

Building a Business Review Program From Scratch



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 SPICY 

Agenda

1. Motivation
2. Preparing to launch the meeting
3. Running the meeting
4. Where we're taking it next
5. Takeaways

Motivation





**GLOWING CUSTOMER
FEEDBACK IN
A SOCIAL MEDIA POST**

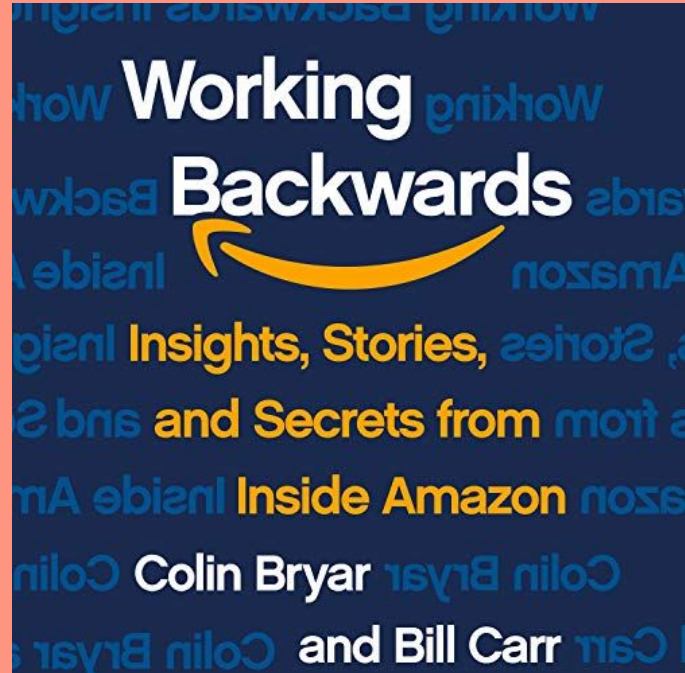
**EXEC
TEAM**

**DATA
TEAM**



But how do you get started?

There are entire books
written about how
Amazon does theirs





How are we doing
this as a scrappy
startup data team
with average tenure
of less than 6
months?

Preparing for launch



goals

metrics

pre-read

The Goal

What is this meeting?

The GlossGenius Executive Metrics Review will be a weekly 1 hour meeting where the Leadership Team reviews a curated set of metrics that reflect the overall health of the business, and then use those metrics as a basis of discussion about how the company is tracking towards our goals. It is meant to thread the needle between operational and strategic, so while it may include in depth discussions of what factors are driving movements in metrics, the [actual set of metrics](#) we review in this meeting will be kept intentionally small and high level.

What are our goals?


- **Learn Fast:** Setting aside time to use and interpret data will give us a more nuanced understanding of how the components of our business work together
- **Make Others Successful:** By discussing our metrics as a group, we will proactively share our context for parts of GlossGenius that they may not have daily visibility into
- **Own the Outcome:** Regularly reviewing metrics will help us more quickly identify when we're off track and shorten the time required to change course when it's appropriate

