

STRATEGY · TEMPLATE

Operating Rhythm Calendar Template

For small technology teams designing their first set of recurring business reviews, with sample agendas for leadership, pipeline/revenue, product, and customer cadences.

How to use this: Assign an owner and a day/time to each cadence below, adapt the sample agenda items to your business, and cross out any review your team isn't ready for yet.

Weekly: Pipeline & Revenue Review

Short and operational: what changed since last week.

Day/time this happens:

Who owns running it:

Who must attend:

- ☐ Review new pipeline added this week and its source.
- ☐ Review deals or signups that moved forward, stalled, or were lost.
- ☐ Flag current blockers that need a decision this week.
- ☐ Confirm what shipped or is shipping in the next 7 days that affects revenue.

Monthly: Product Review

A step back from day-to-day execution to check roadmap health.

Day/time this happens:

Who owns running it:

- ☐ Review roadmap progress against what was planned last month.
- ☐ Review recurring themes in feature requests or complaints.
- ☐ Decide what moves onto or off of next month's roadmap.

- ☐
- Flag any product decision that needs leadership input at the quarterly review.

Monthly: Customer Health Review

Checking whether existing revenue is stable and identifying risk early.

- ☐
- Review upcoming renewals and their likelihood of renewing.
- ☐
- Review accounts showing usage decline or support friction.
- ☐
- Review expansion opportunities among healthy accounts.
- ☐
- Assign an owner and next action to every at-risk account.

Quarterly: Leadership Strategy Review

The only cadence where direction itself, not just execution, is up for reconsideration.

Date of this quarter's review:

Who must attend:

- ☐
- Revisit whether the current GTM motion still fits deal size and buyer type.
- ☐
- Review progress against the growth lever prioritised last quarter.
- ☐
- Decide the single growth priority for the coming quarter.
- ☐
- Review resourcing and hiring needs against current priorities.
- ☐
- Confirm or adjust the weekly/monthly cadences below based on what's working.

This Quarter's Cadence at a Glance

Cadence	Review	Owner	Day / Time
Weekly	Pipeline & Revenue		
Monthly	Product		
Monthly	Customer Health		
Quarterly	Leadership Strategy		

One-Sentence Test

After each review, write one sentence summarising what changed or was decided. If you can't fill this in, the review isn't producing a decision.

This week's pipeline review changed/decided:

This month's product review changed/decided:

This month's customer health review changed/decided:
