

How to set up

Product Ops

in your organization

(and how to know if you did it right)

Introduction

Late in a Season 3 episode of the sitcom *Seinfeld*, Jerry, Elaine, and George are planning to see a movie together. Everyone's excited until Jerry announces he can't go. He's on dog duty. No problem, Jerry tells Elaine: you and George go.

"But we need you," stresses Elaine. "I relate to George through you. We're like friends-in-law."

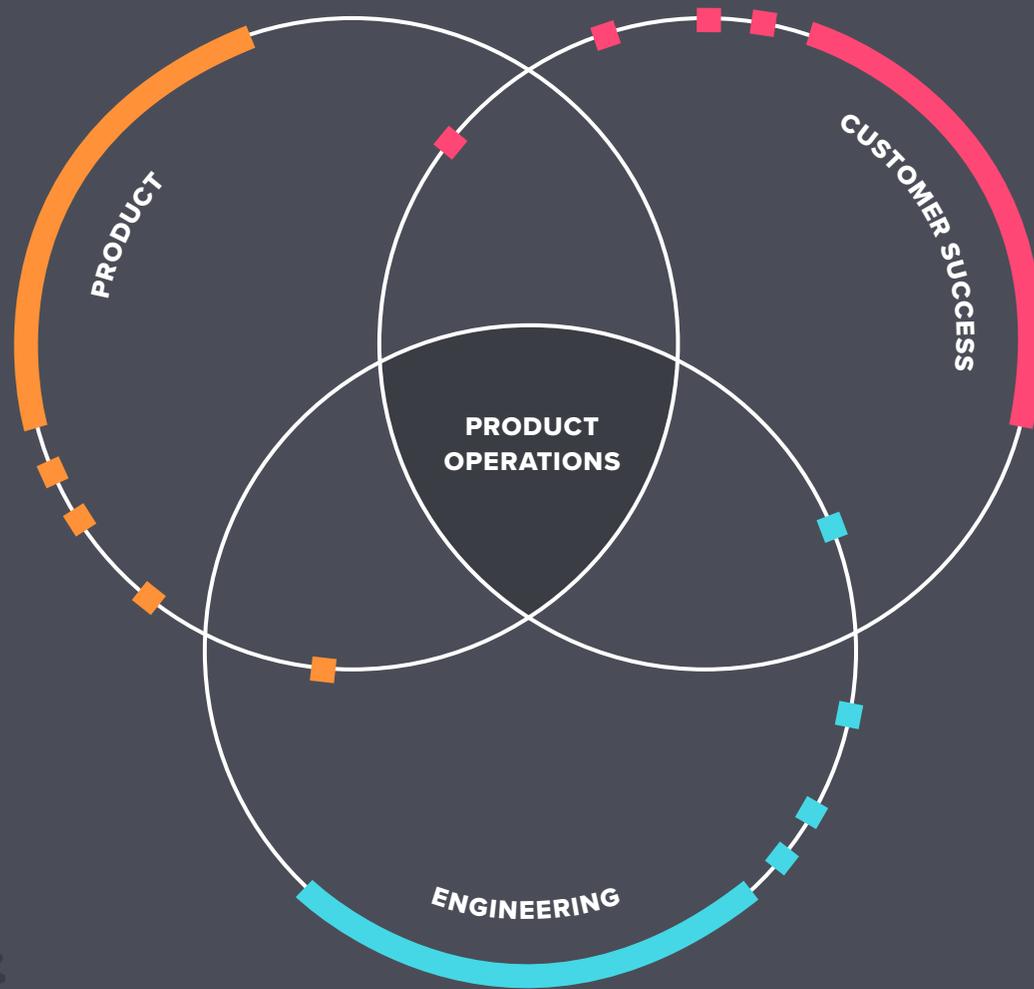
George and Elaine *could* go together, sure, but Jerry helps the room feel more comfortable; the conversation runs almost exclusively through him. Who can't relate? We've all been there, forced even for a minute to make conversation with a person we only know through someone else. Both parties exhale when the mutual friend returns from the restroom.