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- expected outcomes →

The Metrics

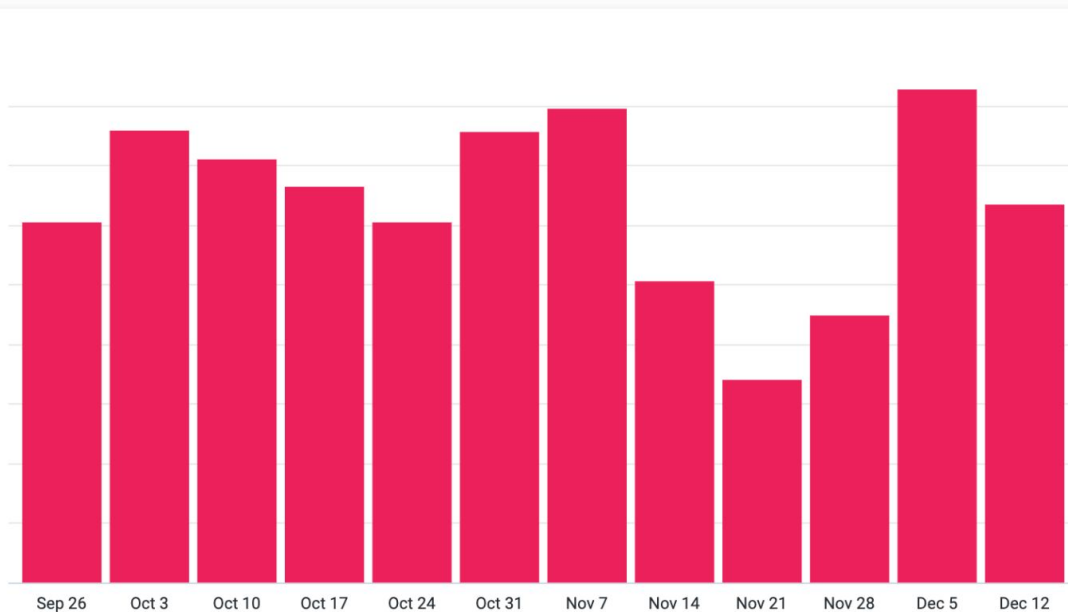
Weekly Metrics Meeting

Weekly Metrics Meeting  

just now   

Created Date

is from 2022/09/26 until 2022/12/19



