

*e*Money



Meet the Team Product

October 26, 2023

Agenda

1. Welcome
2. Business Unit Overview & Connecting to eMoney's Mission and Vision
3. Meet the Teams
4. Questions



Welcome



*“There’s a snake
in my boot.”*



Tom Sullivan
Head of Product

Product



User Experience Research



Cara Woodland

Director, User
Experience Research

User Experience Research



Cara Woodland
Director, UX Research

Fun fact: Paraglided off mountains in both the Alps and Grand Tetons



Alex Mauritz
Advisory User Experience Researcher

Fun fact: Built a tree house for his kids (and himself)

Julie Strubel
Advisory User Experience Researcher



Fun fact: Obsessively looking for "the best" zucchini bread recipe.



Fun fact about both: They both have twins and love New York Times games.

User Experience Research (UXR)

What do we really do?

Goal: Ensure a delightful user experience & de-risk decisions as we develop & implement our market & product strategy

- **Discover the Needs:** Ensure we solve the most important problems
 - Understand and prioritize spoken and unspoken market and product needs
 - Understand how our product is used and identify needs and gaps
- **Test the Solution:** Ensure the solution solves the needs with the best possible experience
 - Test, learn, prioritize and iterate on potential product concepts
 - Feedback on product design and experience
- **Measure Delivery:** Ensure the implemented solutions provides the value we anticipated
 - Measure the experience, value and success of the product strategy

25

Number of projects completed in the last year

1,500

Number of advisors who have volunteered to be a part of our research panel

Core Values

- Iterative learning
- Insight integrity
- Inclusiveness
- Customer first
- Collaboration
- Customer & business knowledge building
- Research knowledge building

Career Development Highlights

1

New Hire



Julie Strubel

Advisory UX Researcher
Started on Oct. 10, 2022

1

Promotions



Alex Mauritz

From Senior UX Researcher
To Advisory UX Researcher

Contacting User Experience Research

The Scenario

How to Contact User Experience

Need past research

Market Research Sharepoint site: [Research Folders](#)

Want to attend research

uxresearch@emoneyadvisor.com OR join one of our Teams channels

- Advisor Experience: A-team Teams channel
- Client Experience: Client Experience Gang Teams Channel

Need help with research

uxresearch@emoneyadvisor.com

Treehouse design or
NY Times puzzles

Ask Alex or Julie

Product Management



Ricky Illigasch

VP, Product
Management



Chad Porche

SVP, Product
Management

Product Management & Design

Product Management and Design at eMoney plays a central role in delivering software solutions that not only meet customer needs but also contribute to the company's growth and profitability. We balance technical, business, and user considerations to make informed decisions about our product strategy.

1. Market Research:

Collaborate with market research to understand user needs, pain points, and emerging trends.

2. Product Strategy:

Define a clear product vision, goals, and a roadmap that aligns with the company's objectives.

3. Feature Prioritization:

Determine which features and functionalities to build, balancing customer demands, technical feasibility, and business priorities.

4. Development & Delivery:

Collaborate with Technology to guide the product development process.

5. User Experience (UX) Design:

Ensure the product is user-friendly, intuitive, and meets the needs of the target audience.

6. Go To Market (GTM):

Plan and execute product launches, working with marketing teams to promote the product.

7. User Feedback and Iteration:

Gather feedback from users, analyze data, and make continuous improvements to the product through iterative development cycles.

8. Metrics and Analytics:

Define key performance indicators (KPIs) to measure the product's success and use data to inform decision-making.

9. Competitive Analysis:

Monitor the competitive landscape to identify opportunities and threats and adjust the product strategy accordingly.

10. Pricing and Monetization:

Decide on pricing models and strategies that maximize revenue while providing value to customers.

11. Customer Support and Feedback

Management: Collaborate with customer support teams to address user issues and incorporate user feedback into product improvements.

