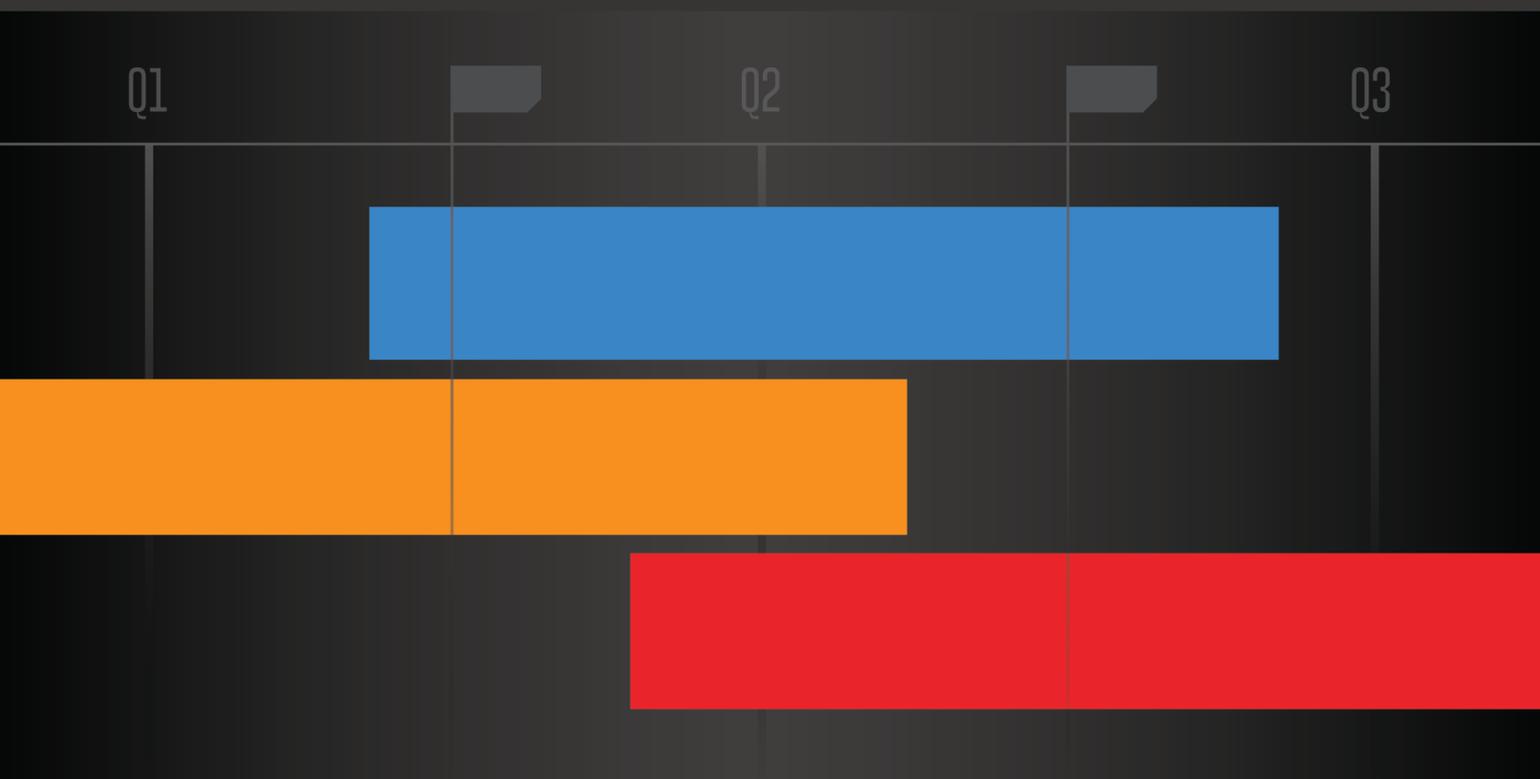


PRODUCT ROADMAPS



YOUR GUIDE TO PLANNING AND
SELLING YOUR STRATEGY

Product Roadmaps:

Your Guide To Planning & Selling Your Strategy

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Why we Wrote This book

At ProductPlan we've been fortunate to work with some of the most forward-thinking product managers at the world's most successful companies. We've had a chance to learn along with them, and in turn we're sharing that knowledge with you.

In my 15 years of product management and new product development, I've learned that product vision, goal-driven decisions, customer evidence, ruthless prioritization, and clear roadmap communication are essential for product success.

Product roadmaps are central to what you do as a product manager. But every week I hear how product managers still struggle with planning, creating, and communicating a compelling roadmap. After working with thousands of product teams and others involved with creating, marketing and managing products, we've learned that there is no single best way to roadmap.

Because there are so many different types of products, companies and product managers, every roadmap is different. Regardless of whether or not your title is "product manager," your goal in developing your roadmap will always be the same: To clearly articulate where you're headed, and to show your strategy to your stakeholders in a compelling way. For this reason, the lessons in this book will be helpful for those developing IT, technology, engineering, and marketing roadmaps as well.

In this book we'll talk about product roadmaps from two perspectives: The process of discovering and communicating the roadmap, and the document you build to communicate the roadmap. You'll learn:

- **The Key Role of Product Managers.**

We'll define what a product roadmap is and discuss the important role you have as its steward.

- **Tying Strategy to Your Roadmap.**

We'll discuss the importance of product vision and goals, and how these tie back to the roadmap.

- **Planning and Prioritizing Your Roadmap.**

We'll give you several practical approaches to thinking through the best initiatives to put on your roadmap.

- **Building Your Roadmap.**

We'll provide you tips and specific examples of roadmaps to inspire your own roadmap process.

- **Communicating Your Roadmap.**

We'll give you suggestions for how to work with your stakeholders to achieve better alignment around the roadmap.

We've attempted to distill our learnings from other product managers. From that, we hope that you can pick out a few new techniques and best practices to help you sell your product vision and become a more effective product manager.

We'll update this book, so please send suggestions and best practices you've learned.

We hope you enjoy it.



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INTRODUCTION: THE KEY ROLE OF PRODUCT MANAGERS



INTRODUCTION:

The Key Role of Product Managers

Product managers are not created equal. The role each product manager plays depends on many dynamics — the size of the company, the type of company, the type of product, the stage of the product, and the culture of the company all dictate the role and influence of the product manager.

As someone who is at the intersection of a lot of critical information in your organization, you are in a unique position to define the success of your product. Even if your culture is hierarchical and bureaucratic, you have significant influence over the choices your organization makes during the lifecycle of the product. And a key part of that influence is the roadmap you produce.

Characteristics of Successful Product Managers

For most product managers, their core role remains to set the long-term product strategy and manage the roadmap. As part of this role they need to interact with a broad range of stakeholders and departments to ensure their product's success.

Key skills that effective product managers (and product teams in general) must bring to the table:

1. **Be transparent** about your prioritization and roadmap process.
2. **Be able to say “no,”** but explain why in terms that stakeholders understand.
3. **Be a ruthless prioritizer** while balancing the needs of customers and stakeholders.
4. **Bring evidence-based** decision-making to your communication.
5. **Be metrics-driven** when determining which opportunities to pursue.

The Purpose of Product Roadmaps

Let's start by defining what a product roadmap is. And to do that, we will first explain what a roadmap is not. A roadmap is not simply a list of features arranged in a somewhat prioritized order, nor is it the product backlog.

A roadmap communicates the “why” behind what you’re building. It’s a plan for your strategy. A roadmap is a high-level visual summary that maps out the vision and direction of your product, often over time.

Your roadmap needs to convey the strategic direction for your product. And it has to tie back to the strategy for the company.

The roadmap has several ultimate goals:

- Describe your vision and strategy
- Provide a guiding document for executing the strategy
- Get internal stakeholders in alignment
- Facilitate discussion of options and scenario planning
- Communicate progress and status of product development
- Help communicate your strategy to external stakeholders (including customers)

Note that we did not include specific resource requirements, man-hours, story points, or other details. These details are typically reserved for the execution of the roadmap. This information resides in your company’s project management solution.

It’s worth noting that roadmaps aren’t limited to products. Technology teams, marketing teams, and others can benefit by communicating their plan with a roadmap. In this book, we will provide several examples of roadmaps for other situations, including technology, architecture, and marketing roadmaps. In a typical organization, these roadmaps might be combined with the product roadmap to provide a complete view of the strategic plan.

The Roadmap Planning and Communication Process

It's important for product managers to think of the roadmap as a living document rather than a plan set in stone. It should be regularly discussed, prioritized, estimated, updated and shared. Figure 1 illustrates the general process we'll follow.

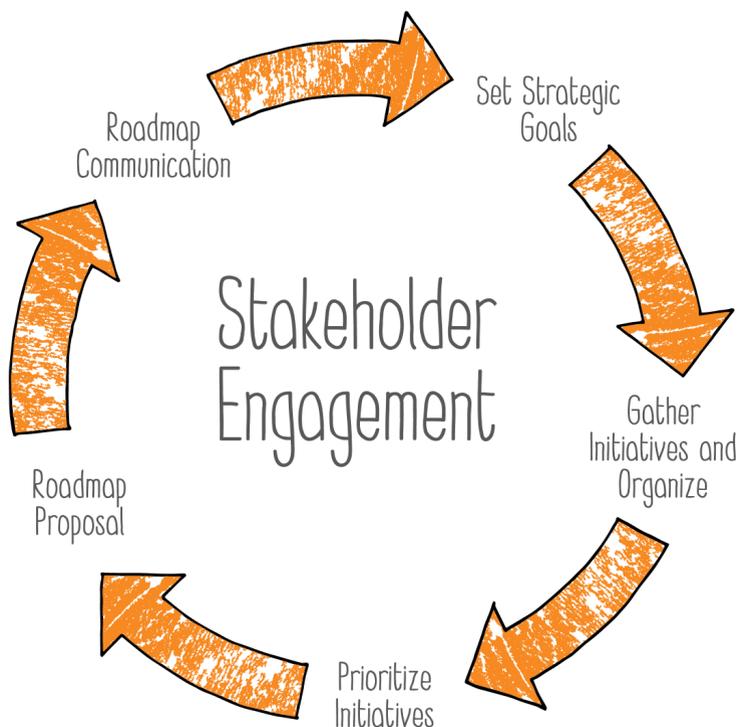


FIG. 1 – Roadmap Planning and Communication Process

TYING STRATEGY TO YOUR ROADMAP



INCREASE REVENUE
LIFETIME VALUE REDUCE CHURN
TARGET CUSTOMER
FEATURE USAGE NET PROMOTER SCORE



Tying Strategy To Your Roadmap

The most important part of the roadmap process happens before you begin building your roadmap. Setting the vision and strategic goals for the product — and, more importantly, getting alignment on these with your stakeholders — is the first step to creating a successful roadmap.

