?

Program managers **oversee the fulfillment of larger organizational goals.**

They coordinate activities between multiple projects without directly managing them.

They Manage program area goals and roadmaps, giving detailed attention to program strategy, project delegation, resource management and enhancement.

They drive the use of project management principals throughout their areas of work, and ensure that leadership and stakeholders have visibility to work within campaigns and projects.

## Responsibilities

- Facilitator of the planning and coordination of the Campaign Analysts
- Enablers of roadmaps, documentation, long term planning
- Designers of project plan templates
- Planners of resources across team
- SME's of team capacity, upcoming capabilities, and rollouts
- Reporters of high level KPI's
- Facilitators of individual projects, assisting in requirements gathering
- Coordinators of projects with objectives that measure up to Team wide goals.

# QA Analyst Roles & Responsibilities

## What is a QA Analyst?

A QA analyst is a technical professional who typically works in the quality assurance stage of a product development life cycle.

The Quality Assurance (QA) Analyst will **conduct testing on code,**

**Execute systematic testing on program enhancement and other technical products**

**Identify and resolve bugs, defects, and other potential issues.**

## Responsibilities

- Execute QA test Plans
- Establish QA standards across the team
- Coordinate with developers QA test plans
- Analyze and monitor the performance of products.
- Analyze process and fix pain points
- Improve error rates across lines of business
- Serve as the approvers of counts and content across the team
- Execute test plans with close attention to detail and establish approval processes across team

# Sr. Developers Roles & Responsibilities

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## What is an Sr. Dev & Architect?

Senior Developer sand Architects will work on high priority projects.

They develop and oversee a smaller squads to implement high impact and overarching enhancements and improvements to systems the benefit multiple products.

Develop new code, work on major enhancements, and enhance system wide connection points that benefit the whole team.

## Responsibilities

- Makes high-level design decisions and oversees the entire development process
- Establish code standards
- Develop new solutions and products that previously did not exist
- **Develop systems that benefit multiple products on the team**
- **Designing, developing and installing software solutions; support and develop software team**

# Program Manager Goals

# Program Manager Goals Operations Compliance– Q1

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1. Develop and implement product management principals such as road mapping, capacity planning and iteration planning, and backlog planning through Monday.com by the end of Q1.
2. Build out meeting structures and communications with stakeholders and squads to enhance project visibility including weekly and monthly reports by Mid-Q1.
3. Develop and track key KPI's for your campaigns to help establish success and build the narrative for the successes of your squad and the marketing operations team by the end of Q1.

1. Send out squad wide Weekly Status Reports (email) by Campaign to stakeholders
2. Plan weekly iteration meetings 3 weeks out
3. Review Squad roadmaps in daily stand-ups and enhance stakeholder communication
4. All PM's Design their own "Squad" view of tasks in Monday.com
5. All PM's implement "Phases" into their User Stories for better capacity visibility across the team
6. Send out "Email summary lists" on a weekly basis to all stakeholders

# Program Manager Goals Operations Compliance– Q2

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1. Increase the efficiency and productivity of the squads by analyzing capacity, success, and error rate of squad teams and develop project “Sprints” by the end of Q2.
2. Develop a communication plan with standardized documentation to provide stakeholders with planned benchmarks on their enhancements and tickets to drive priority and inform them of progress on planned roadmaps by the end of Q2.
3. Create templated project plans and workflows to help establish ways of working, and capacity across your squad and set expectations with stakeholders by the end of Q2.

1. Organize work into “Sprints” and increase efficiency of project completion
2. Drive Prioritization from the Squad Roadmap
3. Enhance stakeholder communications and visibility on project successes
4. Establish a dashboard report from the intake form in Monday.com to increase stakeholder visibility
5. Create project templates and capacity based on typical enhancement timelines



# Program Manager Goals Operations Compliance– Q3/ Q4

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1. Develop dashboard reporting for Squad views of tasks, Sprints and KPI's that display key success metrics, completed tasks, iterations and planned sprints in Monday.com.
2. Create channel wide communications on the successes of Marketing Operations, project enhancements by developing dashboards that allow leadership to track project movement by channel, and by squad.
3. Evaluate the strengths and weaknesses of campaigns by analyzing KPI's and establishing trends and work with your squad to establish standards for success and projects that make it into sprints.

