

Object Hierarchy Catalyst

This document will be presented for approval in Catalyst on 7/17/2025

Overview

Team: Managed Growth

Status: Ready for Review

MG: [@Oleg Vaskevich](#) [@Hari Sivaramakrishnan](#)
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Approvers

Technical / Architectural features: include Noam & Mark

End user-focused/design-oriented features: include Noam & Collin

Role	Reviewer	Review Status
Product	 Noam Lovinsky	Under Review
Eng	 Mark Schaaf	Under Review
Design	 Collin Whitehead...	Under Review

Background

As we become a multi-product company that offers both individual and bundle offerings, we need to create the connective tissue between our products. We've covered the identity side of this previously ([Identity MVP](#), [Unified Login](#)) and will cover the SuperAdmin experience in a future Catalyst. This catalyst describes **how we will evolve our object hierarchy to support our future without disrupting existing product offerings** through the Oct 6 Launch and beyond. The goal is to identify new or existing objects that can serve as an anchor for Genesis Billing and Settings, while also working with existing product-specific objects.

Goals

- Describe the long-term vision for the Genesis Object Hierarchy and the product decisions that informed it.
- Describe the short-term prioritization to support the Fall, Oct 6 launch. While we describe the long-term vision to paint the big picture, we are especially seeking feedback on the near-term that impacts the Fall launch.
- Showcase high-level mocks that describe the object hierarchy and how that manifests in the user experience.

Non Goals

- Deep dive on admin settings or personal settings wireframes. This will be covered in a separate catalyst to walk through the Super Admin Experience.
- Discuss 10/6 Pricing & Packaging feedback, as that work is ongoing in a separate but related track. A catalyst update for P&P has been scheduled for 7/21.

Current State

Product Offering	Associated Objects
Grammarly	<ul style="list-style-type: none">Institutions
Coda	<ul style="list-style-type: none">Coda OrganizationsCoda Workspaces

► The viability of adding Superhuman Mail to the Genesis Bundle by Oct 6 is being actively discussed by multiple teams. Although initial assessment suggests that the proposed Object Hierarchy will scale to Superhuman Mail, we have not done any in-depth evaluations of the same. Please consider only Grammarly and Coda for this proposed object hierarchy at this time. We plan to deep dive on Superhuman Mail after the acquisition motions complete in mid-July.

Product Decisions

Definitions

► These definitions solely describe product concepts; they do not refer to any existing Grammarly or Coda objects or refer to new Genesis objects. PMs used this to describe the requirements to engineering partners who then worked on a Genesis set of objects and relevant hierarchy.

User	Team	Org
A user is anyone who has a Genesis account and uses the company's products (e.g. Grammarly, Coda, Superhuman Mail).	A collection of users (at least 2). This is <u>not referring to Grammarly/Coda's Team SKU</u>	A collection of Teams (at least 1), usually used for large customers with below qualifications. <u>Does not refer to Coda's org object.</u>
Possible Qualifications		
<ol style="list-style-type: none"> 1. Must have > x seats 2. Must have > y employees 3. Must have at least 1 Team on the Genesis Enterprise SKU 		

- i**
- The goal of these product requirements is to explain current and future needs.
 - Each Decision section has specific callouts for what is needed for Oct 6
 - Since the objects created for Genesis will be foundational to how we enable our multi-product future, we need to consider future requirements, even if we prioritize for the short term.

Requirement 1: Genesis object Hierarchy should support Free and Hybrid Teams

- We expect Free Teams to form and evaluate Genesis before deciding to be paid
- We expect Hybrid Teams (some team members are paid, some are free and have reduced feature sets) to help admins have a consolidated security posture and use PLG techniques to upgrade Free Users to Paid Users within a Hybrid Team.
 - “A Free user within a Hybrid Team is better than a non-user.”
 - Helps us go wall-to-wall for our customers

What is needed by Oct 6?

We need to support both Free Teams and Hybrid Teams for the Genesis bundle by Oct 6 given that Coda supports both and is part of the Genesis bundle.