Top-Down Strategic Planning

We've found through hundreds of conversations with product managers that executives prefer top-down strategic planning and communication, as shown in Figure 2. They want to have productive discussions about future initiatives that tie directly to the product vision and goals. This top-down discussion and planning has a greater chance of producing a product roadmap that moves the needle for the company.

By sharing a high-level product vision, you can get the executive team, marketing, support, engineering management and the rest of the organization on board with the strategy.

Product managers have told us their executive team simply doesn't care much about the details — what they really care about is whether the proposed roadmap fits with the strategic direction of the company and when its initiatives will be delivered to support the strategy. Successful product managers tap into this by keeping the roadmapping process high-level and collaborative. From there, they can derive the detailed release plan and backlog.



FIG. 2 – Take a top-down approach when planning your roadmap, starting with the product vision.

Developing the Product Strategy

A product roadmap is not a document you simply sit down and start drafting — not without first developing a strategy and plan for what the roadmap needs to accomplish, why, and for whom.

Equally important at this pre-roadmap planning stage is developing a strategy that you can clearly articulate and defend. You will, after all, need buy-in from various stakeholders, including your executives. That means you'll need both a high-level vision and evidence or other supporting data to back up your plan.

When developing a strategy that ultimately leads to a product roadmap, it's important to identify and articulate your product's vision and principles — the “why.”

“Clearly explain why your product exists and your approach to running it. This could be a mission statement, tenets, or principles. The important thing is that you believe in them, and by pinning them at the top of every roadmap it will be clear if what follows in the roadmap doesn't match your principles.”

— Ian McAllister, Director of Product Management at Airbnb

Spend time before you begin planning your roadmap determining the product's mission, and then distill it into a simple statement your stakeholders can understand. This includes product vision, the problems it solves, its target customers, and its value to the marketplace. Documenting this forces you to nail down many of the key items that will inform your roadmap.

Ikea's Vision:

“At IKEA our vision is to create a better everyday life for the many people. Our business idea supports this vision by offering a wide range of well-designed, functional home furnishing products at prices so low that as many people as possible will be able to afford them.”

Your executives need to know (and agree with) your plans for your product's development and updates — because they will ultimately need to sign off on those plans. Your development teams need to know what you have planned for your product, and why, because they will be responsible for building it. Your sales, service, and marketing teams will need to know the what and why as well — so they can articulate your strategy to the market.

This strategy-first approach has several benefits:

- It makes it easier to articulate the product vision to any constituency across your company, and ensure your stakeholders are on the same page before you begin the detailed conversations that follow.
- It makes it easier for you to clearly see your product's vision, and allows you throughout the roadmap process to more clearly identify priorities as well as those items that should be set aside because they don't serve the product vision.

Google's Vision:

“To organize the world's information and make it universally accessible and useful.”

Defining Your Product Goals

From the product vision you can derive product goals that will in turn influence the initiatives that are on your roadmap. Coming up with product goals is the step that helps you translate your product strategy into an executable plan.

Every organization's product goals will be different. You can develop product-specific, company-oriented, or more generic goals. Here are some examples:

- Competitive Differentiation
- Customer Delight
- Technical Improvements
- Sustain Product Features
- Improve Customer Satisfaction
- Increase Lifetime Value
- Upsell New Services
- Reduce Churn
- Expand Geographically
- Mobile Adoption

As you can see, these goals are general, but can usually be measured and tied back to metrics and Key Performance Indicators (KPIs). It's these types of goals that will resonate with your stakeholders. Goals are often longer-term initiatives — for example, they might change annually rather than monthly.

Roadmap Planning in an Agile World

At first blush, the terms agile and product roadmap seem like a contradiction, but they're not.

In most agile product development organizations, the backlog defines the product features for the near term. From the backlog, the development team is (hopefully) aware of what's coming next, at least for the next few sprints or iterations.

But the backlog in itself is not the roadmap — a product roadmap defines a strategic view of where the product is headed over the mid to long term. The roadmap is tied to the organization's vision and strategic goals, often for the next 12 or more months. In an agile organization, the roadmap provides guidance rather than a strict project plan.

The Backlog is Not a Roadmap

The roadmap needs to communicate the big picture to the organization — the initiatives that move the needle, expand markets, address competition, and create customer value. That big-picture thinking can't be distilled in the backlog. It's challenging to communicate strategy in a list that's 200 items long, especially to executives and other stakeholders who might not think in terms of iterations or sprints.

Your roadmap cannot simply be a list of features — it should ideally convey high-level strategy, goals and vision.

Even agile organizations need this strategic view. At ProductPlan, we've discovered our customers are sharing product roadmaps with the engineers to give perspective to the backlog. This helps the development organization understand how the next few sprints fit into the big picture.

A roadmap speaks in terms of epics and themes, while the backlog represents the detailed features and other tasks that deliver the product. In a sense, the backlog is a translation of how your team will deliver the vision outlined in the product roadmap.

Agile Roadmaps

A roadmap should be agile and treated as a living document — not a fixed plan. You should expect to regularly revisit, discuss and re-prioritize your roadmap based on new inputs.

“Today's companies need to be agile, move quickly, and be adaptive — and that is really difficult with a static roadmap. We believe that anything that is more than just a few months out is fuzzy and needs to change. We're fast moving and to be agile, it's important to have a living roadmap!”

— Jon Walker, CTO, AppFolio

Because the roadmap will inevitably change, it's important to set expectations with your stakeholders that the roadmap is not a promise. Many of our customers keep the roadmap dates at a monthly or quarterly level, or leave the dates off altogether to avoid setting the impression that features will be delivered by a specific date.

Product managers need to regularly communicate where the product is heading so that everyone is on the same page, especially stakeholders who make final decisions, control the budget, or influence the direction of the company. Your agile product roadmap, therefore should be a visual, easy-to-digest document that your stakeholders can understand and that gives perspective to your backlog.

Typical Roadmap Process Challenges

Why are product roadmaps so challenging? In our conversations with product teams, we hear some common themes: Product managers are frustrated that their executives and other stakeholders aren't on board with the product strategy. Product managers want to convey the big picture but are stuck in the weeds.

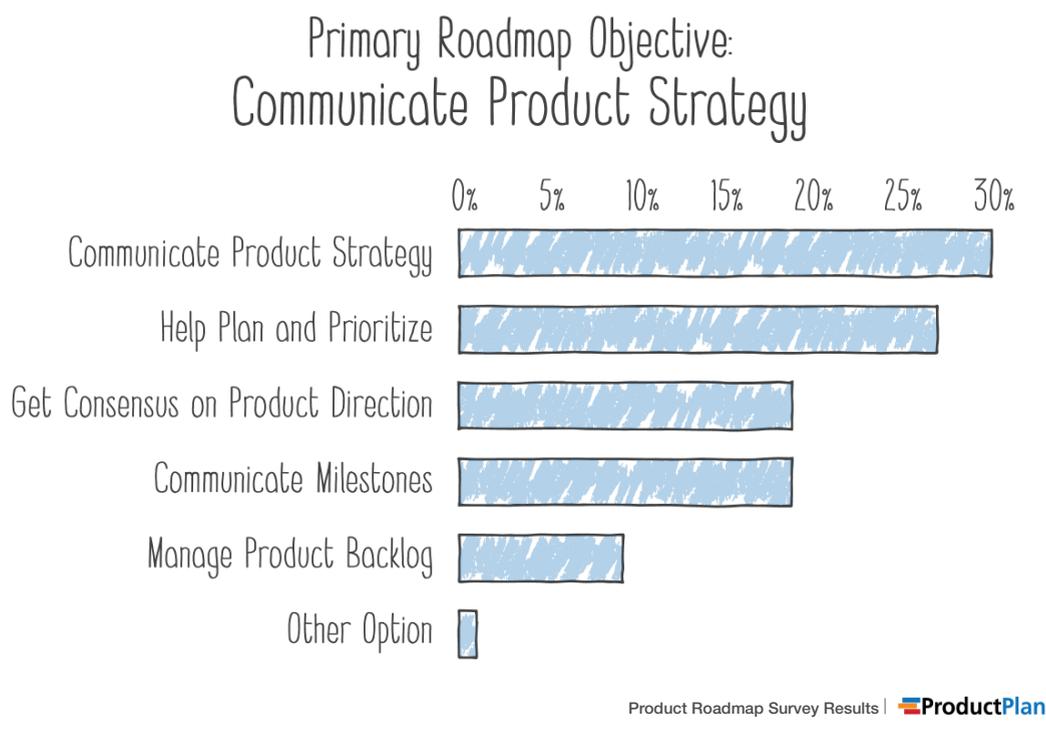


FIG. 3 — The primary objective of most roadmaps is to communicate product strategy.

