

# Sales and Success Execution Sync Agenda

## Asana Links

- [Sales](#)
- [Success](#)
- [Setter](#)
- [TT Front Desk](#)

## Other Docs

- [Sales & Success Leadership Sync Doc](#)
- [S^2P Asynchronous Doc](#)

## Quarter 2 2022 Goals:

- **Implementation of experimental framework and automation.**
- **V1 refreshed LTV, Incrementality, Cost → ROI.**
- **1 Presentation each in SBR during Q2**
  - **Retention Campaign Results**
  - **Sales ROI**
  - **MHF Funnel V2**

2022-08-29

## Discussion:

- Office closed 8/2-9/5
- Diego (+Anne) out Thursday 9/1
- Josh out until 15th after camp

## Josh

- NBO tracking
- Communications
  - Zillow Stuff
  - Inflation Reduction Act
- Mode Tableau Dashboard shtuff
- ??

## Diego

- **IB Flip Dashboard Updates**
- SBR deck for IB campaign

### Elliot

- **Sales Exceptions**
- **Invoice and message delays**
- LTV Query work
- Productionize lead score model?
- Review Jill's pro lifecycle RFC

### Robbie

- **Mode to Tableau dashboard migration**



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- MHF final testing
- Postponed: Sales infra conversation

### Anne

- Out Thurs-Fri for moving
- Standardize supply and demand revshare query
- HEB query
- Partner overlap update
- Josh to talk to Anne about cost stuff

### Shiyu

- Presentation to Blake's team today
- Last week wrap up

### Rommel

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2022-08-22

**Discussion:**

- New Position Posted on Friday
  - Referrals
  - Resume Review
- Main execution topic in bold
- New Jack 1:1 cadence
- Support for Mel's readout
- GTM Meeting topics??

**Josh**

- SBR Prep
- **Self serve pro costs vs sales pro costs**
  - **Anne Nollet might have some questions for you.**
- NBO tracking table
- Check in on payment table updates for experiment.

**Diego**

- **Heads down on IB Flip Dashboard**
- PONB readout
- Tier1 and Tier2 benchmarking

**Elliot**

- **LTV Query work**
  - **Invoices**
- Request from Seth: "Do you know of a table where we can query charges based on payment type?"
  - Saying he is having issues with a toggle somewhere
- IB - category into Salesforce

**Robbie**

- **New MHF model review from Mark with Gaurav**
  - RFC and action plan
  - Testing analyses with new table
  - Discuss go-forward strategy
- Sales infra communication with Blake
  - Sales prospects rebuild
  - Sales and Tracking data sources rebuild

- Future state: Structure data table hierarchy and create documentation for how to pull ops data from these tables going forward

### Anne

- HEB dashboard build
- Yelp API pull
- **Supply attribution - finalize process and finish dashboard**
  - Further investigate which event fire on partner landing pages
- Front desk one-pager
- A few ad-hoc queries + setting up better ad-hoc organization flow
- Start API pro incrementality analysis

### Shiyu

- SQL implementation of Lead Score Model and Check alignment
- Presentation to Blake

### Rommel

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2022-08-15

### *Discussion:*

- Functional Calibrations Over (up to level 5)
- SBR topics??
- Success starting IB flip calling.
  - Diego to plug in.

### Josh

- More NBO
- Add geo preferences to IB flip stuff
- SBR Calendar
- New Activated Services

### Diego

- VACAY Baybay
- Tier3 close out...finally
- IB Flip check in
- Carl is no longer with us

**Elliot**

- Committed Contracts
- LTV Query work
- Instant Book
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**Robbie**

- Sales Market Data Dashboard update (working with IT)
- Sales infra testing
  - Dig into Tom's sandbox tables behind sales tracking dashboard (identify tables to be migrated)
  - Research tables/dashboards that use new pro performance and sales outcomes (will need to migrate)
  - Look into adding LTV fields from NPP into pro\_details
- MHF follow-up with Mark and Gaurav, start RFC

**Anne**

- Supply attribution
  - Build dashboard
  - Finalize rev share process
- HEB reporting scoping
- Start API pro analysis
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**Shiyu**

- Finalize Lead Score Model and Presentation Prep

**Rommel**

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2022-08-08

***Discussion:***

- Diego Out
- Pre Calibrations Over
- Josh can't attend today's team sync.

