

Monthly Business Review: [Team Name] - Month Year

Last updated: Month, Day, Year | [Link to prior reviews](#) | @kateruthbrennan

Summary

This is the too long, did not read (TL; DR) section that provides 1 - 2 paragraphs and summarizes the key take-aways for the entire document. It is the executive summary and tells the audience how we'll spend our time and what we want to discuss. For your first meeting, this section will be longer and should set context as seen in the appendix ([First meeting context](#), including "Rules of the Road"). In subsequent meetings you may want to include a snapshot of the progress towards Objectives & Key Results (OKRs). If your team is really large, move the OKR table to the appendix.

Objective	Key Results	Status
Sub-team n		
Objective 1	KR 1	Complete
Objective 2	KR 2	In progress
Objective 3	KR 3	At risk
Objective n	KR n	Missed

Voice of the End User | Sales | Operations

During every Review, we will feature 2 - 3 [end user] stories. This should include an overview of who the user is and their experience with our products (i.e. how they discovered/ considered our product, context in which they decided to use our product, and struggles faced as well as moments of delight). You can have a dedicated "Voice of" section for all end users or break it up by UX Research, Customer Success, Sales and/or Operations as relevant to your business. No more than 2 paragraphs for each. Ideally these are selected to highlight key initiatives in flight OR to surface things that we need to consider addressing but to which we have not yet committed.

Product area featured | [Headline insight from end user](#)

[Insert supporting image of the product or user experience]

In [month, year], James was trying to do something amazing. He encountered a challenge and decided to consider our product because of reasons. However, he ran into trouble when a thing happened. What he shared with us was a key insight. Because of that insight we believe James represents a larger opportunity for all of our end users. We believe this issue impacts [addressable market] and is important to tackle because of [insert reason]. No more than 1 - 2 paragraphs - be concise. You can link out to supporting interview/ observation notes.

Product area featured | [Headline insight from sales or operations](#)

[Insert supporting image of the product or user experience]

In [month, year], Company B was trying to do something amazing. They are one of our fastest growing [accounts] through the [x] sales team. They encountered a challenge and decided to consider our product because of reasons. However, they ran into trouble when a thing happened. What they shared with us was a key insight. Because of that insight we believe Company B represents a larger opportunity for all of our sales customers. We believe this issue impacts [addressable market] and is important to tackle because of [insert reason]. No more than 1 - 2 paragraphs - be concise. You can link out to supporting interview/ observation notes.

Top of minds

3 - 5 major topics that the creators of this document want the room to focus on. This is where the majority of reading time and discussion should be spent. Example top of minds include strategic decisions we are wrestling with, and any conflicts or misalignment that needs to be surfaced. This is NOT meant to be a status update and a way to show all of the work we are doing --- it is meant to drive discussion, facilitate decision making, and raise awareness.

Product area | [Headline of conflict/ misalignment/ awareness](#)

No more than 2 paragraphs maximum. Link to supporting documents as necessary. Use fewer, better words. Explicitly state what you want from the reader, what trade-off you're considering or what misalignment needs to be addressed.

Key launches past [4] weeks

In the spirit of focusing on execution excellence (ship what we say we will and on time), we have a dedicated section to calling out the key things that launched. This will NOT cover everything we do. Please refer to our weekly OKR and roadmap tracker for a status of all projects.

Title of feature or product launched

[Insert supporting image of the product or user experience]

1 paragraph summarizing what it is, why it is important and the impact it is having (ideally quantifiable on behalf of our end users and business).

Key launches next [4] weeks

Title of feature or product launched

[Insert supporting image of the product or user experience]

1 paragraph summarizing what it is, why it is important and the impact expected to have (ideally quantifiable on behalf of our end users and business).

Key metrics

Overall we are driving [xxx] metrics and they are doing [xxx, yyy and zzz]. The key metric we want to feature this month is [xxx]. It is important because of [xxx]. You should care because [xxx]. You will link to the dashboards of all of your relevant metrics in the Appendix. This section is meant to call the reader's attention to the most important area (i.e. new users are decreasing and we think it is because of reasons), and not to simply prove you can do math and add event tracking. Curate and edit, and make sure your data/ metrics counterparts are driving this section.

[Insert chart for every highlighted metric and a very short summary of the take-away in metric trends, including what we are doing to move the metric.]

Discussion topics

- Demo of XXX (dedicate ~ 10 minutes of every meeting to product demos)
 - Proactively add topics before the meeting ...
 - Crowd source topics during the meeting...
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Appendix

Team updates

In the past [4] weeks, we have seen the following team changes (new hires, attrition, critical open roles). We are especially excited to have hired [xxxx] which helps us accelerate [yyyy].