According to a product roadmap survey that ProductPlan conducted in 2015 — the results of which are shown in Figure 3 — the primary objective of most roadmaps is to communicate product strategy. A secondary objective is to help plan and prioritize. Unfortunately, these are the very items that product managers struggle with the most.

Strategic decisions are essential for your product's eventual success in the market. But product managers today face several challenges — some organizational — in developing roadmaps that are as effective as they could be.

Let's look at a few of these typical challenges to creating effective product roadmaps, and how to overcome them. These challenges and solutions go beyond the roadmap document and get to the heart of the process you use to develop the roadmap.

Challenge: Attempting To Lock In Plans That Are Too Long-Term

Many product managers today build roadmaps with long-term plans and deliverables locked in, sometimes years into the future. But in today's era of agile development (and this is true of products in many industries — not only software), market demands and opportunities, as well as new technologies, often require mid-stream changes in a product's development or priorities.

This is why successful product roadmaps are designed as living documents, focused on high-level product strategy and organization goals — with built-in flexibility to adjust plans and priorities quickly and easily.

This is also why it is so important that your roadmap effectively communicate to all constituencies the need to keep the milestones and deliverables flexible, in favor of meeting the high-level goals for the product rather than any specific deadline.

Challenge: Prioritizing In The Moment

It is the product manager's responsibility — at an early stage, when developing the roadmap — to create goals that drive prioritization. The product manager must also prioritize the product's development within the larger context of the organization's other initiatives that will be running in parallel.

23% *of product managers cite prioritization as their #1 roadmap challenge in 2015 (the second-biggest challenge, behind communicating product strategy)*

— **ProductPlan's 2015 Product Roadmap Survey**

Building a prioritization framework into your product decisions gives you leverage when faced with deciding whether to prioritize a stakeholder's pet project or a feature required by a big prospect. Similarly, this step is vital to managing expectations and ensuring that when necessary, a team can quickly switch focus to a higher-priority initiative.

We'll discuss more specifics about prioritization in chapter 3 — Planning and Prioritizing Your Roadmap.

Using Metrics to Support Your Roadmap

Metric-driven product management is now at the foundation of most successful products. But new products or features that are on your roadmap are sometimes challenging because there is rarely a history of data. In some cases, if the product has recently launched, there might be a flood of data, but no structure or focus on the right metrics to use.

What are the right metrics that product teams can use to measure the potential success or weakness of a new product? Here are several tips for incorporating metrics into your roadmap planning.

Define the Metrics Early

By defining the right metrics early, you can get better insight to guide your product decisions and your product roadmap. It's a good practice to begin discussing success metrics as early as you can during the development of the product — and well before it reaches customers.

With so many new analytics tools available for product managers, it's become common to have a firehose of data and metrics soon after your product launches. The real challenge is in determining the few metrics to focus on — the sooner the better.

The Scientific Mindset

In order to begin setting the right metrics and product goals early, you'll need to think like a scientist. Scientists first describe their hypothesis, define a test, and measure. Product managers can do the same by setting goals and then setting metrics for those goals. Although simple, this scientific mindset is one of the best ways to guide new products to success.

For example, you might decide that a conversion metric is important to measure — such as the percentage of trial customers who convert to paying customers.

Even without solid customer data, you can create a hypothesis about what you think you will see and a target of what is ideal. This process itself is incredibly valuable because you'll have great conversations with the team about the business model and will be able to spot challenges early on once the customer data begins arriving.

Are You Measuring the Right Things?

Ultimately, the metrics you choose depend on the stage of your product, your industry, the type of product, and the size of your company.

But the most important consideration is to focus on a limited number of metrics that really matter. These are metrics that tie back to the organization's top-line goals and business results.

Avoid "vanity metrics," those metrics that feel good but in the end are rarely actionable. For example, vanity metrics might include website page views or the number of Facebook likes. In the end, these metrics rarely tie directly back to business results or customer success.

Better choices would be metrics such as active users, acquisition cost, and average revenue. These are metrics that make a difference to the business.

Sample Metrics for Your Product

If you don't already have success metrics, how do you set about finding the right ones?

Begin by researching metrics discussed in your industry. Whether you are in SaaS, retail, media, or another industry, there are experts who are discussing those metrics online.

Look at information about competitive products — companies that are publicly traded will often discuss those metrics during earnings calls.

Generally speaking, business goals such as revenue, margin, acquisition cost and retention are good places to start. Customer-specific metrics such as product usage and retention are good starting points as well.

Here are a few examples of metrics that will help you measure success from a customer and business standpoint. Of course, the metrics you select will depend on your business and product. Choose only a few to start, so you can focus.

Customer success and product engagement metrics	Business-oriented metrics
<ul style="list-style-type: none"> • Product usage/adoption (sign in frequency, sharing, etc.) • Percent of users who take a specific action that matters • Feature usage (usage versus other features) • Which customer type is using certain features • Retention or churn rate • Quality (e.g. average bugs, net promoter score) 	<ul style="list-style-type: none"> • Customer Acquisition Cost (CAC) • Lifetime Value (LTV) • Monthly Recurring Revenue (MRR) • Annual Recurring Revenue (ARR) per customer • Average Revenue per User (RPU) • Conversion (e.g. site visit to lead conversion)

FIG. 4 — Sample Metrics

You'll pick a handful of these metrics to set the baseline — these are a great place to start, but ultimately you'll refine the metrics for your business. Work with your team to get consensus on the metrics that matter.

These are actionable metrics that tie back to the strategic goals and initiatives you put on your product roadmap. Revise the goals and metrics periodically — as the product matures, the metrics will need to change and likely grow with it.

PLANNING AND PRIORITIZING THE ROADMAP



Planning and Prioritizing Your Roadmap

Only after identifying and articulating your vision and goals should you begin the next step: Sifting through all of the information you've gathered about the product and market to begin prioritizing what should actually make it into your product roadmap.

Making Sense of the Firehose of Ideas

At this point, you've distilled your product's vision, and articulated it in a high-level message that your stakeholders understand (and hopefully agree with).

Now you're ready to gather all of the business intelligence you'll need to build the best product you can. This intelligence is what will ultimately lead to the details of your roadmap: What the new product (or new version of the existing product) will include, for whom, why, and how it will advance your company's strategic goals.

When it comes to finding data about what to include in your roadmap, the problem isn't having too little information — it's having too much.

If you've been a product manager for any time, you've likely found that your challenge isn't a lack of data, ideas or feedback. It's just the opposite — having too much information, and trying to sort through it all to decide what supports your product's goals and what doesn't.

Here are some great places to start gathering this business intelligence to help determine how to build your roadmap.

Customer Feedback

Obviously one of the best sources of feedback on how your product is working, and where it needs work, is with the customers who are actually using it.

Use whatever methods of communicating with your customer base will work best for you. That could be phone calls to specific customers for detailed interviews, online

surveys, hosting user groups, or even asking your customer service teams.

But keep this in mind: Your customers represent a skewed set of data. They, after all, have purchased and are using your product. Don't fall into the trap of relying on your existing customer base as the sole source of information about where your product excels, where it falls short, or what should be included in the next version.

And more importantly, don't build exactly what your customers ask. Sometimes customers' feature requests do not necessarily align with your product vision. As a product manager, you also need to bring to the table your knowledge of what's feasible to solve their problem in the best possible way — and that might not match with their feature request.

When looking for market feedback, consider all of the prospective customers who didn't buy your product, but instead bought a competitor's. And don't forget your prospects who haven't yet made the decision to buy. A caveat: Although you want to solicit feedback from the sales team, you do not want to have sales drive the roadmap, as their goals may or may not align with the product goals.

Competitive Landscape

Your goal, of course, is to create a unique and valuable product in the market. However, you can learn a great deal about the landscape by reviewing your competitors' products.

While it's possible to identify features you hadn't thought of, be aware of the danger of using your competitors for inspiration. Simply using your competitors' feature list for your roadmap is a sure fire way to launch another “me too” product that provides little in the way of competitive differentiation.

Gain valuable competitive intelligence by looking in less-obvious places than within your competitors' products themselves. For example, check out blog comments or support pages where users are discussing your competitors' products. This can represent a gold mine of intelligence for you.

Learn what customers like about these products, what they don't like, and what they wish they had.

Related idea: Do the same with your own product. Spend time regularly reviewing your social media channels and user support sites where your customers are discussing your product, offering each other tips, complaining, etc. There's gold there, too.

Sales and Customer Service

Your sales reps are your front-line liaisons between your company's products and the people and organizations that ultimately buy them (or don't). Your customer service department might spend more time with your customers than any other group in your company.

These teams represent another invaluable source of intelligence about how best to build and update your product roadmaps.

1 in 4 product managers
say their Sales teams consciously avoid selling certain products in their company's portfolio

— Pragmatic Marketing's "2014 State of Product Management and Marketing"

When sales and product management don't communicate, the business's bottom line often suffers. If your sales reps know that a certain product or feature upgrade won't resonate with their customer base, or that they won't be able to sell it at the price your organization has set, you need to know why.

Similarly, your customer service personnel are on the front lines gathering real-world user feedback. They know what the most common problems are with your product, what features customers most often call to ask for, etc.

As with your customers, you can communicate with and learn from your sales and customer service teams in many ways. Take a sales or customer service rep out to lunch. Create a short online survey and ask these departments strategic questions about their experiences with customers and the company's products.

Bottom line: Don't leave your sales and customer service teams out of the product roadmap process. Including their feedback among the valuable information you'll be gathering from around your organization will give you better real-world intelligence and will also help to better align everyone's interests across the organization.

People like to be asked for their input, particularly in a professional setting where they know they have valuable insights to contribute.

