

HUM Engagement Time Machine

Team Charter

Griffin McCauley, Theo Thormann, Eric Tria, Jake Weinberg

1. Purpose and Key Responsibilities

- a. Purpose: The goal of our project is to create two predictive models that understand user behavior. The first model will identify members who are likely to forgo continued membership. The second model will identify pathways that lead to high value actions such as product purchases or membership renewals.
- b. Responsibilities
 - i. Meet with our client every week
 - ii. Meet or exceed established deadlines
 - iii. Evenly distribute work amongst team members
 - iv. Propose additions to the model to the client as we see fit

2. Vision

- a. Our vision is a well written report to our client describing our code and our findings regarding the analysis of our two models.
- b. Our model will be replicable and easy to manage.
- c. Our model will have a tangible economic benefit to our client's business.

3. Values

- a. It is important to set values for our team that will not waver under time pressure or demands on requirements. We will commit to:
 - i. Analytical rigor – we will strive to build the best product possible for our client that can consistently deliver accurate results.
 - ii. Collaboration – in order to succeed to the best of our ability, it is important to make sure we value all perspectives and work together as a team to support each other in our work.
 - iii. Reliability – we will attend all meetings with the client and our internal team to the best of our ability, we will be prepared with our work, and we will succeed in meeting all key deadlines.
 - iv. Trust – members will have trust in teammates to complete their assigned tasks, and the group will work together to ensure all members get the experience they need out of the project.
 - v. Accountability – team members will carry their individual weight on the team and will communicate any obstacles so the team can problem-solve around them.

4. Goals

- a. Many of our goals are in flux, as we have yet to have the kick-off meeting with our sponsors, but the broad theme will be to diligently and ethically attempt to

serve our stakeholders to the best of our abilities and to deliver reliable and actionable models and results to help enhance user engagement with our clients.

- b. Project goals:
 - i. To understand the user retention situation of HUM clients by understanding which users are in danger of dropping out and recommending how HUM can provide further value to those users to prevent them from doing so.
 - ii. To recognize high-value events (purchases, renew memberships, etc.) and build a tool that will automatically encourage all these high-value events.
 - c. General deliverables:
 - i. First Semester: Perform exploratory data analysis and construct a structured plan for the project pipeline.
 - ii. Second Semester: Develop a model that lets HUM dig into their user history to show what happens before a user disengages or fails to renew a membership to an association or media outlet.
 - iii. Second Semester: Create a model that identifies pathways in historical data to lead to high value events (membership renewal or resubscription).
5. Roles and Responsibilities
- a. Our team will strike a balance between efficiently distributing labor and rotating responsibilities so that we all have varied learning experiences throughout the project. Our team members will all share equally in the contributions of the team and everyone's preferences for work will be considered. We will work together as much as possible. With that being said, the following responsibilities will be divided between the team after meeting with the client:
 - i. Client communication
 - ii. Advisor communication
 - iii. Model 1 – Client retention
 - iv. Model 2 – High-value action pathways
 - v. Any other responsibilities or requirements to be discussed with the client
 - b. Team Members:
 - i. Griffin McCauley
 - ii. Theo Thormann
 - iii. Eric Tria
 - iv. Jake Weinberg
6. Mutual Expectations
- a. In order to build a respectful, cohesive, and collaborative environment, all members of our team will bring open and non-judgmental attitudes to every meeting in order to hear the thoughts and ideas of each other and to move forward with clear direction.
 - b. Out of a mutual respect for the time of each other and our stakeholders, we will all engage in transparent dialogue to ensure that each of us is staying on top of our assigned tasks and to keep others up to date on any crucial decisions being made.

- c. If a team member is feeling frustrated with their section of the project, the other team members will come together to help them solve the problem.
7. Operating Procedures
- a. Our group will have two standard weekly meetings:
 - i. One meeting will be with the project sponsor in order to provide updates on our progress and to facilitate an open discussion about how we can proceed most effectively. This meeting will be kept to 30 minutes.
 - ii. A second meeting will be held with just the members of the group, and this time will be used to assign tasks and to evaluate progress as the project evolves. This meeting will be kept to 1 hour.
 - iii. Additional meetings intended to serve as joint working sessions for the group will be scheduled as needed.
 - b. Communication within the group will be mainly through MS Teams. Deadlines and deliverables will be tracked using MS Planner.
 - c. Communication with our project sponsor and advisor will be mainly through email. Additional communication can be done through MS Teams as needed.
 - d. Decisions will be made as a group. Any idea should have the approval of all the group members before proceeding.
 - e. Conflicts will be resolved by consulting other group members for their opinion. If there is any serious disagreement amongst members, we will reach a compromise by either combining ideas or consulting the project sponsor or advisor.
 - f. Reflections will be made during the weekly meetings within the group. The group will discuss what went well and did not go well from the previous week in addition to considering ways in which we can improve going into the next week.