We're not here to discuss the best TV show of all time. But look closely enough, and a similar situation plays out time and again in our professional lives — two or more departments are forced together, yet often have little in common or even a baseline understanding of the other. Who's over there? What do they want? Where do they spend their time? When do they need things done? Why? The dynamic breeds choppy communication and inefficiency at best, significant mistakes and resentment at worst. It's a natural outcome. After all, people can't be expected to know the ins and outs of each department, no matter if the organization is 20 people or 200.

Except, that is, for the Jerrys, or, as we'll refer to it from here on out: **Product operations** (commonly known as product ops).

The product ops team sits in the middle of an organization's Venn diagram, bridging the gap between go-to-market and research and development teams, which is to say, nearly every group, sub-group, and group within every sub-group throughout the company. **By communicating each division's needs and wants in a language everyone can better understand, product ops helps foster conversations about the product that pinpoint problem areas, offering insight through data-backed stories.** It's their superpower. The product ops team is one that, when given the resources and space to flourish, can help a fledgling start-up properly scale to the delight of its investors or help a legacy company rediscover its purpose and begin streamlining what may be outdated practices. Want a simplified version? They help companies talk. Indeed, without giving in to hyperbole, a product ops team can be the difference between a good company, and one that changes the world.

No one said it is easy. Standing up a dynamic product ops team requires diligence and patience, and an investment from leadership all the way down. But the payoff is worth it. Let's get started.



Where to begin?

The new product ops team (which will look different at every company — we dig into team structure later on) should take stock of the current landscape and spend a few weeks or even months organizing how its system will be implemented, with data as the cornerstone. Begin meeting with different department leaders and their teams. Get a sense of rhythms and workflows; familiarize with different teams' shorthands. Ask questions to learn of frustrations and pain points (especially as they relate to the product). Ask where teams feel inefficiencies may be occurring. Log all of it.

Product ops' key partners

- Product management
- Customer success
- Sales
- Product marketing

Phase 1: Discovery

Take stock of the current landscape across the organization

Meet with various department leaders and their teams

Learn as much as you can about team structures, workflows, and processes

Ask about pain points and where teams believe there are inefficiencies

Log everything

Next, drill down on initial questions or if anything stood out in the discovery process. For example, consider the customer success team. Perhaps it's having trouble capturing which customers are at risk of churning, or, it's unsure how to proceed once that data's been captured. Flag it, and begin thinking about how different departments could assist in setting up a new process to keep it from happening. Replicate this process across the organization.

Phase 2: Narrow the scope

Identify any key questions or standout items from the discovery phase

Determine what's needed from other departments to prevent or mitigate each issue

Propose a go-forward process to all stakeholders

Start to think about things to say company-wide that can make an impact on gaps in workflow or process. For instance, say the revenue team is voicing the fact there aren't any product updates. That is unlikely to be true. What it might mean is there is a breakdown in communication. Start that dialogue. Place the two heads of the department in a room. Meet with both separately and bring to each side the other's concerns or plans. Pendo, for instance, has a weekly digest for the revenue teams to view a quick download on everything going on in the product department. Sometimes a new rollout is six days out, sometimes six months. Regardless, the two sides talk and share information that is then shared with the customer.