Imagine how much more effective you can make your products if you speak first to the people who earn their living selling those products, and the people who field real-world questions and complaints about them.

Analyst Research

Study industry reports about your category of product (from Gartner, Forrester and other analyst firms that cover your industry) to determine what types of products work, with whom, and why.

What's often useful about these reports is the survey-generated data they gather from your target customers across the landscape. While it is relatively easy to create a survey for your own customers or prospects, it is much more difficult (and costly) to gather a similar set of responses from all of those target customers out there with whom your organization has never communicated and has no relationship. And remember: Studying only your own customers will give you a skewed picture about your products.

Consult your sales and customer service teams for their insights in the early stages of your product roadmap development. This will give you better real-world intelligence and will also help to align everyone's interests across the organization.

Analytics and Metrics

Evidence is far more compelling than your opinion — or anyone else's opinion, for that matter. Your executive stakeholders and your other product roadmap constituents will be less interested in what you think or what your gut tells you than in what you've proven.

If you have real-world user data on your product — or, if you're developing a new product, data on similar products you've launched in the past — then you already have an excellent source of business intelligence to inform how best to build your product roadmap. Let your own analytics help guide your decisions.

This data could be video of your customers discussing or using your product, user analytics, direct customer quotes or requests, etc. But it needs to be evidence, not speculation.

Organizing Initiatives Into Themes

Does this product meeting sound familiar? You're stuck reviewing an endless laundry list of future features while everyone's eyes glaze over.

It's a slow death by a thousand features.

Building your product roadmap to convey your vision in a compelling way is challenging. But by grouping initiatives together into themes, you can organize your roadmap in a way that describes value to customers and other stakeholders. Themes can help you put together a roadmap that creates a story — the why behind what you're proposing.

Rather than listing individual features and tasks in your product roadmap, instead think bigger-picture and group them into “themes” — arranged on the roadmap in a priority hierarchy that you can clearly explain and defend.

In their simplest form, themes are groupings of similar features, epics or initiatives. Ideally, themes describe customer value — what customers are going to be receiving or the job that you'll help them accomplish. In Figure 5, “Customers Complete First Purchase Faster,” is an example of a theme, and into this theme you would group the initiatives that support it (new features, feature enhancements, bug fixes, etc.).

theme:

in product roadmaps, a series of similar product features, epics or initiatives grouped together according to a larger, strategic objective they share, and ideally described in terms of customer value

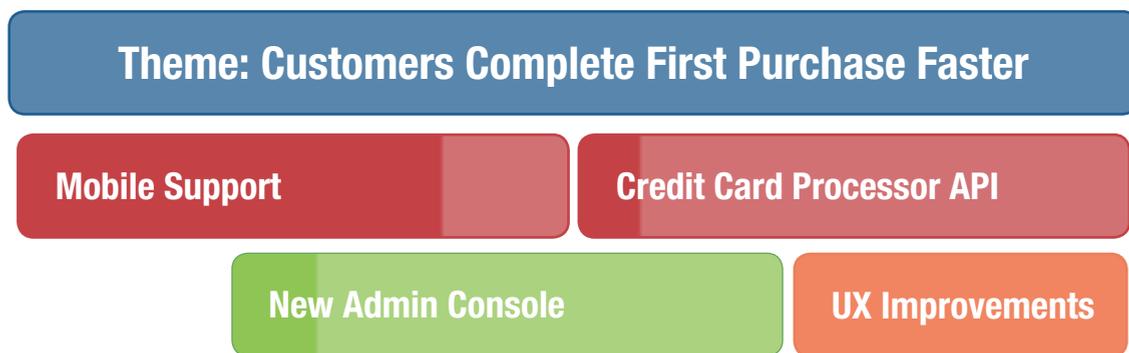


FIG. 5 — Group your initiatives into themes.

Themes help keep your roadmap at a high level, especially for those long-term, fuzzier initiatives. One benefit is that you can switch features in and out of the theme without significantly affecting the roadmap. It's a better way to keep executives and stakeholders on the same page and focused on the big picture.

So, how should you develop your themes? Themes should be goal-driven. If you can get executive alignment on the goals first, it's easier to create themes that align with those goals. As part of the process it's essential to discuss the metrics and KPIs that define whether the goal has been met.

There is often discussion in agile circles about the difference between epics and themes. We've defined a theme here as a grouping of similar epics. Whatever your definition, it's important to keep your themes at a high level.

How to Create Themes

Your product's strategic goals are a good way to identify roadmap themes. You can pick a handful of high-level initiatives you want to accomplish — they can be at the product level or identified for the broader organization (such as a platform-oriented initiative).

Themes can be short in duration (spanning one release) or they can span multiple releases. If you are agile, themes can contain one or more epics. They are rarely feature-specific.

One caution on using themes: Stakeholders such as the sales team are quick to fill in the blanks about what a theme includes. Therefore, education is an important part of communicating the roadmap — educating stakeholders about how you define the theme, how you are measuring success, and of course providing some detail about what is included in the theme.

One of the key things you do as a product manager is communicate. Getting the executive team and other stakeholders on board with your vision is essential. Whether you use a product roadmap template, an online roadmap spreadsheet, or product roadmap software, themes can simplify your product plan and create a more compelling vision.

Prioritization Techniques

Your organization has finite resources. Choosing when to prioritize forward-looking initiatives like new features or enhancements, and when to deploy those resources for more defensive projects like adjusting the user experience based on complaints or other data, will be a decision only you can make.

How then should you prioritize them in your roadmap? What criteria should you use?

As your organization's central hub for your products, you are probably bombarded with requests for features and tweaks and updates from... just about everywhere.

A sales rep tells you about a customer who made an offhand request that something be added to the product, ASAP. An executive stops you in the hall with a great idea for the next revision. A prospective customer — who hasn't actually bought your product — calls customer service to tell them you should move a feature off of the product's main page.

You can't afford to treat every request as a priority — not even the ones from your longstanding customers, or from your executives. You need to be more strategic about how, when and why to update your product.

Suggestions for Prioritizing

Regardless of the prioritization method you choose, here are some suggestions for thinking through which initiatives to include on your roadmap:

- Approach prioritization as a team activity; not only does it create buy-in on the team, you get different perspectives. It's also a lot more fun.
- Limit the number of items you are prioritizing — focus on the biggest items rather than the details.
- Categorize and group initiatives together into strategic themes (for example, “improving satisfaction” for a particular persona would be a good way to group).
- Before you begin prioritizing, it's helpful if you understand the customer value for each initiative. The customer value should be rooted in evidence that you've gathered from customers rather than your opinions.
- Start with a rough estimate of cost for each item. Even T-shirt sizing of “small,” “medium” and “large” will be helpful during the process.

Here are several other ways of quantifying the many variables among the features, enhancements, fixes and other items competing for the limited resources in your product roadmap.

Value versus Complexity

In the Value versus Complexity model, you evaluate every opportunity based on its business value and its relative complexity to implement. Based on our conversations with product managers this is a common approach, and many product managers go through this assessment instinctively every day.

The matrix, as shown in Figure 6, is simple: The initiatives that have the highest value and the lowest effort will be the low-hanging fruit for your roadmap.

You can modify this matrix for your own purposes, including adding in variables for customer impact.

7 STRATEGIES for weighing roadmap initiatives

- Value vs. Complexity
- Weighted Scoring
- Kano Model
- Buy a Feature
- Opportunity Scoring
- Affinity Grouping
- Story Mapping

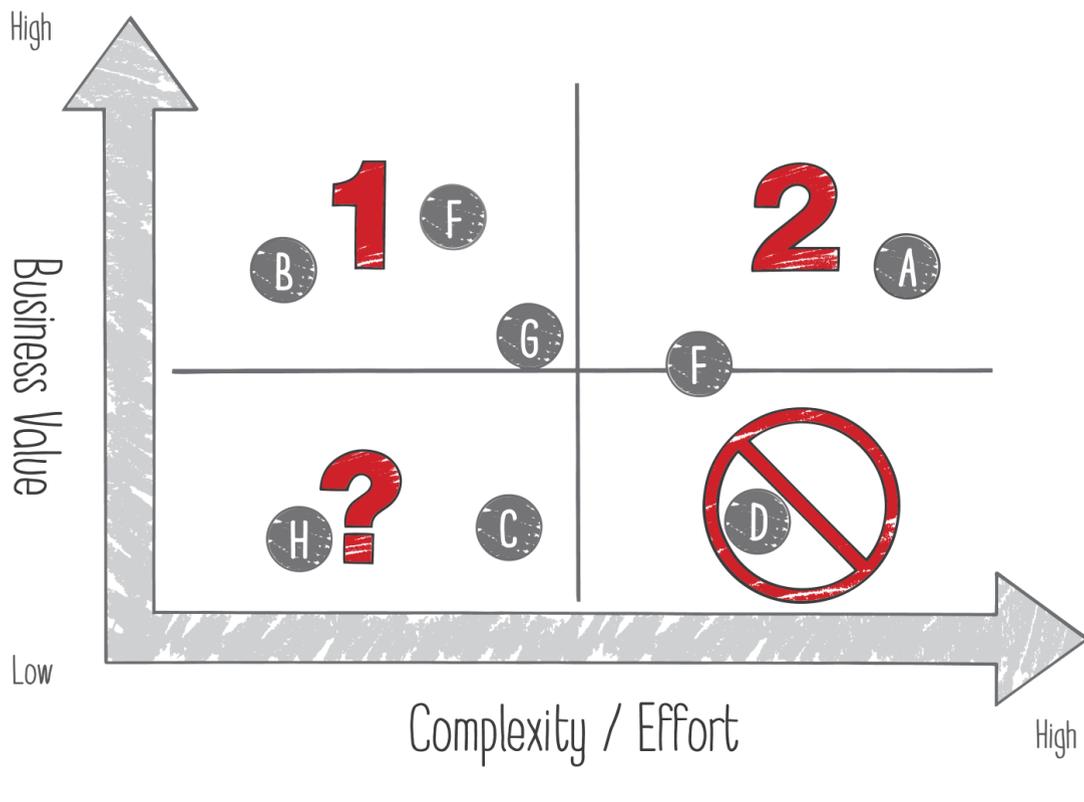


FIG. 6 — Value Versus Complexity Graphic

Weighted Scoring

With Weighted Scoring you can use the Value versus Complexity model, but layer in scoring to arrive at an objective result.