35m Number of aggregated accounts

\$5.4t Assets aggregated

12k Sources Supported via Agg

250+ REST APIs offered

10m API calls made last month

109k Users on the platform

6.5m End Investors

19 Planning features released

4 Top user requests

Product Management

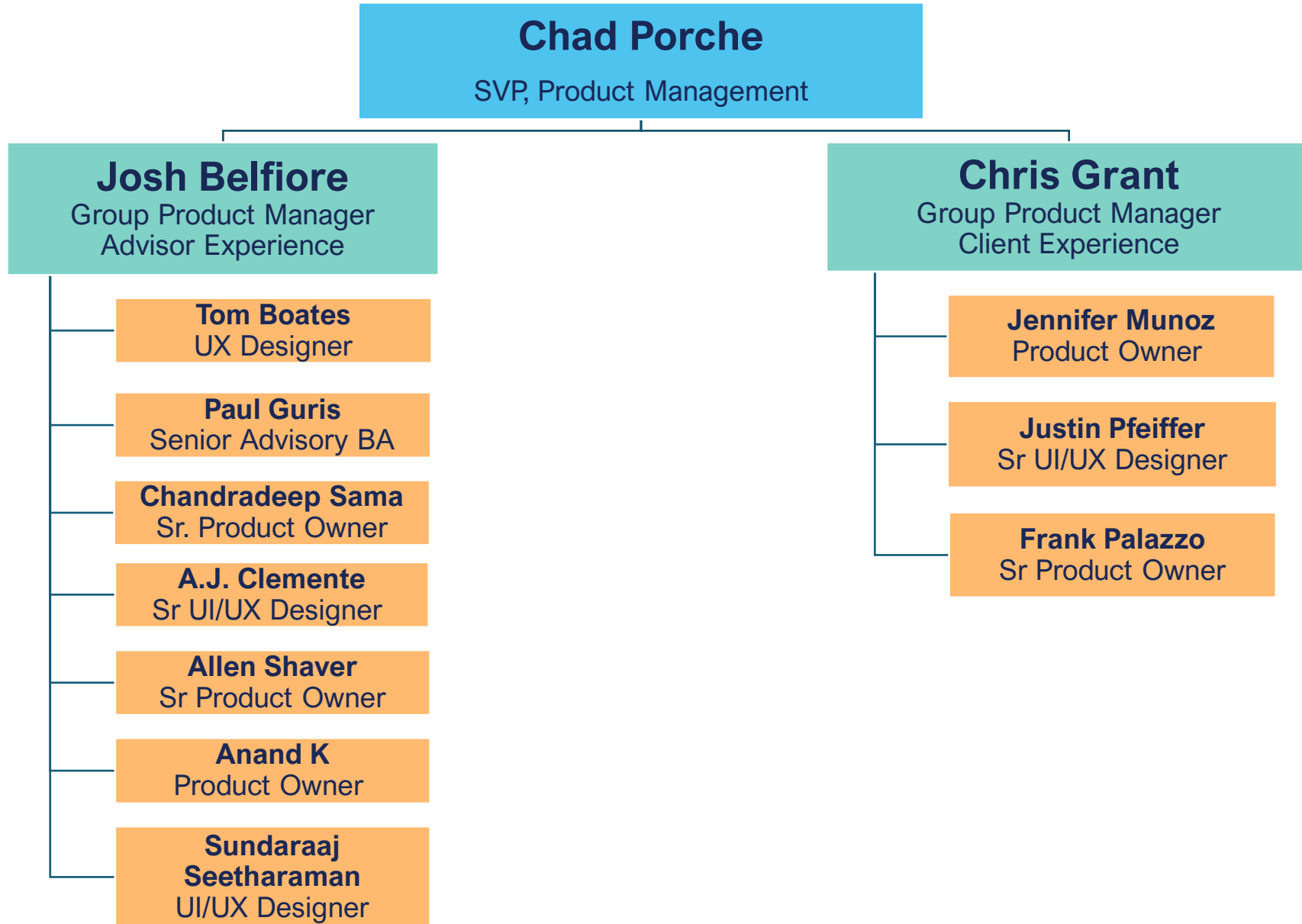
Client and Advisor Experience



Chad Porche

SVP, Product
Management

Product Management Team



Product Management



Fun fact: I sat next to Eagles legend Malcolm Jenkins at Super Bowl LVII.

Chad Porche
SVP, Product Management



Fun fact: Is a photographer & videographer who shoots landscape, portraits, and occasional weddings on the side.

A.J. Clemente
Sr. UI/UX Designer



Fun fact: 6'11 Former Boston Celtic Kevin Garnett once tapped him on the shoulder in a crowded bar to ask him to move out of the way. So, he moved out of the way.

Josh Belfiore
Manager, Group Product Management



Fun fact: Ran a Christmas Tree lot fundraiser for many years for a non-profit organization. The smell of fresh cut Fraser Fir is engrained in memory.