1. Create templated project plans and workflows to help establish ways of working, and capacity across your squad and set expectations with stakeholders.
2. Work to define what information is necessary to create a dashboard on your squad and channel

# QA Analyst Goals

# Quality Assurance Analyst Goals- Q1

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- Establish a roadmap of QA Quick wins for all CRM PAM Campaigns that go out the door by Q2.
- Build foundational practices at key points in the program executions process by mapping end to end process that increase campaign accuracy overall and daily operations and connection points between teams. (sending proofs, approvals, etc)
- Establish baseline reporting and Backlog of QA processes in Monday.com.
- Publish out Weekly and monthly QA reports to increase stakeholder visibility on our processes and approvals.

## Task Examples:

1. Create a process Map of the PAM Campaign process and identify key areas in which QA is needed
2. Establish QA processes for the Deployment Details, Proofing, Scheduling and approval process for PAM Campaigns.
3. Provide the team with guidelines of how to perform general QA on project “stages”.
4. Establish QA documentation, and suggestion for how to QA across roles on Marketing Operations.

# Quality Assurance Analyst Goals- Q1

---

- Implement the following:
  - Ensure that the products and systems being developed and released meet the required standards of quality and are free of defects. Implement processes and procedures for identifying and addressing defects, as well as training and development for team members to ensure that they have the necessary skills and knowledge to meet this objective.
- Monitor the following:
  - Ensure that Errors are being tracked and fixed in a timely manner, that stakeholder communication is clear, and that processes are in place to improve overall error rates in daily operations of campaigns. Improve bug and error processing by campaign analysts and developers
- Understand the following:
  - Understand the process flow of work on our team in the various products and develop a QA process approach in the Project phases. Inform the team of where QA checks should take place in a process and train them on how to do it. Inform the business on where the QA team should be in the process and how this will be managed.

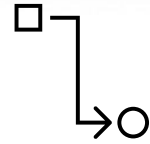
# PAM Breakout of Processes- Focus Areas



## Meraj

- Back-end PAM Processes
- Making changes to the rainbow template in PAM
- Documentation of PAM Rainbow templates
- PAM Capabilities Checklist
- S2e Tables
- Xref Tables
- Moveable Ink Connection
- Moveable Ink Clean up
- New Mover- Adding Rainbow Template

Define Process Between Squads



## Mike

- Daily Operations and Process Mapping
- Issue Logging
- Improving Daily Operations
- Who should do QA at every step?
- Who QA's Audience tables when they are run
- Are we checking details from DS?
- MM Automation Improvements
- Promo ODL issues,

Define Process Between Squads



## Alanna

- Deployment Processes
- Deployment Details checklist
- Launch schedule checklist
- Automated Seeds scheduler
- Gap Analysis for Qa needed on HDH

Define Process Between Squads

# Quality Assurance Analyst Goals- Q2

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- Establish a roadmap that details your plan for implementing baseline QA practices across all channels and CRM campaign types.
- Ensure that QA practices are in place for Trigger and Transactional Campaigns by the end of Q2.
- Develop Error Reporting metrics and KPI's to report to leadership and drive your Roadmap and make recommendations to the team on where to improve process by the end of Q2.

1. Create a Roadmap for QA implementation plans by email type and channel

2. Build process maps for triggers and transactional campaigns

3. Implement basic QA Practices on Trigger and Transactional emails

4. Develop baseline KPI's for QA to report out on Campaigns and programs to give leadership stakeholder visibility and develop a plan of action for QA on campaigns that are error prone

# Quality Assurance Analyst Goals- Q3/Q4

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- Establish QA practices around Data governance, EPC end to end assessment, to ensure that the data we receive fits legal guidelines and can be sent to customers by the end of Q4.
- Conduct a QA Assessment of systems, pipelines and vendors connected to the data flows of marketing operations that results in recommendations to the business for changes and data optimization by the end of Q4.
- Develop a plan to automate and implement QA practices by the end of Q4 for campaigns that have already been road mapped and assessed in Q1 and Q2. Implement at least 2 automations by the end of Q4.
- Establish basic QA Practices for Paid Media, SMS and Direct Mail by subject matter are by the end of Q4.

# Ops Compliance Team OKR's\_ Yearly View (TASKS)

## OKR

Q1

**Implement governance oversight of entire audience activation process**

Document and disseminate knowledge on process flow to your squad

Learn the high-level technical process of your products

Document the processes for your products

Ensure Stakeholders are trained, and have access to knowledge on process and capabilities

**Maximize campaign performance through audience and content optimization**

Optimize and create process for all areas of marketing operations for Promo & Pro

Establish internal Project Management for all programs

Develop Project Plan Templates by Channel

Develop Wishlist for Project Management Platform

Enhance Monday.com Submission Form

Q2

**Build an effective team**

Understand the fundamentals of Program and Product Management and workflow of products.

