LaunchNotes

A Product Ops Playbook: 10 Best Practices to Optimize Your Product Org

10 best practices to build and execute a Product Operations strategy that drives tighter internal alignment and superior business outcomes.

2024

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About the authors

Since we know you're wondering, this playbook wasn't created by ChatGPT and therefore isn't be stuffed with all the same information you've already seen. To the contrary, we not only wrote it ourselves, but did so based on our own lived experiences working in and with Product teams over the past decade.

We also enlisted Graham Reed, a Product Ops leader, advisor, and coach, to bring his experience and perspective to our playbook as well. As one of the most prominent advocates and educators in the Product Operations community, his expertise is sought after by many organizations, from academic institutions to enterprise SaaS companies. And now much of this knowledge and experience is distilled here for you.

Jake Brereton

Jake Brereton is the Co-Founder & COO of LaunchNotes. Prior to founding LaunchNotes, Jake held of a variety of Product and Marketing roles over a 7-year tenure at Atlassian. Most recently, he was the Head of Product Marketing for the Jira business unit, where his team helped 8x Atlassian's revenue growth to $1.2B in 2019.

Graham Reed

Graham Reed writes the Practical Product Operations newsletter on Substack, hosts the Product Operations Chronicles podcast, and runs the Product Mind Community. He previously led Product Ops at Cobalt and Learnlight, and has advised many more companies on how to implement Product Operations successfully.

Welcome to the Product Ops Playbook

Hi there 👋

First of all, welcome! We're glad you're here.

We authored this playbook to support anyone actively building or refining a Product Operations function within their organization. So whether you're just beginning to put some operational structure around key areas of your product development process for the first time, or are actively hiring a Product Ops leader to build out a dedicated team and function, this guide is packed with practical and actionable advice to optimize Product Ops in your organization.

We'll cover the following topics:

- Whether Product Ops is necessary to building a successful product org
- How to calculate the ROI of a product ops implementation
- The six pillars of Product Operations
- The secret sauce to the most successful product ops practices
- What effective Product Ops looks like in action
- How to pitch Product Ops internally to get broader buy-in
- What a successful Product Ops implementation looks like

By the end, you should not only be confident about the value Product Operations can add to your business over time, but also about how to begin implementing (and/or refining) it in a way that has immediate impact on your business.

Our sincere hope is that you'll come away with tangible, actionable learnings that you'll be able to take back to your team today. And we look forward to hearing about your experiences doing so!

With good things ahead,

Team LaunchNotes and Graham Reed

Why now?

The world of product management is currently in uncharted territory, and we believe the function of product operations is the compass that can help product leaders navigate this unprecedented storm.

As software companies race to evolve and reinvent their products to keep up with today's cutting-edge technologies, the product management function finds itself increasingly in the crosshairs and under more pressure than ever before. Compounding this pressure is that most PM orgs are smaller than they've been in a decade, driven by the wave of budget and personnel cuts that hit the technology sector in 2022 and 2023. Driven by these factors, today's product leaders are not only having to deliver greater value at a faster clip, but do so with far fewer resources than they might have had even one year ago.

However, new challenges present new opportunities, and it's in this exact environment where the function of product operations has the opportunity to shine.

Anyone that's worked in a product org knows that moving fast is vital… yet challenging. The product org is one of the most cross-functional parts of any organization, and their decisions impact almost every corner of the business. To excel, PMs must not only collaborate with one another, but also with R&D, PMM, CSM, Support, Executives… the list goes on. Oh, and do all of this while staying laser-focused on the customer.

If there's any chance that modern product orgs are going to be successful in delivering greater value faster, it begins with ensuring the product org is:

1. Running optimally and transparently, while
2. It's activity is being communicated clearly and frequently across the business

The product operations function is equipped—and in many cases exists—to accomplish both of these things. It's a time-tested set of tools, processes, and principles that enable product teams to make faster decisions, ship higher quality products, drive tighter alignment, and ultimately produce increased business value.

So that's why we believe Product Ops is needed now more than ever before.

However, anyone who's been in the product space—especially those of us who have lived through the rollercoaster of 2022 and 2023—have heard a common refrain that goes something like: "Product Ops sounds great, but do we really need it? It seems like a nice-to-have that we can't justify right now. Especially with our CFO scrutinizing everything twice as much as last year. We just can't tie product operations to tangible ROI…"

Actually we can.

Chapter 1
The ROI of Product Operations

Regardless of whether or not you have a dedicated function for it, members of your team are already carrying out many of the roles and responsibilities of a Product Ops team. For example, any business shipping software—regardless of the size and maturity of their R&D org—has someone somewhere tasked with writing product documentation, building usage and metrics dashboards, drafting and sending product updates, and ensuring roadmaps are aligned across the business (just to name a few).

Unfortunately, far too many businesses treat these product operation tasks as an afterthought instead of a focus and, as we'll illustrate below, this mistake can be an extraordinarily expensive one.

The real question isn't "whether or not we need Product Ops," the real question is: If you invested in optimizing the most impactful processes across your product org—making the entire organization as operationally efficient as possible—how much faster could your business deliver value? How much happier and more productive would your R&D org be? How much additional revenue could you generate?

Said differently: What's the cost to your business of not prioritizing the operational efficiency of your product org? This is the vitally important question that gets lost in the larger and more theoretical "To Product Ops or not to Product Ops" debate.

Whether or not your organization is at the size and scale to justify a full-time Product Operations role or team is a topic we'll explore a little later. First, let's put to bed, once and for all, the fallacy that there isn't a crystal clear ROI in making your product org more efficient and effective. To the contrary, it's actually one of the easiest ROI calculations a business can make.

The cost of *not* investing in product operations

Let's walk through two quick, yet all-to-common, scenarios that highlight how tangible the value of product operations really is.

New onboarding flow to increase activation

You're a product leader at a mid-size SaaS company and your company's #1 OKR for the year is to improve new user activation rates. Among a long list of potential ideas to improve these activation rates, you assure company leadership that the lowest hanging fruit is a new onboarding flow for your highest converting persona. While not fully convinced, they ultimately say it's your call and that they trust you to get the job done ASAP.

As this project is both high priority and high visibility, you ask your best scrum team to pick up the work. They agree, and spend two sprints building and shipping everything to spec. The work goes through the necessary testing and is pushed live. With the project on time and budget, everyone is pleased with the outcome and excited to see the impact.

However, over the next week you watch as new user activation rates don't improve, but instead begin to plummet. Needless to say, company leadership isn't pleased and demands answers as to what's happened and how you intend to fix it.

You dig in further to discover the root cause of the issue is related to a change that was made to your product's RBAC system. The Platform team, which sits in a different part of the org, reprioritized their last sprint at the eleventh hour so they could ship an update that would help Sales close an Enterprise customer on the finish line. Unfortunately, what the Platform team shipped required an update to the RBAC system that resulted in new evaluators no longer receiving the permissions they need to complete the most important tasks in your new onboarding flow. And because test users always have the correct permissions, your team's automated tests didn't catch this issue prior to deployment.

Realizing there isn't an immediate fix and with activation rates continuing to decline, you're forced to roll back the onboarding flow altogether. You then begin scoping how much extra work will need to be added to the next sprint to get everything working correctly in light of these RBAC updates. However, company leadership, afraid to do anything else that might negatively impact activation rates before their upcoming board meeting, asks you not to invest any more time in the new onboarding work until a full retro is completed and new processes are implemented to prevent anything like this from happening again.

The cherry on top? As an immediate action item, you're asked to plan, manage, and run a new weekly roadmap review meeting, which will hopefully prevent another similar mishap until a more formalized process is put in place.

Cost review: New onboarding flow

👥 6 engineers   🕐 1 month build   💳 ~$118,000 average salary

960 wasted hours	**$60,000** up in smoke

What it cost the business

So how much did a month's worth of work building this new onboarding flow—a flow that sent new user activation rates plummeting and ultimately got shelved for the foreseeable future—cost your business?

According to Buffer's salary calculator, a mid-level software engineer at a mid-size SaaS company makes ~$118,000 a year. If we assume the sprint team you assigned to this work had six engineers on it, this month's worth of work cost the business ~$60,000. And notably, this $60,000 doesn't include any time spent on design, QA, user research, or any other auxiliary function. Nor does it take into account any of the rework the team will have to do to get the new onboarding flow working again.

$60,000 to build a new onboarding flow that not only had a negative impact on company goals, but was ultimately rolled back. $60,000 to discover what your team delivered wasn't compatible with what other teams across the business were shipping. $60,000 that could have been spent building new features and functionality that would unlock new revenue for the business.

In case this $60,000 figure didn't grab your attention, now let's run the numbers for what a similar mishap might look like at a larger company with a bigger Engineering org.

SAML buildout to bolster shift up-market

You're a product leader at a Series C startup that's fully remote and scaling. To help accelerate the business' move up-market, leadership asks you to add SAML into the product. SAML is deemed a critical investment in platform security as well as a large potential growth lever for new business, and as a result the project is prioritized over other feature work that could drive immediate revenue.

As a bonus, your current customers—including many of your larger ones—have repeatedly asked for SAML, and shipping it will drive an uptick in CSAT and revenue expansion. But a smooth migration for these customers will require help from your Customer Success and Support teams and thus, close coordination with these teams will be critical to a successful rollout.

The project takes two months to prepare and complete and consumes a quarter of the Engineering team. In parallel, Product Marketing is busy crafting the perfect launch plan to get the word about the new SAML functionality out far and wide. Because of how high-visibility the release will be, executives begin working closely with both teams to ensure the maximum splash on launch day.

Less than a week before the release, a tech writer reaches out to someone on your PM team and asks when the new SAML functionality is shipping. Your PM realizes the R&D org has been so focused on hitting the release date and assisting PMM with the public-facing messaging, there's been almost no time or resources given to Tech Writing, Success, and Support. In response, the PM quickly compiles a list of relevant materials for the Tech Writing team, as well as records a walkthrough of how to set up the new SAML functionality. These assets are then shared in a few relevant Slack channels and emailed to the leaders of the Support and Success teams.

Launch day arrives and from the perspective of the R&D and Marketing orgs, the release and launch are both a success (including a featured article in TechCrunch! 🥳). However, within minutes of the announcement the Support team is inundated with hundreds of specific questions about the new SAML functionality that they aren't equipped to answer.

Furthermore, no one knows where to go to find the correct documentation, and the docs they do find aren't detailed enough to help them resolve customer issues. Customers' excitement over the big launch quickly turns to frustration, as they don't know how to set up the new SAML functionality and the Support team is responding with unclear and even contradicting directions. Several customers paying extra for Premium Support get so mad they threaten to cancel the service altogether.

Meanwhile your CSMs, who aren't confident in the details of the migration themselves, and who didn't have enough lead time to set up calls with their high quality clients to get them quickly migrated over, also begin receiving emails from their clients asking why they weren't informed sooner and how they can begin using SAML ASAP. The easy upsell opportunities that existed for the Customer Success team evaporate, and CSMs find themselves on their heels as they begin reaching out to their customers to mend fences and help customers begin the SAML migration process.

The icing on the cake? The CRO sends you a Slack saying the Sales team just lost a high five-figure deal the month prior because the prospect needed SAML. And because they didn't know SAML had been prioritized and was being worked on, the prospect signed with a competitor.

What could and should have been a slam dunk for the business quickly spirals into a disaster, as both your customers and your customer-facing teams are left feeling helpless, demoralized, and annoyed with your Product org.

Cost review: SAML buildout

👥 14 engineers   ⏱ 2 month build   💳 ~$118,000 average salary

4,480	$236,000
wasted hours	up in smoke

What it cost the business

So how much did this fumble on the 1-yard line cost your business? It can be measured from any number of angles:

- Missed upsell and expansion opportunities
- Missed opportunities to close new deals
- Lower NPS from an angry customer base
- Lower internal CSAT from demoralized Support and CSM teams

However, for the sake of comparing apples to apples, let's look at how much you spent building SAML into your product, only to drop the ball in the home stretch.

If we assume that two full sprint teams worked on SAML for two months, that's 14 engineers working for four sprints. Using our $118,000 figure once more, those two months of work cost the business $236,000. And again, this doesn't take into account any time spent on design, QA, user research, or any other auxiliary function.

Almost a quarter of a million dollars spent on a feature that was expected to create excitement, drive expansion, and unlock new upmarket deals, and instead the rollout pisses off half of your enterprise customers, as well as your Support, Success and Sales orgs. With no expansion dollars in sight.

Do either of these scenarios sound familiar? If you're honest with yourself, how long ago did you witness something similar happening at your organization? Within the last week? The past month? How many engineers were working on the project?

The truth is that scenarios like these happen on a regular basis at most organizations, and the amount of money wasted in salary costs alone is mind-boggling. And this is why the Product Operations function was born. Product Ops exists to help businesses reduce complexity across the Product organization, increase the efficiency of product delivery, align internal teams, and facilitate better, more data-informed decisions.

Chapter 2
The Basics of Product Operations

The Definition of Product Operations

According to the 2023 State of Product Ops report, which surveyed practitioners from companies like Comcast, Target, and ADP, the most agreed-upon definition of Product Operations is, "fostering cross-departmental collaboration and utilizing product insights to identify improvement areas and inform key decisions."

We'll go with a slightly more colloquial version:

> ### ☀ WHAT IS PRODUCT OPERATIONS?
>
> Product Operations enables product and engineering teams to do their best work, from the conception of a product to its final release.

At its heart, Product Operations is an enablement function. It looks within your organization to see how people work now, and how those ways of working can be improved to increase efficiency going forward. Product Operations partners with product managers, engineers, designers, and data and business analysts to facilitate efficient, productive environments for the people in these roles to thrive.

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> *We listen, we empathize, we understand, we respond, we discuss, we improve, we educate, we inform. This is the basis for everything Product Ops does.*
>
> -Graham Reed

What Product Operations Isn't

Product Ops, as a function, doesn't call the shots. As Graham notes: "We're not decision-makers, but we make sure decisions actually happen."

This means that Product Ops isn't responsible for deciding:

- What to build
- How to build it (technologically)
- What the product requirements will be
- What the PM department KPIs should be

When to Invest in Product Operations

Product Operations solves many problems at a departmental and company-wide level, including:

- An ineffective discovery process with customers
- Misaligned communications between technical teams and the rest of the organization
- Inefficient and disparate ways of working within tech teams
- Lack of data-informed decision-making within product development
- Lack of process for product and feature prioritization

While Product Operations largely focuses internally, its results—both positive, when implemented successfully, and negative, when it lacks cohesion and transparency—reverberate externally in the quality and consistency of value-driven products and services.

When to begin implementing Product Ops

Notably, there's a big difference between the function of product operations and a dedicated Product Operations role or team. As such, any software organization—regardless of size or maturity—can (and should) begin implementing the principles of product operations at any time. In fact, from Graham's experience, the earlier the better, as the smaller the organization, the easier and faster experimentation and implementation can be.

In short, if your team is struggling with any of the pain points listed above, it's time to begin putting some structure around the operations in your product org. But, if you don't have a dedicated Product Ops team, who should lead the charge?

While you could start by hiring a contractor to come in one day a week, or even look to hire part-time help, the first step for many organizations is asking someone to allocate one day a week to a full focus on product operations. In many cases this is often:

1. A program manager already serving in a more cross-function operations role
2. A seasoned product leader who has prior experience with the product operations function, or
3. A more junior PM that's highly capable and trying to make their mark

As long as this person has dedicated goals they're held to, anyone can begin helping you successfully lay the foundation of a Product Ops function.

Notably, Product Ops fits into any product management framework, including Agile, Kanban, and Waterfall. Because it focuses more on how product teams interact as they build products, rather than the development methodologies used, its principles are adaptable to your company's preferred way of working almost instantly. In fact, as every business is unique, you should always adapt the principles to fit your business.

When to begin building a Product Operations team

A full-time Product Operations role is typically required for a certain size or complexity of business. While there's no magic number or threshold for when to hire your first dedicated Product Ops manager, from Graham's experience there's often a sweet spot around the 150-employee mark, or when a business grows to 5-6+ Product Managers (or squads). It's at this size and scale when gaps in practices, communications, data, interactions, and productivity begin reaching a breaking point and a conversation about adding a Product Ops function usually makes sense.