Last week

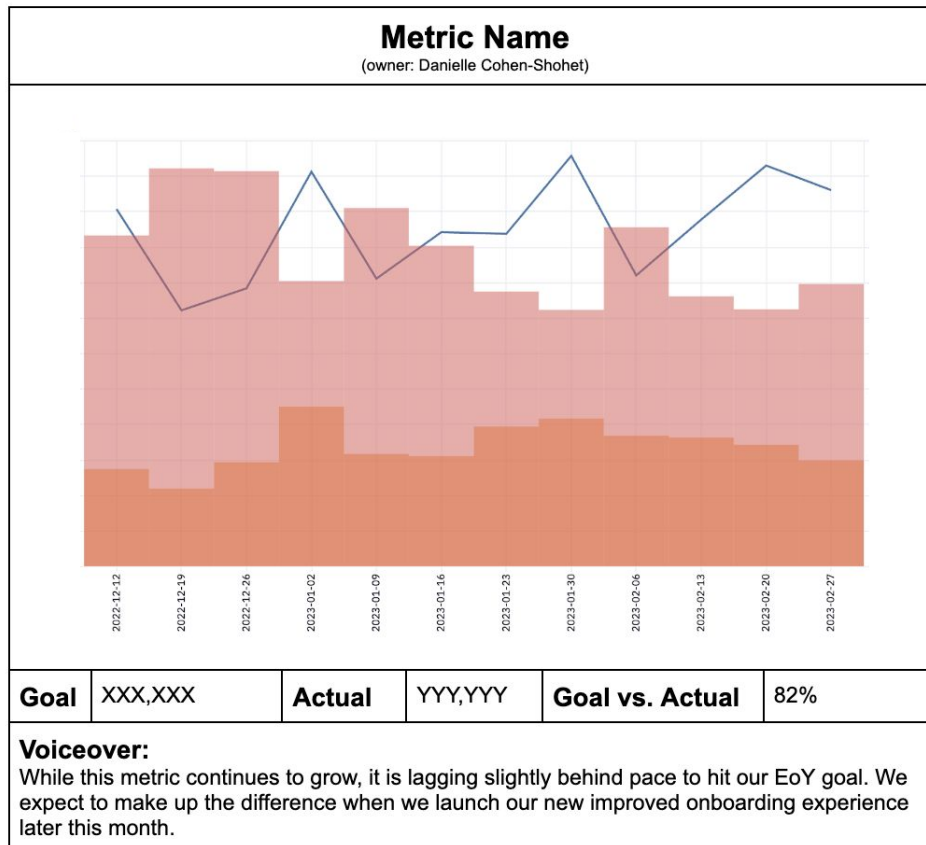
-4.2%

Weekly change

81.7%

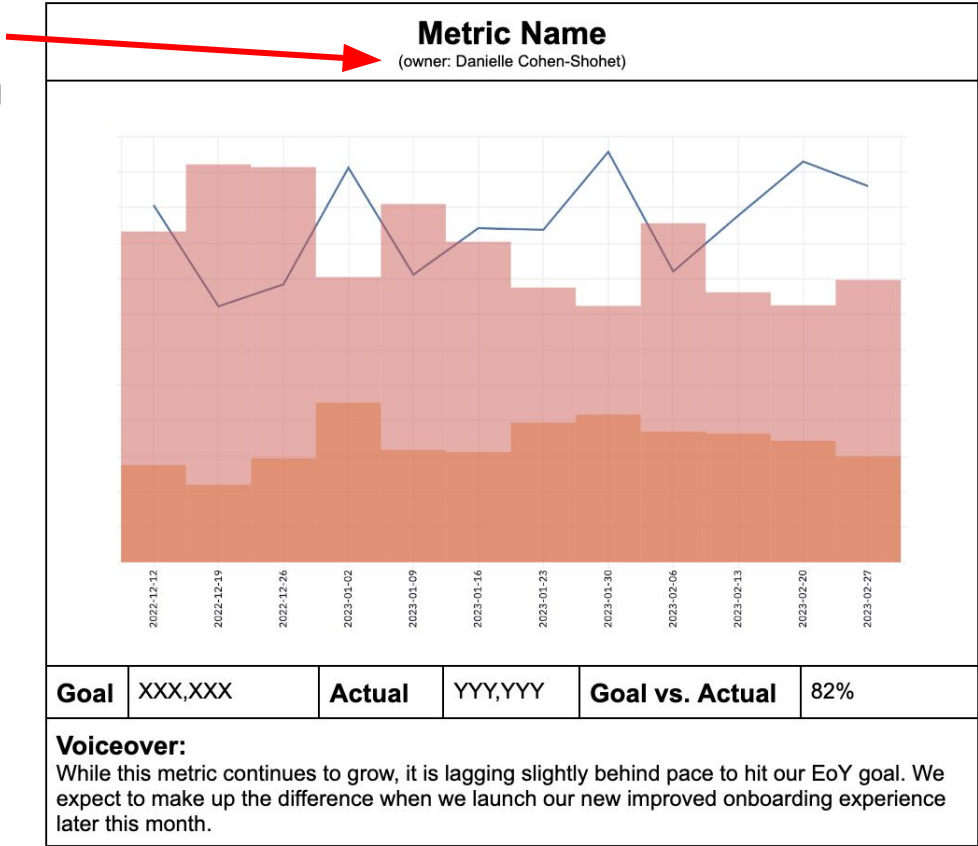
Yearly change

The Pre-Read



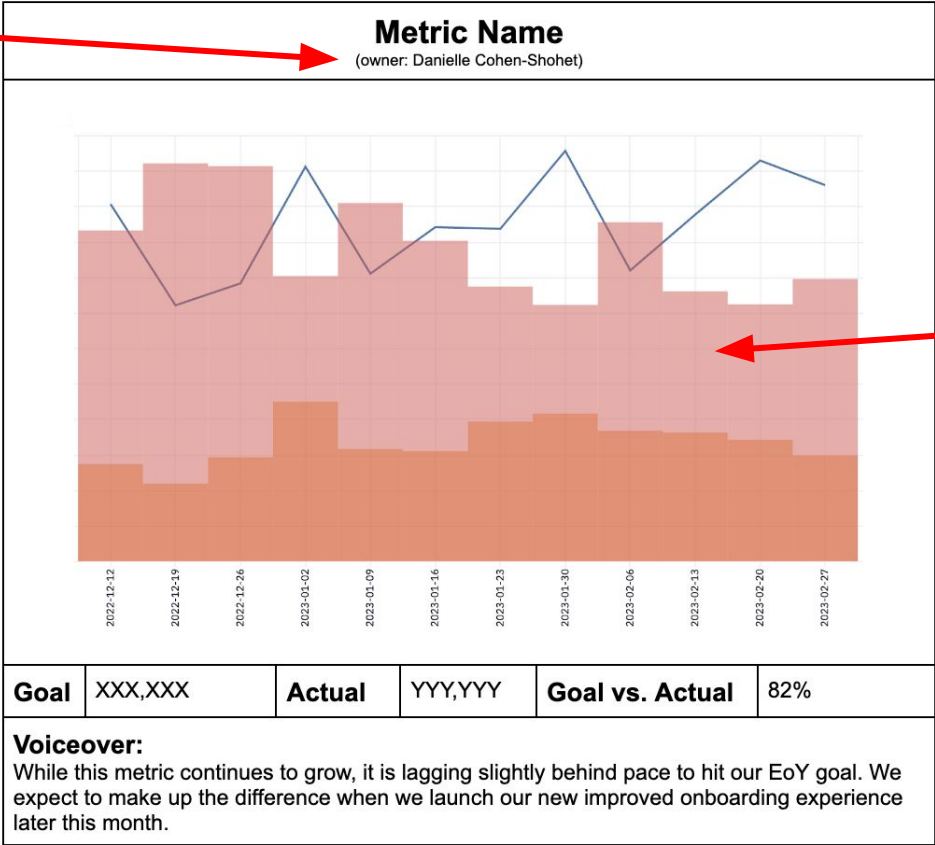
The Pre-Read

person
