ADD PRODUCTS PHASED DEVELOPMENT PLAN

	Phase 1: Recents for Windows/Doors and HVAC	Phase 2: Search and filter for Windows/Doors and HVAC	Phase 3: Solar Product Support	Phase 4: Zip Code filters and other products
What value are we delivering	The ability for selected CO who work on Windows/Doors and HVAC to pick from their recently sold products	In addition to Recently sold products, selected CO will be able to search for products from the Product catalog [Setting of dealtype]	Extending support to Solar CO. In addition, the system will prompt the user to add recommended Solar Inverters	Zip code specific functionality to filter out certain Products. Support for FL specific Products
Hypothesis and learning Plan	- CO will use an online add Product Experience - Recently sold products are helpful and will allow CO to get through add Product Experience quickly - Picking from recents will not drive more call volume than current experience - Time to generate docs via PSR does not add anxiety to CO	- CO without CAM/CDS support will be able to easily learn and use add products online - AHRI search for HVAC products is not painful for CO - No increase in issues (ACA, regen docs, etc) due to online add products	- Recommending Required products is useful for CO - CO can successfully find products with Special chars	- CO working on multiple Product categories will be able to add producsts successfully online
Estimated Delivery	Delivery by May 3rd	2-3 Sprints	1-2 Sprints	1-2 Sprints
Product Categories	Windows/Doors HVAC	Windows/Doors HVAC	Windows/Doors HVAC Solar	Windows/Doors HVAC Solar Roofing All other Categories
CO Rollout Plan	Hand picked Windows/Doors CO Hand picked HVAC CO	Hand picked Windows/Doors CO All HVAC CO	Hand picked Windows/Doors CO All HVAC CO All Solar CO	All Windows/Doors CO All HVAC CO All Solar CO All Roof CO All Other Product CO

State Support

	Phase 1	Phase 2	Phase 3	Phase 4
CA	x	x	x	x
MO			x	x
FL				

Product Features

	Phase 1	Phase 2	Phase 3	Phase 4
Ability to Add products from Recents	x	x	x	x
Set Term Online	x	x	x	x
Set Installation Details	x	x	x	x
Prepay CAPI and fees online	x	x	x	x
Case Creation via Ops Web	x	x	x	x
Best Number functionality	x	x	x	x
Search		x	x	x
Filter		x	x	x
AHRI Search		x	x	x
Required product recommendation			x	x
Search by Special characters			x	x
Zip code/address functionality in search/filter and recents				x
Products by state (i.e. Florida)				
Matterhorn rates in CAPI and fees				x
Online Doc Gen				

Analytics and Metrics

	Phase 1	Phase 2	Phase 3	Phase 4
Analytics (Google Analytics)	x	x	x	x
Recents usage, abandonment	x	x	x	x
Recents for additional Installation types		x	x	x
Search and filter usage		x	x	x
Required Products usage			x	x

Support Plan

	Phase 1	Phase 2	Phase 3	Phase 4
PSR: Select PSR	x			
PSR: General PSR Population		x	x	x
CAMs/IS: CAM and CDS	x			
No CAM/IS Support		x	x	x