

# PROJECT PLAN

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# OBJECTIVES

01

## **PROJECT MANAGEMENT TOOLS: SNAPSHOTS (SLIDES 3-6)**

Showcase the various Project Management tools that determines our team member's roles, responsibilities, and keeps Momento on track + constantly delivering.

02

## **PROJECT SCOPE (SLIDES 7-17)**

Documents objectives, assumptions, decisions, project stakeholders, costs, calendars, and more.

03

## **ADDITIONAL PLANNING RESOURCES (SLIDES 18+)**

Gantt charts and other visual frameworks that help with Momento's planning.

01

# PROJECT MANAGEMENT

# PROJECT DARCI

Due Date	Item	Before we assign, who is interested in working on what?   Add your name to the deliverable you'd like to work on; there can be more than one person per item!	Accountable	Responsible	Consulted	Informed
			<i>Makes sure it gets done</i>	<i>Gets it done</i>	<i>Gives input</i>	<i>Is kept in the loop</i>
	Create, Structure, & Populate Sharepoint	Jen B.	Jen B.	Jen B.		
	Structure & Populate Asana Board	Jen B.	Jen B.	Jen B.		
	Finalize Group Meeting Cadence & Send Invites	Joel K	Joel K.	Joel K.		
	Finalize Roles & Responsibilities	ALL	ALL	ALL		
Week of A	Proposal Draft	Dan M.	Dan M.	ALL	NFAC; Advisor	NFAC; Advisor
18-Aug	Submit Proposal	Dan M.	Dan M.	Dan M.	NFAC; Advisor	NFAC; Advisor
23-Aug	Meeting with Amy & Becca	ALL	ALL	ALL		
27-Aug	Minutes posted on Project Site	Erin M	Erin M.	Erin M.	NFAC; Advisor	NFAC; Advisor
27-Aug	Set up Project Site	Dan M.	Dan M.	Dan M.	NFAC; Advisor	NFAC; Advisor
27-Aug	Set up meeting with faculty advisor	Jen B.	Jen B.	Jen B.	NFAC; Advisor	
12-Sep	SITUATIONAL ANALYSIS (Due date Sept. 12 / 10% of Final Assignment Grade)					
17-Sep	Project Plan - Draft	Sean T., Jen B.	Sean T.	Sean T., Jen B.	NFAC; Advisor	NFAC; Advisor
17-Sep	Company Profile - Draft	Dan H, Dan M	Dan M.	Dan M., Dan H.	NFAC; Advisor	NFAC; Advisor
17-Sep	Marketing & Segmentation Strategy - Draft	Jen B., Erin M, April M, Joel K	April M.	Jen B., Erin M., April M., Joel K.	NFAC; Advisor	NFAC; Advisor
17-Sep	Brand Positioning - Draft	Jen B., Erin M, April M	Jen B.	Jen B., Erin M., April M.	NFAC; Advisor	NFAC; Advisor
17-Sep	Brand Profile - Draft	Jen B., Erin M, April M	Jen B.	Jen B., Erin M., April M.	NFAC; Advisor	NFAC; Advisor
17-Sep	Pages created on Project site to include above	Dan H, Sean T.	Dan H.	Dan H., Sean T	NFAC; Advisor	NFAC; Advisor
20-Sep	Meeting with Amy & Becca	ALL	ALL	ALL		
24-Sep	Minutes posted on Project Site	Erin M	Erin M	Erin M		
24-Sep	Set up meeting with faculty advisor	Jen B.	Jen B.	Jen B.		
26-Sep	ENVIRONMENTAL RESEARCH & PERSONAS (Due Sept. 26, 10% of Final Assignment Grade)					
10-Oct	Data Analysis - Rough Draft	Dan M, Joel K	Dan M.	Dan M., Joel K.	NFAC; Advisor	NFAC; Advisor
10-Oct	Data & Process Model - Rough Draft	Dan M, Joel K, April M	Joel K.	Dan M., Joel K., April M.	NFAC; Advisor	NFAC; Advisor
10-Oct	Pages created on Project site to include above	Joel K	Joel K.	Joel K.	NFAC; Advisor	NFAC; Advisor
11-Oct	Meeting with Amy & Becca	ALL	ALL	ALL		
15-Oct	Minutes posted on Project Site	Erin M	Erin M	Erin M		
15-Oct	Set up meeting with faculty advisor	Jen B.	Jen B.	Jen B.		