I am aligned:  

I have questions, will add them to [Dory](#):



Requirement 2: A user can be part of multiple teams across multiple customers

- A user can be added to multiple teams within an organization, representing the same customer, or multiple organizations representing many customers

Student Example

Setup: Anna is a student with a Genesis personal account for herself with anna@gmail.com. Anna would like to join the Dramatics Club and Gymnastics Club with the same email id for this semester.

Expectation: Anna should be able to do so without requiring a new email ID or sharing data implicitly between her personal account, the Dramatics Club, and the Gymnastics Club

Consultant Example

Setup: Anna is a consultant with a Genesis personal account for the company with anna@a1consulting.com. Anna has been offered to help with Amazon and Ebay to consult on their Office Snacks policy. She will join both companies for 2 months respectively and will have access to a subset of apps (Coda Docs, Mail), agents (snack feedback), and content (Coda Docs: Historical Snacks).

Expectation: Anna should be able to do so without requiring a new email ID for Amazon and eBay, respectively. She should also not be sharing confidential snack information between Amazon and eBay and keep her personal content separate.

- The user can be billed for each team they are a part of, either at a Team level or organization level, when applicable.
- Team admins or organization admins can decide if external users can join their team or if their users can join external teams. They can do so by the following settings:
 - If they allow external users to be added to their team (on by default)
 - If their team's users can be a part of external teams as guest users (on by default, setting only available if Domain Capture is on)
- Content can still be shared with users external to the team without needing them to join the team.
- [Settings] We can choose to introduce a Guest system role with a limited set of permissions rather than a full paid seat in the future, eg:
 - cannot be an admin, group admin
 - cannot search across content or members



We are actively having discussions with Orchestra and Managed Growth to enable a user in multiple organizations, and the required product experience changes needed to support this. This is to say that the Requirement is a long term goal that we want to enable but the specifics are still under discussion.

What is needed by Oct 6?

We need to support Self-Service customers in the following priority



I am aligned:  

1. Individual Free customers
2. Individual Paid customers
3. Multi-seat customers with a max of 1 Team and up to ~149 members

I have questions, will add them to Dory:



Requirement 3: All admin settings should be managed at the highest object level

- Some customers may have an organization and multiple teams within representing different business units or geographical locations. For eg:
 - Amazon Org: IT Team, Marketing team
 - Amazon Org: Amazon US, Amazon EU
- Other customers may have a small team or be an individual free or paid user.
- Depending on pricing & packaging outcomes, some of these customers require settings for SSO, SCIM, Domain Capture (DC), and Billing Groups. These settings should be available at the highest object i.e., the organization, in this case
- IDP push group rules can determine which team within an Organization each new user will be added to.
- Users can have membership within one or more teams and should be a part of at least 1 Team within the Organization.
- If the customer has SSO enabled, they may also have external “guest” users that do not require the same SSO to login (see examples [here](#)). In this case, these external “guest” users can use id/pwd as a login mechanism.
- Only one SSO per organization is supported. For Enterprise customers who need more than 1 SSO, will need to set up multiple organizations.

What is needed by Oct 6?

Since we are only supporting Self Serve customers and Genesis Free and Genesis Pro tiers by Oct 6 we need an object to house billing and settings for those two tiers. This does not include SSO, DC, SCIM, since those will be available for Business and Enterprise tiers (pending P&P decisions).



I am aligned:



I have questions, will add them to Dory:



Engineering Design

We need to enable objects that enable multi-product bundle experiences without disrupting existing product foundations for eg: Coda workspaces and Grammarly Institutions as much as possible. This will allow us a faster GTM while also enabling future usecases for bundle offerings and collaborative experiences.

- This principle does not apply to Identity, where a unified login is necessary to offer a bundle experience but it does apply to billing and settings where in the short term we can have a less than ideal experience of product specific settings/duplicated settings in some cases, and product specific search



All scenarios below describe the end state and are not specific to the Fall Launch (Oct 6)

At the Genesis level, we'll use terms to refer to our offerings and plans:

- **Products** represent a core offering of Genesis, such as Grammarly, Coda, or the Salesforce Agent.
- **SKUs** represent a specific plan of a given product, such as Coda Pro or Grammarly Team. They may define a rank to indicate that a given SKU represents a tier higher or inclusive of another one with a lower rank.
- **Bundles** represent a collection of SKUs sold together.