**Josh**

- NBO Infra
- Portland Booking Pull

**Diego**

- VACAY Baybay

**Elliot**

- Finance #s
- Committed Contracts - looks like experiment may be coming directly to me. Need to sort out needs here
- LTV Query for LTV expansion
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**Robbie**

- Sales infra testing
  - All\_Prospect vs Sales\_Prospect (for sales tracking dashboard)
  - Research tables/dashboards that use new pro performance and sales outcomes (will need to migrate)
  - Look into adding LTV fields from NPP into pro\_details
- MHF follow-up with Mark and Gaurav

**Anne**

- Supply attribution
  - Finalize query
  - Build dashboard
- Neighborhood purchasing pricing info
- Moving to booking - how many pros are using the API

**Shiyu**

- Finalize Lead Score Model and Presentation Prep
- Share and Synchronize with Blake

**Rommel**

- Follow up on Chris' tt-people table for roster
- Pro characteristics - \$50 and \$300 packages

2022-08-01

**Discussion:**

- Jack out
- Elliot out
- Josh shotty (parents in town)
- Diego out next week

**Josh**

- NBO Infra
- Booking scoping
- Follow up on payment method expirations
- Partnerships pro vs TT Pros

**Diego**

- Tier2 Power Analysis using other metrics
- Tier3 final presentation needed?
- Tier1 Monitoring

**Elliot**

- VACAY

**Robbie**

- Sales infra work with Blake
- Potential post MHF work
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**Anne**

- Out wednesday for Women ERG event
- New pro attribution
- Rev share
- BizOps
  - Neighborhood purchasing meetings
  - Pulling jobs done rate for overserved contacts
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**Shiyu**

- Further refine/select features and thresholds in Lead Score model
- Interpret model result

- Build dashboard for Moving Customer Experiment with Anna

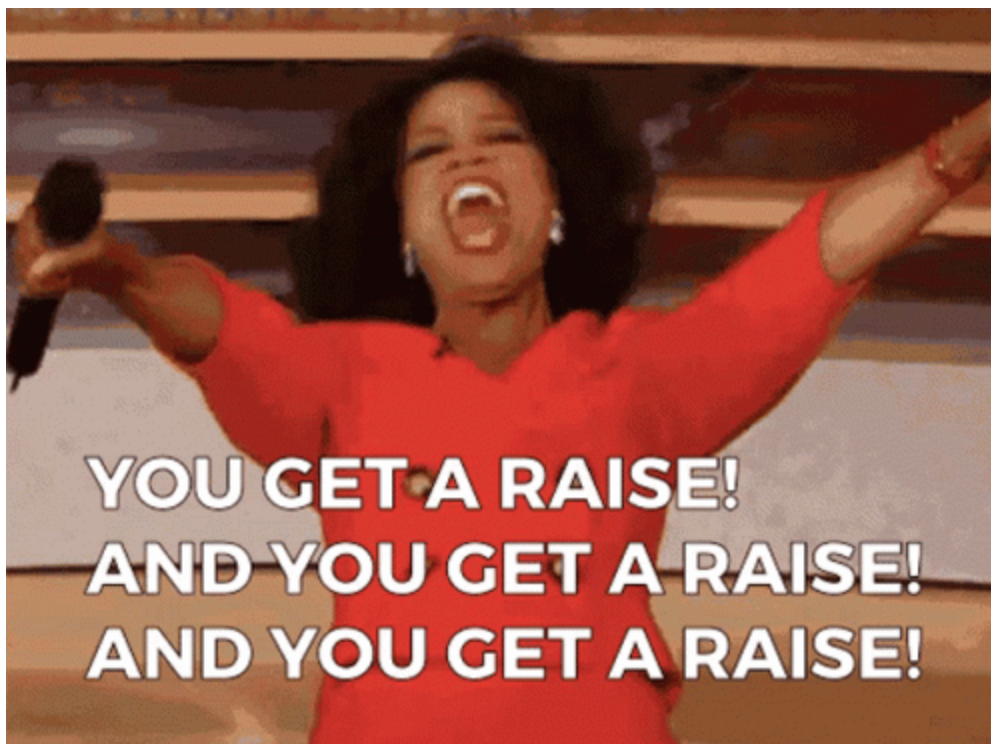
#### **Rommel**

- Explore LTV
  - Fix query
    - Duplicates caused multiple counting of revenue
  - Include budget, services, requests, contacts, and hires in the view and analysis
- Refund Sampling Sync - finalizing