# Asana Board – Project Management Tool





+ Add task ⌵

🕒 All tasks ≡ Filter ⬆️ Sort ⚙️ Customize ⋮

# Task name ⌵ Assignee Due date +





▶ by September 10

▼ by September 12

1	▶ <input checked="" type="checkbox"/> FEEDBACK ON: Initial Drafts for Specialized Groups for Review (Dan/Jen/April/Erin/Joel) <span>2</span> <span>🗨️</span> <span>5</span> <span>🔗</span>		Today	
2	<input checked="" type="checkbox"/> For 5603/5606: SITUATIONAL ANALYSIS (Description Inside)	 Dan Hetheri...	Today	
3	▶ <input checked="" type="checkbox"/> Draft of Drafts Due for Group Sharing/Presentation: Be prepared to present to full group! <span>4</span> <span>🔗</span>		Today	
4	<input checked="" type="checkbox"/> Rolodex of Tech Offerings	 Joel Koch	Today	
5	<input checked="" type="checkbox"/> Business Model		Today	

Add task...

▼ by September 17, 2021

1	▶ <input checked="" type="checkbox"/> Project Plan, Company Profile, Market & Segmentation Strategy and Brand Positioning & Brand Profile– Rough Drafts <span>1</span> <span>🔗</span>		Friday	
2	▶ <input checked="" type="checkbox"/> Project Plan <span>2</span> <span>🔗</span>	 Sean T. Mad...	Friday	
3	<input checked="" type="checkbox"/> Company Profile		Friday	
4	<input checked="" type="checkbox"/> Market & Segmentation Strategy	 April Morton	Friday	
5	▶ <input checked="" type="checkbox"/> Brand Positioning <span>6</span> <span>🔗</span>		Friday	

Add task...

# Asana Board – Continued

▼ by September 24, 2021

- 1  Meeting with Amy & Becca
- 2  Virtual Meeting/Update with Faculty Advisor to Discuss Progress + Minutes Posted on Project Site
- 3  Minutes Posted on Project Site
- 4  Virtual Meeting w/ Faculty Advisor

Add task...

▼ by September 26, 2021

- 1  5603/5606: ENVIRONMENTAL RESEARCH & PERSONAS (10% of Final Assignment Grade)

Add task...

▼ by October 10, 2021

- 1  Digital Analysis, Data & Process Model – Rough Drafts| Pages created on Project Site to include this information – should be rough drafts and available to mentor and faculty advisor
- 2  Data Analysis
- 3  Data & Process Model

Add task...

▼ by October 15, 2021

- 1  Meeting with Amy & Becca
- 2  Virtual Meeting/Update with Faculty Advisor to Discuss Progress | · Minutes posted on Project Site
- 3  Minutes Posted on Project Site
- 4  Virtual Meeting with Faculty Advisor

Add task...

02

# PROJECT SCOPE

# Company Background

***Momento*** powers the world's most thoughtful people, using technology to imagine a future that is more expressive and heartfelt.

We do this by helping people remember to celebrate the moments that matter most to them. Through a suite of powerful digital tools, we provide a more timely, customizable, and out-of-this-world satisfying card *selection, writing, and gifting* experience that other greeting card brands cannot match.

A go-to destination for the world's most thoughtful people, just two taps away in the *Momento* app and *Momento.com*.



