Agenda
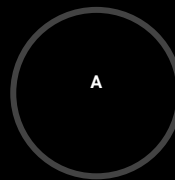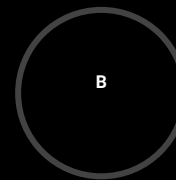
- **Overview**

● Team at Podium

OCI

Lead Product Designer

A

PM

B

Tech Lead

● Projects

Problem Scope

Payments activation has increased but users have churned from the platform at a high rate and revenue growth has slowed. Given high CAC this has negatively impacted path to profitability.

Success Metric

Retention goal: Increase retention of 5x5 locations from 66% to 75%.

Agenda

- **User Research**

Out of **100,000**+ local businesses

50%

wanted platform improvements to provide more product value offerings

Podium

User Feedback

• GTM and Support Findings

Customers have difficulty seeing holistic view of payment transactions.

Customers don't have ability to personalize their outgoing communications for payments.

Customers would like to have the ability to manage their items.

Customers want to be able to send estimates for services and ready to made products.

Agenda

● Delivered Designs

Delivered Designs

● Monthly Statements

Monthly Statements

Selecting Statement

Payments

- Home
- Payment Activity
- Outstanding Balances
- Estimates
- Card Readers
- **Financial Reports**

Financial Reports

Stay up to date on all your transactions for <Org A>.

Print

Daily   **Monthly**

📅 **May 2023** May 1 - May 31 ⌄   🏛 West Bank ⌄

2023

May   ✓

Nothing to see here yet

Data will become available the following month after your first transaction

- Payment Settings

Payments

- Home
- Payment Activity
- Outstanding Balances
- Estimates
- Card Readers
- **Financial Reports**

Financial Reports

Stay up to date on all your transactions for <Org A>.

Print

Daily   **Monthly**

Apr 2023 Apr 1 - Apr 30	North Bank

2023

April ✓

March

February

January

2022

December

November

October

ACCOUNT SUMMARY

Total Processed	$1,500,000.00
Refunds	– $25,000.00
Fees	– $30,000.00
Total	**$1,425,000.00**

...UNT

...ne

⌖ Business name business name
5678 Address Ctr, Los Angeles, CA 90210, USA

⌖ Business name business name
5678 Address Ctr, Los Angeles, CA 90210, USA

⌖ Business name business name
5678 Address Ctr, Los Angeles, CA 90210, USA

⌖ Business name business name
5678 Address Ctr, Los Angeles, CA 90210, USA

Payment Settings

Have questions? Reach out to us at support@podium.com

Payments

- Home
- Payment Activity
- Outstanding Balances
- Estimates
- Card Readers
- **Financial Reports**

Financial Reports

Stay up to date on all your transactions for <Org A>.

Print

Daily   **Monthly**

Dec 2022 Dec 1 - Dec 31	North Bank

North Bank	✓
South Bank	
East Bank	
West Bank	

Monthly Statement

NET TOTAL

$960,000.00

ACCOUNT

Chase...1234

LOCATIONS LINKED TO BANK ACCOUNT

◦ Business name business name
  5678 Address Ctr, Los Angeles, CA 90210, USA

◦ Business name business name
  5678 Address Ctr, Los Angeles, CA 90210, USA

◦ Business name business name
  5678 Address Ctr, Los Angeles, CA 90210, USA

◦ Business name business name
  5678 Address Ctr, Los Angeles, CA 90210, USA

ACCOUNT SUMMARY

Total Processed	$1,000,000.00
Refunds	– $15,000.00
Fees	– $25,000.00
Total	**$960,000.00**

Payment Settings

Have questions? Reach out to us at support@podium.com

Payments

- ⓢ Home
- 🕐 Payment Activity
- ▤ Outstanding Balances
- Estimates
- ▭ Card Readers
- 🏛 **Financial Reports**

Financial Reports

Stay up to date on all your transactions for <Org A>.

Print

Daily   **Monthly**

⚠ No transactions were made for the selected dates and bank account.

