COREFORCE   FOR PRODUCT MANAGEMENT TEAM

Product Manager Collaboration Playbook

Turning Client Success Into Your Most Valuable Intelligence Source   Powered by NotebookLM and Notion.

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CONFIDENTIAL   PM PLAYBOOK   CoreForce 2025

- NotebookLM PM Ecosystem
- Client Health Intelligence
- Feature Request Intelligence
- Renewal Risk Signals
- Notion Workflow
- 90-Day Roadmap

SECTION 01

What the Product Team Is Currently Experiencing

The documented communication and workflow gaps between Client Success and Product

These are the documented operational issues identified between the Client Success team and Product. They stem from a single core problem: there is no structured, consistent workflow for how Client Success communicates client intelligence to Product. Each issue below has a direct solution in this playbook.

No Structured Communication Workflow Between CS and Product

There is currently no defined, consistent process for how Client Success communicates with Product. Everything travels informally through Slack with no cadence, no format, and no accountability. Important client patterns, recurring product concerns, and account health signals are never aggregated into a format Product can act on. Information that should flow freely between teams is getting lost in threads that nobody is systematically reading, organizing, or acting on. This playbook establishes the structured channel that replaces ad hoc Slack with organized, recurring intelligence.

CS Team Communicating Product Commitments Without Product Input

Account Managers are telling clients that features can be added or that product changes are possible without first confirming this with Product or Engineering. This creates misaligned client expectations and puts Product in a difficult position when those informal commitments cannot be delivered. The new system establishes a formal escalation path so that no product commitment is communicated to a client without Product's formal input and approval.

No Visibility Into Client Health and Product Concerns Across Accounts

Product currently has no organized view of what clients are worried about, what product gaps are generating frustration, or which accounts are at risk of churning because of a product-related issue. This information exists inside the CS team's notes and conversations but has never been organized or shared in a format that Product can use. The NotebookLM folder structure and Notion dashboards established in this playbook give Product a live, organized view of client health and product concerns across the entire account base.

SECTION 02

NotebookLM: The Product Intelligence Ecosystem

How the CS team's organized NotebookLM folder structure becomes Product's most powerful source of client intelligence

The NotebookLM ecosystem for Product is architecturally different from the Engineering query system. For Engineering, NotebookLM processes individual requests. For Product, NotebookLM is an always-on intelligence library that organizes the entire Client Success knowledge base into searchable, structured categories that Product can access at any time. Every Account Manager's notes, every client concern, every feature request, every renewal risk signal lives in NotebookLM, organized and ready for Product to surface the insights they need without waiting for a CS team member to compile a report.

The CS NotebookLM Folder Architecture What Product Can Access

Client Questions

Every question a client has asked the CS team, organized by account and category. Product can search this folder before any client meeting to understand what that client is actively trying to understand about the product and prepare answers in advance.

Client Concerns

All documented concerns, frustrations, and friction points raised by clients across every account. Product can see which concerns appear repeatedly across multiple clients, which product areas generate the most friction, and which concerns are growing in frequency.

Client Needs and Goals

The documented goals and success criteria each client has communicated to their Account Manager. Product uses this folder to understand whether the roadmap is aligned with what clients are actually trying to achieve and where gaps exist.

Client Feature Requests

Every feature request organized by account, ARR value, and frequency of request across the client base. This is the structured input Product needs to make confident, data-driven prioritization decisions instead of responding to whoever sent the most recent Slack message.

Renewal Risk Signals

All accounts currently classified as Yellow or Red with the primary risk drivers documented. Product can see when a product gap or missing feature is contributing to churn risk, giving the team time to intervene before the renewal window closes.

Engineering Query History

All past Engineering feasibility verdicts organized by account and request type. Product can see what has been escalated to Engineering, how it was classified, and whether patterns in technical requests point to a need for a product-level solution.

Three Ways Product Actively Uses NotebookLM

How the Product team queries, searches, and applies the NotebookLM intelligence library day to day

The six folder categories described on the previous page are not passive archives. They are active intelligence sources that Product queries before meetings, during roadmap planning sessions, and throughout the renewal cycle. The three primary use cases below define exactly how Product engages with NotebookLM in practice, and what changes as a result of having this intelligence organized and always available.

Meeting Preparation

Before any client meeting or handoff, the PM searches the client's account folder in NotebookLM. They review the client's documented concerns and questions, check the feature request history, see the current health status, and read the CS team's most recent account notes. The PM arrives to every client meeting already briefed on what the client cares about, what they have been asking, and what friction points are currently active. This replaces the current experience of entering meetings without organized context, and gives Product the ability to address client concerns proactively rather than reactively.