Scenario 1: Free Users

I am a Free Genesis user

- I have access to the Genesis Free SKU, which has the following
 - Apps → Coda Free, Email Free
 - Agents → Grammarly Proofreading, Spotify, Wikipedia, Dropbox
- I added 4 additional members to my account, now I have a Free Team

Object Hierarchy

In this scenario, we'll have a top-level Organization object, containing the five users and their roles. The organization will be subscribed to the Free Genesis Bundle, and all users will have access to use the bundled free agents. There will also be a Coda workspace created for the organization. Users can use Grammarly but they will not be part of an institution.

User Experience



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Scenario 2: Paid Users and small teams

I am a Paid Genesis user

1. I have access to Genesis Pro SKU, which has the following
 - a. Apps → Coda Pro, Email Pro
 - b. Agents → Grammarly Authorship, Grammarly Plagiarism, Gmail, G Calendar, Slack
2. I added 4 additional members to my account, 2 of them are Free and 2 of them are paid, now I have a Hybrid Team

Object Hierarchy

As an evolution of the first scenario, the organization will now be subscribed to both the Genesis Free and Genesis Pro Bundles. The Coda workspace will be upgraded to the Pro tier, and users with paid licenses will be Admins/Doc Makers (or Editors otherwise). Within Grammarly, there will now be an institution and users with licenses will be part of it, and allowed to use team-relevant features (while free users can still use Grammarly, but will not be part of the team). There will also be a Superhuman Team created, with those paid users part of the team (long term, not decided to be in scope for Oct 6 yet!). Lastly, the bundles include licenses to agents that grant access to users to use them.



User Experience



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Scenario 3: Enterprise Organizations

I am an Enterprise Genesis organization

1. I have 2 Teams within my account, both at the Enterprise tier
 - a. US Team: Has access to Genesis Enterprise SKU
 - i. Apps → Coda Enterprise, Email Enterprise
 - ii. Agents → Salesforce, MS Teams
 - b. EU Team: Has access to Coda Enterprise SKU + 1 à la carte agent eg: Jira
 - i. Apps → Coda Teams
 - ii. Agents → no agents
 - iii. Ala carte Agents → Jira
2. I have added a consultant to the US team as a guest user with access to specific apps, agents, and content within the US Team

Object Hierarchy

User Experience



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[Full object hierarchy diagram](#)

Engineering deliverables for Oct 6

Oct 6	Postponed
<p>Goals</p> <ol style="list-style-type: none">1. New Genesis Organization object that is associated with 1 Coda workspace and up to 1 Grammarly Institution2. Enable provisioning of Genesis Free and Genesis Pro tiers<ol style="list-style-type: none">a. Support new Grammarly, Genesis, Coda customers to get Genesis Free tier upon signup, and upgrades to Genesis Pro.b. Support existing Grammarly Free to upgrade to Genesis Pro.3. Support Free and Paid seats on the Genesis Organization object.4. New Super Admin Experience for Genesis Free and Genesis Pro customers. <p>Stretch Goals</p> <ol style="list-style-type: none">1. Support for existing Grammarly Pro to upgrade to Genesis Pro2. Support for Genesis Pro Trials3. Allow manual migration from Genesis Pro<ol style="list-style-type: none">a. Grammarly Enterprise (applies to Managed customers only)b. Coda Team, Coda Enterprise (applies to both SS and Managed customers)4. Support à la carte product upgrade path for Genesis Free → Coda Team/Coda Enterprise <p>Interested in details? Find them here</p>	<ol style="list-style-type: none">1. New Genesis Team object<ol style="list-style-type: none">a. Support for existing customers on Grammarly upgrade to Genesis plan tiers and vice versa.b. Support Genesis Business and Genesis Pro.2. Superhuman Mail in the Bundle. Currently evaluating bundle for launch.3. New Orchestra SKUs4. Agent Marketplace



Call to Action: We will be reaching out to various engineering teams to integrate with the new Genesis Enterprise object over the next 2 weeks via the PI Program. Please help us by prioritizing the work breakout and subsequent resourcing conversations.