Understand daily operations

Understand our core products

Establish Program Management for daily operations

Establish Product Management process flow for our core products

**Support cross-functional change management and process optimization**

Create processes and structure that give leadership visibility into projects and capacity planning

Monday.com Backlog Planning

Team Capacity Planning/ Resource Management

Roadmaps by Channel

Prioritization by channel

Q3

Establish chain of custody and ownership of responsibility in Data Workflows

Understand What changes are made, are who owns certain parts of the process

Understand inputs and outputs to our teams on your assigned areas

Establish better ways of working and process flows between our external partners.

Improve External Processes for visibility

Establish Channel Roadmaps & Priorities with External Teams

Improve Process for External Team requests

Establish Quarterly Goals for products with external partners

Develop Reporting of Operational KPI's by Channel and program

Establish templated milestone marking for each Channel

Campaign Reporting Dashboards

Q4

Identify area's in need of automation, or improvements to internal processes

Job Automations & Logic Overhauls

Personalization/ Content Optimization

Process Management Overhauls

Pipeline Restructures

Improve processes and visibility on internal product/ program management.

Build effective Squads

Improve Monday.com Visibility

Identify areas in need of additional training

Decrease Error Rates



# How we plan on Monday.com

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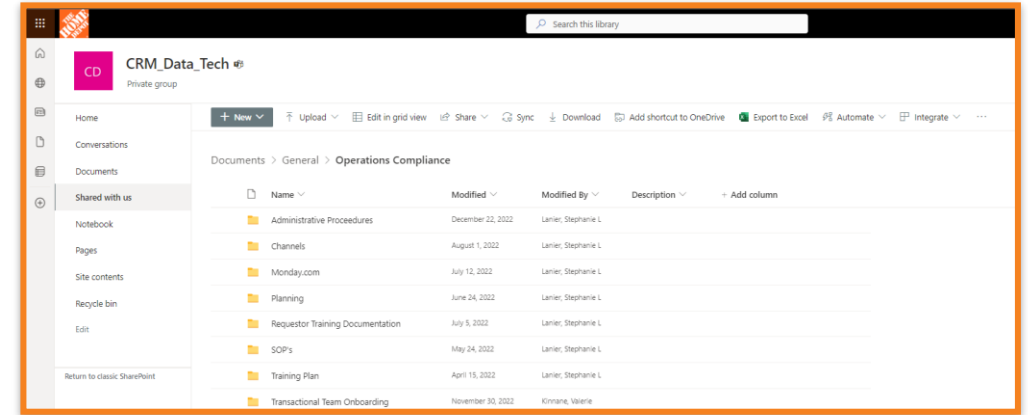
- Iteration Dashboard - <https://thd-crm.monday.com/overviews/13077443>
- Backlog Planning Board: <https://thd-crm.monday.com/boards/720600601/views/23827252>
  - Each team member receives about 30-36 hours of work.
    - This is because we assume all team members have meetings, lunch hours, etc during the week.
    - A full day is 6 Hours of work
    - If an assigned project runs over we are able to see what other projects are impacted in the backlog and communicate issues.
- Mary Helen Runs recurring tasks on Monday Afternoon- Tuesday Morning for the next week

## **Management uses these boards to understand:**

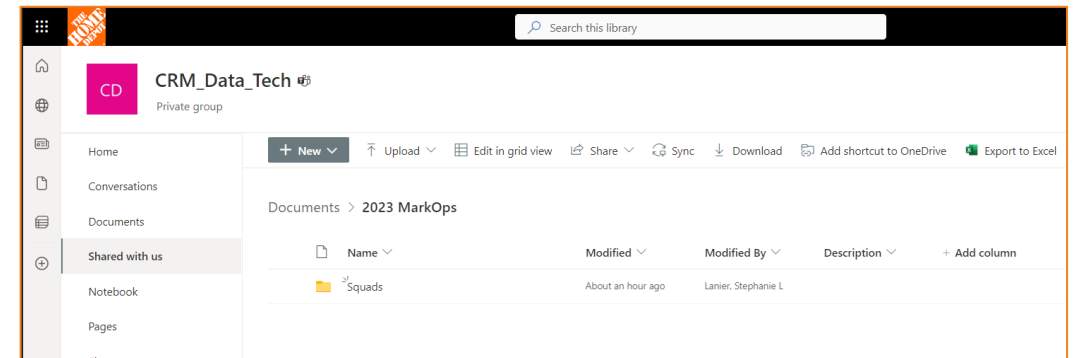
- Capacity on our team-to see what initiatives we can commit to
  - Communicate to leadership that we need more/less resources
  - Understand team priorities and progress for leadership meetings
- 
- Things that break the structure:
    - Not running recurring tasks
    - Not putting in hours, assignee or timelines for projects
    - Sub-projects- hours do not accurately show for all of this