Allen Shaver
Sr. Product Manager



Fun fact: I was born in Portugal

Chris Grant
Manager, Group Product Management



Fun fact: I speak fluent Spanish and am learning Italian

Jennifer Munoz
Product Owner



Fun fact: Is a DJ and once opened for Coolio (RIP) and later sang "Gangsta's Paradise" with him on stage.

Tom Boates
UX Designer



Fun fact: I design and build my own toys

Justin Pfeiffer
Sr. UI/UX Designer

Product Management



Chandradeep Sama
Sr. Product Owner

Fun fact: I stood next to Mike Tyson in a buffet line once, and I think I could take him.



Anand K
Product Owner

Fun fact: Amateur photographer, hobbyist singer, math geek, avid traveler, erratic bibliophile and cinephile - Jack of many trades, master of none.



Sundaraaj Seetharaman
UI/UX Designer

Fun fact: I like to travel a lot – going on long car rides and blasting my favorite music.



Frank Palazzo
Sr. Product Owner

Fun fact: Cousins with actress [Maria Bello](#).



Paul Guris
Advisory Business Analyst

Fun fact: Owned and operated a birding tour business for 18 years that specialized in taking people offshore, often more than 100 miles, to search for seabirds and marine animals.

Career Development Highlights

1

New Hire



Chandradeep Sama
Sr Product Owner
Started on July 10, 2023

2

Promotions



Josh Belfiore
Advisory Product Manager
To **Group Product Manager**



Chris Grant
Product Lead - Incentive
To **Group Product Manager**

Product Management

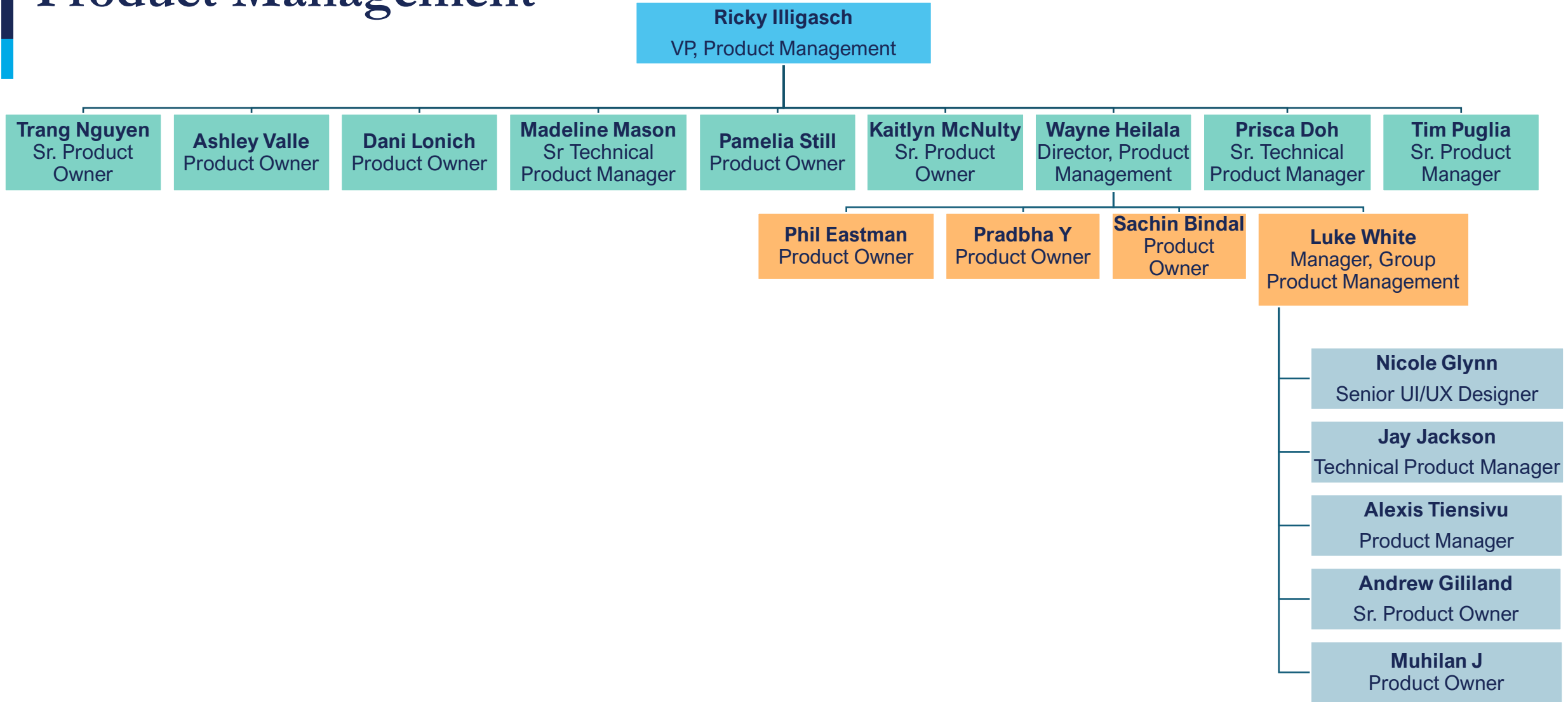
(Platform Data – APIs, Aggregation, etc.)