Example: Need Coda Enterprise Foundations support to integrate the Coda Workspace object with the Genesis Organization object

Example: Need Grammarly Billing team to integrate with the Genesis Organization object for any paid member billing

Dory: Open Questions

Done	Idea	Author	Upvote	Notes
<input type="checkbox"/>	For Requirement 2: It would be helpful to share the frequency of this happening today for Coda (both as a signal of the migration challenge, and for understanding the underlying frequency of behavior). Sidenote: I think the need for this issue is mostly correlated with products that have "shared artifacts". In other words, as we replace Grammarly Editor with Coda, and add sharing, we'll hit the same issue (basically all artifact products have the same pattern — Quip, Figma, Miro, etc)		 	
<input type="checkbox"/>	To be aligned - pricing is at the workspace level or user level or both?		 	
<input type="checkbox"/>	I see the October 6 milestone only supports 1 Coda workspace to 1 Genesis Organization. What does this mean for all of the existing Coda workspaces where the relationship is many workspaces to one org? In particular, I don't see any plans beyond Oct 6 where we allow many to one?		 	
<input checked="" type="checkbox"/>	<i>Is requirement 2 something that is required by October 6? This seems to have complexity? I get that it is ultimately required, but I'm confused as to why it is in this document now, and I don't really see it reflected in the engineering design part</i>		 	
<input checked="" type="checkbox"/>	Requirement 2 seems concerning and overly complex. For Orchestra/Brain, we've tried to contemplate what it means if a user's knowledge is the union of data shared and administered from multiple separate customers and it's mind-bending and very hard to rationalize. We're also in the process of developing a plan for a sharding scheme to enable Brain to scale arbitrarily to Grammarly's entire user base, and any sensible sharding scheme would rely on a single user's data residing in a single shard (because we would shard by customer aka tenant and a user should belong to one tenant). The design of such a system if a user can be associated with multiple tenants would be dauntingly complex and only to support very fringe scenarios. As a matter of resource allocation it doesn't seem prudent to attach most of the complexity to long-tail scenarios. For October the Orchestra team will have little choice but to proceed with an architecture that presumes each user resides in 1 tenant, so if we wish to support multiple tenants per users in the future we would have a lot to unwind here. Would rather see us punt on contemplating requirement 2 until years down the line when it's actually a top business need (and after it's proven that asking such users to have multiple accounts is prohibitive).		 	
<input checked="" type="checkbox"/>	Requirement2 - While in the long run agree with the requirement that users should be in multiple accounts but I'm wondering if that's needed for Oct 6, as currently Grammarly doesn't allow it and this could be a big lift (So just checking if this is a northstar or an Oct 6 requirement)		 	
<input checked="" type="checkbox"/>	In Coda, a user can add a Pack to a doc and share it with the whole team, enabling anyone with edit access to use the Pack as well. For that reason, Packs must be purchased as a workspace-wide subscription where all Doc Makers pay for it. If agents will be purchased on a per-user basis, and we consider agents to be Packs, what does that mean for Pack subscriptions in Coda workspaces?		 	
<input checked="" type="checkbox"/>	RE: Requirement 2, I don't see how this aligns with companies which require anyone accessing their data to be controlled by their own IdP or at least be able to mandate 2FA and some set of security options. Apple is an extreme example of this.		 	
<input checked="" type="checkbox"/>	What URLs will be live by Oct 6		 	
<input checked="" type="checkbox"/>	We need to have something like account.grammarly.com, who is working on that?		 	