Interestingly, Graham notes that this 150 number aligns with a well-known principle, Dunbar's Number. The principle suggests that the typical number of stable relationships a person can maintain is 150, which may help explain why an organization usually begins experiencing gaps in communications around this size. Product Operations is not a solution to Dunbar's Number, but it does provide the necessary support to help maintain the one:many ratio of critical relationships as a business grows.

The Six Pillars of Product Operations

Product Operations is supported by six pillars, or guiding principles, as originally defined by Graham in Practical Product Ops. These six pillars outline the scope of Product Operations' functions and provide more detail on how it can support business operations:
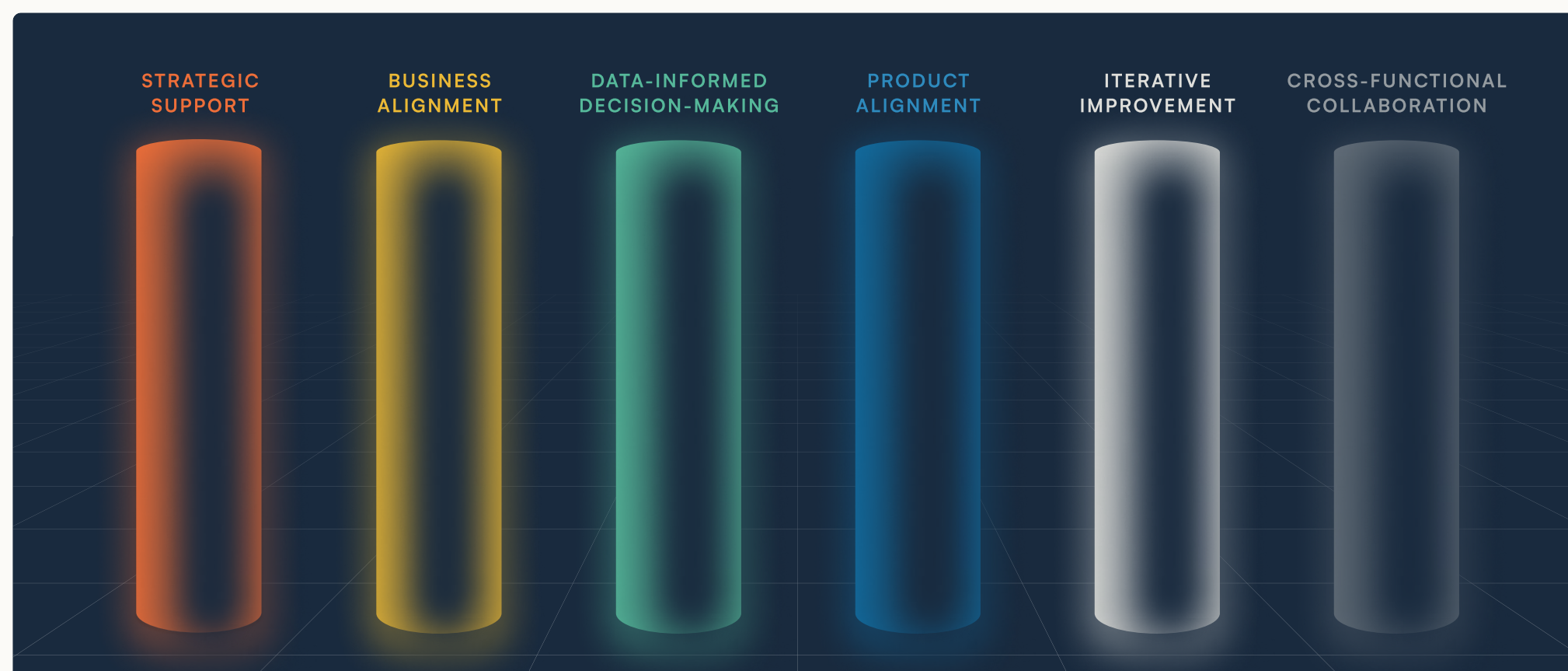
The Six Pillars of Product Operations

Strategic Support

Ensure teams stay on track through regular roadmap maintenance and refinement, and help them eliminate barriers they discover in the process. Provide guidance on software use and product delivery, facilitate essential conversations for quarterly and annual planning, and chair meetings to drive clear decisions across multiple teams and stakeholders as needed.

Business Alignment

Serve as an independent reminder of the broader business needs while helping each team plan for scale and success. Stay well-informed of the business strategy and direction, keep up to date on detailed plans from various departments, and ensure alignment of product plans and objectives from strategy to feature rollouts.

Data-informed decision-making

Build dashboards, analyze data, and partner with product teams to actively review and incorporate data into their decision-making. Make data collection and analysis a key part of the planning and rollout phases, and prompt product managers to ask: 'Is there any additional data we lack that could help us?'

Product alignment

Serve as an independent monitor of the product org's current plans and priorities in broader business settings. Circulate regular product updates that are crisp, consumable, and keep everyone in sync with the latest decisions and timelines.

Iterative improvement

Continuously evaluate the performance of existing product processes, frameworks, and methodologies. Identify which add the most value and which need improvement. Ensure the Product organization is constantly improving and that the wider business knows how to best interact with it at any given time.

Cross-functional collaboration

Ensure Product teams work together effectively using similar methods and tools without being overly prescriptive. Achieve economies of scale and enable teams to compare and contrast their efforts and outcomes.

While the six pillars of Product Ops span from the very strategic to the highly tactical, Graham notes that in his experience what underpins every successful product ops implementation is a strong focus on building a culture grounded in open, accessible lines of communication. And for the product operations function to build on top of this culture by establishing their own set of communication workflows and best practices.

> 66
>
> *Whether it's partnering with leaders to craft, share, and evangelize the product strategy, providing dashboards to the business to communicate trends and patterns, or facilitating and encouraging conversation between teams, crisp, clear, and timely communication is critical and mandatory. Especially in today's distributed and asynchronous world.*
>
> -Graham Reed
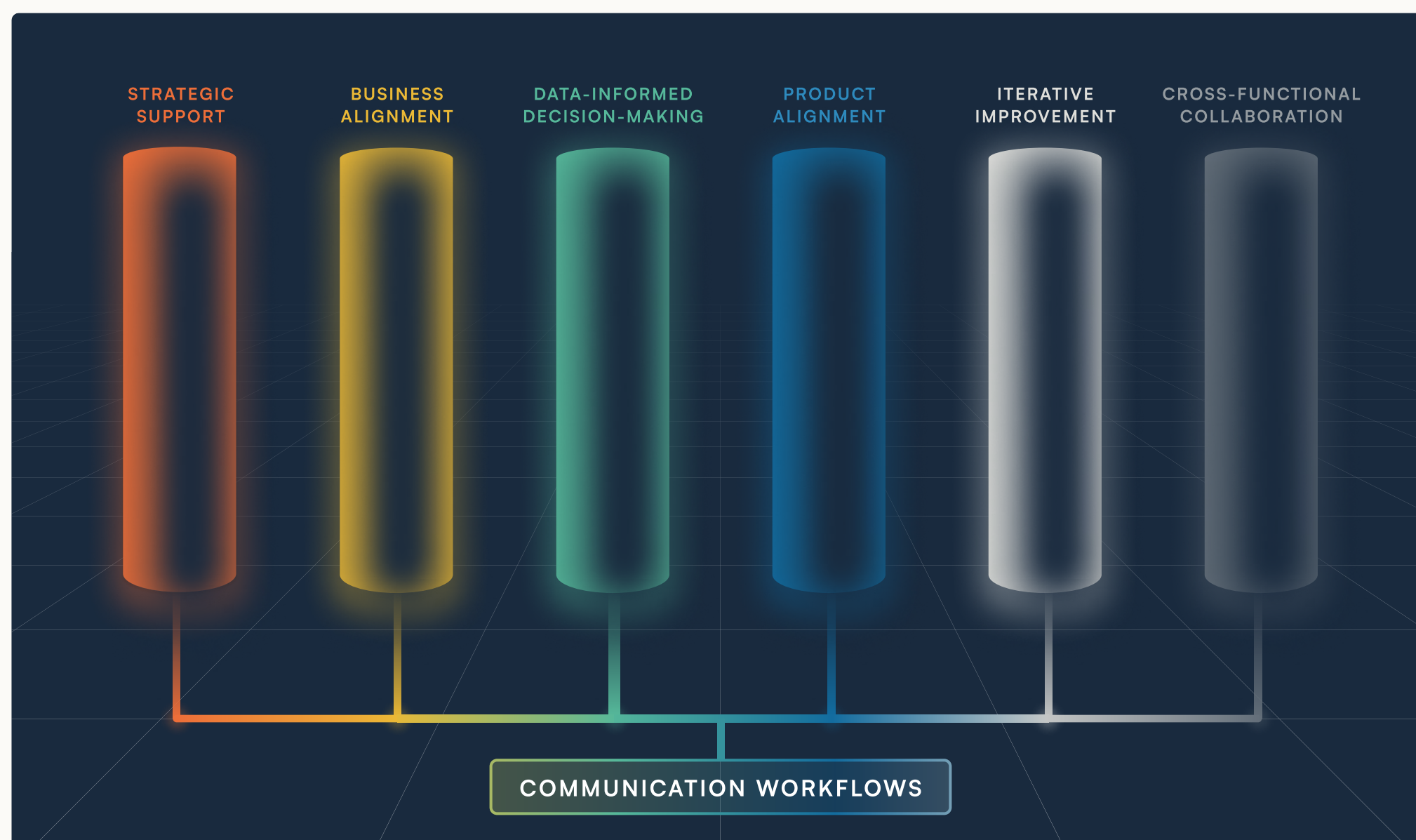
In Graham's view, establishing these communication workflows and best practices is vital, not only because they serve as the glue that connects each of the six pillars into one larger foundation, but more tangibly, unlock the product operations function to excel in their mission to enable the R&D org to do its best work.