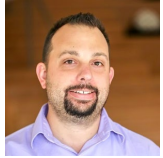
Ricky Illigasch

VP, Product
Management

Product Management



Product Management



Ricky Illigasch
Vice President

Fun fact: Avid gardener and makes jams, sauces, pickles, and wine from things he grows.



Dani Lonich
Product Owner

Fun fact: Was on Wipeout in 2011, and got 2nd place.



Pradbha Y
Product Owner

Fun fact: Loves re-reading books that she likes. Growing up, there were books that she would re-read every year and still learn something new!



Maddie Mason
Sr. Technical Product Manager

Fun fact: Fosters companion animals for multiple local rescue organizations.



Prisca Doh
Sr. Technical Product Manager

Fun fact: Is an avid non-fiction reader and podcast listener.



Phil Eastman
Product Owner

Fun fact: I've hosted a podcast called "Full Tank with Phil" about gambling on NASCAR since 2019.



Pamela Still
Product Owner

Fun fact: Loves to dance and takes weekly tap dance lessons.



Wayne Heilala
Director, Product Management

Fun fact: Last name is Finnish but the Heilala is also the national flower of Tonga, whose citizens celebrate their culture with an annual Heilala Festival. Wayne has never been to Tonga but digs their style.



Muhilan J
Product Owner

Fun fact: An Orophile (Mountain lover) who loves to explore new places.



Kaitlyn McNulty
Sr. Product Owner

Fun fact: Recently took a rug tufting class and working on making her first full rug.



Tim Puglia
Sr. Product Manager

Fun fact: Had the letter of the week in Rolling Stone and was sent a Ramones skateboard autographed by Johnny Ramone X.



Ashley Valle
Product Owner

Fun fact: Moved to San Diego less than 24hrs after graduating from college and planned to stay for 1-2yrs. Picked SD because she loved the beach, even though she hated sand. 13 years later, she's still there and still hates sand.

Product Management



Fun fact: Loves cooking for her family and friends, recently made her own hot honey from peppers she grew.

Trang Nguyen
Senior Product Owner



Fun fact: Loves capturing everything on his camera.

Sachin Bindal
Product Owner



Fun fact: Can trace his lineage back to Peregrine White, the first child born to the Pilgrims in the colonies.

Luke White
Manager, Group Product Management



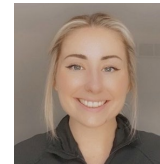
Fun fact: Designs and draws houses as a hobby.

Nicole Glynn
Senior UI/UX Designer



Fun fact: Is right-handed but plays the bass left-handed.

Jay Jackson
Technical Product Manager



Fun fact: Owns over 40 live house plants.

Alexis Tiensivu
Product Owner



Fun fact: Enjoys competitive strategy card games.

Andrew Gilliland
Sr. Product Owner

Product Management (Platform Data – APIs, Aggregation, etc.)