accountable
for explaining
the metric



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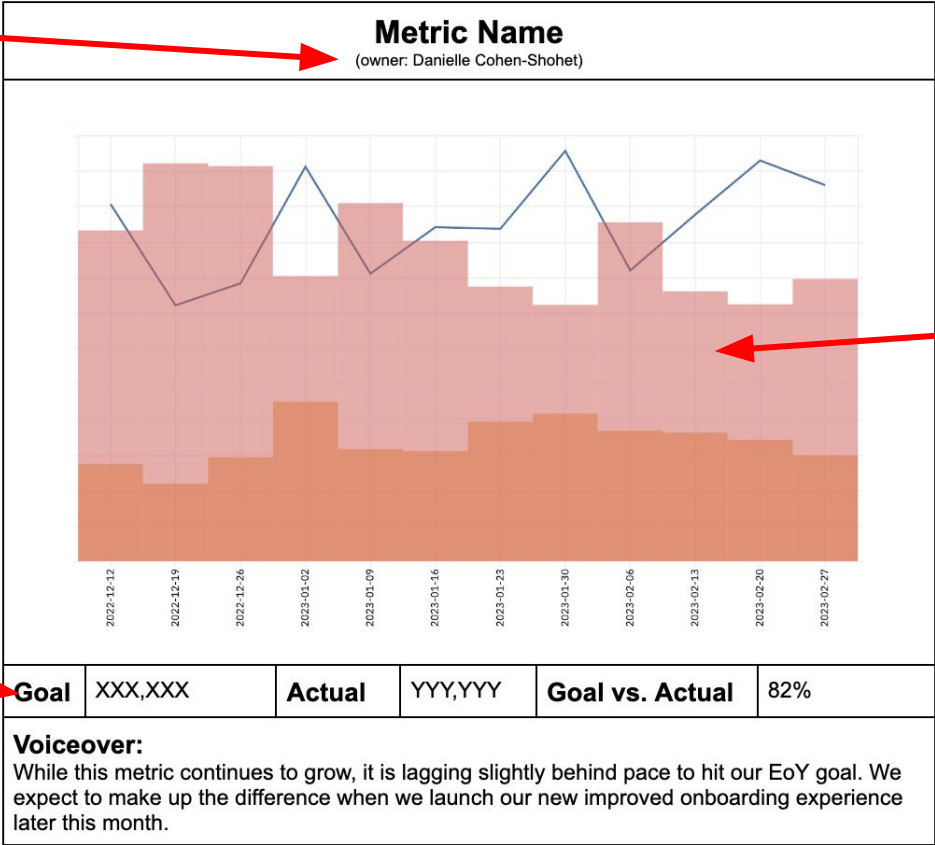
person
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time series
chart to show
trends

