**Customer Story Outline: Sam's Club & Airtable - The VISION - Todd Garner, CPO**

Todd's leadership and architectural vision were crucial to transforming Sam's Club product development lifecycle

- He spearheaded the shift from a fragmented system to a unified platform built on Airtable's Enterprise Managed App (EMA) architecture.
    - This EMA architecture provides a single source of truth, unified intake, and standardized roadmaps.
    - The project/transformation addressed key challenges like inconsistent strategy linkage, fragmented processes, and limited dependency visibility.
- Todd's vision for a scalable, data-driven solution transformed Sam's Club's product development lifecycle.
    - Focusing on user-centric design and strong data governance, the team streamlined workflows and reduced tool sprawl.
    - They  also used Airtable to  improve communication and coordination, leading to faster time to market and enhanced collaboration.
    - Measurable results include reduced intake processes and roadmap formats, and enhanced dependency visibility.

**Summary Before/After Airtable:**

**Before Propel:**

- **Inconsistent Strategy Linkage:** Product work was inconsistently linked to the overall strategy.
- **Fragmented Intake Processes:** Over 100 processes and 4 different tools were used for intake.
- **Infinite Roadmap Versions:** More than 100 formats for roadmaps existed across 6 tools, leading to hours spent on customization.
- **Tool Overload:** Users contended with 12+ different tools.
- **Limited Dependency Visibility:** Late-stage dependencies caused delivery delays, with visibility only one quarter out.
- **Slowed by Network and Tribal Knowledge:** Getting work done relied heavily on knowing specific people and internal knowledge.

**After Airtable:**

- **One Source of Truth & Strategic Alignment:** Propel establishes a single, consistent source of truth for roadmaps and OKRs, directly linking all product work to the overall strategy across every management level.
- **Streamlined Processes & Reduced Tool Sprawl:** Reduced from over 100 fragmented intake processes and 4 disparate tools to a single, unified process and tool. Roadmap management standardized from 100+ formats across 6 tools to just 1 format in 1 tool. Toolkit streamlined from 12+ tools to a core of just 5.

- **Proactive Dependency Management:** Provides unprecedented visibility into potential dependencies, with identification starting five quarters out, compared to just one quarter previously.
- **Enhanced Agility & Context-Agnostic Work Routing:** Enables problems to be solved regardless of individual connections or tribal knowledge.
- **Scalability & Flexibility through EMA Architecture:** Allows for a standardized, core schema to be deployed across numerous installations while allowing local teams to augment and customize.
- **Data-Driven Decision Making:** Enables cross-organizational dashboarding and analysis, empowering better, more informed decision-making.

In essence, Propel is not just a tool; it's a strategic enabler that fundamentally improves our ability to deliver high-quality products at scale, making our product development more transparent, efficient, and effective.

**STORY OUTLINE:**

**Overview**

- **Customer:** Sam's Club
- **Industry:** Retail
- **Project:** A unified product development platform built on Airtable, code named Propel  (built on Airtable)
- **Goal:** Radically improve experience fundamentals (quality at scale)

**Challenge**

Sam's Club faced significant challenges in their product development lifecycle (PDLC) due to:

- **Inconsistent Strategy Linkage:** Product work was inconsistently linked to overall strategy.
- **Fragmented Intake Processes:** Over 100 processes and 4 different tools were used for intake.
- **Infinite Roadmap Versions:** More than 100 formats for roadmaps existed across 6 tools, leading to hours spent on customization.
- **Tool Overload:** Users contended with 12+ different tools.
- **Limited Dependency Visibility:** Late-stage dependencies caused delivery delays, with visibility only one quarter out.
- **Slowed by Network and Tribal Knowledge:** Getting work done relied heavily on knowing specific people and internal knowledge.

**Solution**

Sam's Club implemented an internal platform, codenamed Propel, an Enterprise Managed App (EMA) built on Airtable, to streamline and standardize their PDLC. Key components of the solution include:

- **One Source of Truth:** Propel (integrated with Jira) became the single source of truth for roadmaps and OKRs, complementing Jira as the source of engineering truth.
- **Unified Intake:** A single process and tool for intake.
- **Roadmap Standardization:** One format and one tool for roadmaps, enabling hundreds of instant configurations.
- **Streamlined Toolkit:** Reduced to 5 core tools.
- **Proactive Dependency Awareness:** Dependency identification starts 5 quarters out, providing product and engineering with greater visibility.
- **Context-Agnostic Routing of Work:** Problems are solved regardless of individual connections or knowledge.
- **Enterprise Managed App (EMA) Architecture:** Propel is deployed across N number of installs, allowing for:
    - Standard, locked core schema.
    - Local augmentation with new tables, fields, automations, and interfaces.
    - Broadcast updates from the Development base.
    - Aggregation into reporting bases for cross-organization dashboarding.
- **Data Layer Structure:** Airtable's relational database principles ensure data consistency and scalability.
    - **AOP Base:** Facilitates the Annual Operating Plan process, containing canonical datasets (Products, Initiatives) synced one-way to the Aggregate base.
    - **Aggregate Base:** Source of truth for remaining canonical datasets (Problems, Capabilities, Items, People). These tables are linked and two-way synced with the Development base, allowing for record additions, deletions, and edits in any Propel install.
    - **Development Base (Propel Hub):** Manages the EMA, containing all canonical datasets, interface pages, and automations. Only admins have access for changes and publishing updates. All tables are synced from Aggregate.
    - **Synced Linked Records (SLR):** Maintained relationships between linked tables across synced bases, allowing actions in Propel installs to sync up to Aggregate and down to other installs.
- **Interface Configuration:** Majority of Propel interfaces are configured in the Development Hub, with User Management interfaces in Aggregate. Interfaces are designed around six key work patterns: Intake & Submit, Monitor & Analyze, Optimize & Schedule, Review & Triage, Update & Entry, and Store & Search. Each pattern often corresponds to a single page in an interface and helps choose the right UI and layout.
- **Automations & Rules:** Automations run in either the Aggregate base or local Propel installs, ensuring data consistency and workflow enforcement. Examples include:
    - Enforcing relationships between tables (e.g., a Capability linked to only one Initiative).
    - Updating fields based on conditions (e.g., Problem Status as a formula field).
    - Flagging non-enforceable rules.
    - Copying data based on user actions.