Platform Services



Pradbha Y
Product Owner



Phil Eastman
Product Owner



Wayne Heilala
Director, Product
Management

Client SOW

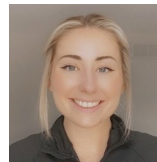


Sachin Bindal
Product Owner

APIs and Integrations



Jay Jackson
Technical Product
Manager



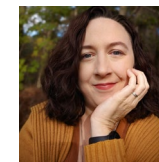
Alexis Tiensivu
Product Owner



Andrew Gililand
Sr. Product Owner



Luke White
Manager, Group
Product Management



Nicole Glynn
Senior UI/UX Designer



Muhilan J
Product Owner

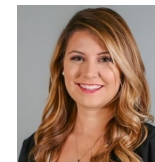
Aggregation



Maddie Mason
Sr. Technical Product Manager



Prisca Doh
Sr. Technical Product Manager



Ashley Valle
Product Owner



Tim Puglia
Sr. Product Manager



Pamela Still
Product Owner



Kaitlyn McNulty
Sr. Product Owner



Dani Lonich
Product Owner



Trang Nguyen
Sr. Product Owner

Career Development Highlights

5

New Hire



Trang Nguyen

Sr Product Owner

Started on June 26, 2023



Tim Puglia

Sr Product Owner

Started on May 15, 2023



Kaitlyn McNulty

Sr Product Owner

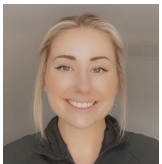
Started on May 1, 2023



Andrew Gililand

Sr Product Owner

Started on May 15, 2023



Alexis Tiensivu

Product Owner

Started on March 13, 2023

3

Promotions



Maddie Mason

From Technical Product Manager

To **Sr Technical Product Manager**



Luke White

Senior Product Manager

To **Group Product Manager**



Jay Jackson

Senior Product Owner

To **Technical Product Manager**

Contacting Product Management

The Scenario

How to Contact Product Management

Questions about our planning roadmap or vision

Email Josh Belfiore jbelfiore@emoneyadvisor.com

Questions about our client experience/client portal roadmap or vision

Email Chris Grant cgrant@emoneyadvisor.com

Questions about our APIs roadmap or Vision

Email Jay Jackson jjackson@emoneyadvisor.com

Questions about our integrations roadmap or vision

Email Luke White lwhite@emoneyadvisor.com

Questions about account aggregation/connections roadmap and vision

Email Maddie Mason mmason@emoneyadvisor.com

Questions around data sources that feed aggregation, asset allocation, pricing, etc..

Email Prisca Doh pdoh@emoneyadvisor.com

Questions about ANYTHING in our product, from how it works, to how a partner has set something up, or any of the above topics and you didn't get an answer

Email the keeper of knowledge aka the SME of SMEs, Wayne WHeilala@emoneyadvisor.com

Interested in joining the product team in any of our roles

Reach out to Chad and/or Ricky via email
chadp@emoneyadvisor.com rilligasch@emoneyadvisor.com

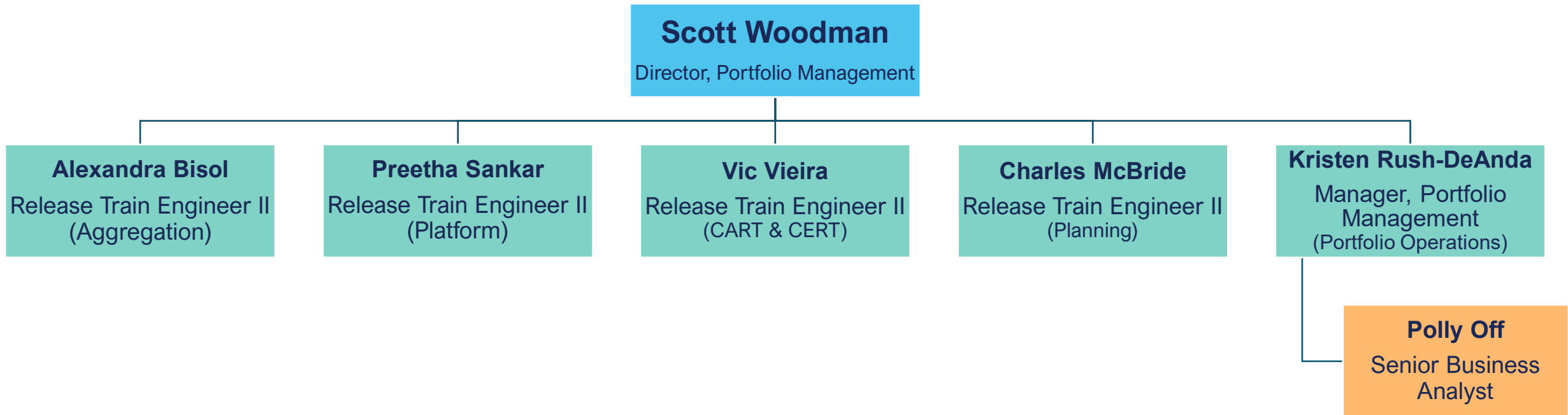
Portfolio Management



Scott Woodman

Director, Portfolio
Management

Portfolio Management Team



Portfolio Management



Fun fact: Once worked as a lumberjack in Canada.