<input checked="" type="checkbox"/>	After october 6, can you still buy Grammarly Pro or can you only get Genesis Pro (from the Grammarly funnel)			
<input checked="" type="checkbox"/>	Does requirement 1 mean we need to support free and hybrid teams for Grammarly by Oct 6th?			
<input checked="" type="checkbox"/>	After October 6 if a Grammarly Pro user lands on genesis or Coda what experience should they get?			
<input checked="" type="checkbox"/>	RE: Requirement 3, we've had to make some settings available at both the workspace & org levels due to the customer desire to be able to specify more "locked down" workspaces living side-by-side with "standard" workspaces. This requires more nuance than a single set of settings at the org level.			
<input checked="" type="checkbox"/>	Is the new denali-like app going to be a net new application or a new iteration of Denali?			
<input checked="" type="checkbox"/>	What is different about guest users, do we need to support that for 10/6?			
<input checked="" type="checkbox"/>	IUC, Team created maps to a Coda workspace. Multiple teams creates multiple Coda workspaces. Curious where would the whole company collaborate, is there another layer above that? It seems like it would be more scalable, if one org creates one Coda workspace, and each Genesis Team gets a Teamsphere or something equivalent instead of a standalone workspace.			
<input checked="" type="checkbox"/>	Will there still be paths to add members directly via the individual apps(i.e. entrypoint from a Coda workspace) or will all management happen via the Genesis portal?			

Appendix

Decision 6: Allowing existing objects to work as is via loose coupling to enable faster GTM

We need to enable objects that enable multi-product bundle experiences without disrupting existing product foundations for eg: Coda workspaces and Grammarly Institutions as much as possible. This will allow us a faster GTM while also enabling future usecases for bundle offerings and collaborative experiences.

- This principle does not apply to Identity, where a unified login is necessary to offer a bundle experience but it does apply to billing and settings where in the short term we can have a less than ideal experience of product specific settings/duplicated settings in some cases, and product specific search



What is needed by Oct 6?

- Only global settings are available at the organization level that apply to the entire Organization and not parts of the bundle.
- Genesis bundle will likely have a collection of
 - Apps: This is where content is created, for example Coda Docs, Mail
 - Agents: These are either knowledge gatherers (eg: SFDC agent) or action doers (eg: send an email) or knowledge improvers (eg: Grammarly Proofreading/Authorship/Plagiarism)
- Apps and Agents have their own settings and we will try to not touch them as much as possible for Oct 6



I am aligned:



I have questions, will add them to Dory:



Decision 5: Personal Content is moved over to the “home organization”, otherwise, personal and organization content has strict boundaries

- A user's personal content before joining an organization is not moved over to the organization unless the user is moving to their “home organization” (see definition [here](#))
 - Example 1: anna@ebay.com had an individual Free account. Here she created a number of Coda Docs for her personal use. She learns that Ebay has an organization account. She joins Ebay's account. Ebay has neither SCIM nor DC (its not Anna's “home organization”). Anna has now access to her personal workspace and Ebay's organization workspace. Anna can create/edit docs in either workspace. When Anna leaves Ebay's organization, she only has access to her personal workspace and she loses access to Ebay's organization workspace including any content she created in that workspace.
 - Example 2: bob@amazon.com had an individual Free account. Here he created a number of Coda Docs for his personal use. He learns that Amazon has an organization account and his domain has been captured. Bob's personal workspace contents have been moved to Amazon's organization's workspace. He had been informed before such a move such that he can remove any content he likes before such a move. When Bob leaves Amazon's organization his account is deleted and any content he created remains in Amazon's organization.
- A user who joins an organization (not a “home organization”) will have the option to create/edit content in either their personal workspace or their organization workspace.
- An Individual Free user, converting to Paid will be creating an organization for the first time. At that point all of their personal workspace content should be moved to the organization workspace.
- All content created in an organization remains within the organization except for when it's a Student (except K-12) user leaving the organization. In this case, the content gets moved to the Student's Free account. For K-12 students their content is deleted when they are deleted from the organization
 - Example 1: anna_prof@amazon.com is part of Amazon's org. Amazon has neither DC or SCIM turned on (living dangerously eh?). When anna_prof@amazon.com is removed from Amazon's org, Genesis creates a Free individual account for her. Any content that anna_prof@amazon.com created under Amazon will not be moved to her Free account
 - Example 2: bob@wgu.edu is a Student and is not in K-12. Once Bob completes his degree he is removed from Western Governor Univ's account, Genesis creates a Free account for Bob. All of Bob's content i.e. his assignments, term papers are moved to Bob's personal Free account.
 - Example 2: charlie@fremontmiddleschool.com is a Student and is in K-12. Once Charlie graduates from Fremont Middle School, his account is deleted and his content is also deleted.

