Monthly Retro Meeting Agenda Template

Created by **Square**

Meeting Agenda Owner: <mark><Policy owner></mark>

Effective Date: <mark><Effective date></mark>

Monthly Retro Premise

To effectively highlight wins and identify areas for future improvement.

A Prototypical Square Monthly Retro

- Rotate who runs this meeting among engineering. To start, lean on the PM or EM to run it first
- The first 10-15 min of the meeting:
    - 3 smiley faces are drawn on a whiteboard or if remote, in a doc
    - Everyone adds bullet points under the relevant smiley face
        - If someone agrees with a bullet point, they can add +1
- The remaining 45-50 minutes:
    - The appointed meeting runner starts at the : (section and reads a bullet out loud
    - Whoever wrote that bullet shares context. The team discusses it.
    - If in the : (or : | sections, the meeting runner ties to converge on an action item with an owner to mitigate/prevent it from happening again. Sometimes, though, it's just about being heard.
    - Meeting runner ends the meeting with a :) so people leave with a spring in their step
- The value of the meeting is fostering an authentic discussion so ensure:
    - People feel heard
    - Action items are real and happen
    - The retro isn't swayed too much by an individual

Monthly Retro Template

:) What Went Well

- We shipped new tax rules! +2

- Designs look really strong +1
- We added support for additional printers +3
- We're now "feature complete" for coffee shops! +4
- Jennifer joined the team as new iOS eng +4
- Beta customers really like the new features +2

:| What Went Meh

- Did we over engineer the tax feature? Could we have shipped it sooner?
- QA for printer was tough because we didn't initially have all supported printers in-house
- Aside from tax and printers, we shipped many miscellaneous P2s that while helpful is not super strategic +1
- Too many one-off meetings. Let's consolidate or drop 'em.

:(What Went Poorly

- We had an outage that took 18 hours to fix
- Adding additional printer support created many regressions
- Not enough early alignment on the tax project yielded delays due to under discussed edge cases

Action Items

- **Product:** unearth and socialize edge cases earlier in the product
- **Eng**: identify other parts of code base and do a knowledge share
- **Eng:** improve outage response protocols for faster SLA
- **Product & QA:** improve plans to reduce blockers for hardware testing

Version	Date	Description	Author	Approved by
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