Chapter 3
Bridging the Technical and Non-technical Divide

> **"**
>
> *Product teams must see the world through their colleagues' eyes—in sales, in marketing, in support—and understand what each team needs from them. This often isn't the same as what Product teams want to share.*
>
> -Graham Reed

If we revisit our definition of Product Operations above—enable product and engineering teams to do their best work, from conception to final release—one of the highest impact activities Product Ops can spearhead to accomplish this goal is driving seamless alignment between the work going on across the Product org and the host of stakeholders across the business whose jobs revolve around this work. It's not a coincidence that the word alignment is seen twice in the six Product Ops pillars above.

The reason alignment is of such significance is simple: when communication breaks down between two essential components of any organization, the consequences are far-reaching and costly. And there are few parts of any software organization more essential than:

1. The teams building software, and
2. The teams responsible for selling and supporting that software

As you saw in our scenarios above, and as we'll unpack even further below, a complex web of implications can arise from lack of alignment between technical and customer-facing teams. The repercussions of these implications can manifest in various forms, including decelerated growth, forfeited revenue opportunities, and slower expansion, just to name a few. Thus, helping to bridge this divide should be one of the highest priorities of anyone in a Product Operations role.

Technical vs. customer-facing teams

Technical teams and customer-facing teams often operate in distinct spheres within an organization, each with its own set of priorities, processes, and communication styles.

Tech teams comprise product management, engineering, technical leadership, and design (along with research, QA, data analysis, and several other supporting roles, depending on how large your organization is). These tech teams are responsible for developing, maintaining, and innovating technological solutions that power your organization's products or services. They are focused on coding, debugging, and ensuring the reliability and functionality of systems.

Technical teams are extremely hands-on with building the product, and thus are more familiar with its intended use, rather than actual use.

TECHNICAL + NON-TECHNICAL DIVIDE

Technical Leadership

Product Management

Data Analysis

Engineering

Research

Design

QA

Sales

Marketing

Customer Success

Implementation

Non-technical leadership

Account Management

Customer Support

Customer-facing teams, on the other hand, comprise sales, marketing, customer support, customer success, non-technical leadership, and account management. They are the frontline ambassadors of the organization, interacting directly with clients, customers and end-users. They possess in-depth knowledge of customer needs, preferences, and pain points. They see how people succeed and fail once the product is out in the world, and they play a pivotal role in gathering feedback and relaying it back to the organization.

Nevertheless, though technical and customer-facing teams possess their own unique competencies, organizational structures, and objectives, collaboration and alignment of these two groups are the cornerstone of any business' success (or failure).

The intangible cost of misalignment

Unfortunately, in today's business landscape, which is characterized by an explosion of new Agile and DevOps tooling, integration of technologies such as CI/CD into mainstream engineering practices, and the global shift towards remote and asynchronous work, the gap between the technical and non-technical sides of most businesses has never been more pronounced.

As clearly illustrated in the two scenarios we presented at the outset of our playbook, the financial toll of product misalignment is staggering. However, misalignment between the Product org and other departments within your company has far-reaching consequences that extend beyond the direct expenses associated with squandered time and wages. These include:

⚠ **EROSION OF CUSTOMER TRUST AND SATISFACTION**

Consistent and clear customer communication is essential for building trust over time. When issues arise, communication gaps between the engineering team resolving the problem and the customer-facing team managing customer expectations can quickly erode trust. Customers may feel neglected or uninformed, leading to dissatisfaction. Consequently, this can result in lower NPS and CSAT scores, negative support ratings, and even public scorn on social media.

⚠ **LOSS OF MARKET SHARE TO COMPETITORS**

When technical and customer-facing teams work in silos, misaligned priorities are inevitable. If Engineering delivers features that don't address customer needs, it wastes resources and makes customers feel unheard. Over time, this may lead customers to consider competitors who appear more responsive to their requirements. Open communication between those closest to customers and those building for them is crucial for a healthy product development lifecycle.

⚠ **DELAYED BUG RESOLUTION**

Effective communication is vital to addressing customer issues promptly. Without open channels of communication between Engineering, Support/CSM, and end users, you risk significant delays in both identifying and resolving reported bugs. While the list of implications for buggy software is long on its own, there's no faster way to anger paying customers and damage your reputation than not swiftly resolving their bugs. Especially if they're non-trivial.

⚠ **INTERNAL FRICTION AND FRUSTRATION**

Poor communication doesn't just negatively impact users; it can also devastate internal morale. Without tight alignment between the teams building software and the teams selling and supporting it, businesses risk leaving front-line teams unprepared to address customer concerns and ultimately succeed in their roles. For customer-facing teams, being blindsided by questions they can't answer is frustrating and embarrassing, leaving all parties disheartened. Over time this frustration will drive lower employee satisfaction, create a toxic work environment, and eventually lead to resignations.

Driving alignment through personalized, proactive product comms

> *The two words 'information' and 'communication' are often used interchangeably, but they signify quite different things. Information is giving out; communication is getting through.*
>
> -Sydney Harris

For years the most common solution to this fundamental product misalignment has been some combination of the following:

1. A set of monthly release notes, drafted and sent to the entire company via email
2. The addition of a weekly PM status meeting to review static product roadmaps
3. A Friday round-up message dropped into a Slack channel (that most of your team muted last year)

If any of these sound familiar, you're not alone!

Graham shares that in his experience these outdated "solutions" not only failed to solve the underlying root cause of misalignment in most organizations, but fell apart completely when the COVID-19 pandemic forced companies to adopt remote-first policies and work became largely asynchronous.

> *"The era of a single, solitary, static release notes page languishing in a forgotten corner of your website is long gone. As is the assumption that everyone within the organization knows the product as intricately as the product teams do, bugs and all.*
>
> -Graham Reed

But new challenges create new opportunities, and this same global shift to remote work presented an opportunity for Product Ops teams to finally drive the necessary structural changes to solve this problem once and for all.