# Company Objectives

## Business Objectives:

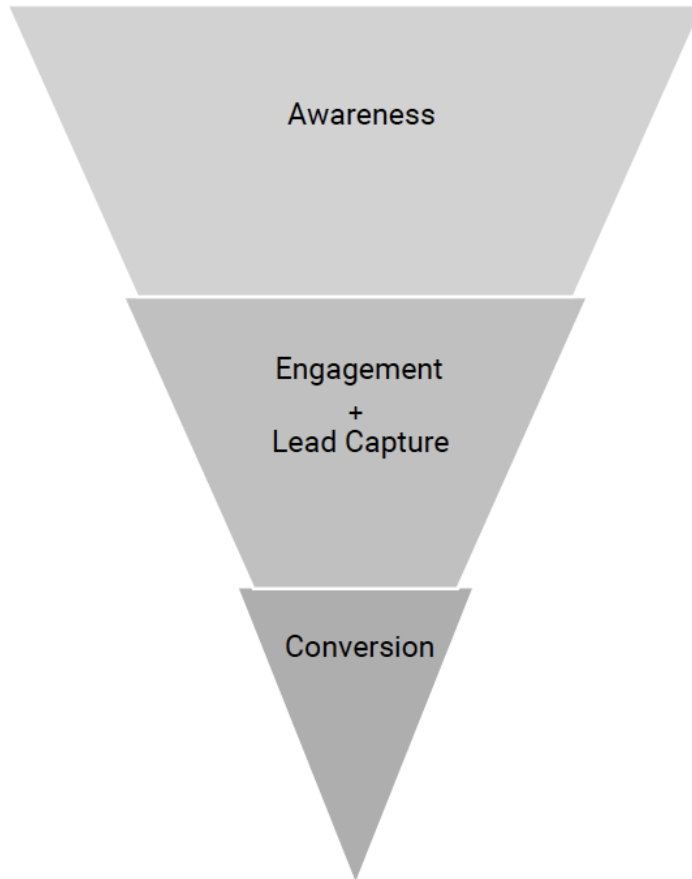
- Sell 22,500 cards (2,160 (90\*24) + 20,520 (1,710\*12))
- Sell 225 gifts (1% conversion rate from cards)
- Sign 20 small business partners/suppliers
- Become a member of the Greeting Card Association within six months of launching
- Launch of user-friendly website within the first year; an app within the three years
- Become profitable within five years of launch

## Marketing Objectives:

- Increase Awareness (specifics on next slide)
- Increase Engagement + Lead Capture (specifics on next slide)
- 1,800 new subscribers (60,000 leads\*.03 [conversion rate])
- 90 premium subscribers (5% of total)
- 1,710 free subscribers
- 60,000 website traffic hits (assuming 5,000 per month)

# Marketing Measurement

## MEASUREMENT FRAMEWORK



OUTCOMES	COMMUNICATIONS	MARKETING PROGRAM HEALTH
Unaided Awareness Aided Awareness Brand Perceptions/Traits Ad Recall Organic Search Volume	GRP Impressions CPM Reach Frequency Viewability Views Time with Ads Video Completion Rate	Word of Mouth Change in Rate of Growth
Leads Captured Lead Types Cost Per Lead LP Conversion Rate Cost Per Conversion New Followers/Friend Cost Per Follower/Friend	Impressions CPM Reach Frequency Clicks CTR CPC Viewability Views Time Spent with Ads Video Completion Rate Time on Site Unique Visitors Sessions per User Pages per Session Bounce Rate Likes Comments Shares Reposts Retweets Engagements Conversion Rate	Time to Conversion Touches to Conversion Lead LTV
New members Cost per member Cost per follower/friend	Impressions CPM Reach Frequency Clicks CTR CPC Viewability Views	Time to subscription Time to premium TTM

# Stakeholders

## Customers

- Target Audiences:
  - Time-crunched Taras
  - Busy-mom Belindas
  - Choosy Chaces
  - Techy Terences

## Investors

- Accel: California based IT focused venture capital firm with record of success (Facebook, Slack, and Etsy). Offers full range of funding levels, from seed to growth.

