



JammJar

DELIVERABLE 01 · ROADMAP IMPACT

PMS / DA Platform Review

Every feature where Acre currently wins, the JammJar build required to reach parity, and the engineering effort to deliver it.

DATE

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AUDIENCE

SBG Executive

CLASSIFICATION

Confidential

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JJ 83.8 today → 97.4 post-roadmap · 78 dev-days · 30 build items

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High 2 items · Medium 15 items · Nice-to-have 13 items

02 **What ships in the High-priority band**

RMAR reporting + dedicated compliance view

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Kanban, pipeline config, dashboards, downloadable reports, payments, SMS, email, OAuth, Zapier, and others

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Reviewer-weightable across four lenses · the direction of travel doesn't shift

00

Headline — what the roadmap delivers

JAMMJAR TODAY

83.8

vs Acre 73.6 — lead of 10.2pts

JAMMJAR POST-ROADMAP

97.4

lead of 23.8pts over Acre

TOTAL EFFORT

78

dev-days · ≈6.5 calendar weeks at 3 engineers

BUILD ITEMS

30

one named build per Acre-wins feature

The roadmap consolidates every feature where Acre currently wins into a named JammJar build, with an indicative dev-day estimate against each. The headline figures are base case — at 0.7× best-case efficiency the total drops to 59 dev-days; at 1.5× worst-case it rises to 101.5. Engineer count is similarly tunable: at 4 engineers calendar delivery is ~3.4 weeks; at 2 engineers it is ~14.6 weeks.

All dev-day figures on this page are indicative and require full scoping before they become delivery commitments. Engineer-month figures are derived from dev-days at 20 working days per engineer-month; they inherit the same caveat.

01

By priority — what's High, Medium, Nice-to-have

HIGH PRIORITY

2

13 dev-days · 9.5–16.5 best-worst range

MEDIUM PRIORITY

15

47 dev-days · 34.5–59.5 best-worst range

NICE-TO-HAVE

13

18 dev-days · 15–25.5 best-worst range

The 30 build items split across three priority bands. High priority is the regulatory floor for DA firms — RMAR returns and a dedicated compliance view; non-negotiable for the PMS / DA segment. Medium priority is the bulk of the work — kanban view, pipeline config, dashboards, downloadable reports, payments-settled tracking, SMS & email outreach, OAuth integrations, Zapier connector, and a dozen more. Nice-to-have items round out feature parity at the edges — note types, portal messaging, conveyancing section, fee scenario templates, referral fee UI, and assorted polish items.

02

What ships in the High-priority band

RMAR regulatory reporting (10 dev-days). Direct DA firms file four RMAR (Retail Mediation Activities Return) sections quarterly with the FCA. Acre has a built-in module that pulls the figures from the case data; JammJar today does not. The build delivers the four RMAR section calculations, a UI for review & approval before submission, and an audit trail that maps every figure back to its source case. P0 for any firm choosing JammJar in the DA segment.

Dedicated compliance view (3 dev-days). Acre exposes a compliance dashboard with case statuses, outstanding actions and document chase. JammJar's compliance evidence is generated automatically via the AI audit engine, but the consolidated view that compliance officers expect doesn't yet exist as a single pane. The build wires the existing audit data into a dedicated compliance view with the same affordances Acre's customers are used to.

03

What ships in the Medium-priority band

The Medium-priority band is where the 15 builds and 47 dev-days sit — and is the volume work that takes JammJar to feature parity in the day-to-day surface advisers and case-handlers see most. The headline items: **Kanban view** (3d) for case management; **configurable pipeline stages** (4d); **pre-built dashboards** (3d) covering pipeline, conversion and revenue; **downloadable reports** (4d) — the report library that compliance and management ask for; **payments-settled pipeline tracking** (4d) — money-in vs money-out reconciliation; **SMS outreach** (5d), **email outreach** (4d) and a **Zapier connector** (3d); plus **OAuth integrations** (4d) for the major third-party tools. None of these is technically novel — they are well-understood patterns where Acre currently has a head start.

04

Reading the capability matrix — what reviewer-weightable means

The capability matrix at the heart of Deliverable 01 scores 127 features across 12 categories. The headline +10.2pt lead under **balanced** weighting is the figure the deliverable returns; three other weightings are available with one click — **DA-firm** over-weights regulatory reporting and compliance, **AI-first** over-weights AI & Automation, **Network** over-weights cross-firm operations. None of these alternative weightings flip the verdict — JammJar leads under all four. What they do is shift the size of the lead and where it concentrates. The reader can verify this directly in the live portal: every feature score is exposed, every weighting is one click, and the post-roadmap projection updates live as parity items are toggled in or out.