📅 **Dec 2022** Dec 1 - Dec 31 ⌄   🏛 **West Bank** ⌄

North Bank	
South Bank	
East Bank	
West Bank	✓

Monthly Statement

NET TOTAL

$0.00

ACCOUNT
AMEX...1234

LOCATIONS LINKED TO BANK ACCOUNT

📍 Business name business name
5678 Address Ctr, Los Angeles, CA 90210, USA

📍 Business name business name
5678 Address Ctr, Los Angeles, CA 90210, USA

ACCOUNT SUMMARY

Total Processed	$0.00
Refunds	– $0.00
Fees	– $0.00
Total	**$0.00**

⚙ Payment Settings

Have questions? Reach out to us at support@podium.com

Monthly Statements

Printing Statement

Upgrade

Payments

- Home
- Payment Activity
- Outstanding Balances
- Estimates
- Card Readers
- Financial Reports

Print

Print   1 page

Payments

Monthly Statement

Feb 1 - Feb 28, 2023
North Bank
<Org name>
Report Generated: 03/05/2023 - 11:59 PST

NET TOTAL

$1,425,000.00

ACCOUNT
Chase Bank...1234

LOCATIONS WITH TRANSACTIONS
⌖ Business name business name
   5678 Address Ctr, Los Angeles, CA 90210, USA

ACCOUNT SUMMARY

Total Processed	$1,500,000.00
Refunds	– $25,000.00
Fees	– $30,000.00
Total	**$1,425,000.00**

ⓘ The amounts reflected on this report are based on deposited amounts within the calendar month, not processed amounts.

Have questions? Reach out to us at support@podium.com
Powered by ▮ Podium

Destination	🔲 Save as PDF ▾
Pages	All ▾
Layout	Portrait ▾

More settings ˅

Cancel   Save

0,000.00
5,000.00
0,000.00
5,000.00

Payment Settings

Have questions? Reach out to us at support@podium.com

Monthly Statements

Permissions Access

Payments

- ⓢ Home
- 🕐 Payment Activity
- ▤ Outstanding Balances
- ⓢ Estimates
- ▭ Card Readers
- 🏛 Financial Reports

Financial Reports

Stay up to date on all your transactions for <Org A>.

Print

| Daily | **Monthly** |

📅 **May 2023** May 1 - May 31 ⌄   🏛 West Bank ⌄

Complete your Payments account setup to access data

Monthly Statements will become available after you complete your Payments account setup

Continue Payments account setup

⚙ Payment Settings

Have questions? Reach out to us at support@podium.com

Monthly Statements

● Outgoing Comms

Your Podium Payments monthly statement is available.

Time period	Feb 1 - Feb 28th

View statement

Podium

+ ✦ Upgrade

Payments

- $ **Home**
- ⏱ Payment Activity
- 📄 Outstanding Balances
- ⌖ Estimates
- ▭ Card Readers
- 🏛 Financial Reports

Daily total
$0.00

Open terminal   **Request payment**

📄 Your monthly statement from the time period of April 1 to April 30th is ready to view.   **View statement**   ✕

Recent Activity   View All

CI	**Chris Idi** Status	$5,000.00
S	**Sam** Status	$10.00
J	**Jane** Status	$24.00

Payment Summary

📅 **Today** Apr 5   ⌄

Payments $0.00
Refunds   -$0.00

Total   -$0.00

View monthly statement

FAQ

Rates and fees

Taking payments from customers

Deposit & withdrawals schedule

Getting support

⚙ Payment Settings

Delivered Designs

● **Text-to-Pay Custom Message**

Text-to-Pay Custom Message

● Creating Custom Message

Settings
Asgard Shop

- 👤 Your Profile
- 🕐 Your Business
- 📋 Users
- 🏛 Phone Numbers

- 📣 Bulk Messages
- 📇 Contacts
- 💬 Inbox
- 📱 Leads
- ⓢ Payments
- ⭐ Reviews
- 📞 Phones

< Payments

Invoices

Message

Add a customized text message to your invoices that will apply to all locations.