# Operations Compliance Folder Structure

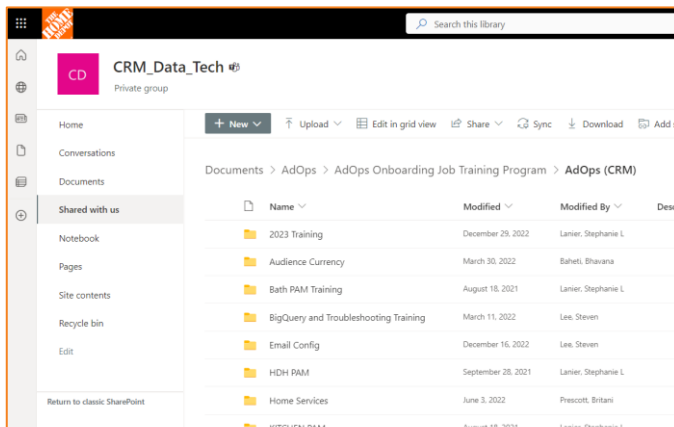
- Where we save all Ops compliance docs: Operations Compliance



- Squad Docs should be saved here: Squads

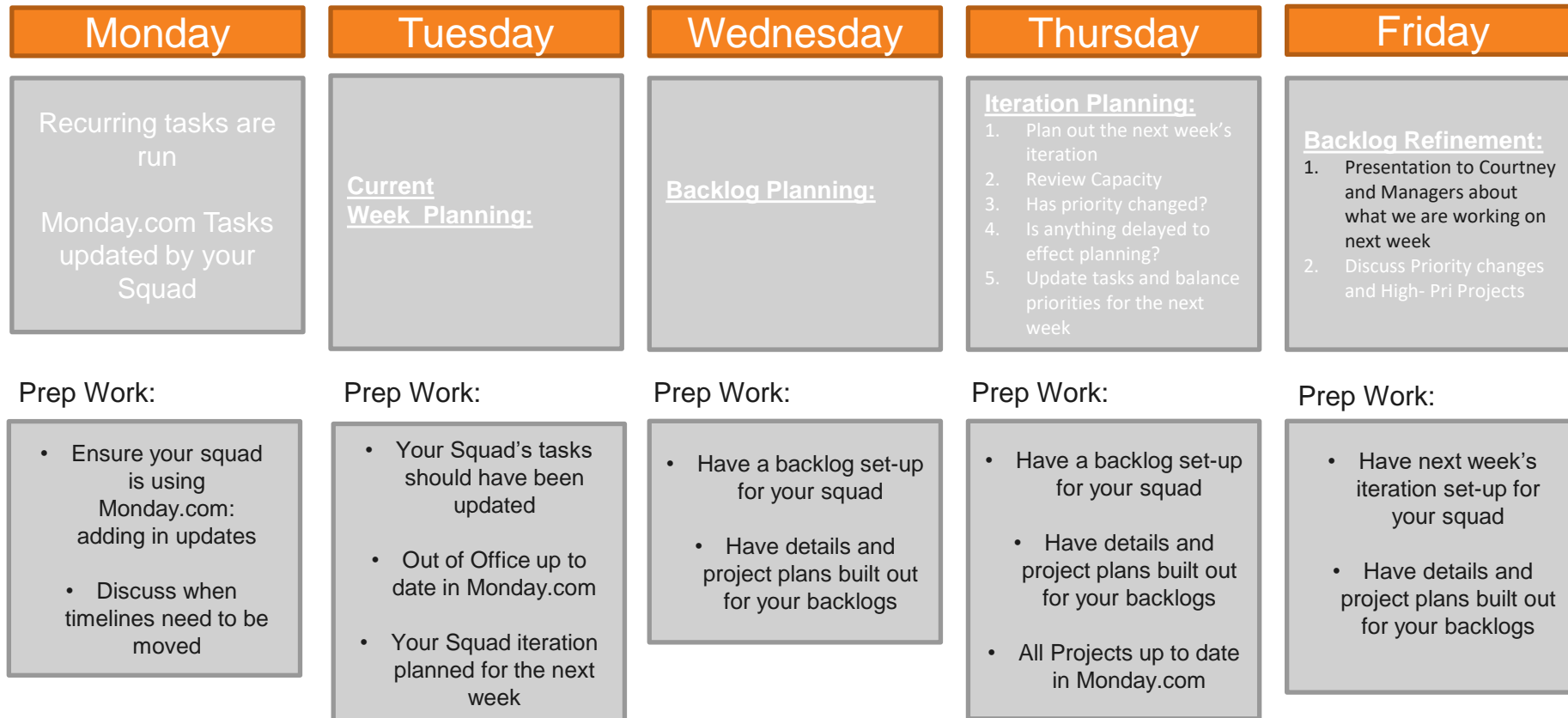


- Older Training folders: AdOps (CRM)



# Weekly Iteration Planning

- An Agile Principal where all team members determine how much of the Team Backlog they can commit to delivering during an upcoming Iteration.



- Right now we barely plan a week out. We want to get to monthly plans, and utilize the backlog fully

# Squad Views in Monday.com

- **Goals:**

- Provide Visibility of the workload of squad members (in and outside squad)
- Serve as a platform to allow stakeholders to view progress on projects and other workload
- Manage the Backlog view for the squad
- Serve as the basis for Squad stand-ups and prioritization conversation

The screenshot shows a Monday.com board titled "Weekly Iterations | Marketing Operations". The board is in "HDH Squad View" and displays a list of tasks. The tasks are organized into two sections: "New Intake Tasks - In Processing" and "FIXED DATE - Medium Priority | Everything w/Hard Due Date Including Ad-Hoc & Recurr...".

Task	Status	Task Timeline	Assignee	Total Estimat...	Curren...	Next ...	Due Da...	Move to
HDH PAM - LCWK - Combine LC audience and Targeting Campaigns	To Do	Feb 6 - 10	[Avatar]	0 Hours	0 Hours	0 Hours	New Item	New Item
HDH Lifecycle Trigger Creative Changes	To Do	Jan 30 - Feb 3	[Avatar]	1 Hours	1 Hours	0 Hours	New Item	New Item