Roadmap Prioritization

When PM is preparing for a roadmap prioritization conversation, they open the Client Feature Requests folder in NotebookLM and filter by ARR value and request frequency. NotebookLM surfaces which features are being requested by the highest-value clients, most frequently, with the clearest connection to renewal risk. This organized, revenue-weighted view of client demand replaces informal Slack requests as the primary input for every roadmap prioritization decision. PM can now answer the question of what to build next with data, not just recency bias.

Renewal Risk Review

On a monthly basis, PM reviews the Renewal Risk Signals folder in NotebookLM alongside the Monthly Renewal Risk Report from the CS Manager. For each at-risk account, NotebookLM surfaces the documented risk driver, the account's full concern history, and any prior Engineering or Product interactions relevant to the risk. PM can identify whether a product change, a roadmap acceleration, or a targeted client communication could realistically improve the renewal outcome before the window closes. Product is no longer discovering churn risk too late to act on it.

NotebookLM Core Outcome for Product: Product has on-demand access to every client insight the CS team holds. Always organized. Always searchable.

SECTION 03

Structured Intelligence Feeds to Product

Four recurring deliverables that give Product the client context they need before they have to ask

Beyond the NotebookLM ecosystem that Product can access on demand, the CS team commits to delivering four structured intelligence feeds on a defined cadence. These are not informal Slack updates. They are formatted, consistent Notion reports built from organized CS data. They are designed to answer the questions Product is always trying to answer: What do clients want? Who is at risk? What is driving dissatisfaction? What should we prioritize next? Product no longer has to wait for an escalation to get these answers. They arrive on a schedule.

Weekly Feature Request Log

Every Monday

Every Monday morning the CS Manager delivers a Notion report pulled from the NotebookLM Feature Request folder. The report lists every active feature request across all accounts, organized by ARR value, frequency of request, and the account health status of requesting accounts. Each entry includes the specific request, which accounts are asking for it, the combined ARR weight, and a brief note on how the absence of this feature is affecting the client relationship. This is the primary structured input for Product's roadmap prioritization process, replacing informal Slack requests with evidence-based data.

Monthly Renewal Risk Report

First Monday of Each Month

On the first Monday of every month the CS Manager delivers a full renewal risk report to Product. This report identifies every account currently classified as Yellow or Red, documents the primary risk driver for each account, and highlights any cases where a product gap or unresolved product issue is contributing to the risk. For each product-related risk driver, the CS Manager includes a note on what product action could realistically improve the renewal outcome. Product receives this report 30 or more days before any renewal window opens, giving the team time to act rather than just react.

Bi-Weekly Client Sentiment Pulse

Every Other Wednesday

Every two weeks the CS Manager delivers a sentiment summary pulled from CS team account notes in NotebookLM. This report aggregates health scores across all active accounts, identifies the trend direction for each account (improving, stable, or declining), and highlights any accounts where the primary driver of sentiment change is product-related. Product uses this pulse to stay aware of the broader client landscape between monthly renewal risk reviews. It surfaces early warning signals before they escalate into formal risk conversations.

Roadmap Validation Input

Before Releases and Announcements

When Product is preparing to release or announce upcoming features, the CS Manager provides a pre-release impact assessment. This pulls from the NotebookLM client goals and feature request folders to answer three questions: Which accounts will benefit most from this feature and why? Which accounts have raised concerns this feature might address? Are there any accounts where this announcement needs careful framing to avoid creating a misaligned expectation? Product receives this before the announcement, not after.

SECTION 04

Notion: How the Command Center Serves Product

Real-time dashboards and organized intelligence giving Product visibility into client health and CS activity

Notion is the operational layer that connects NotebookLM's intelligence to the workflows Product uses every day. Product does not need to request information or schedule a sync meeting to understand what is happening across the client base. The information is already visible and structured around the questions Product needs answered.

Feature Request Database

A live Notion database aggregating every feature request across all accounts. PM can filter by ARR value, request frequency, account health status, and date. Sorting by ARR weight surfaces the highest-value feature priorities instantly. Each row links directly to the full client account record and NotebookLM source notes so PM can access full context in seconds.

Renewal Risk Dashboard

A real-time view of every account with an active risk classification. The dashboard shows account name, health status, renewal date, primary risk driver, and the CS Manager's current recovery action. PM can see at a glance which accounts have product-related risk drivers and flag accounts where a Product input could change the renewal outcome.