Custom Message

Hi Contact , this is User from Location . Please use this secure link to make a payment. Thank you!

📦 🙂 🖼   97

Hi Chris, this is :user: from :location:. Please use this secure link to make a payment. Thank you!

This is a preview

Business Title & Logo

Add your business name and logo to customer invoices

🖊 Customize invoice

Invoice Number

Display invoice number
Includes invoice number of payment request.   On

Require invoice number
Invoice number required on requests and charges in Podium.   On

Upgrade

Settings
Asgard Shop

- 👤 Your Profile
- 🕐 Your Business
- 📋 Users
- 🏛 Phone Numbers

- 📨 Bulk Messages
- 📇 Contacts
- 💬 Inbox
- 📇 Leads
- 💲 Payments
- ⭐ Reviews
- 📞 Phones

< Payments

Invoices

Message

Add a customized text message to your invoices that will apply to all locations.

Custom Message

Hi Contact , this is User from Location . We appreciate you for doing business with us and if you need anything else feel free to hit us up. Check out this secure link to make a payment. Thank you!

203

Hi Chris, this is :user: from :location:. We appreciate you for doing business with us and if you need anything else feel free to hit us up. Check out this secure link to make a payment. Thank you!

This is a preview

Save   Cancel

Business Title & Logo

Add your business name and logo to customer invoices

✏️ Customize invoice

Invoice Number

Display invoice number
Includes invoice number of payment request.

On

Require invoice number
Invoice number required on requests and charges in Podium.

On

+ ✦ Upgrade

Settings
Asgard Shop

- 👤 Your Profile
- 🕐 Your Business
- 📋 Users
- 🏛 Phone Numbers

- ✉ Bulk Messages
- 🪪 Contacts
- 💬 Inbox
- 🔲 Leads
- 💲 Payments
- ⭐ Reviews
- 📞 Phones

< Payments

Invoices

Message

Add a customized text message to your invoices that will apply to all locations.

Custom Message

Hi Contact , this is User from Location . We appreciate you for doing business with us and if you need anything else feel free to hit us up. Check out this secure link to make a payment. Thank you!

📦 🙂 🖼   203

Hi Chris, this is :user: from :location:. We appreciate you for doing business with us and if you need anything else feel free to hit us up. Check out this secure link to make a payment. Thank you!

This is a preview

Business Title & Logo

Add your business name and logo to customer invoices

✏ Customize invoice

Invoice Number

Display invoice number
Includes invoice number of payment request.

🔵 On

Require invoice number
Invoice number required on requests and charges in Podium.

🔵 On

Payment settings saved.

Text-to-Pay Custom Message

- # Deleting Custom Message

Settings
Asgard Shop

- 👤 Your Profile
- 🕐 Your Business
- 🗒 Users
- 🏛 Phone Numbers

- 📣 Bulk Messages
- 📇 Contacts
- 💬 Inbox
- 🗂 Leads
- 💲 Payments
- ⭐ Reviews
- 📞 Phones

< Payments

Invoices

Message

Add a customized text message to your invoices that will apply to all locations.

Custom Message

|

📦 🙂 🖼   0

As you type, you'll see a preview of your text message here.

Business Title & Logo

Add your business name and logo to customer invoices

✏ Customize invoice

Invoice Number

Display invoice number
Includes invoice number of payment request.

On

Require invoice number
Invoice number required on requests and charges in Podium.

On

Settings
Asgard Shop

- 👤 Your Profile
- 🕐 Your Business
- 📋 Users
- 🏛 Phone Numbers

- 📨 Bulk Messages
- 📇 Contacts
- 💬 Inbox
- 📇 Leads
- 💲 Payments
- ⭐ Reviews
- 📞 Phones

< Payments

Invoices

Message

Add a customized text message to your invoices that will apply to all locations.

Custom Message

As you type, you'll see a preview of your text message here.