				1 Hours sum	1 Hours sum	0 Hours sum		
FIXED DATE - Medium Priority   Everything w/Hard Due Date Including Ad-Hoc & Recurr...								
Inbox Icon (BIM) Implementation Phase	Doing	Oct 24 '22 - Feb 3 '23	[Avatar]	40 Hours	2.7 Hours	0 Hours	Hard	N/A
Team Trainings   SQL Standards   Campaign Analysts	Doing	Jan 16 - Feb 10	[Avatar]	1 Hours	0.3 Hours	0.3 Hours	Hard	N/A
Pro Tier 2 Support HHID Mapping Issues	Doing	Jan 2 - Feb 18	[Avatar]	12 Hours	0.9 Hours	0.9 Hours	Hard	N/A
Team Trainings   Ops Glossary   Campaign Analyst	Doing	Jan 23 - 27	[Avatar]	6 Hours	0 Hours	0 Hours	Hard	N/A
Team Trainings   Coding Standards   Developers	To Do	Jan 16 - 26	[Avatar]	6 Hours	0 Hours	0 Hours	Hard	N/A
Reporting Investigation Placeholder	Doing	Jan 23 - 27	[Avatar]	1 Hours	0 Hours	0 Hours	Hard	N/A
Team Trainings   Local History   Developers	To Do	Jan 23 - 27	[Avatar]	6 Hours	0 Hours	0 Hours	Hard	N/A
Team Trainings   Data Dictionary   Campaign Analyst	Doing	Jan 23 - 27	[Avatar]	6 Hours	0 Hours	0 Hours	Hard	N/A
Daily Monitoring for Weekly Campaigns   Weekly Iteration Task	Doing	Jan 23 - 27	[Avatar]	6 Hours	0 Hours	0 Hours	Hard	N/A
HDH PAM - BAU   Tuesday Checklist	To Do	Jan 24	[Avatar]	2 Hours	0 Hours	0 Hours	Hard	N/A
Message Gear   Weekly Monday - Friday   To be done Daily: Run SQL S...	Doing	Jan 23 - 27	[Avatar]	0.5 Hours	0 Hours	0 Hours	Hard	N/A
M-H OOO 1/27 - 2/1	Doing	Jan 27 - Feb 1	[Avatar]	24 Hours	18 Hours	0 Hours	Hard	N/A
				110.5 Hours	21.9 Hours	12 Hours		