The Pre-Read

person accountable for explaining the metric

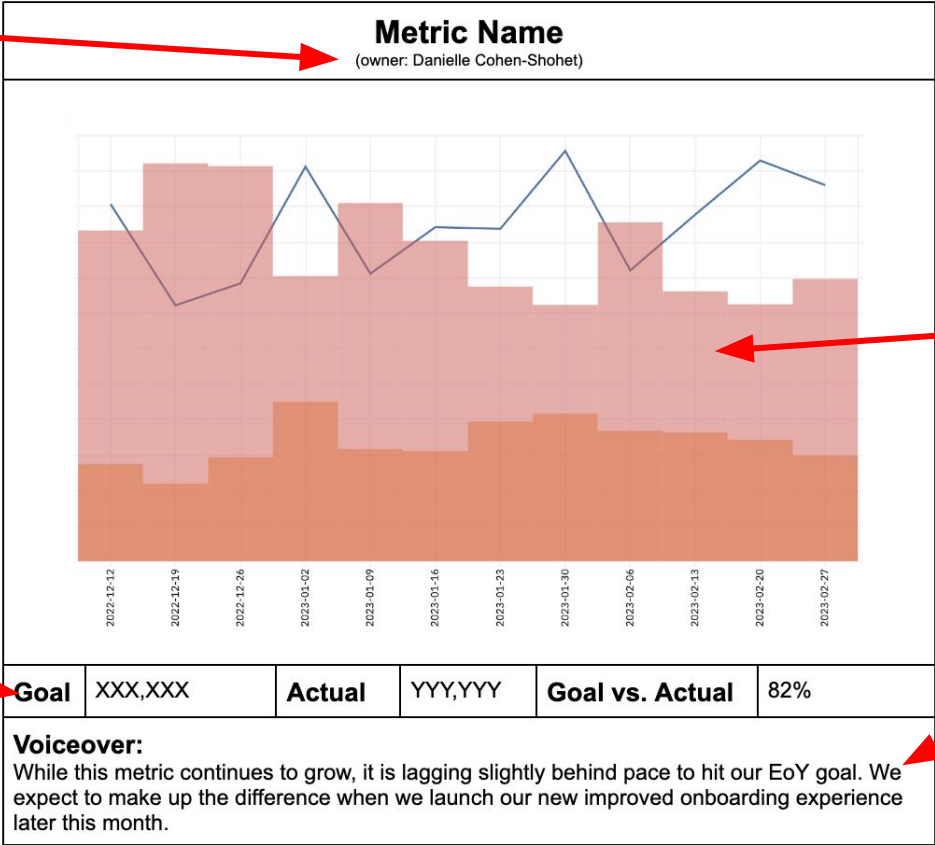


time series chart to show trends

quantitative context on metrics

The Pre-Read

person accountable for explaining the metric



time series chart to show trends

quantitative context on metrics

qualitative context on metrics

Running the meeting



Not everything went according to plan...

**When no one wants to
be the owner for the metric**



People weren't used to looking at data this way



Pulse: Subscription Status Movements Today Inbox x Metrics x

D datanotifications@glossgenius.com Thu, Mar 16, 5:00 PM (18 hours ago) ☆
to danielle, evelyn, me, leah, eric ▾

Subscription Status Movements Today
Sent by GlossGenius

Total Activations (Today)
[Empty box]

Trialing > Active (Today)
[Empty box]

Cancelled > Active (Today)
[Empty box]

Delinquent > Active (Today)
[Empty box]

Disabled > Active (Today)
[Empty box]

Total Cancellations (Today)
[Empty box]

We had to deflect a lot of in-meeting requests

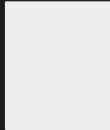


We felt the tension



Katie Bauer 2:27 PM

i don't know if we need a live debrief after that one, but would be curious to get thoughts/reactions as you have them. the biggest takeaway for me is that we'll need more context on metrics presentation, but there were a lot of ideas shared in that meeting that i need to digest



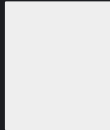
2:29 PM

Good to add thoughts here.