By using a scoring method, such as the one shown in Figure 7, to rank your strategic initiatives and major features against benefit and cost categories, product managers can facilitate a more productive discussion about what to include on the product roadmap. While there are many inputs that ultimately go into a product decision, a scoring model can help the team have an objective conversation.

TITLE	LANE	BENEFIT			COST			SCORE	RANK
		Increase Revenue	Customer Value	Strategic Value	Implementation Effort	Operational Costs	Risk		
		WEIGHT	20	20	20	20	20		
1  New Admin Console	Mobile Product Line	1	4	2	2	4	1	72	4
2  Android	Infrastructure Projects	3	4	4	3	2	3	84	2
3  Customer Experience Initiatives	IEM 2.0	3	5	3	2	2	1	96	1
4  Cloud support for PowerLink	Infrastructure Projects	5	3	2	3	1	3	84	2
5  iOS Reporting	GEMS Product Line	3	3	4	5	3	3	68	5

FIG. 7 — The Weighted Scoring Model in ProductPlan

Kano Model

With the Kano model, you can look at potential features through the lens of the delight a feature provides to customers versus the potential investment you make to improve the feature.

As illustrated in Figure 8, there are some basic features that your product simply needs to have in order for you to sell your product. You need to have these “threshold” features, but continuing to invest in them won’t improve customer delight dramatically.

There are some features (like performance) that give you a proportionate increase in customer satisfaction as you invest in them.

Finally, there are some “excitement” features that you can invest in that will yield a disproportionate increase in customer delight. If you don’t have these features, customers might not even miss them; but if you include them, and continue to invest in them, you will create dramatic customer delight.

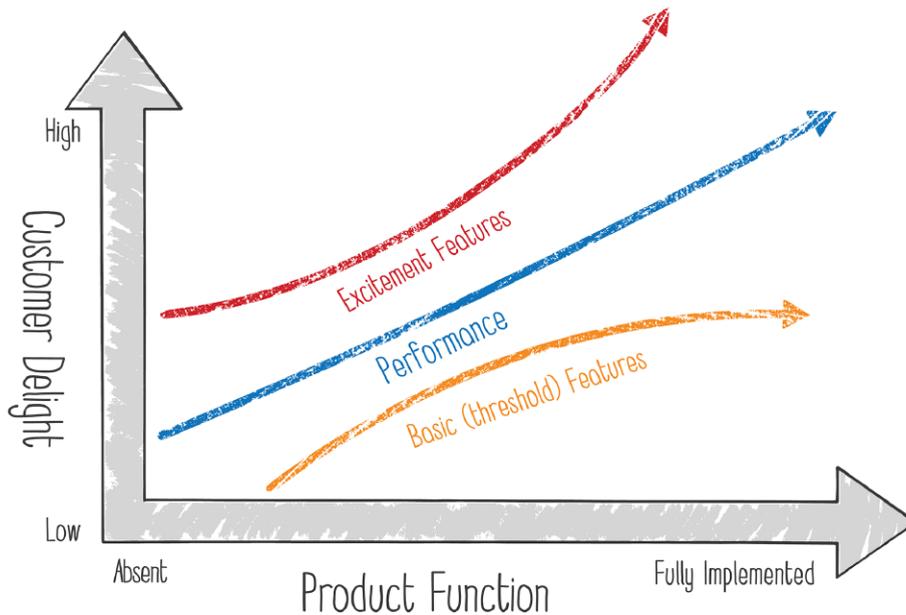


FIG. 8 — Customer Delight versus Product Function

Buy a Feature

The Buy a Feature model is an activity you can use with customers or stakeholders to prioritize a set of potential features. The approach is simple but fun. List out potential features and assign a “price” to each (based on a relative cost to develop it). Hand out a set amount of cash and then ask participants to buy the features.

Some will place all their money on one particular feature they’re passionate about, while others might spread their cash around. The result is your prioritized feature list.

Opportunity Scoring

Opportunity Scoring is a type of Gap Analysis that comes from Outcome-Driven Innovation. Without getting too detailed, the idea is to measure and rank opportunities based on their importance versus customer satisfaction (see Figure 9).

Job/Outcome	Importance of New Features (1-10)	Satisfaction with Existing Features (1-10)	Opportunity
Reporting & Printing	8	2	High
Billing	8	4	Medium
Purchasing	4	7	Low
Account/Management	6	3	Medium
User Management	7	8	Low

FIG. 9 — Opportunity Scoring Example

To conduct Opportunity Scoring you ask customers to score the importance of each feature and then also score how satisfied they are currently with that feature. Your opportunities are those features that are highly important yet customers gave a low satisfaction score.

Many organizations identify product opportunities with the “Jobs to Be Done” theory: It’s a customer’s desire to get a job done — rather than features — that will cause them to buy a product or service in the first place. Using the Opportunity Scoring model you can find innovation areas by plotting the competitors and the customer’s relative satisfaction with features.

Affinity Grouping

Affinity Grouping, illustrated in Figure 10, can be a fun prioritization activity. The idea is simple: have everyone brainstorm opportunities on sticky notes. Then as a team, begin to group similar items together, and then name the groups. Finally, everyone on the team begins to vote on or rank the groups.

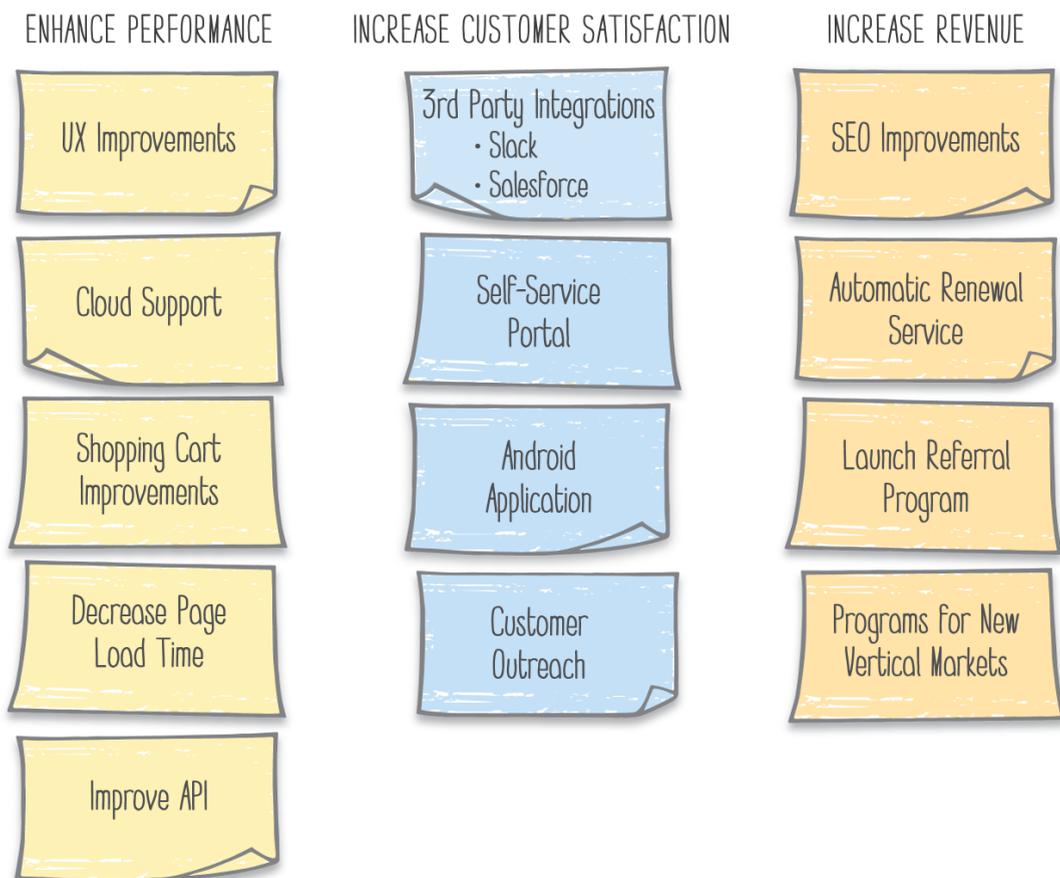


FIG. 10 — Affinity Grouping Example

Story Mapping

Story Mapping is a great way to document the MVP by organizing and prioritizing user stories. The idea in a nutshell is that you first create task-oriented story cards as shown in Figure 11, and group them into a workflow. You then arrange the cards in priority order for each group. The final step is to draw a line (often with tape) across all the stories to divide them into releases/sprints.