<https://thd-crm.monday.com/boards/720600601/views/88329450>

- EX:
- We will know the total capacity of squads per week
  - 3 people in each squad ( 30 hrs per weeks)= 90 Hrs per week the squad can manage
  - Do capacity based off each person, and aim to have about 90 hrs per week that can be dedicated to the program

# Helpful views in Monday.com

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- Backlog Iteration 2 (Manual): Shows Next Week's Hours
  - <https://thd-crm.monday.com/boards/720600601/views/23827252>
- Main table Shows whole team, all tasks
  - <https://thd-crm.monday.com/boards/720600601/>
- Intake Board: <https://thd-crm.monday.com/boards/3090045977/>
- **How to work with filters in Monday.com:**
  - <https://support.monday.com/hc/en-us/articles/360003624660-The-Board-Filters>

# How to break out tasks from Projects

## Major Project or Initiative

1. Discovery/ Requirements Gathering- Campaign Analyst
2. Development- Developer + QA
3. QA- QA Team
4. Product Release / Launch- Campaign Analyst

Naming convention:

Campaign Name-Project Name | Squad | Phase

Return Survey - Data | Transactional | Discovery

Return Survey - Data | Transactional | Development

Return Survey | Email Dev | Development

ProPAM-Tier Banner | Pro Squad | Discovery

ProPAM- Tier Banner | ProWelcome | Discovery

## Resources for Stages of Campaigns and Project Templates:

[User Stories & Phases Examples - Copy.xlsx](#)

[Ops Compliance Project Plan SOP.xlsx](#) ← Older Project timelines from Ops Compliance

## Campaigns Migration to Message Gears – 200hrs

2021 Completed Iterations | Marketing Operation

Your assigned tasks are available here on this board. Please make updates as needed. [See More](#)

Completed Itera... | Main Table | +

New Task ▼ | HDH DSBOTW Email ... 🔍 | Person | Filter / 1 ▼ | Sort / 2

COMPLETED - Done Tasks

<input type="checkbox"/>	Task	
<input type="checkbox"/>	HDH DSBOTW Email   Email Migration to MG   New Campaign Intake	✓
<input type="checkbox"/>	HDH DSBOTW Email   Email Migration to MG   Discovery	✓
<input type="checkbox"/>	HDH DSBOTW Email   Email Migration to MG   Audience Integration	✓
<input type="checkbox"/>	HDH DSBOTW Email   Email Migration to MG   Email Development	✓
<input type="checkbox"/>	HDH DSBOTW Email   Email Migration to MG   Email QA	✓
<input type="checkbox"/>	HDH DSBOTW Email   Email Migration to MG   Launch	✓
<input type="checkbox"/>	+ Add Task	

INTERNAL USE

# Backlogs

- A backlog is a buildup of work that needs to be completed.
- **We are keeping our Backlog in Monday.com.**
- How do you know what goes in a backlog?
  - Conversations with stakeholders
  - Projects coming in on intakes
  - Improvements the squad has discussed needs to happen
  - What Matches your roadmap?

When do you add items to a backlog?

- All the time!

## Questions to ask when building a backlog:

- Is training needed on my squad?
- Is our campaign documented?
- What would make this campaign run better?
- How to we improve manual processes?
- What do stakeholders need and when do they need it?
- When are stakeholders planning creative updates?
- What data updates are coming up?
- Is my campaign on the latest version of our products?
- What are past issues we've had? Can we improve them?
- Can we automate the reports needed for the squad?
- Do we need to improve requirements with stakeholders for projects?