In Graham's experience, getting to the root of product misalignment in any organization—particularly remote businesses—begins with the Product org fully embracing two concepts:

1. Personalized
2. Proactive

In his words: *"Modern product teams, guided by Product Ops, recognize the importance of proactively sharing regular, contextual product updates with their stakeholders. These updates tell micro-stories about the problems, solutions, and the significance of each investment to both customers and the business, in terms that commercial teams can easily understand and use."*

Just as CFOs tailor financial reports for investors, employees, and regulators, and medical researchers adjust findings for doctors, patients, and policymakers, modern product teams must customize updates for different business audiences to ensure alignment and success.

TECHNICAL + NON-TECHNICAL ALIGNMENT

Technical Leadership

Product Management

Data Analysis

Engineering

Research

Design

QA

Sales

Marketing

Customer Success

Implementation

Non-technical leadership

Account Management

Customer Support

Graham emphasizes that driving this process is one of the most impactful roles of Product Operations in creating significant business value: *"Whether it's a multi-layered roadmap accessible to every stakeholder in the org, a batch of pre-release notes sent to customer-facing teams a week before a big release, or ensuring executives receive a bi-weekly round-up of roadmap progress at the right fidelity for them, the rules of the game have changed. For a business to succeed today, it starts with the Product organization abandoning reactive, outdated practices like weekly roadmap reviews and instead fostering tight alignment through proactive product communications with the rest of the business."*

With a better understanding of how Product Ops can bridge the gap between technical and non-technical teams, let's dive into 10 best practices that will now only unlock drive tighter alignment across your business, but transform your R&D org into a world-class operation positioned to drive top-line growth.

Chapter 4
Product Ops Best Practices

**10 product operation best practices you can implement today**

1. Practice audience-led communication
2. Be intentional with technical details
3. Minimize 'sales speak'
4. Maintain a regular cadence of updates
5. Establish a centralized, self-service Product Hub
6. Open channels that encourage feedback and ideas
7. Implement a pre-release notes workflow
8. Schedule events to reinforce learning
9. Build trust through reliability
10. Drive habits through process

1. Practice audience-led communication

Tailor communication to your audience's specific needs and expertise levels to ensure your message resonates effectively. Understand the varying technical knowledge among groups (e.g., sales, technical support, executives) to craft clear, relevant, and actionable communication for each.

Consider each audience's specific journey when drafting communications:

- Sales teams focus on closing deals
- Marketing teams generate leads
- Executives ensure company-level goals are on track
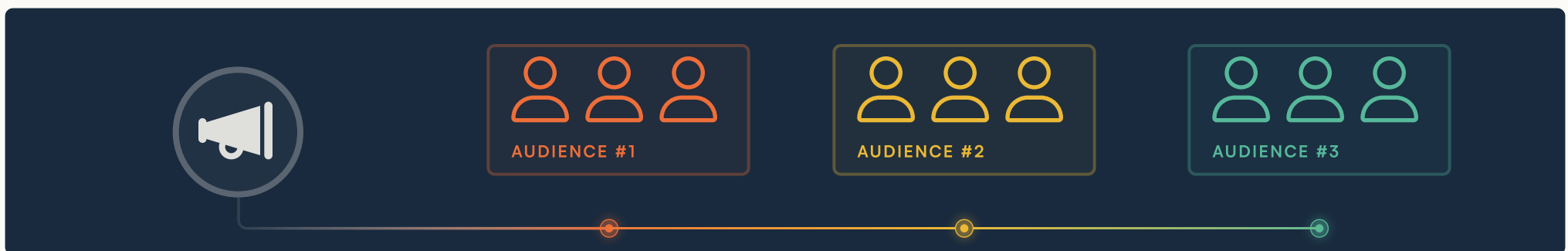
Use language and examples that align with their daily experiences and challenges, enabling everyone to effectively convey product benefits to their stakeholders.

This approach may require crafting multiple versions of a communication for different audiences. However, this upfront investment outweighs the time spent answering repetitive questions later. Targeted comms drive higher engagement rates, leading to a better-informed, aligned, and productive organization.

2. Be intentional with technical details

Striking the right balance between technical depth and accessibility is crucial in product communication. Providing sufficient technical information for stakeholders who require it (e.g., technical support teams, implementation teams) while avoiding overwhelming other teams (e.g., sales, marketing) with unnecessary jargon is how to keep everyone informed and engaged. Clear, concise explanations of technical concepts help demystify complex topics and facilitate deeper understanding and tighter alignment across the org.

The primary goal of controlling the level of technical detail is to ensure that everyone in your organization has the necessary knowledge to confidently address customer inquiries, requests, and objections. By tailoring the technical depth to each team's specific needs, you empower them to effectively communicate the product's value proposition and key features to their respective audiences.

3. Minimize 'sales speak'

Product, in partnership with Product Marketing, must equip customer-facing teams with authentic, compelling messaging that highlights the value proposition of new releases. This messaging needs to strike the perfect balance between promotional language that gives teams the necessary confidence and excitement, and clear, concise description of the pain being solved and how it does so. Overly promotional language or language that's too sales-oriented and lacks practical details can damage credibility and trust among stakeholders and customers alike.

The most critical aspect is ensuring that every stakeholder across the organization understands the real-world benefits of the product updates and the specific customer pain points they address. When executed effectively, each product communication will empower stakeholders across the business to persuasively articulate the value of new releases to their respective audiences, ultimately driving adoption and customer satisfaction.

4. Maintain a regular cadence of updates

Establish consistent communication channels with customer-facing teams to keep them informed about product releases, updates, and changes. Leverage multiple channels, technologies, or mediums to do so. Sending updates on a regular cadence is good organizational hygiene and trains teams to know when and where to expect updates.

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
✕	✓	✕	✕	✓	✕	✕
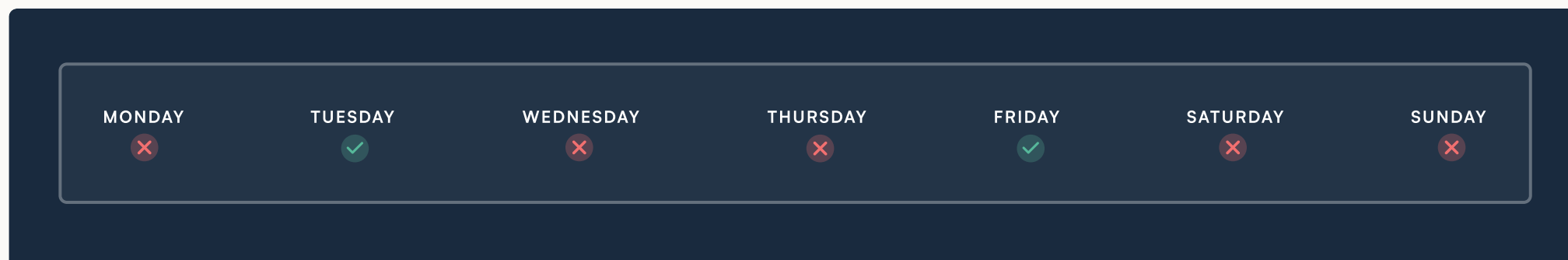
The chosen cadence and channels will vary based on factors like organizational size, complexity, and work environment (in-person, remote, or hybrid). Options include dedicated Slack channels, regular email updates, or weekly standups. Ensure information is delivered reliably and timely, allowing teams to stay current and effectively communicate updates to customers.

Consistency builds trust and fosters engagement. If teams eagerly anticipate your next update, you've created a culture of transparency and open communication.

5. Establish a centralized, self-service Product Hub

Develop a dedicated Product Hub for customer-facing teams to access relevant product information, resources, and training materials on-demand. Organize content in a user-friendly manner, enabling teams to independently find answers to customer questions and address common issues. This self-service approach empowers teams and reduces the need for constant updates from product managers.

PRODUCT HUB

Regularly update and maintain the Product Hub's content, incorporating user feedback and addressing information gaps. Encourage teams to use the Product Hub as the primary source of truth for product-related queries, actively directing them to relevant sections when answering questions. This will establish the Product Hub as the go-to resource for product information, reducing repeated calls and emails to product managers.