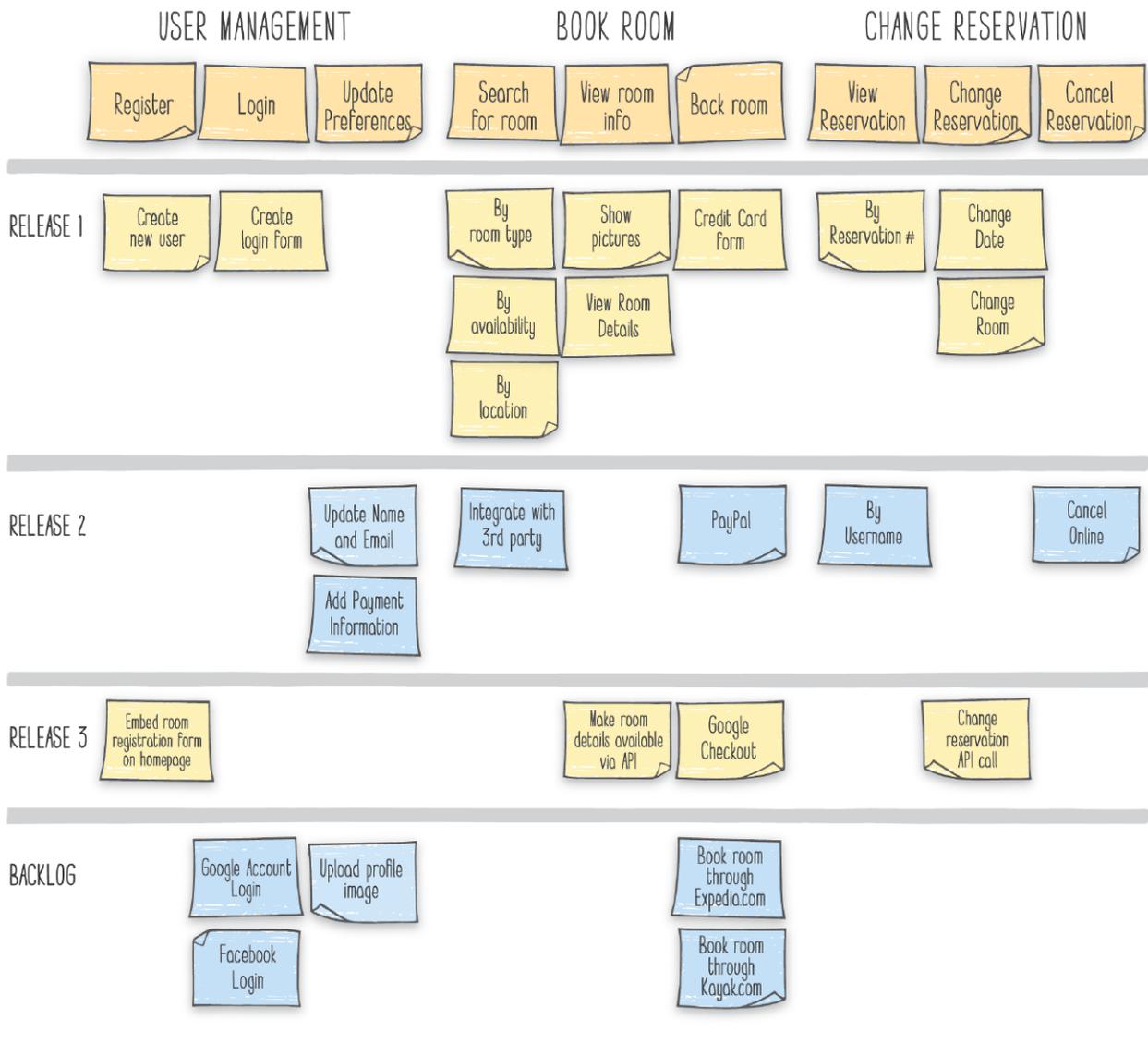


FIG. 11 — Story Mapping Example (book a hotel room)

Buckets of Features

Balancing the effort across new features, enhancements, usability issues, and so on depends in large part on the goals of the product and organization. A new product may focus on new features, while a mature product may be focused on improving the experience for a new market.

In addition to creating themes, you can use a Buckets of Features model to allocate by percentages or some other weighting across buckets such as:

- Core feature enhancements
- New features that are requested by customers
- Bug fixes and UI improvements
- New innovative features (customer delighters)
- Internal initiatives

Paying Special Attention to “Level of Effort” in Your Prioritization Strategy

In the previous section, we briefly discussed the importance of factoring in the level of effort that each new feature or initiative will require, and that this should inform your overall roadmap strategy.

For our pre-roadmap planning stage, we can broadly think of the “level of effort” required for adding a new initiative as all of the costs required — to your team, to your business, and even to your customers — to bring that initiative to fruition. That includes the time to implement, level of expertise required, monetary cost and — perhaps most important — the opportunity cost of not being able to implement something else.

This is why the first suggested method we listed above for weighing an item was to create a Value versus Complexity matrix, and then to augment the details of this matrix by adding a Weighted Scoring system that you can apply to each item.

The reason this is worth calling out here is that it is easy to forget that none of your possible features or other initiatives can be added in a vacuum — they will all consume some of your organization’s limited resources and edge out some competing initiative. You have to weigh each feature addition or bug fix for its value to the product as well as the business. But you must also consider the implementation cost against every other possible initiative.

If a colleague tells you, “This feature add won’t take long,” that’s not enough information to add it to the roadmap, even if it seems like a useful feature. You need context, the full picture. You need to understand what adding this feature will mean in terms of all other jobs you’re weighing for inclusion in the roadmap. You also need to know how many other “won’t take long” features are also on the list. They add up.

At this pre-planning stage of roadmap prioritization, we recommend grouping each item on your list into broad categories — such as “big undertaking,” “medium effort,” or “simple task.” Or use the more standard T-shirt sizing we mentioned earlier, and group items into “small,” “medium,” or “large” buckets.

Then you can take a step back and view all of your possible initiatives in relationship to each other. With this higher-level perspective, you’ll be in a much better position to make intelligent decisions about which initiatives to include, which to exclude, and how to prioritize those that make the roadmap list.

“Often the magic is in what you leave out.”

— Steve Jobs

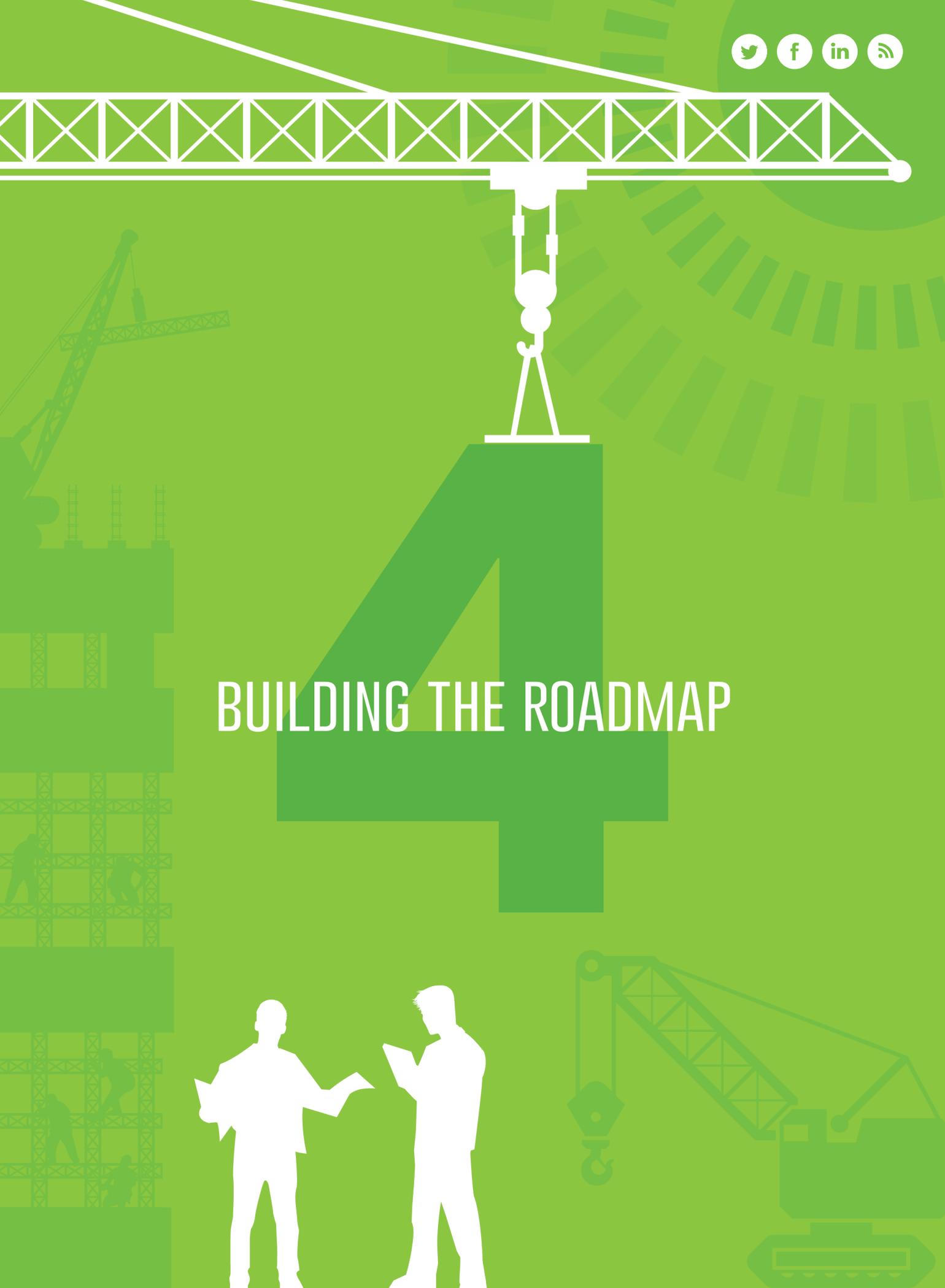
Saying No

Great product managers say no (and they say it a lot). Strategic product planning is as much about what you decide to keep out of your product as what you put in.