Katie Bauer 2:29 PM

drop 'em while they're hot



2:29 PM

it's working

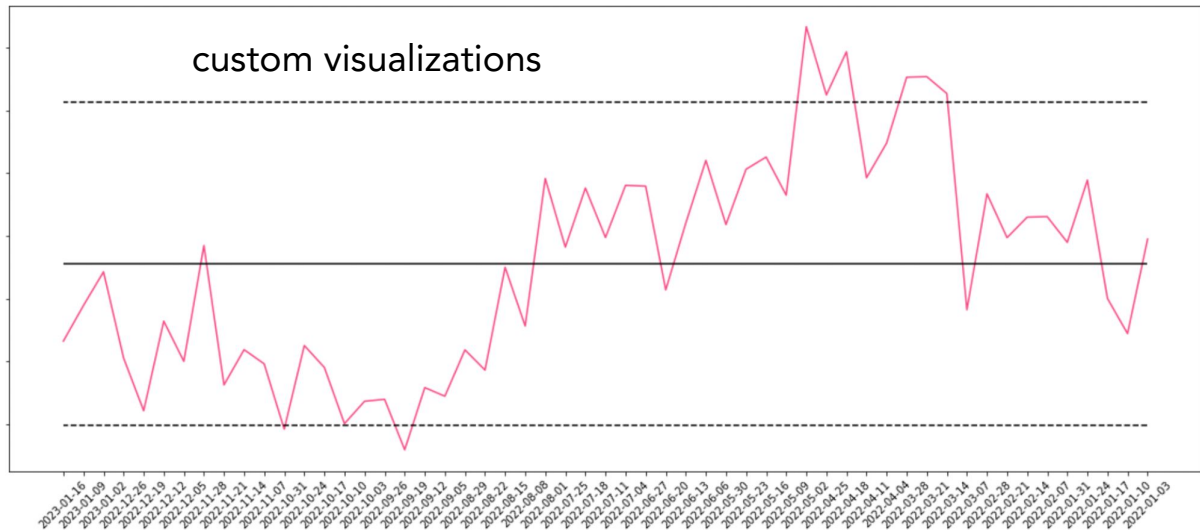
is my overall take

we're generating a tremendous number of questions and ideas meeting agenda / flow is still a little bit disorganized but I think sitting with that is okay (it's eliciting a lot of good, broad participation) and the group is tolerating it

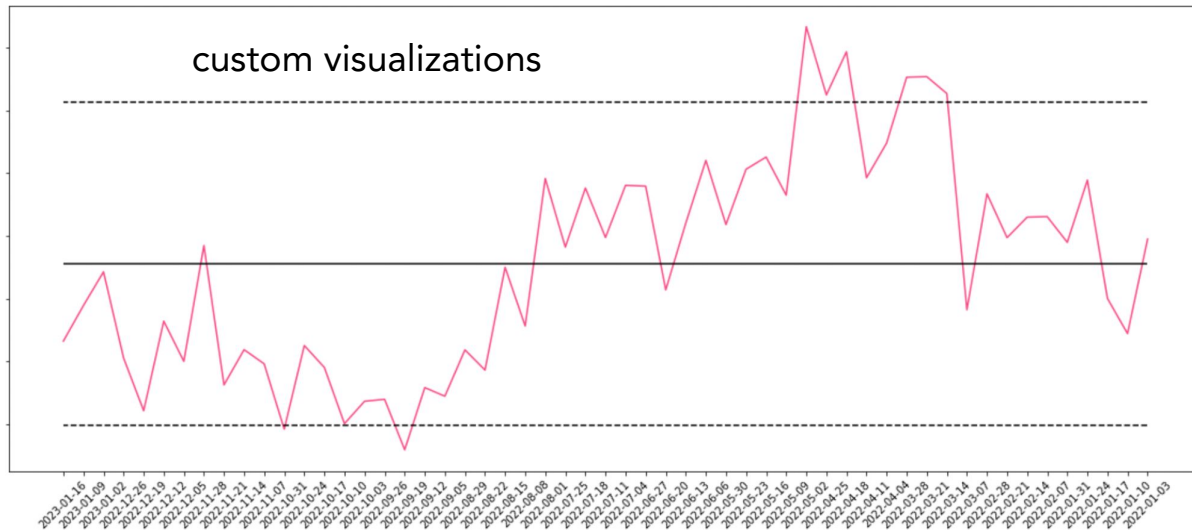


We tried all kinds of things...