Phase 3: Open up communication

Think about which items from the previous phases should be surfaced widely

Identify where there are breakdowns in communication between teams

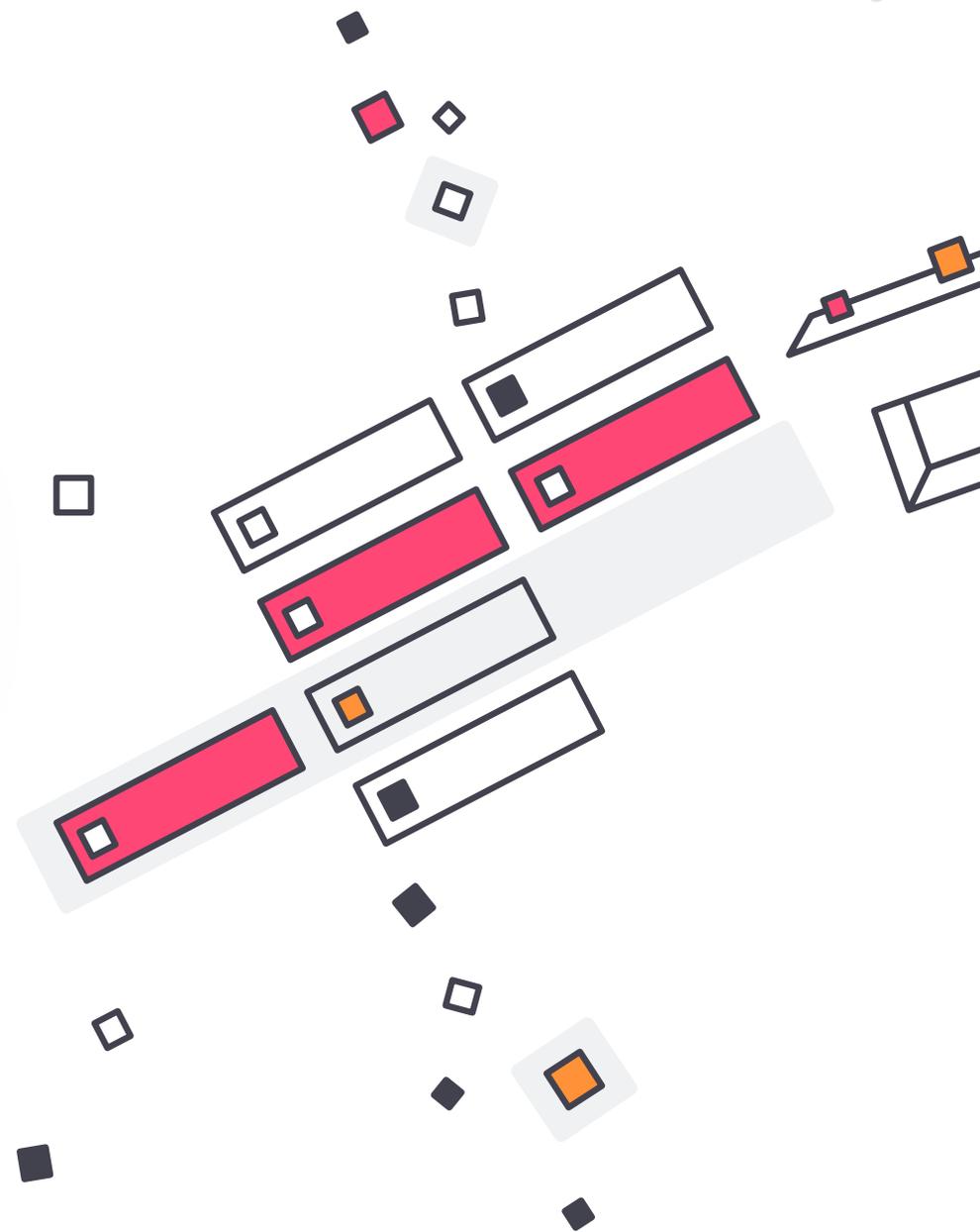
Initiate dialogue (either one-off or recurring) between team leaders or entire teams

Another critical step early in the process is building proper alignment with the product management team. This is the group product ops should be most focused on building a strong relationship with. Just as the product manager (PM) needs to communicate through influence, so does the product ops manager, only their audience is slightly different.

Survey your PMs

Ask product managers where they currently spend their time (e.g. by listing in order of time spent), and where they'd like to be spending their time six months from now.

Identify where there might be overlap so that boundaries and expectations can be established. Product ops should make clear its goal is to help the product management team, not take someone's job. An effective way of making this strong connection is to ask questions. Sometimes, it's best to formalize it by way of a survey. Ask people where their time is going and, say, in six months, where would it ideally be? If someone says half her time is spent managing processes but would like more of it to be directed to customers, figure out how to help readjust that internal work.



Recap

Where to begin?