Stakeholders inside and outside your company will be continually asking for more features. And while sometimes those features will be legitimate and logical, often they’re the result of another agenda — one that runs counter to the product vision and your company’s strategic goals.

You’ll get feature requests that seem like easy wins, but these features cumulatively add up to “product debt” that needs to be managed. In other words, each feature requires not only development, but overhead in quality assurance, operations, documentation and many other areas of your organization. You’ll also be faced with requests from the sales team to close a deal or perhaps follow through on a commitment that was made to a customer. Or perhaps the request is the pet idea of a particularly strong-willed stakeholder.

There are really only a few legitimate reasons to include an item in your product roadmap, and the primary one is that it aligns with and supports your product or company’s strategic goals.



BUILDING THE ROADMAP



Building Your Roadmap

Once you've settled on your product vision and prioritized all your initiatives, it is time to start building your roadmap. Like with any other craft, before you jump in and start chiselling out your roadmap, it is important to familiarize yourself with the different tools available. But before we discuss the different options at hand, let's take a brief look at how product managers are building roadmaps today.

How Product Managers Roadmap Today

In our 2015 product roadmap survey, we asked hundreds of product managers to share their perspectives, goals and challenges of product roadmaps with us.

According to our survey, the primary objective of most roadmaps is to communicate the product strategy. A secondary objective is to help plan and prioritize. Coincidentally, the top challenges also match the top objectives. Product managers struggle with communicating product strategy and prioritizing.

The top issues with managing roadmaps are the amount of time they take to update and that they are not visually compelling. Most roadmaps are updated monthly or weekly and are executive facing. Despite new tools on the market, most product managers still use presentation software, spreadsheets, and wikis to manage their roadmaps.

When we moderated a panel discussion at a product management trade show, our panel of product managers echoed that exact same challenge: It's hard to engage your audience with the same old PowerPoint® template.

Executives want regular updates on the changing product strategy but are faced with inconsistent (or non-existent) roadmaps from the product team. In our conversations with product managers we have heard consistently:

- Spreadsheets are great for organizing and prioritizing, but bad for communicating a vision.
- Presentations take time to produce and are static documents that are hard to share.
- Wikis and other documents are disjointed and hard to keep updated.

- Getting company alignment is an uphill battle.
- There is rarely a single source of roadmap truth.

In most organizations the development tools are too granular for the big-picture strategic discussion that needs to happen. In addition, most tools are “bottom up” — they assume you already know what you want to accomplish.

Roadmap Tool Satisfaction:

“Only 13% of b-to-b product managers indicate they are very satisfied with the tool they use for documenting and communicating their product roadmaps and only 15% are very satisfied with the tool they use for managing product requirements.”

Source: The 2015 SiriusDecisions Field Guide to Product Planning, Prioritization and Roadmapping Applications

The Importance of a Visual Roadmap

You’ve planned your product strategy, and now you’re ready to present your proposed roadmap to the team. You begin to review your spreadsheet outlining how your roadmap will be a needle-mover for the company. Surely everyone can look past the rows of text in 8-point font and see the genius of your strategy, right? Maybe. We have all heard that people respond better to visual information rather than plain text. Yet most roadmaps are mired in spreadsheets and text-packed presentations.

As a product manager, one of your key jobs is to be an evangelist for the product. A high-level visual presentation is a powerful way to help get buy-in on your strategy.

In fact, some product teams care so much about creating the right impression that they spend hours crafting a beautiful product roadmap presentation. We regularly hear stories about how much the presentation matters. For example:

- The VP of Product who had a designer use Adobe Illustrator to create their product roadmap document. (Unfortunately, the designer needed to be involved in every change).

- The product team who asked the marketing department to create their roadmap — the document was so beautiful they continued to use it even after the roadmap was outdated!
- The product owner who spent hours each month re-formatting and color-coding an Excel® spreadsheet to convey how the roadmap tied to the strategy.

These teams understood the value of the visual — so much in fact that they spent an inordinate amount of time and resources getting the presentation right.

But in today's agile world, there isn't time to hassle with updating a graphic, PowerPoint® deck or spreadsheet every time the roadmap is re-prioritized or your executives want to review it.

Whether you use PowerPoint, a product roadmap template or product roadmap software, here are a few suggestions for creating a roadmap document with impact.

- **Use color.** Color is a great way to represent how your roadmap ties to the product vision or strategic objectives. Color-code each item on your roadmap to help people make the connection between each initiative and how it fits into the big picture.
- **Use large fonts.** People have a limited amount of time to digest your strategy, so use large fonts, especially if you are presenting your roadmap on a projector or in an online meeting. Think of your roadmap very much like a presentation and you'll be ahead of the game.
- **Keep it high level.** Remember that you are telling a story about how your strategy fits with the product vision. So tell the story in big, bold strokes rather than diving into the details. If you can, create logical groupings of initiatives to make the roadmap easier to grasp.

The Collaborative Roadmap

Like all things in life, roadmaps are better when shared. Free your roadmap from that PowerPoint file that is stored deep in your laptop, and use a solution that allows you to move things around together with your teammates in real time.

Building a roadmap often has to be a fluid conversation — a compromise among different priorities. A common way to collaborate during the build phase is to enable each stakeholder to lead their own initiatives within their respective areas.

Let's assume you are a product manager for a large software company. You could have a roadmap that shows all your User Interface (UI) initiatives; another roadmap could

focus on all your Application Programming Interface (API) projects; and still another roadmap could be driven by your architects, outlining your overall software strategy.

As a product manager, you have to stay in the picture on all those initiatives. But you can't be an expert in or even own all those areas. It is your job, however, to set priorities. In order to understand the big picture, you need to be able to roll up all of those individual roadmaps into one portfolio plan and distill an easy-to-understand picture for the executive team to earn their buy-in.

How Often to Update the Roadmap

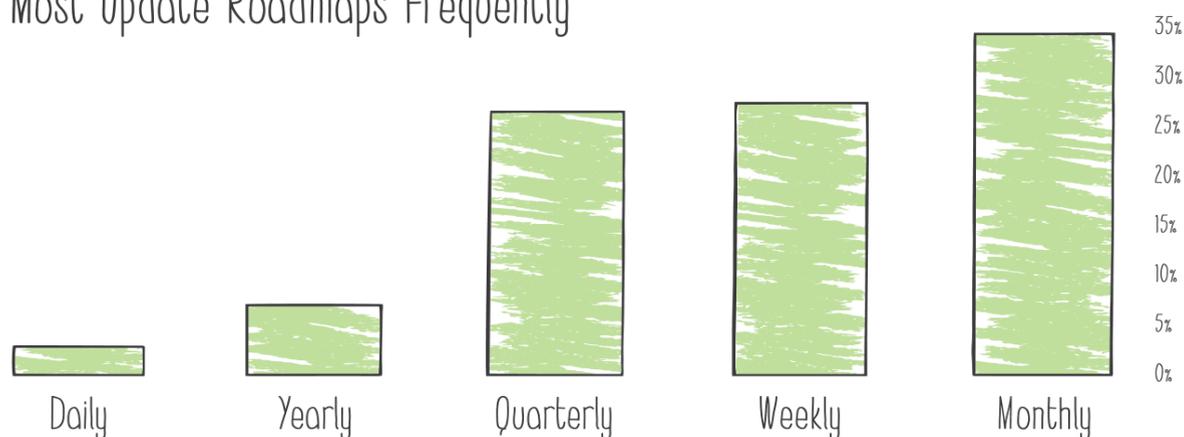
A product roadmap is a high-level strategic document that reflects your long-term product vision. But a roadmap does not need to be set in stone. You have to be able to update your roadmap frequently, if you need to adjust your direction.

In an agile world, you can no longer predict what's going to happen years out. The reality is that you need to rapidly adjust to market changes, customer requirements, stakeholder needs, and other influences. Therefore your roadmap needs to be a living document and allow for changes.

How often you change your roadmap depends on how many details you include on your roadmap as well as the timeframe for the roadmap. For example, if your roadmap tends to be long-term (more than 12 months) and is at a higher strategic level, it may not change as frequently as a short-term roadmap with detailed features.

Our 2015 product roadmap survey revealed that most product managers change their roadmaps monthly or even weekly.

Most Update Roadmaps Frequently



Product Roadmap Survey Results | ProductPlan

FIG. 12 — Most product managers update their roadmaps monthly or even weekly.

Three Popular Roadmap Styles

The first step in building a roadmap is selecting the appropriate style. Thousands of roadmaps have been built with ProductPlan, putting us in a unique position to comment on various formats. Even though the roadmap style permutations are endless, we see the following three styles most commonly: Timeline, Roadmap without Dates and Kanban. In this chapter, we will explain when and where these styles make sense and what some of the advantages and shortcomings are of each roadmap type.

