

MONTHLY OPERATIONS REVIEW

Meeting Minutes & Action Plan | Prepared by Daniel Elisea

MEETING OVERVIEW

July 29, 2026

60 min

Duration

6

Attendees

5

Agenda Items

7

Action Items

Date / Time	July 29, 2026 10:00-11:00 AM	Location	Executive Conference Room / Teams
Facilitator	Jordan Blake, COO	Minutes	Daniel Elisea, Sr. Administrative Assistant
Objective	Review monthly sales, inventory, product status, supplier costs, and operational priorities.	Next Meeting	August 26, 2026 10:00 AM

Attendees

ATTENDEE	ROLE	MEETING RESPONSIBILITY
Jordan Blake	Chief Operating Officer	Facilitator
Maya Chen	Chief Executive Officer	Executive Sponsor
Robert Hayes	Sales Manager	Sales Update
Elena Torres	Operations Manager	Operations / Inventory
Marcus Reed	Purchasing Manager	Suppliers / Costs
Daniel Elisea	Sr. Administrative Assistant	Minutes / Follow-up

Meeting Agenda

TIME	TOPIC	PURPOSE	OWNER
10:00	Opening & Prior Actions	Review outstanding items from June meeting	Jordan Blake
10:10	Sales & Revenue	Monthly sales performance and customer demand	Robert Hayes
10:20	Inventory & Product Status	Stock levels, ETAs, and delayed product categories	Elena Torres
10:35	Supplier Costs	Vendor pricing, freight increases, and purchasing priorities	Marcus Reed
10:50	Decisions & Action Items	Confirm owners, due dates, and escalation items	Daniel Elisea

Pre-Read Materials: Monthly Operations Report, Inventory Status Report, Sales Summary, Vendor Cost Comparison, and prior Action Tracker.

Discussion Summary

1. Prior Action Review

Completed: Updated supplier pricing was received for 18 high-volume SKUs. Inventory reorder points were also reviewed and revised for agricultural bearings.

Open: Alternative-source quote for specialty bearings remains pending and will carry forward.

2. Sales & Revenue

July sales reached \$428,750, up 6.8% from June. Growth was strongest in agricultural and ball bearing categories. Sales expects elevated demand to continue through August. Leadership requested that high-demand inventory be reviewed weekly until stock coverage stabilizes.

3. Inventory & Product Status

Fourteen high-volume SKUs are approaching minimum stock levels. Insert Bearings and Specialty Bearings remain delayed because of supplier material availability and extended lead times. Operations will provide revised ETAs to Sales for customer communication. No broad production disruption was reported.

4. Supplier Costs & Margin

Freight expense increased 18.7% month over month, while supplier pricing increased across selected product lines. Gross margin declined from 34.2% to 32.8%. Leadership approved a targeted pricing review rather than a company-wide price increase.

5. Purchasing Priorities

Purchasing will expedite nine priority SKUs, consolidate shipments where practical, and pause additional purchases on six slower-moving items. Alternative supplier options will be reviewed for two product families with persistent lead-time issues.

Key Decisions

NO.	DECISION
1	Maintain weekly review of high-demand inventory through August.
2	Prioritize expedited replenishment for nine high-volume SKUs.
3	Review pricing only on products with significant cost or margin deterioration.
4	Request alternate-supplier options for delayed specialty product families.
5	Sales will receive revised product ETAs before customer follow-up.

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ACTION PLAN

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Action Item Tracker

ID	ACTION ITEM	OWNER	DUE	STATUS	PRIORITY
A-01	Send revised ETA list for Insert and Specialty Bearings to Sales	Elena Torres	Jul. 31	In Progress	High
A-02	Expedite purchase orders for nine priority SKUs	Marcus Reed	Aug. 1	Open	High
A-03	Obtain alternate supplier quotes for two delayed product families	Marcus Reed	Aug. 7	Open	Medium
A-04	Prepare margin review for products with cost increases above 5%	Daniel Elisea	Aug. 5	Open	High
A-05	Update customer-facing ETAs for affected accounts	Robert Hayes	Aug. 1	Open	High
A-06	Review six slow-moving SKUs before additional purchasing	Elena Torres	Aug. 8	Open	Medium
A-07	Add action-item status update to August leadership packet	Daniel Elisea	Aug. 24	Open	Medium

Follow-up & Accountability

Follow-up Process	Escalation
Action owners will provide status updates by email. Daniel will consolidate progress into the action tracker and follow up on overdue items before the next monthly review.	High-priority items that cannot meet the agreed due date should be escalated to the COO immediately with a revised completion date and reason for delay.

Next Meeting: August 26, 2026 at 10:00 AM | Action tracker will be reviewed at the start of the meeting.

Portfolio disclosure: All names, companies, meeting details, figures, decisions, and action items in this document are fictional and were created solely to demonstrate meeting coordination, documentation, executive support, and follow-up skills.