Companies large and small, young and old can benefit greatly from a strong product ops team. Among first steps getting started:

- Research different departments to get a sense of mindset.
- Ask questions, especially when and where inefficiencies seem likely.
- Foster communication between departments, act as a throughline and warm facilitator of conversation.
- Listen, and be respectful of people's space and sensitivities.

Finding talent and establishing the team

Assembling a product ops team takes time. Rarely can a company put it together over night — it requires deft recruiting, both externally and in-house.

First, it's important to define hallmarks of good product ops talent. It should be assumed team members are comfortable with technology and think analytically. Further, three key areas stand out when rounding out the team:

- An enthusiasm for problem-solving across multiple channels
- A level of comfort handling considerable data sets
- Empathy for all, especially when delivering unwelcome news

It is recommended that new product ops teams should have experience in ... yes, product. People with a background in customer pain while searching for solutions will transition well into a role that must do just that. And it doesn't hurt to be a great storyteller.

“If people don't buy into your story, or they don't buy into the way you're presenting it, you're going to fail,” says Christine Itwaru, Pendo's director of product operations.

“ People who have that ability to be trustworthy is really important because you're dealing with three different customer sets — you have to be able to absorb their pain, but also articulate why or why not you're doing something about it. ”

Christine Itwaru /// Head of Product Operations



Product ops leads must have the ability to work cross-functionally and be credible — a difficult trait to define but an impossible one to ignore. This credibility often stems from a mix of hard work and strong relationships across the organization. Put another way: people must enjoy working with product ops leads. And history serves as a good guide.

Product ops' customer sets

- 1 Product managers
- 2 Internal revenue teams
- 3 End users

Finding this talent takes patience, especially when seeking out talents that can be difficult to measure. But it's not impossible, even when considering people whose backgrounds may not appear to be a "perfect" fit or they're early in their careers. When talking with candidates, consider asking questions that reveal character and analytical thought. How would you interact with stakeholders around this? What would your messaging be here? If a customer were upset and said, 'This isn't the way we do things', how would you react?

Gaining insight to this type of thinking coincides with the importance of being a servant leader in the product ops role. Yes, the job is done through storytelling and influence, but it's also to serve customers. Find people in your organization who understand this. Recruit candidates whose thinking and passions align with helping audiences and customers.

Attributes to look for in a product ops hire

They're excited by the idea of problem-solving across multiple channels

They're comfortable handling considerable data sets

They exhibit empathy, especially when communicating unwelcome news



Interview questions that reveal character and analytical thought

How would you interact with stakeholders around this?

What would your messaging be here?

If a customer were upset about X, how would you react?