## 6. Open channels that encourage feedback and ideas

Actively seek feedback from customer-facing teams on pain points, feature requests, and market trends. Establish dedicated channels for sharing insights directly with the Product team, fostering a collaborative feedback loop that helps Product Managers stay informed and prioritize development effectively. Use forms, surveys, or other centralized mechanisms to collect this information while minimizing distractions for tech teams. Employ asynchronous methods to reduce interruptions for product teams.

Establish clear guidelines for submitting ideas and insights. Regularly review and analyze feedback, communicating the impact back to customer-facing teams. This refines the product roadmap and demonstrates the value of their input, encouraging continued participation.

If necessary, you can even consider implementing a system to acknowledge and reward valuable contributions, further incentivizing stakeholders across the business to share their insights.

7. Implement a pre-release notes workflow

Establish a workflow to circulate pre-release notes internally before code reaches production, avoiding challenges when your organization learns about updates simultaneously with users. Share these notes with stakeholders, beta testers, or early adopters, including information on upcoming features, improvements, bug fixes, and known issues. This provides a preview and allows feedback gathering before the final release.
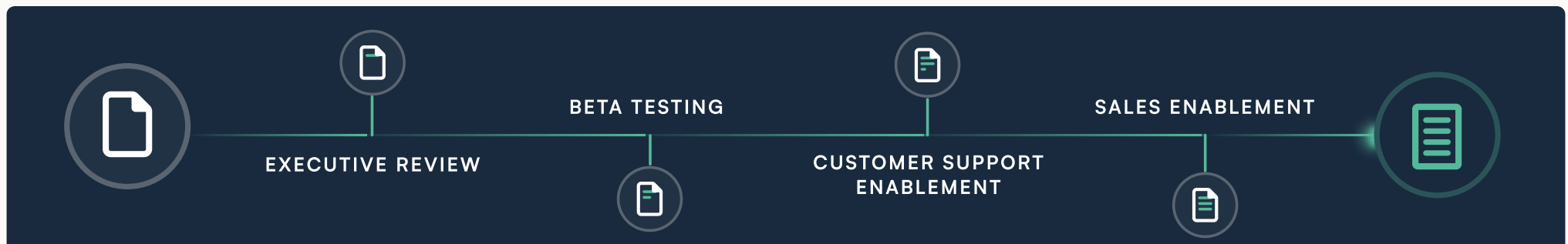
Ensure pre-release notes are comprehensive and clear, detailing all relevant updates and potential issues. Encourage thorough review by stakeholders, especially customer-facing teams responsible for selling and supporting changes. This proactive approach enhances transparency, manages expectations, and serves as a final check to keep everyone informed. It reduces the risk of unexpected issues and ensures a smoother transition to new features and changes.

8. Schedule events to reinforce learning

Host regular, interactive training sessions and workshops for customer-facing teams to deepen their product knowledge. These events should provide opportunities to ask questions, share best practices, and learn from real-world use cases. Empowering team members to effectively communicate product value can directly impact customer satisfaction and retention.

Tailor content and format to each team's specific needs. For example, offer role-playing exercises for sales teams and in-depth technical knowledge for support teams. Invite Product team members to participate, fostering cross-functional collaboration and a sense of shared purpose.

9. Build trust through reliability

Deliver reliable, consistent product communications through pre-established channels, providing predictable, accurate, and timely information. Build trust through transparency, responsiveness, and proactive updates on product changes, issues, or delays.

Address challenges openly, offering clear guidance on resolution efforts. This transparency fosters strong partnerships based on mutual trust and respect.

> "
> Trust is the lubrication to make it possible for organizations to work
>
> - Warren Bennis

Consistently meet commitments and deadlines. If unable to meet a timeline, promptly inform stakeholders and provide updates. This reliability demonstrates that the Product team is a dependable partner invested in the success of customer-facing teams and the entire organization.

10. Build habits through process

Implement structured processes for communicating product updates, feature releases, and customer feedback to customer-facing teams. Define clear roles, establish communication protocols, and provide training to ensure consistent practices across teams. Regularly review and iterate on these processes based on feedback and changing needs.

By incorporating these tailored best practices into your communications strategy and Product Operations function, you can create stronger internal alignment and goodwill. This drives better customer experiences and business outcomes. Consistent, reliable communication builds trust in the Product team, fostering collaboration and shared success. As these practices become habits, teams can focus more on delivering customer value and less on navigating communication challenges.

Chapter 5

Building a Business Case for Product Operations

If you've made it this far, chances are you're now convinced of the countless advantages a product operations function can bring to your business. However, we know all too well that investing further in Product Operations isn't a decision you can make on your own. So let's examine a few ways you can sell product operations internally to get buy-in from other stakeholders.

First and foremost, we encourage you to revisit and share the two scenarios we used to open this playbook. The most powerful way to advocate for something is to tie it to dollars and cents. Given how much your organization is spending on R&D, there's no better way to get stakeholder attention than by highlighting the cost of every wasted engineering cycle.

However, beyond the cost of wasted development cycles, here are some additional metrics that might help.
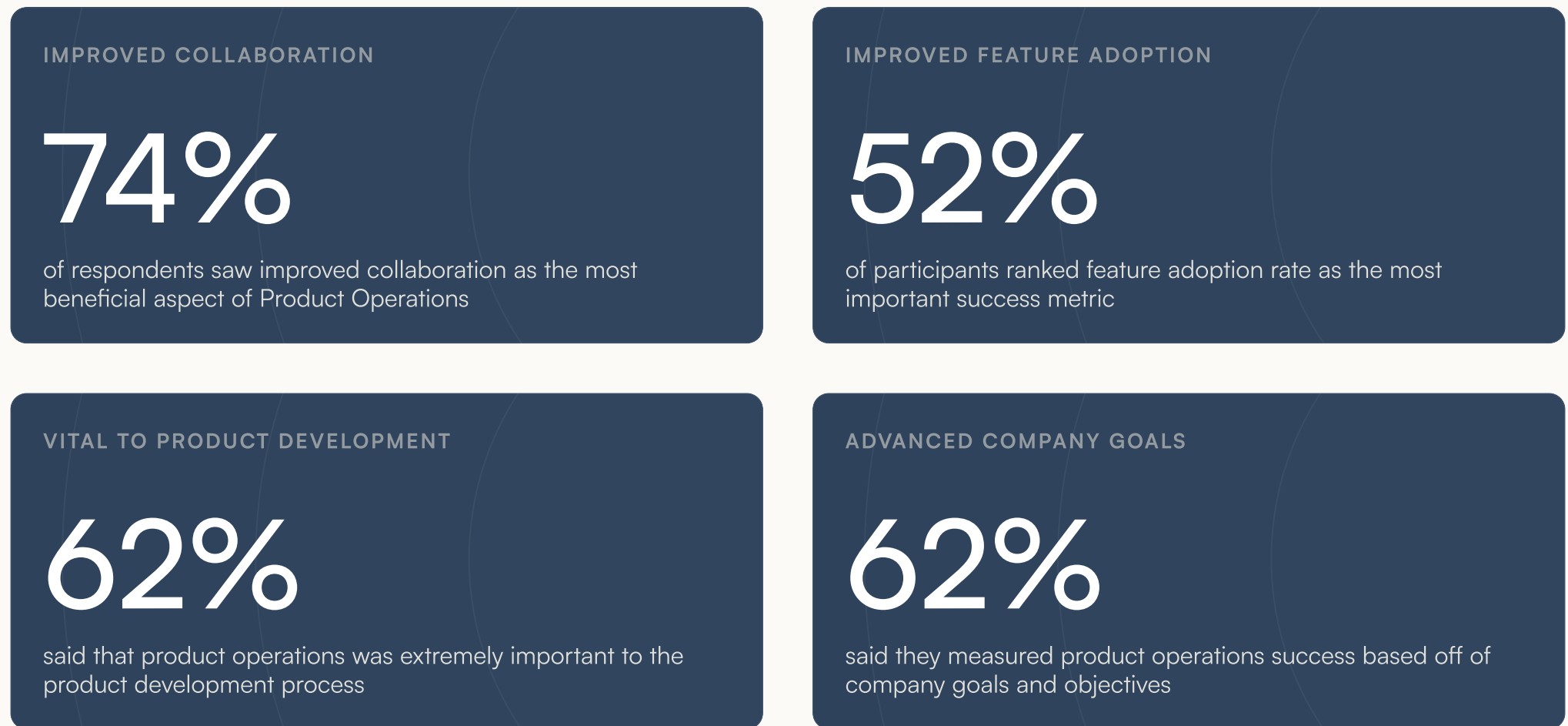
Moving the metrics that matter