## Product Team

- Dan Martin | Founder
- Jen Berman | Director of Brand Strategy
- Joel Koch | Chief Technical Officer
- Sean Madden | Chief Information Security Officer
- April Monee Morton | Director of Marketing Operations
- Erin Mihalik | Director of Digital Marketing
- Dan Hetherington | Director of Experience

## Advisors

- Industry Advisor: Debbie Kiederer
- Faculty: Amy Lavin & Becca Zinn
- Social & Mobile Experts: Kimberly Jaendl & Greg Ebbecke

## Potential Business Partners

- Independent Card Makers
- Etsy
- Calendly

# Budget/Cost

- **Overhead:**

- Travel: \$5,000 per month
- Tech equipment for remote team
- Taco Bell subscription

- **Tech & Web Services:**

- Domain Registration: GoDaddy \$20/year (\$200 to purchase)
- Hosting Service: WP Engine, Ecommerce Hosting Professional plan \$750/year
- Web Content Platform: Fee
- Website Template: Divi/WooCommerce 1-time fee \$250
- Site development: In house
- Site UX study: MUIQ offers the most comprehensive study at a reasonable price \$20-100K. Free options are available in the early phases of testing (UsabilityHub).
- App development: in house
- Cloud storage: AWS: uses a variable pricing model so we only pay for what is used. Budgeting \$10,000 per month in first year of operation.
- Analytics/Tracking: Google Analytics, Tag Manager, Ad Manager free

- **Marketing & Branding:**

- Advertising: Are we going to do a social media content marketing concept (ie limited to no advertising)? Or a more traditional concept with more website ads? I recommend SM, it will allow us to spend more money on website and content development.
- Branding: in house
- Marketing plan: in house

# Timeline: Year One

## Year One: Discovery, Planning, Prototyping, Testing, & Investing

- **Q1-Q2 Discovery + Planning (January – June 2021)**
  - Concepting
  - Market Research
  - Consumer Value Proposition (CVP)
  - Reasons To Believe (RTBs)
  - Valuation
- **Q3: Planning Cont'd, Branding, & Marketing Strategy (July 1 – September 30, 2021)**
  - Project Product Plan
  - Scoping & Mapping
  - Company Profile
  - Brand Positioning + Identity
  - + Market Testing
  - Market & Segmentation Strategy
  - Situational Analysis
  - Environmental Research and Personas
- **Early Q4: Data, Prototyping (October 2021)**
  - Data Analysis
  - Data & Process Modeling
  - Content and Channel Strategy
  - Campaign/activation and Editorial Calendar
- **Mid Q4: Prototyping, Leadership Buy-In, & Channel Planning (November 2021)**
  - Prototype
  - Memo to Company Leaders
  - Marketing Channels
  - Deck Build
  - Budget and Resource Plan
  - Measurement Strategy and KPIs
- **Late Q4: Pitches for Funding (December 2021)**
- **Year Five: Scale Beyond the US**

# Timeline: Years Two-Four

- **Year Two: Launch, Upgrade, Feature Release**
  - Q1 Launch Version 1.0 in the US
  - Q2 Update to Version 1.1
  - Q3 Release new voice-to-text feature
  - Q4: Update to Version 1.2
- **Year Three: Brand Partnerships & Integrations**
  - Q1: Release new brand partnerships (Hallmark, Etsy, Facebook, etc)
  - Q2: New integrations
  - Q3: Brand Audit
  - Q4: Plan for Brand Refresh
- **Year Four: Brand & UI Refresh**
  - Q1: Pivot to Gen-Z customer focus



# Momento. Year One

## 4. Prototype + Leadership

### + Measurement

Prototype  
Memo to Leadership  
Marketing Channeling  
Deck Build  
Budget & Resource Plan  
Measurement + KPIs



## 5. Pitch for Funding





03

# ADDITIONAL RESOURCES

# Technology Requirements

[Momento's tech requirements here.](#)