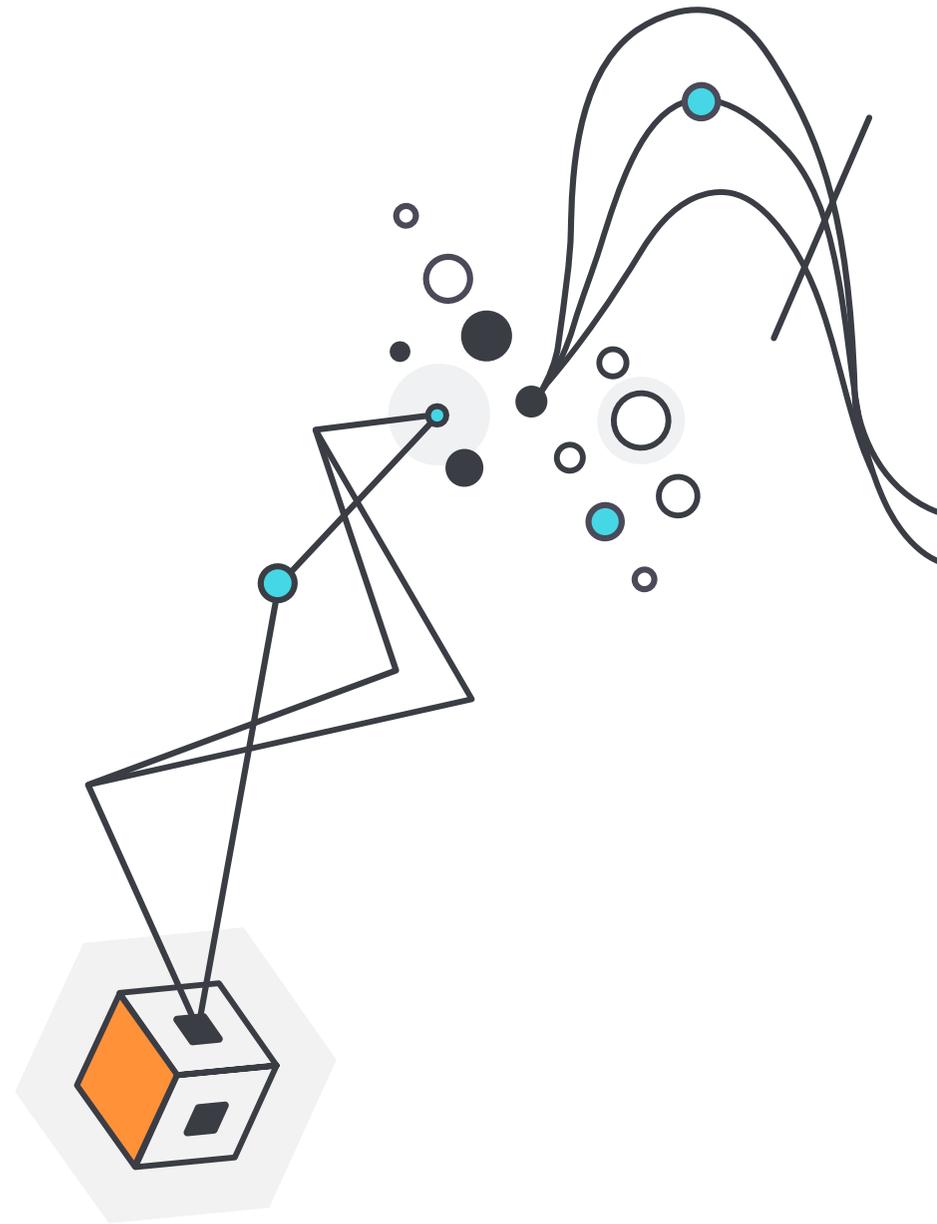
Interview questions related to tactical parts of the role

How would you stay organized when collecting data (both quantitative and qualitative) from multiple sources?

What ideas do you have to increase efficiency in the experimentation process?

Are you comfortable working both independently and cross-functionally?

How would you prepare to provide product insights to the leadership team?



Recap

Finding talent and establishing the team

Recruiting for product ops roles can take time. But better to get it done right than fast.

- Product ops leads must have respect throughout the organization.
- Talent can come from anywhere. Soft skills such as empathy, critical thinking, and reliability are paramount.
- Focusing on the customer takes on a whole new meaning for product ops given they're serving all. Balance is key.
- Be a servant leader — tell great stories and paint pictures through data to help empower others to make good decisions.

Reporting for duty

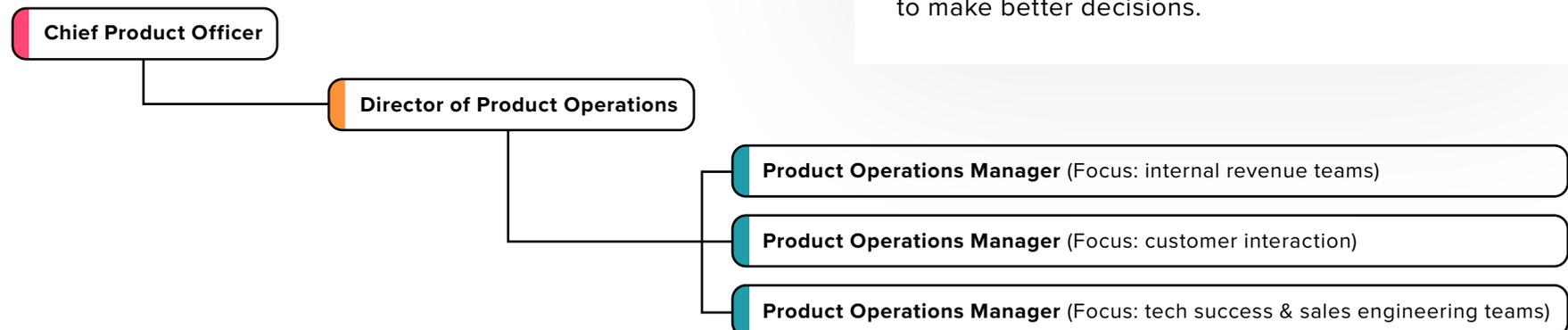
Product ops is part of several core functions that report into chief product officers (CPOs). Alongside their product design and product management partners, the team focuses on driving operational efficiency that bolsters productivity and results within the product team and organization at large.