	Phases of Project		Asignee	Hours Planned	Dates
Presently Working on	ProWelcome Tier Banner   Pro squad   Discovery	1 Week	Babu	6	FW01
	ProWelcome Tier Banner   Pro squad   Development	2 weeks	Britani	6	FW02
	ProWelcome Tier Banner   Pro squad   QA	1 Week	Babu & Britani	6	FW03
	ProWelcome Tier Banner   Pro squad   Launch	1 Week	Babu	6	FW04
	ProPAM- Preference Center Update   ProSquad   Discovery	1 Week	Babu	6	FW01
	ProPAM- Preference Center Update   ProSquad   Development	1 weeks	Britani	6	FW02
	ProPAM- Preference Center Update   ProSquad   QA	1 Week	Babu & Britani	6	FW03
	ProPAM- Preference Center Update   ProSquad   Launch	1 Week	Babu	6	FW04
Backlog	ProsFirst Direct Mail-Automate Prosquad  Discovery	1 Week	Babu	10	FW 05
	ProsFirst Direct Mail-Automate Prosquad  Development	1 weeks	Britani	15	FW 06
	ProsFirst Direct Mail-Automate Prosquad  Development phase 2	1 Week	Babu & Britani	6	FW 07
	ProsFirst Direct Mail-Automate Prosquad   QA	1 Week	Babu	6	FW 08
	ProsFirst Direct Mail-Automate Prosquad  Launch	2 Week	Britani	6	FW 09

See the [Monday Resource Guide](#) for what columns should be filled out in the backlog.

# Roadmaps

- A product roadmap is focused on the overall product development strategy, whereas a backlog focuses on the task specifics and details.
- **Your squad should be developing high level goals for every program you touch that align to our OKR's.**

## 2021 TRIGGERS ROADMAP

	Program	February	March	April	Q2	2H
ITEM BUYING PODS	In Market	• Review Brand Affinity version	• Subclass level audiences		• Launch stand alone version	
	Transactional	• Review current audience logic • Review recommendation logic	• Including incremental audience			
	Replenishment	• Review counts for water & air filters for email	• Water & Air Filter subscriptions			
CRM TRIGGERS	Abandoned Cart	• Include BOPIS messaging	• Include BOPIS messaging • DCS Mapping	• Additional recommendation strategy testing	• Test addition of Retail Media+ content • Create Cart module	• Test additional content: price drop same subclass
	Browse Retargeting		• Message prioritization: BOPIS, Subscription, Credit • DCS Mapping	• Test addition of Retail Media+ content	• Creative refresh • Test additional content: additional browsed SKUs	• Test additional content: price drop same subclass • Resend - subclass level
	Lower Price Trigger		• Transition to Pricing Table for file creation	• Test urgency messaging	• Test secondary content	• Discovery for additional sends based on promotion dates
	Search Retargeting	• Launch dynamic subject lines		• Launch stand alone version		• Content testing: top selling SKU, adjacent subclasses, etc.
	Shopper Browser		• Vision 2020 (Weekly) • Sponsored Products + Banner (Weekly)		• Test additional modules (browse, cart, search, reorder)	
	Post Purchase	• Test decrease blackout window from 7 days to 3 days	• Test Recs using Multi Anchor	• Test Recs based on HHID (PPS)	• Test anchor SKU logic • Discovery for additional sends/ journey	• Launch subsequent purchase triggers
	Samples Retargeting		• Launch hard flooring versions • Planning for Décor samples		• Discovery for additional opportunities	
	Modular	• Browse - test PIP recs	• Browse - test backfill logic • Cart - test only ATC recs			

Team Objectives and Key Results

[Link to our 2023 OKR's](#)

When making a Roadmap consider the Objectives you're trying to achieve, the Key Results required to show progress towards that Objective, and then the third part is Demands. The Demands are what is required to meet the Key Results and can help organize your thoughts around the roadmap.

Ex: "I need 3 more developers for 4 months to achieve XYZ Key Result" could be a demand.

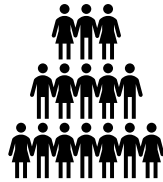
Results on Roadmaps come from prioritizing our resources and that means we have winners and losers on what we're able to do.



# Paid Media Ways of Working

# Examples of the Roles: <https://miro.com/app/board/uXjVPP2mYPY=/>

## External Teams



3 New Ideas for products!  
EX: New landing destination

## Paid Media SME/ Project Lead : Matt

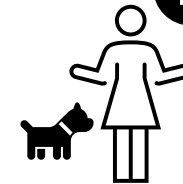


Matt Looks at the three projects:

1. Decides weather or not they fit into our roadmap,
2. Their priority with other projects the team is working on
3. If they are valuable enough for the team to work on.
4. Works with Meraj to understand the team Capacity for taking on work

1

## Program Manager: Randy



Randy is the organizer of all things Paid Media. He is responsible for breaking down projects from Matt into smaller tasks, and working with Tatianna to set the duration and estimated effort for each task.

