



# Quarterly Business Review Q1

May 22, 2023

# Agenda

- 1 **Introductions**
- 2 **Q1 Performance appraisal**
- 3 **Product and Technology updates**
- 4 **Support and Training updates**
- 5 **Metrc updates**
- 6 **Q2 '23 Focus**

# Introductions

From the Metrc Team:

- **Brent Doherty**, Regional Director Customer Success
- **Chris Fisher**, Customer Success Manager
- **Brooke Solano**, Associate Customer Success Manager
- **Jennifer Clements**, Product Owner

# Q1 Performance appraisal

# Q1 Performance appraisal

Jan 1 – March 31

## Accomplishments:

- First in-person user group post pandemic
- Finalized updated SLAs
- Batch Tagging functionality frame-worked
- Processing Job functionality was completed and training was provided to the industry

## Opportunities:

- Refine Processing Jobs functionality (API and bug fixes)
- Ensure Metrc XP is available and functioning properly
- Improve release

## Forward looking opportunities:

- Establishing the routine delivery of Monthly Report data

# Product and Technology updates

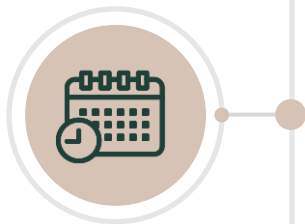
# Product and development updates

January 1 – March 31



## Q1 Releases and beyond

- **Release 2022.7** - Global functionality available
- **Release 15**
  - New user "Welcome email" and "Password reset" expiration window
  - Sales delivery endpoints



## New, predictable release schedule

- Restructured and increased capacity of Metrc's Product and Technology teams
- Product team will be involved earlier in the ESO request process to deliver timelines and progress
- More frequent, predictable releases
- Improved communication on releases to state, industry and integrators for a better user experience
- Scheduled configuration dates to create a predictable feedback period

# System performance

## Key take aways:

- Apdex score improved due to code update that occurred in early February. Apdex has been in the optimal range since this change.
- Demonstrated 99.98% availability





# Support and training updates

# Support by the numbers

Increase in contact from Processors due to the release of Processing Job functionality.

- **Action:** working through reported issues with prioritization on "type to enter".

Bulletins and documentation provided:

- **Bulletin #41:** updates related to transfer rejections, optional field entries when recording sales, and Metrc communications of administrative holds.
- **Bulletin #42:** new functionality related to the change in the production batch process – Processing Jobs

January	February	March	Q1 Totals
812	489	684	1985

Type	Q4 '22	Q1 '23	% chg
Cultivator	732	674	-7.92%
Dispensary	473	452	-4.44%
Lab	93	118	26.88%
Processor	158	191	20.89%
State	142	147	3.52%
Integrators	22	18	-18.18%
Hemp	14	24	71.43%
Wholesale	224	179	-20.09%
Other	198	182	-8.08%

# Training by the numbers

January 1 – March 31, 2023

1

## In-person trainings

No in-person trainings in Q1

2

## Metrc Learn

648 total registered in Metrc Learn to date

174 enrolled in a training in Q1

450 hours spent in learning through Metrc Learn for Q1

3

## New users (credentialing)

284 newly credentialed users began using Metrc

# Metric updates

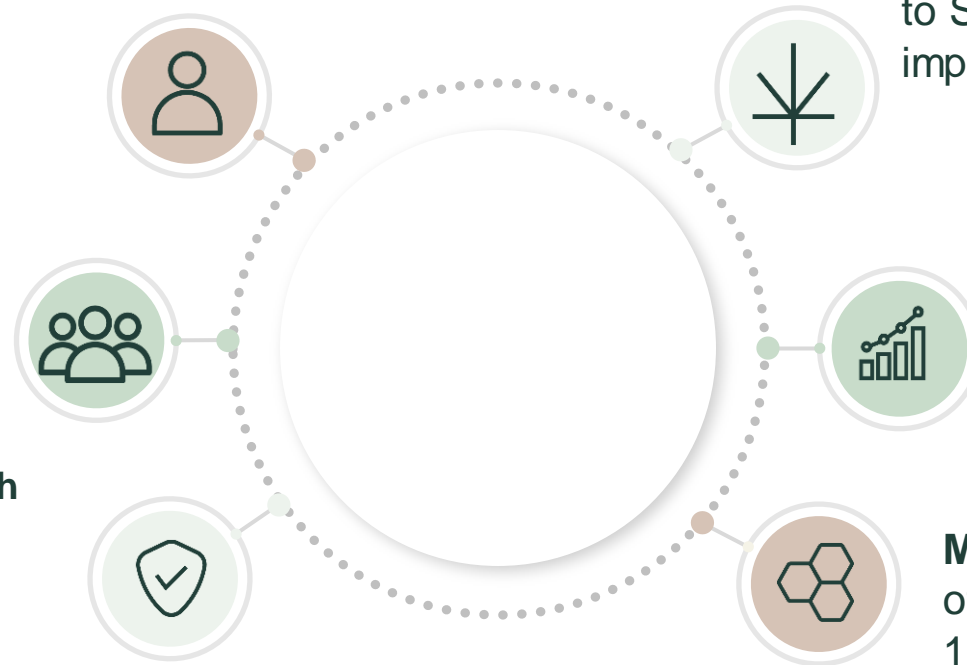
# Metric updates

**New Metric leader** Wendi Odenhausen, Head of Customer Experience.

Continuing to grow our core team and points of contact: **Brooke Solano, Associate Customer Success Manager** and **Chris Fisher, Customer Success Manager**.

New leadership on our **product and tech** teams:

- Sam Peterson, CTO
- James Daley, VP Product
- Chris DeGroot, VP Data & Analytics



**Metric Support** platform will be changing to Salesforce Service Cloud for an improved customer experience.

Upcoming product enhancements to include **reporting and data capabilities** embedded into Metric.

**Metric Connect**, a premium API offering, is fully launched as of May 1st for all integrators.

# Q2 Focus

# Looking ahead

Areas of focus for Q2 include:

- Increased in-person trainings and site visits with licensees
- Improved communication and release cadence
- Refinement of the processing job functionality
- New dedicated product team for batch tracking
- Providing updated LOEs and wireframes for new user group requests
- New monthly reporting structure with the new SLAs