Product ops teams must develop and maintain strong rapport with management and partners. At Pendo, product ops reports to the CPO, allowing him to hear first-hand what is more relevant on given days. Collaborating with product management and strategy and the product design team, product ops leads remain close in order to understand plans that are relayed back throughout the organization. Through weekly downloads of data, each party gains relevant insight that helps them do their jobs. It is here that CPOs can organize, category by category, themes to discuss with C-suite executives at the next meeting.

These direct CPO reports and strong partnerships with PMs help build a world where product is not built and designed in silos, blindly handed off from one department to the next. Rather, designers, PMs, and revenue teams speak the same language, made possible by continuous communication flowing through the product ops team.

Product ops' team structure

At Pendo, this flow of data comes through highly focused product ops team members, each with a specific customer set. One focuses on internal revenue teams, one focuses on customer interaction post NPS and releases, and one focuses on technical success and sales engineering teams. Casting a wide net, they're able to collect data from every angle and pull it together for their partners in product management to make better decisions.



Recap

Reporting for duty

The product ops team spends its days shuttling between different departments within an organization. They:

- Schedule regular/weekly meetings with the CPO.
- Partner with product managers to arm them with data to inform decision-making.
- Keep a continuous, if filtered conversation going among all departments.

Measure of success

Once the product ops team is up and running, it is important to measure its effectiveness. Even if deployment has been anecdotally successful, there are still ways to actively measure performance and continue improving. If revenue ops' ultimate job is to tell the story of how the organization makes money, product ops' charge is to help make sure product managers can keep the product the hero of that story.

And on that note, product ops can be measured on how well revenue teams feel selling new product features — in other words, what do the numbers reflect since product ops began its process? Asking that team to characterize the product ops team's influence can help provide a complementary qualitative review. It may also be beneficial to establish cross-functional goals up front that hold product ops and its counterparts (e.g. product management, customer success, sales) accountable for shared targets.

Quantitative data to measure

Number of deals won quarter over quarter with product team impact

Number of at-risk customers saved as a result of the product team gaining insight earlier in the process

Bug resolution trend: has the number of bugs increased or decreased since product ops was established?

Number of hours saved that were previously spent on administrative or operational tasks

Elsewhere, product managers can quickly tell product ops teams if the relationship has been successful by a fresh look at hours spent on customers, their first and foremost priority. In addition to the new exchange of meaningful data, product ops teams serve as partners to PMs, helping them reach customers even when their attention is split into strategy, vision, and planning. As Itwaru of Pendo says: “helping them feel the pain of a customer that they’re not always able to speak directly with.” Product ops’ role is not to step on their toes, rather serve as wind to their backs.

Qualitative questions to ask

To the product organization:

Do you feel that customer-facing teams know what your current priorities and roadmap are?

How effective has product ops been in regularly surfacing data to help influence your decision making?