- He runs Stand-ups
- Gets updates from the team on their tasks
- Monitors all projects across paid media
- Runs the Paid Media backlog
- Works with Matt to ensure all projects in the roadmap are broken out and planned for
- Assisting on Technical Projects when she is able to
- Monitoring the Intake board and handling day to day tasks
- Communicate with Matt, and Leadership on capacity

## Paid Media SME/ Project Lead: Tatianna



Tatianna gets assignment from Meraj to work on the New Landing Destination project. Being the SME on the Paid Media work she begins to gather requirements for each project she is on to fully understand the business needs and what success looks like on the project.

Tatianna communicates the needs to Meraj so that Meraj can resource plan in Monday.com and break up the tasks for the developers.

Tatianna is the lead on the project and responsible for:

- Communicating with stakeholders
- Use Monday.com to see if there are updates on any of her projects
- Being the liaison between the Dev team and the stakeholders
- Laying out requirements and getting answers for the Dev team
- Providing regular updates to stakeholders on the project
- Assist the Dev's with work if needed such as QA tasks, etc
- Updating Tasks in Monday.com so information is all in one spot
- Communicating with external teams on the launch of the project

# Paid Media Team Structure- Present

<b>Matt</b> Strategic Paid Media product manager/ SME	<ul style="list-style-type: none"><li>• Own Paid Media Pipeline</li><li>• Make decisions based on stakeholder feedback</li><li>• Solution Design on Projects</li><li>• Key Special Project Lead, and Identifier</li></ul> <b>Owner</b>
<b>Tatianna</b> Strategic Paid Media Sr. Analyst / SME	<ul style="list-style-type: none"><li>• Executing the roadmap</li><li>• Taking business requirements and turning into technical requirements</li><li>• Communicate to Stakeholders and report out on project progress</li><li>• Key communicator to celebrate team wins, troubleshooting issues etc</li><li>• Strategic Projects and External team Liaison</li></ul> <b>Owner</b>
<b>Randy</b> Paid Media Program Manager	<ul style="list-style-type: none"><li>• Break out Paid Media Projects into Tasks and assign to the team</li><li>• Running BAU Projects, monitoring audience launches, intake form</li><li>• Keep up with updates and details on tasks, extend timelines, communicate with Tatianna on delays or issues</li><li>• Monitor intake forms and resolve issues</li><li>• Take on stretch projects as they arise</li></ul>

<b>Chris</b> Sr. Developer	<b>Michael</b> Sr. Developer	<b>Harish</b> Sr. Developer	<ul style="list-style-type: none"><li>• Serve as the architect and designers for the paid media pipeline</li><li>• Work on projects</li><li>• Plan out the work in phases and rollouts</li><li>• Work with Tatianna to communicate timelines</li></ul>
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Product Team  
Supporting Audience

# Paid Media Goals 2022

Objective	Key Initiatives	Key Deliverables
Implement governance oversight of entire audience activation process	<ul style="list-style-type: none"> <li>Support community/pod taxonomy governance across all channels</li> <li>Implement process that supplements AC Framework and supports test &amp; learn strategies across all channels and identities</li> <li>Implement audience activation supply chain to provide visibility throughout entire audience activation process</li> <li>Build Workfront-Minitab-CAMP integration to streamline campaign inputs</li> </ul>	Liveramp assessment in order to scale reach across all destinations by XX time frame you should know Liveramp capabilities to understand our capabilities to integrate with them.
Maximize campaign performance through audience and content optimization	<ul style="list-style-type: none"> <li>Build KPIs that provide visibility into resource allocation &amp; task prioritization</li> <li>Implement robust API integrations throughout operations processes</li> </ul>	
Support cross-functional change management and process optimization	<ul style="list-style-type: none"> <li>Implement “reservationing” to support RM+ off-the-shelf requirements                             <ul style="list-style-type: none"> <li>Streamline measurement by integrating with RM+ processes</li> <li>Build Vantage-ARF integration to support RM+ activation requirements</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Keep enhancing Vantage</li> <li>Provide Visibility throughout the AC Process</li> </ul>
Build an effective team	<ul style="list-style-type: none"> <li>Create a Proactive Roadmap of paid media projects our team would like to implement</li> </ul>	<ul style="list-style-type: none"> <li>Build out a Paid Media Roadmap</li> <li>Document Paid Media projects in a project tracker within Monday.com</li> <li>Develop a system of product management that gives leadership visibility into the phases of projects</li> <li>Ideate and develop new ways of product managing on paid media</li> </ul>