Function	Name	Role Sub-team	Start date
Engineering	First name last name	Eng, team x	Month day
	First name last name	Eng, team x	Month day
Product & UX	First name last name	Product Manager, team x	Month day
	First name last name	Product Designer, team x	Month day
Data	First name last name	Data Science, team x	Month day
Operations	First name last name	Ops for Y, team x	Month day

Top requests

We hear a plethora of feedback from end users through support inquiries, surveys, UX research, sales and operations. The "voice of" section above is meant to give richer examples of specific areas, but below is an attempt to synthesize the **top 3 requests**. This will be a work in progress - it may currently index towards the loudest "voices" as opposed to the ideal of biggest impact (measured by various things such as business benefit, end user satisfaction, etc.).

The goal is to drive alignment org-wide on the biggest levers we can pull. If you disagree with this list OR you think something is missing, add a comment and explain why. We ask that Product Managers coordinate with stakeholders to populate these tables.

Program	Request	Description Impact	What we're doing
Sub-team 1	Feature/ product/ bug fix request 1	1 - 2 sentences, link to supporting docs and attempt to size impact if we deliver. Ideally the team making the request writes the first draft of this	Write what Product/ Eng/ Design teams are doing (or not) to solve this. The Product/ Eng/ Design team should write this answer

		(e.g. Sales)	
	Feature/ product/ bug fix request n	Same as above	Same as above
Sub-team n	Feature/ product/ bug fix request 1	1 - 2 sentences, link to supporting docs and attempt to size impact if we deliver. Ideally the team making the request writes the first draft of this (e.g. Sales)	Write what Product/ Eng/ Design teams are doing (or not) to solve this. The Product/ Eng/ Design team should write this answer
	Feature/ product/ bug fix request n	Same as above	Same as above

Relevant documents

- Weekly briefs, if applicable [link to them]
- Sub-team charters [link to them; [see template](#); see also [strategy framework](#)]
- Relevant data dashboards [link to them]
- Quarterly & Annual roadmaps [link to them; [Quarterly template](#), [Annual template](#)]
- Product Requirements Documents - PRDs [link to them; [see template](#)]
- Future sections: Dedicated engineering section which covers the stability and robustness of our tech stack (e.g. oncall, SEVs/ outages, etc.) and product marketing (i.e. SEO/ ASO, app installs/ ratings, etc.)

First meeting context

How to read this document

Welcome to the first Monthly Business Review for [team name]. This document will be used to facilitate a 60 minute meeting (silent reading/ commenting 30 minutes, demos 10 minutes, discussion 20 minutes). We will not have a “how to read” section in future documents.

The meeting is intended to be our version of a Board Meeting. We show up to hold ourselves accountable, celebrate wins and acknowledge shortfalls and to solicit input from our “board” (i.e. you). The following definitions and rules of the road should guide your participation.

Definitions

Summary: Too long; didn’t read (TL; DR) section that summarizes the entire document. The quick glance and top of minds are the most critical to read.

Top of minds: Strategic/ other important things we're wrestling with, conflict we need to address, or misalignment we want to call out. We should spend the majority of reading/ commenting/

discussion on this section. We aim to use fewer, better words. We aim to explicitly state what we want from the reader, what trade-off we're considering or what misalignment to address.

Voice of [end users]: We hear a plethora of feedback from [end users] through support inquiries, surveys and UX research. This section is meant to highlight 1 - 2 concrete user stories. *Why?* To signal to ourselves and you all that we are building first and foremost for them. Their struggles and workarounds are what we intend to solve. Having empathy will help us focus.

Key launches past & next: Focus on execution and delivering results over the past 4 and next 4 weeks (should align with the cadence of the business review).

Metrics: Measure progress and impact, and hold ourselves accountable.

Discussion topics: Section meant to facilitate the discussion portion of the meeting (after silent reading/ commenting). The meeting facilitator will add topics and you can suggest topics that aren't fully addressed in the comment threads that you want to get in-room verbal time.

Rules of the road

- During the meeting, comments should be made in this document and the team should write responses to the comments. Use your best judgment to +name (i.e. tag) the person who you think is best equipped to address your comment.
- The meeting facilitator will then pull out "in-room" discussion topics for any comment thread that was particularly active or anything that was unresolved.
- As an attendee, you can suggest discussion topics as well.
- Please do NOT resolve comments made during and after the meeting (they provide a written history of discussion). However, the working group should start the meeting with a "clean" document (i.e. make a copy without comments before sharing with meeting attendees so that all working group sausage making is not a distraction).
- Lean into areas of conflict, misalignment, lack of clarity - this meeting should be a forcing function for higher productivity, rapid decision making and organizational alignment.

These documents can require quite a bit of preparation but they are a great forcing function to make sure everyone on the team knows the lay of the land and holds themselves accountable in a highly (internal only) visible forum --- as well as a way to recognize and celebrate the progress made and value delivered, and for stakeholders to be fully informed of our work and to have a forum to ask questions and provide feedback. Do your best work to edit for your audience.