Scott Woodman
Director, Portfolio Management



Fun fact: Loves the outdoors, camping, hiking, and backpacking.

Charles McBride
Release Train Engineer II



Fun fact: Climbed 533 steps to the top of the Cologne Cathedral in Germany.

Alexandra Bisol
Release Train Engineer II



Fun fact: Watches one scary movie a day for the full month of October.

Kristen Rush-DeAnda
Manager, Portfolio Management



Fun fact: Trilingual, Working towards a degree in Indian classical dance, enjoys home improvement & restoration.

Preetha Sankar
Release Train Engineer II



Fun fact: First job in High School was as a CVS Photo-lab Technician developing 35mm film.

Polly Off
Sr. Business Analyst



Fun fact: Enjoys doing home renovations, mountain biking & spending time with family.

Vic Vieira
Release Train Engineer II

Portfolio Management

We connect strategy to Product/Technology delivery for our customers. We manage the process of coordination and delivery of the products we develop, maintain, enhance, or retire and we always focus on what matters to our customers!

The goal is to ensure that our offerings that help people talk about money and provide financial piece of mind are developed and delivered as envisioned by our roadmaps and as efficiently and effectively as possible.

Coordinated work for
282 features

to be developed/delivered in
Q4 across workstreams of:

Planning

Client Experience

Aggregation

Platform

Client Work

Product Portfolio Management Director & Manager – Scott & Kristen

What is your role in the end-to-end continuous delivery pipeline?

- Strategy to delivery – Translate the strategy into the organization
- Visibility and Transparency to the initiatives we need to deliver

How do you support value delivery?

- Align Agile Processes – People – Systems to efficiently and effectively deliver value (goal: exceed customer expectation)
- Portfolio Operations – Reporting to Finance, Prod, Tech & other groups, Administration of Jira Cloud, EasyAgile, Align, UserVoice, Mixpanel, (goal: improve Portfolio Delivery & Governance)

How do you lead and support teams?

- Plan – Do – Check - Adjust

Do you have a part in Feature ownership or what is your contribution level?

- Governance - Integrity of a feature – Benefit Hypothesis and Measurement of Value and outcomes

Eliminated
Time Spent!

7%

shift from Core &
Maintenance work to
Research & Development.

Delivered monthly reporting
of spending stats to
Finance/ Leadership to
reflect the work of
Prod/ Tech.

Got rid of administrative
software (**Jira Align**) and
replaced it with something
better and **less** expensive.

Release Train Engineer (RTE) Role

- **Main priority is to Coach the ART (teams and leaders):**
 - to optimize value delivery
 - to embrace strategy
 - to self-organize to achieve strategy
 - to strive for relentless improvement
 - on Lean-agile principles and practices
- **Coordinator and guide for ART processes**
- **Cross team / ART coordination and impediments**
- **Ensuring the health of the ART**
 - Problem Solving
 - PI Planning readiness
 - Cross team/ART coordination
 - PI execution
 - Dependency management

Launched

Client Work Agile Release
Train (**CART**)
&
Client Experience Agile
Release train (**CERT**)

Cleaned Up

65+ initiatives

ensuring acceptance criteria
& outcomes

Reduced hours spent in
product roadmap meetings

by **7 hours!**

Better aligned Marketing,
Product and Tech teams –
resulting in improved
collaboration.

Contacting Portfolio Management/Learning More About ARTs

The Scenario

How to Contact Portfolio Management

More detailed information about Product Portfolio Management Office (PPMO) and what we do?

<https://emoneyadvisor.atlassian.net/wiki/spaces/PTM/overview>

Would you like to know more about any of our ARTs?

Check out the ART pages here:

- [DART](#) (Data aggregation)
- [FPRT](#) (Planning)
- [PRT](#) (Platform)
- [CART](#) (Client Work)
- [CERT](#) (Client Experience)

Would you like to listen in on system demos or any other one of the events in Product & Technology? Many of them are open to anyone.

Look at the [PI Planning Events Calendar](#) and attend one of our events!

Help with Jira or UserVoice or Mixpanel

Kristen Rush-DeAnda or Polly Off

New product idea or new work that requires help from Product and/or Technology

Any of the Release Train Engineers or a PM

Anything else

Contact anyone on our team or send an email to [Product Portfolio Management Office](#)

Questions?