Bi-weekly product ops meeting template

# *Note: it’s always best to have someone taking notes while someone else is running the meeting. This way the meeting host/moderator is able to focus and assign out without missing details from attendees. At Pendo, our director of product ops runs the meeting, and other members of the product ops team own sections tied to their specific purview.*

# 

# **DATE:**

# 

# **ATTENDEES:**

[Attendees’ names]

# Agenda

*Agenda items are due two days before the meeting, and are then structured based on the most important things we’re hearing from our revenue teams, competition, and the market.*

1. **Topic 1**
2. **Topic 2**

# Top focus

*This is the summary section for the document once the meeting is over. At times we have used this to summarize areas of focus for the meeting* ***before*** *it happens and add supplemental data below. The note taking during the meeting should start on the “Follow-ups from last meeting” section below.*

**Most important items to note from this week’s meeting:**

1. **Item 1**
   1. Why it’s important
   2. Who is involved
   3. Any follow-up/action items that need to happen with respect to this item
   4. Any important dates related to this

# I. Follow-ups from last meeting

*This section is for follow-up on items that had action from the last meeting.*

Example:

1. **X item had an action item from the last meeting assigned to \_\_\_\_.** 
   1. Updates that can be shared
   2. Any residual pieces of information we should know about
   3. Ensure all parties are informed - if not, make a note to disseminate information.

# II. Data for this week

## Sales inputs

*This section includes input data/learnings from your sales team.*

1. **What are the top deals we have been asked to review?** *(Link to data if possible)*
   1. Deal A
      1. Account owner, Deal potential, Deal type
      2. Product focus area
      3. Responsible party
      4. Action item(s)
2. **What deals have we made an impact on over the last two weeks?** *(Link to data if possible)*
   1. Deal A
      1. How product has helped on this deal
3. **What themes are arising from sales that we should be aware of?** *(Link to data if possible)*
   1. Theme A
      1. Number of deals we’re seeing with this theme
      2. Amount of revenue tied to this theme
      3. Any notes on what the competition is doing here
      4. Executive callout: if we want to invest time here, assign to an exec, and write up a formal request with data
4. **Anything to celebrate on the deal side?** 
   1. Deals + revenue
      1. Who helped and what they learned/did in the process

## Customer success inputs

*This section includes input data from your customer facing teams, including customer success, support, and onboarding.*

1. **What accounts are at-risk, and why?** *(Link to data if possible)*
   1. Account A
      1. CSM, revenue
      2. Contract expiration date
      3. Reason(s) for at-risk
2. **What themes are we hearing from current customers?** *(Link to data if possible)*
   1. Theme A
      1. Number of accounts we’re seeing with this theme
      2. Amount of revenue tied to this theme
      3. Any notes on what the competition is doing here
      4. Executive callout: if we want to invest time here, assign to an exec, and write up a formal request with data (also ensure this resonates with sales)
3. **What are the top outstanding issues in production today?** *(Link to data if possible)*
   1. Issue A
      1. Customer(s) impacted
      2. Total revenue impacted
      3. Accounts impacted with contracts expiring soon (and when)
4. **Any quickstarts or trainings impacted by issues?** *(Link to data if possible)*
   1. Issue A
      1. Customer(s) impacted
      2. Total revenue impacted
5. **Anything to celebrate on the success side?**
   1. Contract renewals/saves + revenue
      1. Who helped and what they learned/did in the process

## **Commits**

*Link to any data, if available.*

1. **What items have been committed to/contracted recently and how are we resourcing them?** 
   1. Commit 1
      1. Revenue, Contract deal, Customer(s)
      2. Person who will move this forward

## Review of customer feedback and roadmaps

*Link to reports in your feedback management system, such as Pendo Feedback.*

1. **What are the top 5 Feedback requests by revenue today?** 
   1. Request 1
      1. Action item and Owner
      2. If we aren’t handling this, decide how will we communicate it
2. **What are the top 5 Feedback requests by popular vote today?** 
   1. Request 1
      1. Action item and Owner
      2. If we aren’t handling this, decide how will we communicate it
3. **Health check on product roadmap** 
   1. Make sure it’s up to date. If anything is changing, PM to arm product ops with messaging (they should be doing this regularly but this is a good reminder).

## Competitive intel

*This should come from marketing, win/loss reports, or whoever is handling your competitive data.*

1. **Item and details** 
   1. Existing theme that this fits into, if applicable
   2. Decide if this needs executive attention

## Beta review and product launch check-in

1. **Review of items in beta**
   1. Item
      1. When it can be moved to the next state
      2. What marketing needs to know about this (ideally there is a release brief ready to go)
2. **Which items do product ops need to help coordinate training for? What do we need documentation for?** 
   1. Item
      1. Ask and action item for product ops

## NPS review

1. **Review of NPS data over the last two weeks**
   1. Themes that are surfacing
   2. Who has been responding (role, segment, etc.)
   3. Most surprising part of the data
2. **Review of NPS items that need an owner from the last 2 weeks**
   1. Customer name
   2. Revenue & Contract expiration date
   3. Product area of impact/feedback
   4. Owner from product or success

## Anything else!

*Use leftover time to bring up any important items that have come up.*

1. **Examples:** 
   1. Sales is really interested in hearing stories on how our product X or Y.
   2. X department saw turnover and we should be aware resourcing will be impacted, so here’s what we do for now.