Account Intelligence Panel

A dedicated panel per account showing the complete history of CS interactions, Engineering query outcomes, documented client concerns, and current health score. Before any client meeting, PM opens this panel and has a complete organized briefing available in seconds. No need to ask the CS team for a summary or dig through Slack threads.

CS Activity Feed

A chronological feed of all CS team activity across all accounts: new account notes, health status changes, feature requests logged, Engineering queries submitted, and renewal risk updates. Product has a live view of what is happening in the CS ecosystem at all times. Nothing that happens in Client Success is invisible to Product.

How Product Interacts With CS Under This System

Monthly PM-CS Intelligence Sync (30 Minutes)

Once per month the CS Manager and PM hold a structured 30-minute sync with a fixed agenda: renewal risk review, top ARR-weighted feature requests, client sentiment trends, and roadmap validation needs. This replaces ad hoc unplanned interruptions with one organized touchpoint.

PM Roadmap Input Request (Async via Notion)

When PM needs CS input on a roadmap decision, PM submits a Roadmap Input Request in Notion. The CS Manager responds within 48 hours with a structured brief from NotebookLM. No unscheduled meetings. One clean async request and response.

CS Escalation to PM (Formal Only)

When CS needs Product's input, the CS Manager submits a formal CS-to-PM Escalation in Notion. Account Managers do not contact PM directly. The CS Manager owns all Product escalations and ensures every request arrives with full context.

Product Manager Collaboration Playbook

What changes, what Product gains, and where decision authority sits in the new operating model

This section defines the full operating relationship between Client Success and Product. It answers three questions clearly: What does Product stop having to deal with? What does Product start receiving? And who owns what decision? The goal is to give Product exactly what it needs: structured intelligence, organized context, and defined escalation paths.

CURRENT STATE What Product Absorbs Today

No structured CS-to-Product communication

Everything comes through informal Slack messages with no format, no cadence, and no accountability. Client patterns and recurring product concerns are never organized into a format that PM can act on.

Commitments made to clients without Product input

AMs communicate product capabilities to clients without first confirming with Product. Product learns about these informal commitments after the fact and is expected to deliver.

No visibility into client health and product concerns

Product has no organized view of what clients are worried about, which product gaps are causing frustration, or which accounts are at risk due to a product-related issue.

NEW SYSTEM What Product Receives

Weekly ARR-weighted Feature Request Log

Every Monday: a structured Notion report with all feature requests organized by ARR value, frequency, and account health. PM has the evidence base to prioritize confidently.

On-demand client intelligence via NotebookLM

Before any client meeting, PM searches the NotebookLM account folder: concerns, goals, feature requests, CS notes. Full client context in seconds, organized and ready.

Monthly Renewal Risk Report 30 or more days in advance

Product receives renewal risk signals with enough lead time to act. Product-related risk drivers are called out specifically with CS recommendations for each account.

PM Decision Authority Who Owns What

Feature prioritization and roadmap decisions	PM owns entirely. CS provides organized intelligence only.
Roadmap timeline and release communication	PM owns entirely. CS communicates PM decisions to clients.
Client-requested feature evaluation	PM evaluates via the Weekly Feature Request Log, not informal Slack requests.
Renewal risk response on product-related issues	PM and CS Manager collaborate when flagged 30 or more days before renewal.
Client meeting preparation	PM accesses NotebookLM account brief. CS Manager available for context questions.
CS-to-PM escalation routing	CS Manager only. Account Managers do not escalate to PM directly.

SECTION 06

90-Day Transformation Roadmap

How the Product intelligence system rolls out phase by phase with clear milestones

The 90-day roadmap for Product is sequenced so that the most immediately valuable deliverables arrive in Phase 1. Product begins receiving structured intelligence from the CS team before the first month is over. Product's required time investment is minimal: a 30-minute briefing in Week 1 and a monthly 30-minute sync going forward.

PHASE 1 Days 1 to 30

Foundation and First Intelligence

Establish the CS infrastructure and begin delivering structured intelligence to Product before the month ends. By Day 30, Product is receiving the Weekly Feature Request Log and has access to the NotebookLM account ecosystem.

MILESTONES

WEEK 1

PM Briefing and System Introduction

CS Manager presents the NotebookLM PM Ecosystem and Notion workflow to PM. PM reviews the account folder structure and confirms the Weekly Feature Request Log format. NotebookLM folders are configured with the six category structure.