0

This message can't be empty. Please add a message, or revert to the default.

Business Title & Logo

Add your business name and logo to customer invoices

🖊 Customize invoice

Invoice Number

Display invoice number
Includes invoice number of payment request.

On 🔵

Require invoice number
Invoice number required on requests and charges in Podium.

On 🔵

Text-to-Pay Custom Message

● Using Custom Message on Payment

Inbox •
Contacts
Marketing ⌄
Payments
Reporting ⌄
Automations

✦ Upgrade

Inbox

All Conversations

🔍 Search

📋 Filters ⌄   📋 Waiting longest

● Jane Doe • 2 mins ago
How much inventory do we...

Jane Doe • 2 mins ago
How much inventory do we...

CI   Chris Idi • 2 mins ago
Hi, I'd like to get a quote for...

⭐ VIP Customer

● John Doe • 2 mins ago
How much inventory do we...

● John Doe • 2 mins ago
How much inventory do we...

● Jane Doe • 2 mins ago
How much inventory do we...

● Jane Doe • 2 mins ago
How much inventory do we...

All Conversations

Unassigned

Assigned to You

FOLDERS

Use folders to organize your conversations into labeled groups. For example, "New Customers".

Sell more by letting people message you from your website, Google, and Facebook page.

Connect channel to inbox →

C   Chris Idi   🟢   📍 Los Angeles

< Back   **Request a Payment**   ✕

Message   ⚙ Learn about fees

⚡ ✎ Suggest a reply

Hi Chris Idi , this is OG from Asgard Shop . We thank you for doing business with us and if you need anything else feel free to hit us up. Check out this secure link to make a payment. Appreciate you!

💲 **$2,000.00**
Request link

📦 📋 🙂

✈

$2200.00 🛡

Subtotal $2000.00
Sales tax (10%) ✕ $200

Order total $2200.00

Chris Idi
One-time

Continue

of text message conversation.
Day, January 23rd at 3:32 PM

Hi, thanks for reaching out!

I'll send you a payment request for the usual service

Og Idi 4:24 PM

ice with Asgard Shop ! Please use this secure link to make a payment. Thank you!

😊 📎   Send and close   ➤ ⌄

Delivered Designs

● Estimates V3+

Estimates V3+

- **Saving Draft Single Location**

Payments

- (S) Home
- (O) Payment Activity
- Outstanding Balances
- Deposits & Withdrawals
- Estimates
- Card Readers

Estimates BETA

Create estimate

All statuses

Contact		Amount
C Chris I	e sent	$500.00 ⋯
D Jane D	d	$24.00 ⋯
D John D	d	$2400.00 ⋯
D Jane D	e sent	$100.00 ⋯

Create an estimate ✕

Send to: Chris Idi ✏

Estimate Name

Package A

Items	Price	
Good goods	$ 8.00	🗑

+ Add another item

Total: **$8.00**

Estimate Description   Estimate settings ›

Describe the estimate here. You might want to include your terms and conditions.

Save draft   Continue to message

Payment Settings

Payments

- $ Home
- Payment Activity
- Outstanding Balances
- Deposits & Withdrawals
- Estimates
- Card Readers

Estimates BETA

Create estimate

🏷 All statuses ⌄

Contact	Sent	Status	Amount
C Chris Idi	Apr 27, 2023	Draft	$8.00	•••
D Jane Doe	Jan 23, 2023	Invoice created	$24.00	•••
D John Doe	Jan 7, 2022	Canceled	$2400.00	•••
D Jane Doe	Dec 16, 2022	Estimate sent	$100.00	•••
C Chris Idi	Sep 27, 2022	Approved	$500.00	•••

You've saved an estimate draft.