2022-07-25

#### ***Discussion:***

- Pre Calibration Wednesday for Review Cycle



#### **Josh**

- NBO Infra Build!
- Partnership Pros vs Company Pros
- New load of expiring credit cards + impact tracking



- SBR Metric Check in

### **Diego**

- PTO 8/8-8/12
- Tier3 Logic Review and Readout
- Tier1 and Tier2 Metrics
- Churn Definition
- Instant book scoping
  - Mentioned an instant book campaign in the GTM meeting doc.

### **Elliot**

- Breadth and Market Ranking/Decile slides
- LTV
- ROI

### **Robbie**

- More MHF deep dive
  - What is pattern to low decile spending pros? Geography, life cycle, disengagement, etc.?
- Sales Deep Dive Dash modifications
- Review sales outcome tables, action items

### **Anne**

- Attribution tracking for partner pros
- Revenue share for partner pros - stable infra
- FD analysis for Thumbtack Insights
  - Polishing deck
  - Collaborating with other stakeholders to showcase their work as well
- FD Gsheet chaos

### **Shiyu**

- Build Random Forest Model and Solve unbalanced samples issue
- Refine and select features
- Shadow Moving Customer Experiment with Anna

### **Mel**

- Explore LTV
  - Difference between \$50 and \$300 packages
- Follow up Admin Impersonation

- Explore automating roster with team changes

2022-07-18

**Discussion:**

- Review Cycle
  - Pre Calibration on Next Wednesday
- Deadline booking flights for Camp TT next monday.

**Josh**

- MHF Examples
- REVIEWS BABAY
- Marketing Intake Questions
- NBO Scoping
- Data Sync Issues

**Diego**

- Tier1 and Tier2 Launch
- Tier3 update
- Front Desk Sync with Anne (didn't happen last week)
- Pro Success Long Term Strategy Meeting

**Elliot**

- Sales Specialization
  - This is basically getting killed
- ROI
  - Build out some simple documentation
  - [Here's the rough draft code](#)
- LTV
  - [List of potential variables](#)
- Lead Score

**Robbie**

- MHF deep dive part IV
  - Look at pros who fall out of top deciles, what is the pattern?
- Look at sales infra, next steps/action items

**Anne**

- Re-prioritize after ping post cancellation
- New pro attribution for partnership pros
- Revenue share for partner pros
- (Finally) Wrap up Front Desk analysis

**Mel**

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**Shiyu**

- Try different ways to group occupation to segment data
- Finish data cleaning
- Refine the EDA

2022-07-11

**Discussion:**

- Self Upwards and Peer Reviews Due Tomorrow EOD
- Meeting Time to Accommodate TPH
- GTM Meeting Topics
  - Regionalization
  - Package Optimization
  - Projects not captured in planning

**Josh**

- SBR Meeting Prep
  - Q2 OKR Updates
- MHF Deck prep for wednesday meeting
- Finish Reviews
- Push Budget Infra Change
- Update Sales Rev Impact YTD Numbers

**Diego**

- Reviews!!!
- Tier 1 and Tier 2 Launch
- Tier 3 Lingering questions
- TTFD Accounting Data scoping with Anne

**Elliot**

- Reviews
- Sales Specialization
  - Pulling Mel in on this with me
- ROI
  - Build out some simple documentation
  - [Here's the rough draft code](#)
- LTV
  - Compile list of suggested variables and start to define them in SQL
- Lead Score

#### **Robbie**

- Reviews
- MHF deep dive part IV
  - MHF might be working, but is it the right strategy?
- Look at sales infra, next steps/action items

#### **Anne**

- Front Desk
  - Wrap up analysis on the customer side
- Ping Post
  - Get query in a good place w/ Chad and then transfer ownership
- FD Accounting
- Finish reviews
- GTM Meeting?

#### **Mel**

- Workday Use Cases
  - Consolidate needed fields to update Chris Praley's [Workday data pull](#)
  - Main missing and necessary fields: hire and transition dates
- Sales Specialization - Blake's [RFC](#)

#### **Shiyu**

- Clean Data and Clarify metrics definitions for Lead Score
- Perform EDA on social media/platform data