



EXECUTIVE SUMMARY

Q4 Product Roadmap — Northwind Analytics & Apex Retail

Tuesday, 12 November 2025 · 14:00–14:48 GMT · Google Meet · Recorded by Jotease

1 · Executive summary

Northwind Analytics and Apex Retail aligned on a Q4 roadmap that prioritises a unified reporting layer, a phased rollout of the new checkout flow across three pilot stores, and a co-funded customer research sprint. Both sides confirmed a signed Statement of Work by **22 November**, with a hard launch date of **15 January 2026**. Pricing was approved at the previously circulated rate. No blockers remain on the legal or procurement side.

2 · Decisions made

Scope	Three pilot stores — London Soho, Manchester Arndale, Edinburgh Princes — confirmed for the Phase 1 rollout.
Pricing	Annual contract approved at the rate quoted in the 5 November proposal. No further negotiation required.
Launch date	Hard launch on 15 January 2026, with a soft-launch dry run the week of 8 January.
Reporting	Single reporting layer (Northwind Lens) replaces the three separate dashboards Apex currently maintains.
Research	Joint customer-research sprint co-funded 50/50, kicked off in week of 2 December.

3 · Action items with owners & deadlines

Task	Owner	Due
Send the redlined SoW to Apex legal	Priya (Northwind)	Fri 15 Nov
Confirm pilot store list with operations	Marcus (Apex)	Mon 18 Nov
Schedule the joint research sprint kick-off	Elena (Apex)	Wed 20 Nov
Provision Northwind Lens staging access for Apex	Ravi (Northwind)	Fri 22 Nov
Lock the launch comms plan	Tomás (Apex)	Tue 3 Dec
Sign-off on visual identity for the new checkout	Priya & Marcus	Fri 6 Dec



4 · Key discussion points

- Apex flagged a concern about staff retraining costs across the three pilot stores. Northwind committed to providing on-site enablement during the first two weeks of the rollout.
- The team debated whether to keep legacy reports running in parallel for one quarter. Decision: deprecate the old dashboards on 1 February — no parallel running, to avoid data drift.
- Apex's VP of Operations asked for an SLA on dashboard refresh latency. Northwind committed to 5-minute freshness at p95 — to be written into the SoW.
- Customer research scope was debated. Final scope: 18 in-store intercepts plus 6 longer-form interviews with regular Apex shoppers, split evenly across the three pilot cities.

5 · Highlight quotes

"We don't want three dashboards in January. One source of truth — that's the whole point."

— Marcus Bell, VP Operations, Apex Retail · 00:09:42

"Five-minute freshness at p95. I'll put it in the SoW myself."

— Priya Iyer, Head of Customer Success, Northwind · 00:21:08

"If the Soho store doesn't hit conversion lift by week three, we pause and re-baseline. Agreed."

— Marcus Bell, VP Operations, Apex Retail · 00:34:55

6 · CRM-ready notes

Account: Apex Retail | **Stage:** SoW out for signature | **Next step:** Redlined SoW returned by 22 Nov.

Sentiment: Positive — Marcus is the primary champion; Tomás is the budget owner.

Risks: Retraining cost objection raised; mitigated by on-site enablement commitment.

Expansion signals: Apex mentioned a possible Phase 2 expansion into 14 additional stores in Q2 2026.

7 · Attendees

Name	Role	Company
Priya Iyer	Head of Customer Success	Northwind Analytics
Ravi Mehta	Principal Engineer	Northwind Analytics
Marcus Bell	VP Operations	Apex Retail
Elena Costa	Director, Customer Insight	Apex Retail
Tomás Ribeiro	Head of Finance	Apex Retail

8 · Keyword tags

roadmap · Q4-2025 · pilot rollout · checkout flow · SoW · customer research · SLA · dashboard consolidation · Phase 2 · launch · 15-Jan-2026

Sample document. All names, companies and figures are fictional. This summary was generated by Jotease AI from a 48-minute meeting recording in under 60 seconds.