

HEALTHY
HABITS
BETTER
BUSINESS



WELLRIGHT

Stakeholders Quarterly
Meeting

Meeting Agenda

- “Hot” Topics
- Product is Listening!
- Stakeholders **THREE** Priorities
 - Features have not changed
 - Features removed (this is VERY important - can't just keep adding)
 - Features added
 - Updates to Current Feature

“Hot” Topics

This was time the Product Team could use to get feedback from key stakeholders, present data, give general updates, etc.

- Springbuk Update
- Integrations Document
- Customer Advisory Board
 - May 11 - Partners
 - May 12 - Directs
- Data Presentation - University Course Analysis

What we have
been up to?

ROADMAP
UPDATE



Product is Listening!

Items from past Stakeholder requests that were slated in a future roadmap.

2022 Completed Stakeholders Items

Kept a running list of features completed for the current year.

- Item 1 - Date
- Item 2 - Date
- Item 3 - Date

For a full list, click here.

Removed link because it had proprietary information, but this would take them to completed items from past meetings.

What is the Stakeholders Meeting?

- Monthly meeting to discuss new initiatives that arise throughout the year
- Chance to influence the product roadmap - make case for initiatives that will make the biggest difference for internal operations and our customers
 - New features
 - “Pants on Fire” Bugs
 - Move up currently slated features
 - Research
- Each stakeholder group will have the opportunity to present up to three requests
- Your responsibilities prior to the meeting
 - Remove any items either added to the Roadmap or no longer needed
 - Update the presentation with any new requests

Suggested Format

- Description
 - How would you summarize your request?
- Objective
 - What is the problem we need to solve?
 - Why is it important to do now?
 - What are the successful outcomes of doing this? Impact to KPIs?
- Shortcut Epic/Story (if already created)
- Market
 - Does this apply to reseller, direct, reseller or a combination?
- Specific Clients
 - Which clients or prospects have requested the feature?
 - Which clients will this impact? How?
- Revenue
 - How much ARR is associated with these clients?
- Target Date
 - Ideally, when would this “need” to go live?

Example Feature Request

- **Description:** Text Message Reminders for Events
- **Objective**
 - Clients have brought up that their participants are missing events because they don't see the reminder emails. Those who don't sit in front of a computer are especially impacted.
 - Events usage is continuing to increase, so the sooner we can improve the experience, the better.
 - Ideally, this would lead to increased event attendance and client happiness due to the addition of a requested feature.
- **Market:** Reseller and Direct
- **Specific Clients**
 - Requested: HomeTown (40+ clients), PEHP, Winona
 - Impacted: All clients who use events could enable text reminders (roughly 30% of entities)
 - Could be a good selling point for prospects since many are impressed with other text functionality
- **Revenue:** \$300K+ in ARR
- **Target Date:** Q1 2020



DEPARTMENT
UPDATE

CUSTOMER SUCCESS

Each Department would have three slides using the template supplied in the previous slides.

SUPPORT

SALES

DEVELOPMENT

CEO