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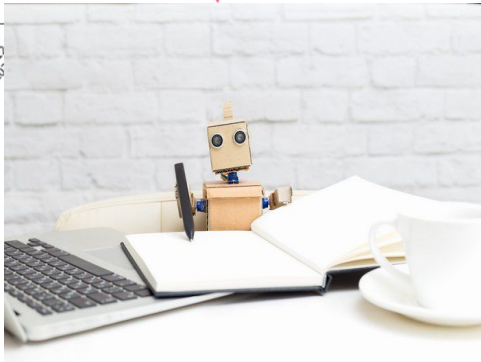
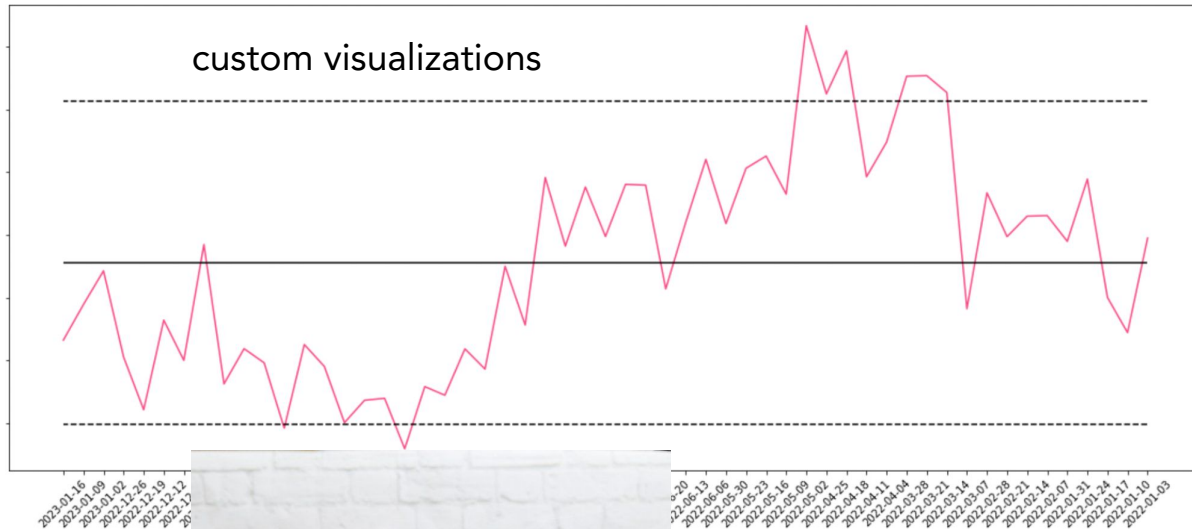


We tried all kinds of things...



inviting special guests

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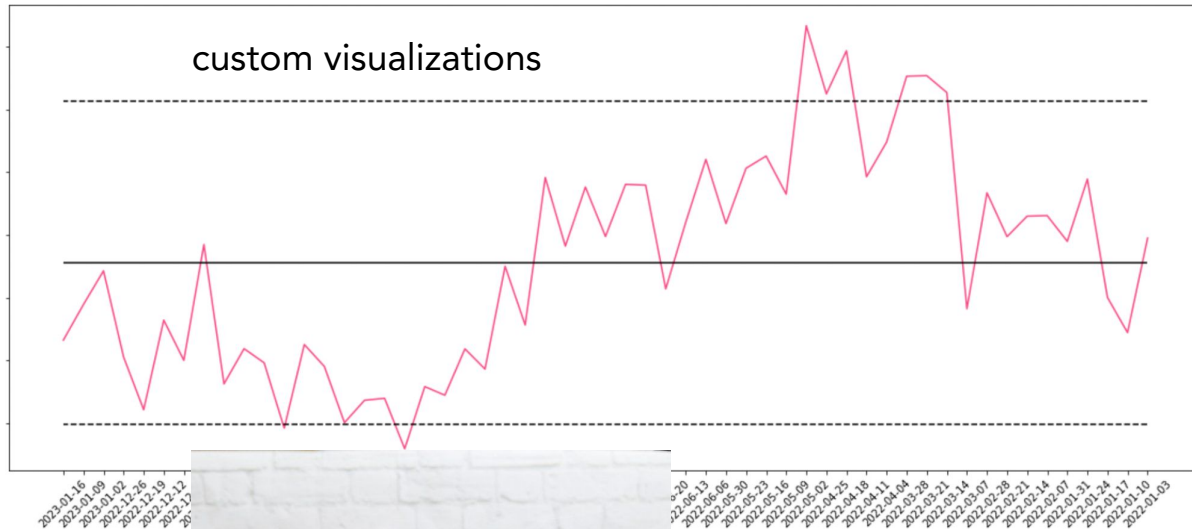