⚙ Payment Settings

● Saving Draft Multi Location

Payments

- Home
- Payment Activity
- Outstanding Balances
- Deposits & Withdrawals
- Estimates
- Card Readers

Estimates BETA

Create estimate

All statuses

Contact			Amount	
C Chris I		e sent	$500.00	•••
D Jane D		d	$24.00	•••
D John D		d	$2400.00	•••
D Jane D		e sent	$100.00	•••

Create an estimate ✕

Send to: Chris Idi ✎

Estimate Name

Package A

Items   **Price**

Good goods $ 8.00   🗑

+ Add another item   Total: **$8.00**

Estimate Description   **Estimate settings ›**

Describe the estimate here. You might want to include your terms and conditions.

Save draft   Continue to message

Payment Settings

Payments

- Home
- Payment Activity
- Outstanding Balances
- Deposits & Withdrawals
- Estimates
- Card Readers

Estimates BETA

Create estimate

All statuses ⌄

Contact	Sent	Status	Amount	
C Chris Idi	Jan 23, 2023	Estimate sent	$500.00	⋯
D Jane Doe	Jan 7, 2022	Finalized	$24.00	⋯
D John Doe		nceled	$2400.00	⋯
D Jane Doe		timate sent	$100.00	⋯

Assign a location ✕

Before you save your draft, please assign it to one of your business locations.

Locations

📍 Select a location ⌄

Cancel   Assign and continue

Payment Settings

Estimates V3+

● Error States

Payments

- Ⓢ Home
- 🕐 Payment Activity
- 📋 Outstanding Balances
- 🏛 Deposits & Withdrawals
- 📇 Estimates
- 📇 Card Readers

Estimates BETA

Create estimate

All statuses

Contact				Amount	
Ⓒ Chris		e sent		$500.00	⋯
Ⓓ Jane D		d		$24.00	⋯
Ⓓ John D		d		$2400.00	⋯
Ⓓ Jane D		e sent		$100.00	⋯

Create an estimate ✕

Send to: Chris Idi ✏️

⚠️ **Draft failed to save. Please try again.** Try again

Estimate Name

Package A

Items   **Price**

Good goods $ 8.00   🗑️

➕ Add another item

Total: **$8.00**

Estimate Description   **Estimate settings** ›

Describe the estimate here. You might want to include your terms and conditions.

Save draft   Continue to message

⚙️ Payment Settings

Payments

- Home
- Payment Activity
- Outstanding Balances
- Deposits & Withdrawals
- **Estimates**
- Card Readers

Estimates BETA

Create estimate

🏷 All statuses ⌄

Contact	Sent	Status	Amount	
C Chris Idi	Jan 23, 2023	Estimate sent	$500.00	•••
D Jane Doe		nalized	$24.00	•••
D John Doe		nceled	$2400.00	•••
D Jane Doe		timate sent	$100.00	•••

Select a location ✕

ⓘ Draft failed to save. Please try again.   Try again

Before you save your draft, please assign it to one of your business locations.

Locations

📍 Los Angeles Plants ⌄

Cancel   **Assign and continue**

Payment Settings

● Details Page

Payments

- $ Home
- 🕐 Payment Activity
- 📄 Outstanding Balances
- 🏛 Deposits & Withdrawals
- 📲 **Estimates**
- ▭ Card Readers

⚙ Payment Settings

< Back

Estimates Draft

Created May 3rd, 2023 at 8:35 AM PST

Edit   ⧉   🗑

Contact	Amount	Estimate ID
© Chris Idi	$8	1234

Activity

● Estimate draft saved

May 3, 2023
Saved by First Last

Los Angeles IRL
Los Angeles Brick Location

Estimate 1234
$8

Sending to
Chris Idi
chris.idi@podium.com

Items

Item 456 test $8

Total $8

Note to customer

Hi Chris! "Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et.