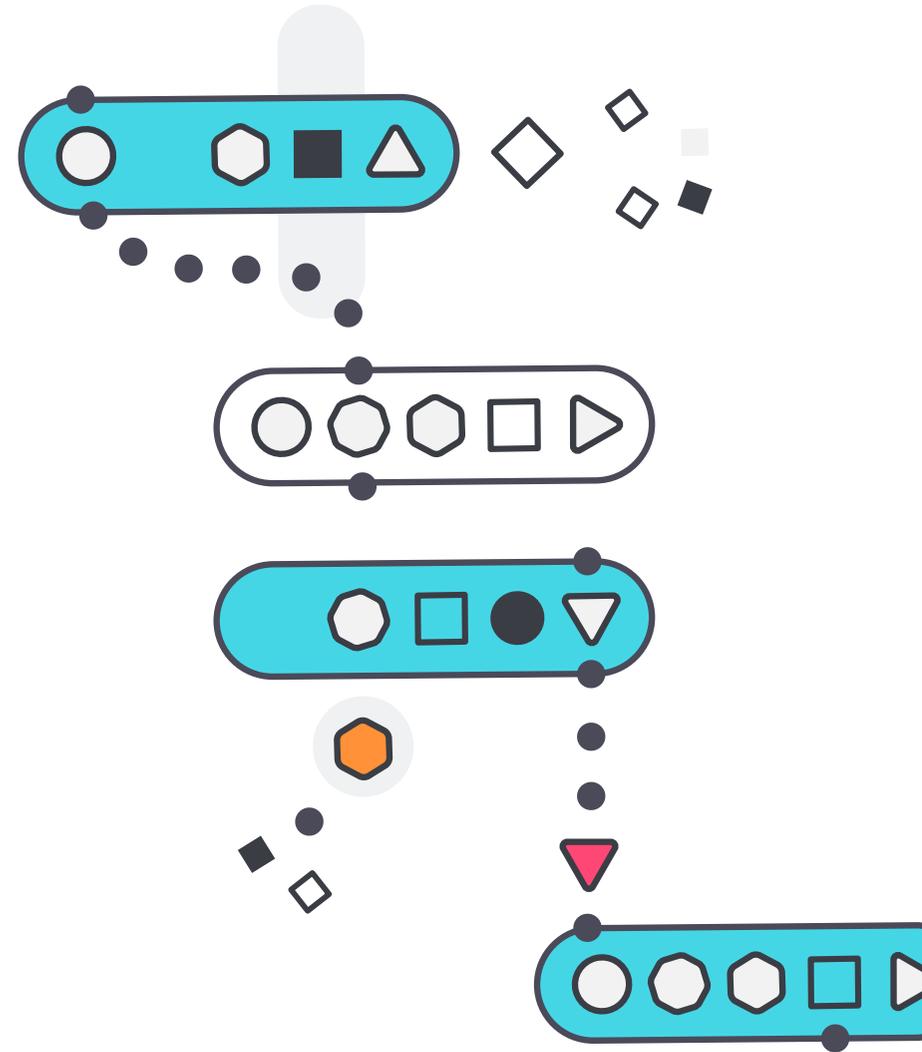
Do you have a clear understanding of what customer-facing teams need from your product area?

To revenue teams:

Since product ops has been established, do you feel that you have more visibility into the product roadmap and upcoming releases and launches?

When new features are released, do you have a clear understanding of their functionality and the value they bring to customers?

How responsive has product ops been to requests for support in high priority deals and/or high priority renewal accounts?



Recap

Measure of success

Product ops will likely provide a morale boost once departments start to see value-added differences to process, communication, and overall work balance.

- Examine where revenue numbers stand since product ops was implemented.
- Is product ops keeping product and the product team central to the story it's telling?
- Product ops arms PMs with more data to reach customers (even when attention is divided).

What's next?

The role of product ops is not abating any time soon. It sits at the center of an organization's most critical decision-making process, rendering it one of the most powerful influences on trajectory and success (especially for companies that are product led). What is true now and will be in twenty years: Product ops must find people enthusiastic for problem-solving and creating delightful experiences for customers while others receive much of the credit.

And we'll finish on that note: the customer. It's why we're here, right? Jerry and Elaine and George needed an audience, and so do organizations. But unlike in the sitcom world, miscommunication isn't funny. Perhaps the single most devastating mistake to make in front of customers or investors is to come off scattered, fueling uncertainty. Standing up a strong product ops team requires perfect alignment, especially for companies looking to scale that need to convince both audiences. Product ops teams make that possible.





www.pendo.io