AI notetaker



inviting special guests

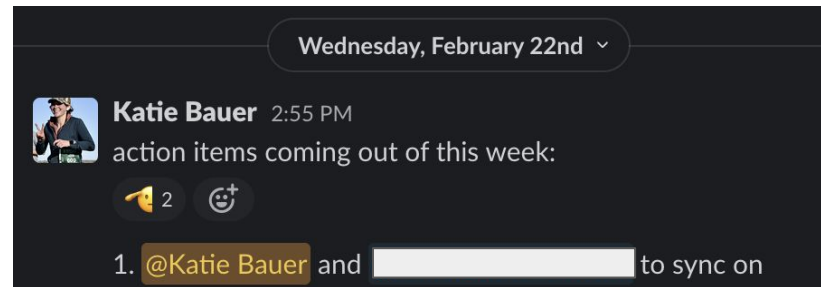
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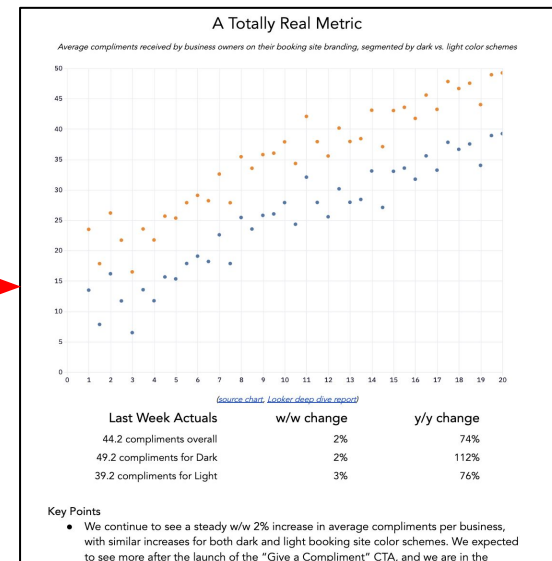
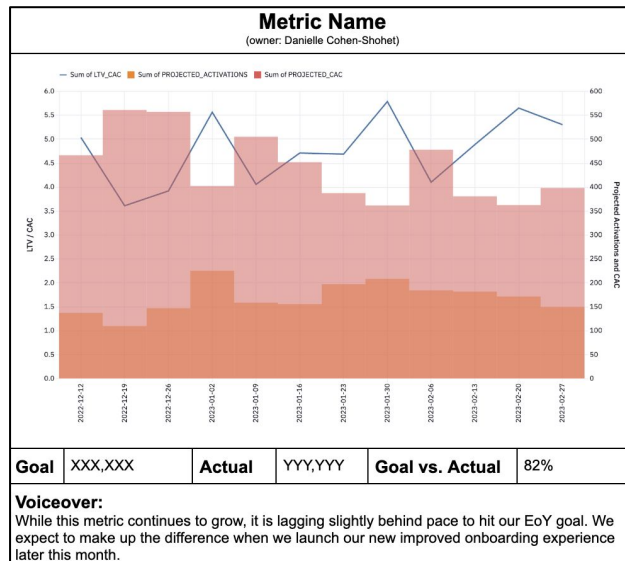


recapping action items in slack

Where we are today?

Where we are today

- Meetings are still based around a pre-read document, segmented by a few key areas
- Metrics have more context baked in, including commentary from subject matter experts
- Meeting discussion is intentionally focused on topics that people disagree on



What's next?

We need to balance different personalities



We need to go deeper to find the best stuff



We like the cadence for learning but not for production



Our next step is "Rotating Spotlights"



(monthly deep dives for each major department)

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- Putting more people into the driver seat better balances personalities

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- Putting more people into the driver seat better balances personalities
- Involving subject matter experts provides richer context
- There's more time to thoughtfully evolve the meeting's content when administrative burden is more evenly distributed

Advice for building your own
business review program

MVP Business Review Program Recipe

get your participants on the same page about what the meeting is for



MVP Business Review Program Recipe



get your participants on the same page about what the meeting is for

goals

metrics

pre-read

start with what you have

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have a consistent structure and cadence to keep the focus on the right things

Takeaways

- The best way to ensure people are familiar with your company's metrics is to make them talk about it regularly
- Production value and fancy methods are less important than consistency
- These meetings work well best if you start with an MVP

Thank you!