Product Operations contribute to improving many "hard" business metrics, including:

- Reduced customer churn rate
- Increased monthly recurring revenue (MRR) or annual recurring revenue (ARR)
- Improved net promoter (NPS) or customer satisfaction (CSAT) scores
- Increased customer lifetime value (CLV)
- Reduced customer acquisition cost (CAC)
- Improved product utilization and engagement rates
- Reduced support ticket volume and resolution times
- Faster time-to-market for new features and releases
- Improved feature development and launch success rates
- Reduced technical debt and maintenance costs
- Increased product profit margins
- Higher return on investment (ROI) for product development efforts

Practitioners of Product Operations find value in many different areas. According to the 2023 State of Product Ops report:

IMPROVED COLLABORATION

74%

of respondents saw improved collaboration as the most beneficial aspect of Product Operations

IMPROVED FEATURE ADOPTION

52%

of participants ranked feature adoption rate as the most important success metric

VITAL TO PRODUCT DEVELOPMENT

62%

said that product operations was extremely important to the product development process

ADVANCED COMPANY GOALS

62%

said they measured product operations success based off of company goals and objectives

Quantifying Product Operations success depends on the unique needs of your business. However, we strongly recommend developing a plan for how Product Operations will explicitly contribute to your company's long-term goals and North Star metrics. This will allow you to track the direct impact of increased investment in product operations and easily communicate this value to stakeholders in a resonant way.

Tailoring your pitch for each team

Now, let's look at some more specific language you might be able to use to get other specific teams and stakeholders onboard.

💼 Executives

- Assess your company's product maturity and identify where your company is in terms of Product Maturity Model (No Activity, Crawl, Walk, Run). Position Product Operations as a scalable framework adaptable to your company, emphasizing its flexibility and versatility in addressing diverse business needs.
- Emphasize the long-term value of Product Operations in sustaining organizational success, from improving internal alignment and employee morale to driving customer loyalty and market differentiation.
- Highlight the potential ROI of Product Operations initiatives, showcasing the tangible benefits in terms of increased sales, faster time-to-market, and enhanced operational efficiency.

⚙️ Product Management

- Emphasize how Product Operations can streamline processes, reduce friction, eliminate inefficiencies, and help the Product org achieve a level of highly predictability in its work and output.
- Highlight the benefits of improved cross-functional collaboration, clear communication, and well-defined roles and responsibilities, leading to higher team satisfaction and unlocking PMs to focus on high-impact work and innovation.
- Conduct a small-scale experiment by implementing one tenet of Product Operations (e.g., starting a Product Hub or creating audience-specific release channels). Gather results and feedback, and share that information with the department to demonstrate the tangible benefits of Product Ops in action.

</> Engineering

- Highlight the potential for Product Operations to help prioritize engineering work based on customer needs and business objectives, reducing wasted efforts on low-impact tasks.
- Emphasize how Product Operations can facilitate smoother product releases and faster feedback loops, allowing engineers to iterate and improve products more efficiently.
- Determine which metric your Engineering team is most focused on improving (anything from a DORA metric to a more qualitative goal like team CSAT) and emphasize how Product Ops can help achieve this goal by fostering better communication and collaboration between R&D and the rest of the organization.

By framing Product Operations as a strategic investment in the most costly area of your organization rather than a mere tactical function, you can help stakeholders—specifically executives with an eye for the top and bottom line growth of the business—recognize its potential. Meanwhile, we also encourage you to invite everyone to participate in understanding the function better, observing it in action, and celebrating its achievements. This inclusive approach will foster a sense of ownership and commitment to the success of Product Operations across the organization.

Chapter 6
What Product Operations success looks like

By now, you've learned the what and why of product operations and have a good sense of how it can drive value for your business. Since we began this playbook with examples of releases that went wrong, we wanted to end with a scenario showcasing what it looks like when a product organization—with the support of Product Operations—is flying. Seeing something in action before implementing it yourself always helps, so we've developed a hypothetical scenario inspired by real-life events.

In this scenario, we'll demonstrate what effective Product Operations looks like in a fictionalized, scale-up (Series A-B) SaaS company called CloudCore.

SCENARIO #3

CloudCore prepares to release CloudCore AI

CloudCore, a Series B software company, is gearing up to launch its new AI platform amidst rapid expansion. Over the past year, the company has significantly scaled its workforce, particularly in customer-facing roles like Sales and Customer Success. However, varied ways of working and siloed development within the R&D organization have emerged as challenges.

Facing pressure to accelerate growth, the Product and Engineering teams are preparing to roll out a transformative AI platform set to impact every facet of the software. This ambitious release aims to substantially increase CloudCore's Annual Contract Value (ACV) and marks its largest launch to date.

Despite being months away from the release, the company's rapid growth is revealing cracks in several areas:

- **Growing misalignment between Product and Commercial teams**: Communication breakdowns lead to misaligned priorities, inefficiencies, and missed opportunities between product and commercial teams.

- **Product Managers overwhelmed by roadmap communication**: PMs are burdened with repeatedly communicating the product roadmap and messaging to internal teams, diverting focus from strategic planning and innovation.
- **Sales and Marketing struggle with product value articulation**: Lack of clarity on the product's value proposition impedes sales and marketing efforts, resulting in missed opportunities and ineffective campaigns.
- **Support lacking visibility into product roadmap and issues**: Limited insight into product performance hampers support teams' ability to address customer inquiries effectively, leading to dissatisfaction and churn.
- **Increasing skepticism about Product launch deadlines**: Widespread uneasiness and distrust towards the product team's ability to deliver upcoming launch, threatening morale and confidence across the organization.

Acknowledging the interconnected nature of these challenges within the Product organization, the executive team decides to hire CloudCore's first Product Operations Manager, Sam. With several months until the CloudCore AI launch, Sam is tasked with implementing processes and frameworks to alleviate friction and ensure smoother communication and alignment across teams.

Rapidly turning chaos into clarity

Sam hits the ground running and immediately begins streamlining and optimizing processes across CloudCore. Within his first month, Sam takes the following steps:

📢 STEP 1

Centralizes product change communication into a dedicated channel with tailored streams for Sales, Support, and Executives. A single channel allows all stakeholders to subscribe to a single place for accurate and timely updates. And Sam is able to practice audience-led communication, providing each audience with information tailored to their needs: Sales gets detailed value propositions, Support receives necessary technical details, and Executives receive concise summaries.

💬 STEP 2

Enables interactive feedback channels alongside these updates. By empowering recipients to ask questions and provide feedback, Sam fosters engagement and dialogue. This shift from monologue to dialogue ensures the broader organization stays connected with the product roadmap. It also instills confidence that stakeholders have a direct line to the Product team for addressing user feedback and inquiries about upcoming releases, fostering close collaboration between the Product team and those intimately connected to the business' customers.

⊶ STEP 3

Establishes a unified roadmap integrated with Engineering's Jira workflows, accessible to all stakeholders. Recognizing that trust hinges on transparency and accuracy, Sam ensures the definitive source of software development resides with the Engineering team's R&D workflow. This roadmap is designed to be universally accessible and subscribable, enhancing organizational alignment. Additionally, Sam takes the audience-led approach one stage further and produces a Multi-View (MV) Roadmap - several filtered versions of the single central roadmap tailored to what each audience needs.

▦ STEP 4

Implements a regular cadence of internal product updates. With a centralized communication channel established for all product changes and the capability to reach stakeholders via email and Slack, Sam initiates bi-weekly updates on progress toward the CloudCore AI launch. These updates not only resolve interdepartmental misalignments but also reaffirm stakeholders' confidence in the Product team's ability to meet the release deadline. Importantly, they serve as an early warning system for any potential conflicts among the numerous engineering teams involved in the release, enabling prompt identification and resolution of issues.

