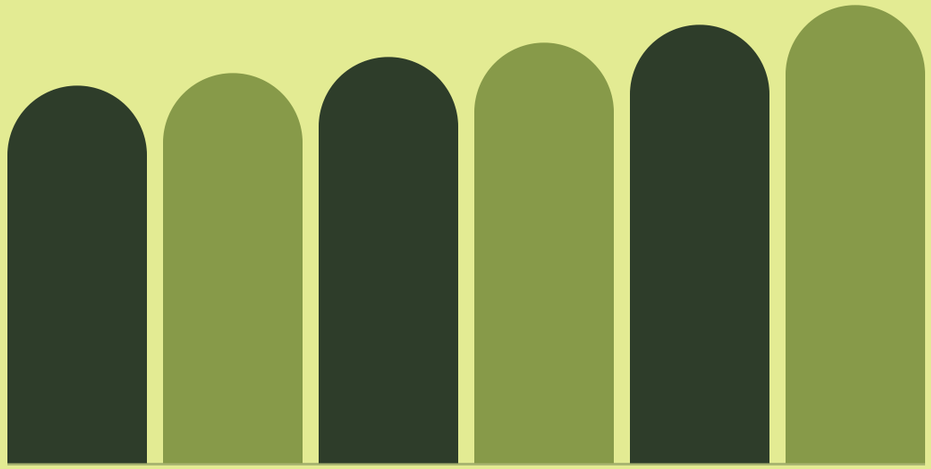
More focus. Better momentum.

Q3

A quarter of making the important things work better.

Operating team · 15 October 2026



FOCUS → MOMENTUM

Progress, with perspective.

Targets and actuals belong in the same conversation.

TARGET MET

Recurring revenue

184

$k / month

Actual	▰▰▰▰▰▰▰▰▰▰	184
Target	▰▰▰▰▰▰▰▰▰▱	180

Previous: 156 $k / month
Higher is better.

Fictional month-end ledger · September vs June

BELOW PLAN

90-day account retention

92

%

Actual	▰▰▰▰▰▰▰▰▰▱	92
Target	▰▰▰▰▰▰▰▰▰▱	94

Previous: 89 %
Higher is better.

Fictional mature account cohorts · equal 90-day windows

TARGET MET

Median first-value time

3.8

days

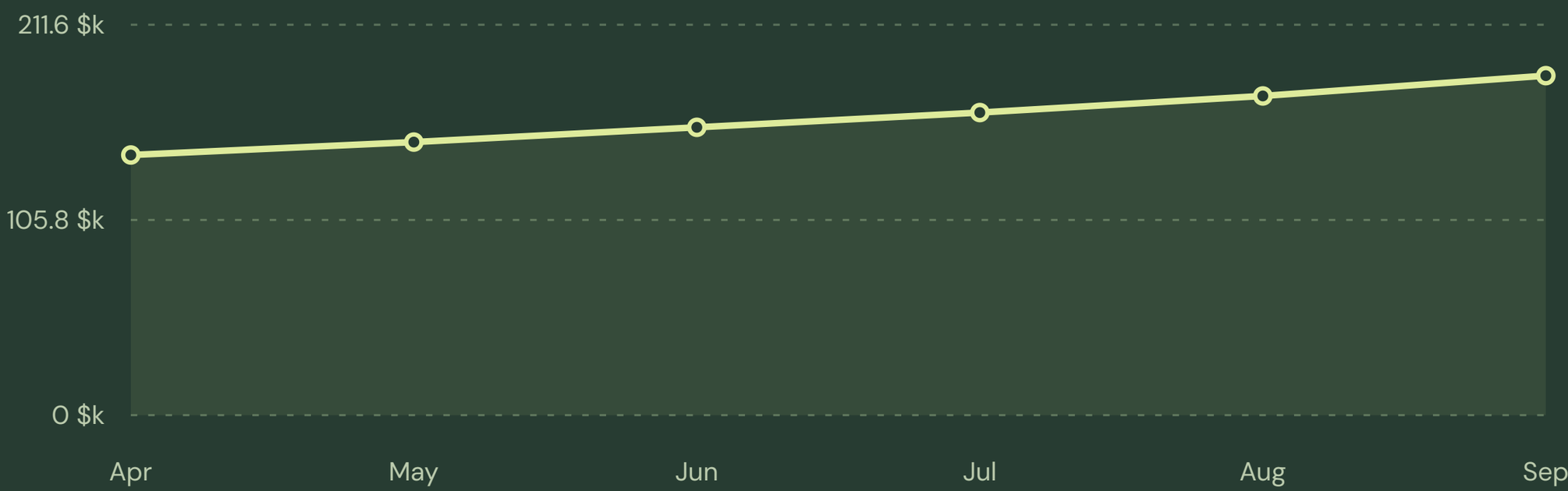
Actual	▰▰▰▰▰▰▱▱▱▱	3.8
Target	▰▰▰▰▰▰▰▱▱▱	4

Previous: 5.1 days
Lower is better.

Fictional activation log · new accounts in each quarter

Keep the whole picture.

Month-end recurring revenue



Fictional recurring-revenue ledger. Snapshot values, not cumulative revenue. Zero-based scale; missing observations must not be filled with zero.

Keep the wins. Name the gaps.

What worked ↗

01

A shorter path to first value

The setup checklist shipped with a clearer handoff. Median first-value time fell from 5.1 to 3.8 days; causality was not isolated.

Fictional activation log · Q2 and Q3

02

Expansion stayed deliberate

The team focused on existing workspace adoption rather than adding another acquisition channel.

Fictional weekly operating notes

What needs work ↘

01

Retention is still the work

90-day account retention improved to 92%, but remained two percentage points below the 94% target.

Fictional mature-cohort review

02

One integration moved right

The scheduled export connector was deferred. The priority now is reliable delivery before broader availability.

Fictional delivery log · September

Listen before you generalize.

Observations are useful. Their limitations are useful, too.

01

Onboarding clarity

Eight of twelve interview participants found the new checklist easier to navigate. This small qualitative sample is directional, not representative.

Fictional research exercise · 12 interviews

02

The handoff gap

Four participants still needed help assigning the workspace owner. That observation defines the next usability task, not a measured retention cause.

Fictional research notes · September

Fewer priorities.
Clearer commitments.

01

Close the ownership gap

Run a new usability round and document owner-assignment completion.

ACCOUNTABLE OWNER

Customer experience

CHECKPOINT

November 2026

02

Ship reliable exports

Publish an export checklist and pass recovery-path testing.

ACCOUNTABLE OWNER

Platform team

CHECKPOINT

December 2026

03

Review the retention cohort

Evaluate the next mature 90-day cohort using the same definition.

ACCOUNTABLE OWNER

Growth analytics

CHECKPOINT

January 2027

Make uncertainty visible.

What we know, what we assume, and what could change the plan.

01

Small research sample

Do not generalize twelve interviews to all customers. Use the findings to frame follow-up research.

Research evidence limitation

02

Capacity is finite

Export reliability and onboarding compete for platform capacity. Sequence work explicitly.

Planning assumption · requires owner agreement

Turn the review into a next step.

Next review / 15 January 2027

01. Protect two engineering cycles for export reliability.

02. Keep the 94% retention target; do not rewrite the baseline.

03. Assign one accountable owner to each Q4 priority.