WEEKS 2 TO 3

First Structured Deliverables

First Weekly Feature Request Log delivered to PM. CS team populates NotebookLM folders with organized account notes. PM has read access to the full NotebookLM ecosystem by end of Week 3.

WEEK 4

Calibration and Feedback

PM reviews the first month of Feature Request Logs and provides feedback on format and usefulness. CS Manager adjusts the report format based on PM input.

PHASE 2 Days 31 to 60

Full Intelligence Activation

Activate the complete intelligence ecosystem. The Renewal Risk Dashboard goes live in Notion, the first Monthly Renewal Risk Report is delivered, and the Bi-Weekly Client Sentiment Pulse begins. PM now has a full organized picture of client health.

MILESTONES

WEEKS 5 TO 6

Notion Dashboards Active

Renewal Risk Dashboard, Feature Request Database, Account Intelligence Panel, and CS Activity Feed all go live in Notion with PM read access. First Monthly Renewal Risk Report delivered 30 or more days before any open renewal windows.

WEEK 7

First PM-CS Monthly Sync

CS Manager and PM hold the first structured 30-minute monthly sync. Fixed agenda: renewal risk review, top ARR-weighted feature requests, client sentiment trends, and any roadmap validation needs.

WEEK 8

Mid-Point Review

PM provides formal feedback: are the intelligence feeds useful? Is the NotebookLM account data organized at the right level of detail? CS Manager adjusts accordingly.

PHASE 3 Days 61 to 90

Optimize and Prove ROI

Prove the impact of the system, refine it based on real usage patterns, and prepare the case for expanding the model. By Day 90, Product has 90 days of structured intelligence to reference.

MILESTONES

WEEKS 9 TO 10

Roadmap Validation Workflow Active

CS team delivers the first Roadmap Validation Input ahead of a PM announcement or release. PM uses the pre-release impact assessment to frame client communications.

WEEK 11

90-Day Intelligence Report

CS Manager prepares the PM-specific 90-Day Report: feature requests surfaced and actioned, renewal risks flagged and outcomes, client meetings where NotebookLM preparation was used.

WEEK 12

Executive Presentation

CS Manager presents to leadership how the PM intelligence ecosystem has changed Product's access to client data and the renewal risks addressed in advance.

KPIs and Success Metrics for Product Intelligence

How we measure whether the intelligence ecosystem is delivering real value to the Product team

Every deliverable in this playbook is measurable. The metrics below track two things: whether the CS team is delivering the intelligence they committed to, and whether that intelligence is making a tangible difference in how Product operates. Baselines are established during the Week 1 audit and progress is reported in the monthly PM-CS sync.

Category	Metric	Target	Baseline
Delivery	Weekly Feature Request Log delivered on time	**Every Monday on schedule**	No structured log exists today
Delivery	Monthly Renewal Risk Report delivered 30+ days before renewal windows	**100% of renewal cycles**	Reactive only
Delivery	Bi-Weekly Client Sentiment Pulse delivered	**Every 2 weeks, consistent**	Not currently delivered
Quality	Feature requests include ARR weighting and account health status	**100% of submissions**	0% structured today
Quality	NotebookLM account folders populated with organized CS notes	**All accounts by Day 30**	No organized folder structure exists
Quality	PM satisfaction rating on intelligence feed quality	**4.0 or above by Day 60**	Not measured today
Impact	Renewal risk accounts identified 30+ days before window	**100%**	Reactive identification only
Impact	Client meetings where PM used NotebookLM brief to prepare	**80%+ of PM-attended meetings**	0% no briefing system
Impact	Feature requests from log actioned in roadmap discussion	**At least 3 per quarter**	No data-driven input process

The Commitment to Product in One Statement

Product will never again enter a client meeting uninformed, receive a feature request without revenue context, or discover a renewal risk too late to respond. The Client Success team, powered by NotebookLM and Notion, will function as Product's organized, proactive intelligence partner, delivering structured insight before it is needed, on a cadence that Product can depend on.

Product should never have to guess what clients want, what they fear, or which accounts are quietly drifting toward the exit.

NotebookLM and Notion change this permanently.
The intelligence is already there. Now it has a structure.

Intelligence-Fed Roadmap

ARR-weighted data. Evidence-based prioritization. Every single week.

Renewal Risk Visibility

30+ days advance warning. Time to act, not just react.

Informed Client Meetings

Full account brief on demand. No more walking in blind.

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