Estimates V3+

• Editing

✦ Upgrade

Payments

- ⓢ Home
- 🕐 Payment Activity
- 🧾 Outstanding Balances
- 🏛 Deposits & Withdrawals
- **Estimates**
- ▭ Card Readers

Estimates BETA

Create estimate

🏷 All statuses ⌄

Contact	Sent	Status	Amount	
C Chris Idi	Apr 27, 2023	Draft	$8.00	
D Jane Doe	Jan 23, 2023	Invoice created	$24.00	
D John Doe	Jan 7, 2022	Canceled	$2400.00	•••
D Jane Doe	Dec 16, 2022	Estimate sent	$100.00	•••
C Chris Idi	Sep 27, 2022	Approved	$500.00	•••

✎ Edit estimate
⊗ Delete estimate

⚙ Payment Settings

● Deleting

Upgrade

Payments

- ⓢ Home
- 🕐 Payment Activity
- 🧾 Outstanding Balances
- 🏛 Deposits & Withdrawals
- 📑 **Estimates**
- 📇 Card Readers

Estimates BETA

Create estimate

🏷 All statuses ⌄

Contact	Sent	Status	Amount	
C Chris Idi	Apr 27, 2023	Draft	$8.00	
D Jane Doe	Jan 23, 2023	Invoice created	$24.00	
D John Doe	Jan 7, 2022	Canceled	$2400.00	•••
D Jane Doe	Dec 16, 2022	Estimate sent	$100.00	•••
C Chris Idi	Sep 27, 2022	Approved	$500.00	•••

✏ Edit estimate
⊗ Delete estimate

⚙ Payment Settings

Delivered Designs

● Custom Estimate Description

Custom Estimate Description

● Create Description

Settings
Greenwood Shop

- 👤 Your Profile
- 🏢 Your Business
- 👥 Users
- # Phone Numbers

- 📣 Bulk Messages
- 📇 Contacts
- 💬 Inbox
- 🅢 Payments
- ☆ Reviews
- 📞 Phones

< Payments

Estimates

Create and manage your estimate description template.

Default Description

Allow default descriptions   Off
Manage your estimate description that will be applied across your organization.

| Add default description | Create description |

Settings
Greenwood Shop

👤 Your Profile
🏢 Your Business
👥 Users
Phone Numbers

📨 Bulk Messages
📇 Contacts
💬 Inbox
💲 Payments
⭐ Reviews
📞 Phones

‹ Payments

Estimates

Create and manage your estimate description template.

Default Description

Allow default descriptions   🔵 On
Manage your estimate description that will be applied across your organization.

Add default description   Create description

Settings
Greenwood Shop

- 👤 Your Profile
- 🏛 Your Business
- 👥 Users
- \# Phone Numbers

- 📣 Bulk Messages
- 🗐 Contacts
- 💬 Inbox
- Ⓢ Payments
- ☆ Reviews
- 📞 Phones

‹ Payments

Estimates

Create and manage your estimate description template.

On ⬤

Create description

Add a custom description   ✕

Estimate description

Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

🙂

Cancel   Save

Settings
Greenwood Shop

- 👤 Your Profile
- 🏢 Your Business
- 👥 Users
- # Phone Numbers

- 📣 Bulk Messages
- 📇 Contacts
- 💬 Inbox
- 💲 Payments
- ⭐ Reviews
- 📞 Phones

‹ Payments

Estimates

Create and manage your estimate description template.

Default Description

Allow default descriptions   🔵 On
Manage your estimate description that will be applied across your organization.

Manage default description   Edit description

Estimates settings saved.

Custom Estimate Description

● Error State

Settings
Greenwood Shop

- 👤 Your Profile
- 🏢 Your Business
- 👥 Users
- # Phone Numbers

- 📣 Bulk Messages
- 📇 Contacts
- 💬 Inbox
- 💲 Payments
- ⭐ Reviews
- 📞 Phones

‹ Payments

Estimates

Create and manage your estimate description template.

Default Description

🔵 On

Edit description

Edit custom description   ✕

Estimate description

Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.   ☺

5111 / 5000 characters

Cancel   Save

- Retention Work Results

Retention Work Results

Retention Work Results

Retention increased*

% of Ideal Customer Profile (ICP)
locations active on Payments increased*

*cannot disclose exact figures

- **Amplitude, Snowflake, Tableau Data**