What is needed by Oct 6?

Since we are only launching Free and Pro tiers for Genesis, SCIM or DC will not be available to these customers. K-12 or Universities are also not in scope since those are Managed customers. So for Oct 6 we need the following

1. All the content that a user has before joining an organization is still maintained in a personal workspace. Such a user has access to both their personal and organization workspaces to create/edit content while they are part of an organization.
2. When a user is removed from an organization, all the content that such a user creates within an organization remains within the organization and is not moved to their Free account. They still have access to their personal workspace.



I am aligned:

I have questions, will add them to Dory:

Decision 4: Only “home organization” can delete a user

- A user can only be deleted by their “home organization”.
 - A “home organization” is either an organization with SCIM or DC on or its a K-12 user (K-12 users are legally required to be deleted). Not all users will have a “home organization”
 - When a “home organization” deletes a user the user is
 - Removed from the “home organization” and any other organizations where they are added as external “guest” user
 - Their login is removed
- All other users can be removed from an organization. At that point, they will become Individual Free users. This helps us achieve our growth goals by enabling us to reach out to those users and convince them over time to become paid users on Genesis.



What is needed by Oct 6?

Since we are only launching Free and Pro tiers for Genesis, SCIM or DC will not be available to these customers. K-12 or Universities are also not in scope since those are Managed customers. So for Oct 6 we only need: When a user is removed from an organization, they become Individual Free users



I am aligned:

I have questions, will add them to Dory:

Milestone Name	Date	List of engg deliverables	User scenarios enabled
Milestone 1: Engineering Technical Design Doc Completed	Aug	<ul style="list-style-type: none"> • Breakout high-level diagram into engineering tech design doc. <ul style="list-style-type: none"> ◦ Target: July 18th for review • Tech Design Work breakdown and ownership assigned <ul style="list-style-type: none"> ◦ Target: July 25th for confirmation 	
Milestone 2:	(Estimate) Sep 18 for reasonable buffer	<p>(Kevin's interpretation of the Engineering Tech Design work breakdown)</p> <ul style="list-style-type: none"> • Build Organization object and Organization Service (tbn) • Build Genesis Product Library that references existing product library • (Assumed) Build the Genesis Admin Dashboard <ul style="list-style-type: none"> ◦ Org Account Settings ◦ MVP User Account Settings (?) • (Assumed) Billing integration to Genesis Organization service. • (Assumed) C/G/SH product integration to work with Genesis Org service 	
Milestone 3:	Oct 6		

Milestone 4:			
	Oct 6	List all the work needed for Oct 6 <ol style="list-style-type: none"> 1. New Genesis Organization object 2. Supporting 	
	Post Oct 6	<ol style="list-style-type: none"> 1. Teams 2. Grammarly Pro → Genesis Pro migration 3. Genesis Business/Genesis Enterprise 	

Loose timelines: 12 weeks between July 14th to October 6th.

July 14-July 25th: Work breakdown and alignment

July 28th - September 19th (8 weeks): Team work breakout time

Org Object + Org Service

Genesis product library

Billing Integration (Potentially under way already)

GCSH integration work (not started/not known)

Admin Experience Dashboard

Org Account Settings

User Account Settings

Existing Grammarly Free/Pro User Migrations

Option 1: By request of the customer, or via customer bundle upgrade

Option 2: Pre-seeded migrations prior to 10/6

Sept 22-Oct 3rd: Buffer time

Not in scope (yet):

Product Picker: UX work on the Design + GCSH and Clients team

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