**Measurable Results**

- **Improved Efficiency:** Reduced from 100+ intake processes and 4 tools to 1 process and 1 tool.
- **Increased Standardization:** From 100+ roadmap formats across 6 tools to 1 format and 1 tool, enabling 100s of instant configurations.
- **Enhanced Visibility:** Dependency identification moved from 1 quarter out to 5 quarters out.
- **Tool Rationalization:** Reduced from 12+ tools to 5 streamlined tools.

**Transformational Impact**

- **Strategic Alignment:** All product work is now consistently linked to strategy across all management levels.
- **Agility and Responsiveness:** Faster problem-solving and delivery due to improved dependency visibility and context-agnostic work routing.
- **Scalability:** EMA architecture allows for standardized deployment across the enterprise while enabling local customizations.
- **Data-Driven Decision Making:** Centralized data and reporting capabilities enable better insights and analysis.
- **Improved User Experience:** Well-crafted interfaces driven by real work patterns make Airtable more accessible and easier to use for a wider range of users.

**Use Cases**

Propel supports a wide range of use cases across the product development lifecycle, categorized by work patterns:

- **Intake & Submit:** Feedback forms, bug reports, feature requests, asset request forms.
- **Review & Triage:** Marketing requests, feedback triage, IT requests, feature requests review.
- **Monitor & Analyze:** Dashboards, insights, flow metrics.
- **Optimize & Schedule:** Sprints, content calendars, resource allocation.
- **Update & Entry:** Project tracker, sprint tasks, task manager, OKR progress.
- **Store & Search:** Assets library, content library.

**Key Success Factors**

- **Strategic Vision:** Clear goal of radically improving experience fundamentals.
- **Standardization and Centralization:** Implementing a single source of truth and unified processes.
- **Scalable Architecture:** Leveraging Airtable's EMA capabilities for widespread deployment.
- **User-Centric Interface Design:** Focusing on mirroring real work patterns for ease of use.
- **Strong Data Governance:** Establishing clear data flow and ownership through AOP, Aggregate, and Development bases.
- **Automation and Rules:** Enforcing consistency and streamlining workflows.

**ROI/Metrics**

- **Time Savings:** Reduced hours spent on customization, fragmented processes, and searching for information.
- **Increased Efficiency:** Streamlined workflows and reduced tool sprawl.
- **Improved Decision Making:** Better data visibility and strategic alignment.
- **Faster Time to Market:** Proactive dependency management and efficient PDLC.
- **Enhanced Collaboration:** Centralized platform fosters better communication and coordination.

Further metrics to consider for quantification could include:

- Reduction in the number of tools used.
- Percentage decrease in late-stage dependencies.
- Time saved in creating and managing roadmaps.
- Increased user adoption and satisfaction with the new system.
- Reduction in errors or rework due to fragmented processes.

–

*Additional data:*

The Propel ecosystem specifically includes these key bases:

- **AOP Base**: This base facilitates the Annual Operating Plan (AOP) process and contains canonical datasets like Products, Initiatives, and their hierarchies. These tables one-way sync into the Aggregate base. No Propel data (Capabilities, Items, etc.) is synced back to the AOP base.
- **Aggregate Base**: This base serves as the source of truth for the remaining canonical datasets that power the Propel app. Tables in this base are linked and two-way sync into the Propel Development base, allowing users in any Propel install to add, delete, and edit records on these tables. Some automations also run on this base to update records and sync them down to Propel. Only Admins typically have data-level access to this base, while end-users can manage their People table records via an interface page.
- **Development Base (Propel Hub)**: This is the development base that manages the Enterprise Managed App. It contains all canonical datasets, interface pages, and automations included in each Propel installation. Only admins should have access to this base as it's where changes are made and published. Every table in this base is synced from the Aggregate base, either one-way or two-way.
- **Propel Installation Apps**: These are the deployed instances of the Propel app across the organization. They are managed by the Development App and can receive updates. They can also have additional local customizations.

**Synced Linked Records (SLR)**: The Propel ecosystem is built using Synced Linked Records, an Airtable feature that allows linked relationships between tables in the source and target of a sync to be maintained in the target base. This enables actions like creating a new Capability and linking a Primary Product in an install, with these data points syncing up to the Aggregate base and then down to other installs.