◷ STEP 5

Scheduling weekly office hours for open discussion on the product roadmap, value propositions, and timelines. In addition to bi-weekly updates, Sam introduces casual, optional office hours over lunch where anyone in the company can drop in to ask questions and gain clarity from the PMs. These sessions aim not only to enhance alignment across teams but also to rebuild trust between PMs and GTM teams through direct, face-to-face interaction.

▢ STEP 6

Sets a pre-release notes workflow in motion. Despite CloudCore AI's launch being a month away, Sam initiates the preparation of detailed pre-release notes to be distributed at least five days prior. Collaborating closely with CloudCore's technical writing team, Sam leverages the ongoing weekly updates to streamline the drafting process, ensuring the notes are thorough and informative.

Product Operations sets the stage for sustainable success by implementing strategic initiatives that streamline operations and foster alignment across CloudCore. By centralizing communication channels, facilitating interactive feedback, and establishing a unified roadmap, Sam swiftly resolves longstanding organizational frictions. These efforts not only restore confidence in the CloudCore AI launch but also pave the way for future growth and innovation.

Through structured bi-weekly updates and inclusive office hours, Sam cultivates a culture of transparency and collaboration, ensuring every team member feels heard and valued. Concurrently, his preparation of comprehensive pre-release notes exemplifies meticulous planning and foresight, underscoring a commitment to delivering clear and informative updates to stakeholders.

As CloudCore prepares to unveil its transformative AI platform, these foundational steps orchestrated by Product Operations demonstrate their pivotal role in steering the company towards a successful release and beyond. With metrics in place to track progress and a refined communication framework, Product Operations equips CloudCore to navigate challenges, seize opportunities, and drive sustained value in a dynamic market landscape.

Product Operations not only addresses immediate challenges but also lays a robust foundation for long-term success. By empowering teams, enhancing communication, and optimizing processes, Product Operations ensures CloudCore is poised to innovate, deliver exceptional products, and thrive in an ever-evolving industry.

In just one month, Sam's strategic initiatives have successfully addressed critical organizational challenges, instilling confidence and guiding CloudCore AI towards a successful release. This scenario vividly illustrates the transformative impact of structured Product Operations in aligning teams and driving business success. Importantly, these foundational practices—centralizing communication, enabling feedback loops, establishing unified roadmaps, maintaining regular updates, and preparing thorough pre-release materials—showcase the essential elements that underpin effective product management.

It's crucial to emphasize that while having a dedicated Product Operations role like Sam can accelerate these efforts, the principles and practices outlined above are adaptable to businesses of various sizes and maturity levels. Whether driven by a dedicated function or integrated across roles, these initiatives lay a robust foundation for organizational alignment and operational excellence. Ultimately, the outcomes achieved through proactive communication, stakeholder engagement, and meticulous planning can significantly influence the trajectory of any business, setting the stage for sustained growth and success in dynamic market environments.
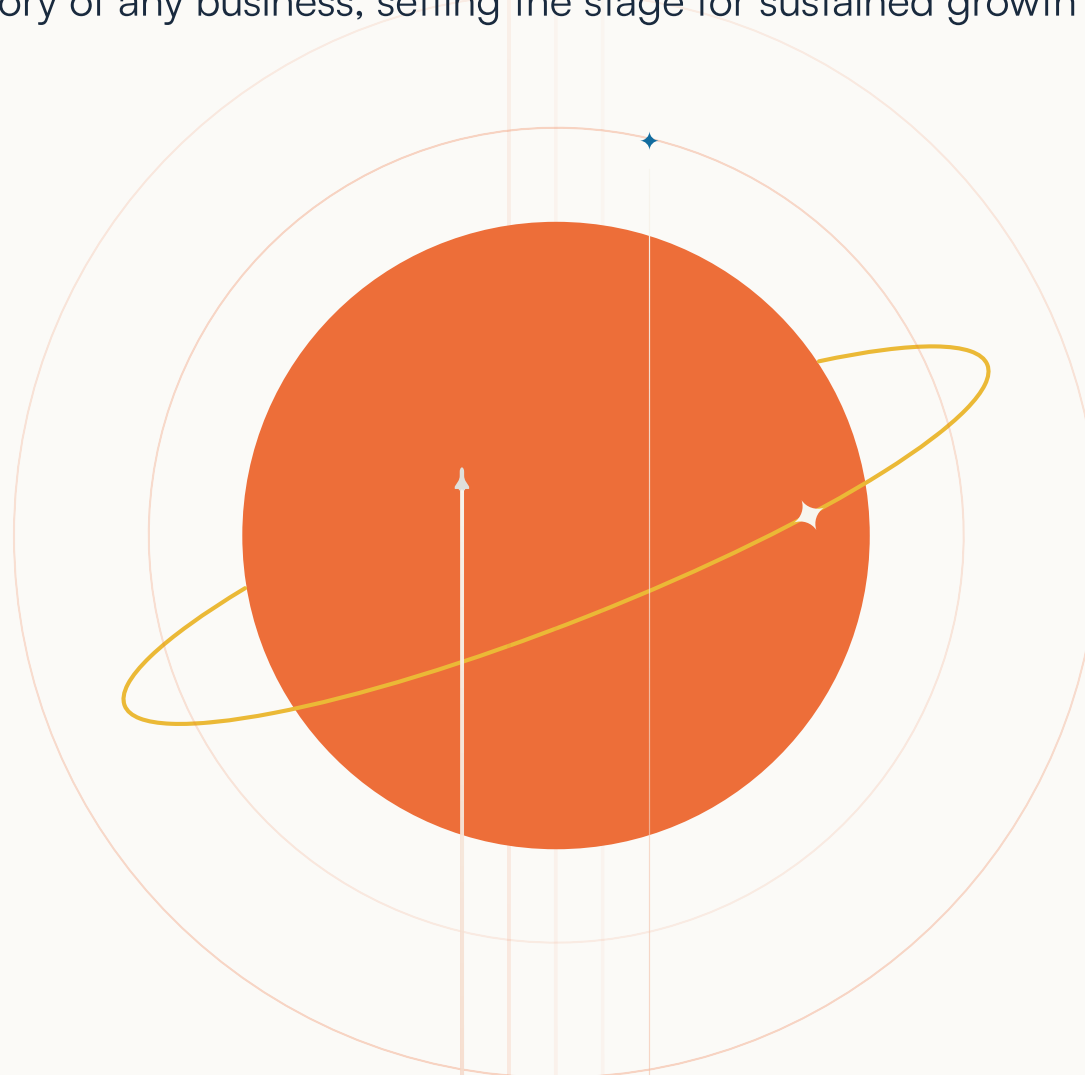
Next Steps

First thing's first: If you've made it this far in our playbook, you deserve a cocktail! Feel free to indulge. This one's on us. 🍸

On the first page of this playbook we said that by the end you should not only be confident about the value Product Operations can add to your organization, but also how to begin implementing (and/or refining) it in a way that has immediate impact for your business. Because we're a team obsessed with continual improvement, we're curious: how'd we do?

It's our sincere hope that, if nothing else, you're walking away with a handful of insights and actionable steps you can put in practice today. However, if we missed the mark, or if you have any thoughts for improvement, we're all ears and would love to hear from you! Reach out any time at hey@launchnotes.io or graham@omegapegasus.com.

Continuing the Product Ops journey

Speaking of continual improvement, if there's one thing we were reminded as we authored this playbook, it's that—like so many things in business and life—building a world-class product operations function is a continual journey. And, like the best Product teams, there's no end state, only a process of sustained, iterative progress.

With that in mind, before signing off we wanted to leave you with three next steps that might be helpful as you look to take the next step on your Product Ops journey. All three are free, and included for the sole purpose of helping you succeed in the next step of your journey.

See where your team is today

We've created a brief Product Ops assessment to help you evaluate your team's performance and identify areas for improvement

[Take the self-assessment]

Calculate how much you're spending

Discover your current Product Ops expenditure with our free ROI calculator

[Visit our ROI Calculator]

Get a free, expert consultation (on us)

Book a free 30-minute consultation with Graham Reed; Graham will evaluate your current Product Ops processes and provide suggestions for improvement

[Reserve time with Graham]

LaunchNotes