Timeline

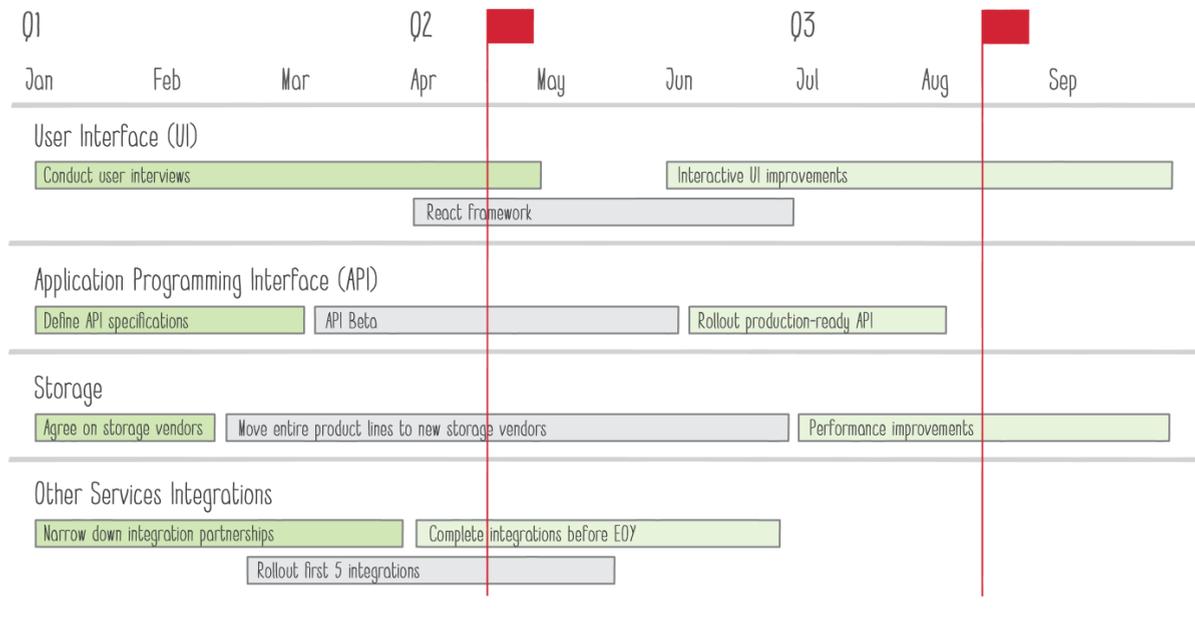


FIG. 13 — Timeline-Based Roadmap Style

Every product manager has heard this question before: “What are you doing and when will it be done?” If your CEO asks you this question, a timeline-based roadmap can be a great tool for you and help you to respond to that question.

A timeline-based roadmap, illustrated in Figure 13, shows your initiatives relative to each other in the context of time. It visually communicates how long you intend to focus on certain initiatives and when you plan to complete them. Typically, you arrange your initiatives in a bar chart on a grid that represents a specific timeframe.

Although there might be dates on your roadmap, from a product management standpoint it is often a good practice to keep your dates high-level and not too specific. For example, show initiatives spanning a few months without designating exact start and end dates. You need to manage expectations with stakeholders, and the more specific the timeline, the more you are setting expectations for delivery of specific dates and capabilities.

Timeline-based roadmaps are great to visualize product schedules among the different tasks at hand. However, a common pitfall for timeline-based roadmaps is to focus on deadlines rather than emphasizing strategic priorities.

Roadmap Without Dates

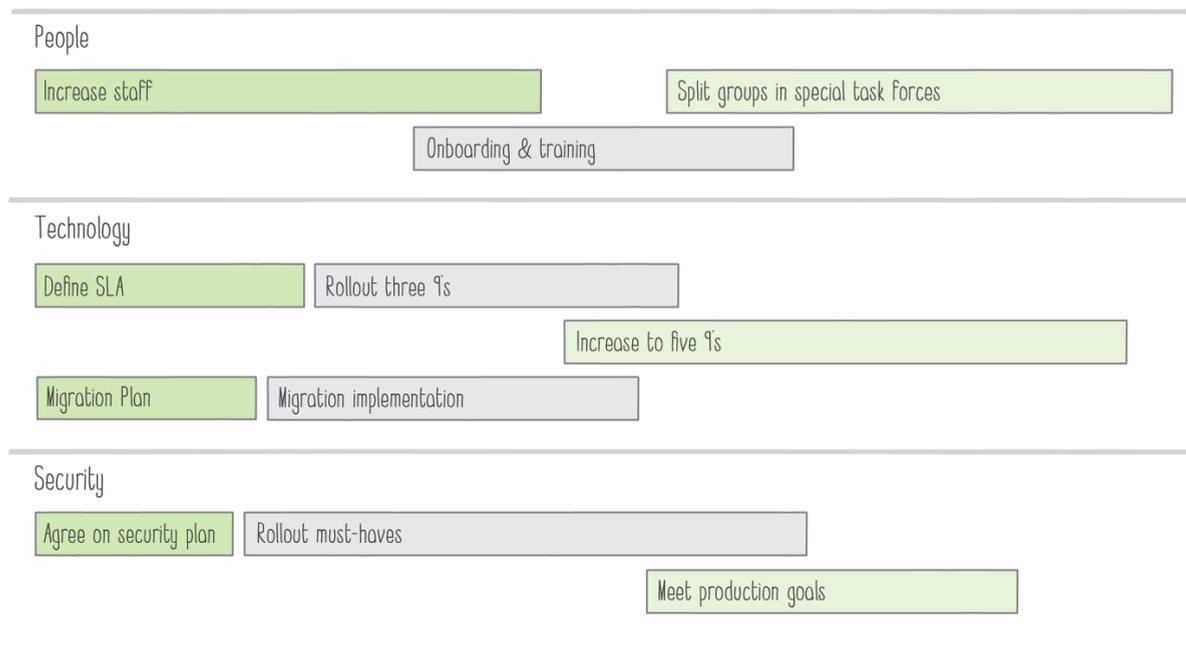


FIG. 14 — Roadmap Without Dates

Keeping in mind the saying, “It’s not the destination but the journey,” removing date constrictions from your roadmaps allows you to better focus on modeling the process — how you can achieve your end goal. While there are a lot of commonalities between timeline-based roadmaps and roadmaps without dates, the important differentiator here, as you can see from Figure 14, is that you do not associate any dates with your initiatives.

You can group similar items together in the same swimlane to better emphasize related initiatives. The length of each initiative, depicted as bars in the example roadmap above, could represent their strategic importance or rough effort level. Even though you don’t need to commit to a specific deadline, a roadmap without dates still allows you to order all involved initiatives sequentially. You can model the process based on what must get done first, and put your initiatives in context with everything else going on.

Kanban

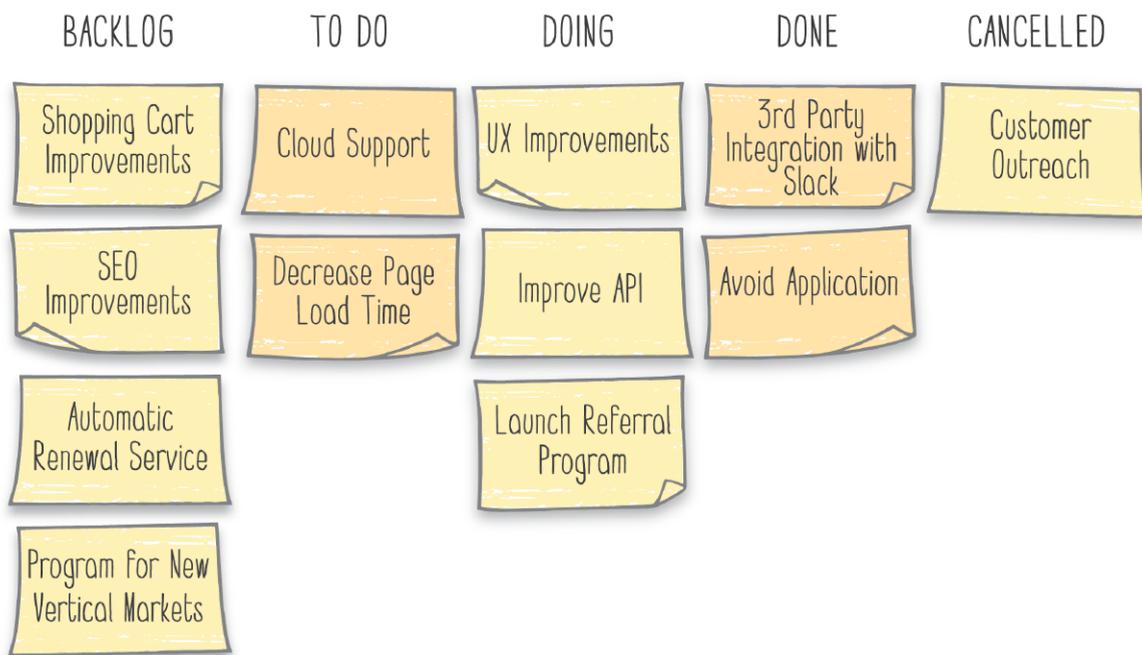


FIG. 15 — Kanban-Style Roadmap

Kanban is a project management framework that got its start in “just in time” manufacturing. It’s now frequently used to show a roadmap, priorities and progress. By matching the amount of work in progress (WIP) to the team’s capacity, kanban gives teams more flexible planning options, faster output, clear focus and transparency throughout the development cycle.

A key tenet of kanban is to limit the amount of work in progress, because WIP limits can highlight bottlenecks and backups in the team’s process due to lack of focus, people or skill sets.

For a kanban-style roadmap, like the one in Figure 15, you want to show stakeholders the status and priorities for each stage of your development. For example:

- Approved
- Validated
- Ready for Estimation
- In Progress
- Ready

Roadmap Examples

Now that we talked about different roadmap styles and highlighted some of their elements, let's outline a few specific roadmap examples that hopefully spark some ideas to get you started.

The style and timeframe that you use depends on your audience — the roadmap you build for your executive team will be very different from the one you build for engineering. For example, the executive team will want to see a longer time horizon and the initiatives at a higher level, with less detail. The engineering team might want to see initiatives on a shorter-time horizon with a greater level of detail.

Note that this list is not exhaustive — you can use combinations from each style or example to craft a roadmap that is ideal for your audience, product and organization.

Example Product Management Roadmaps

As roadmaps are to the product manager what a hammer and chisel are to a carpenter, let's illustrate three common roadmap examples for product managers first. Because these product roadmaps are often executive and stakeholder facing, they might be on a longer time horizon and will show initiatives with less detail. They often tie back to the strategic initiatives, because this is what these stakeholders value.

Single Product Roadmap

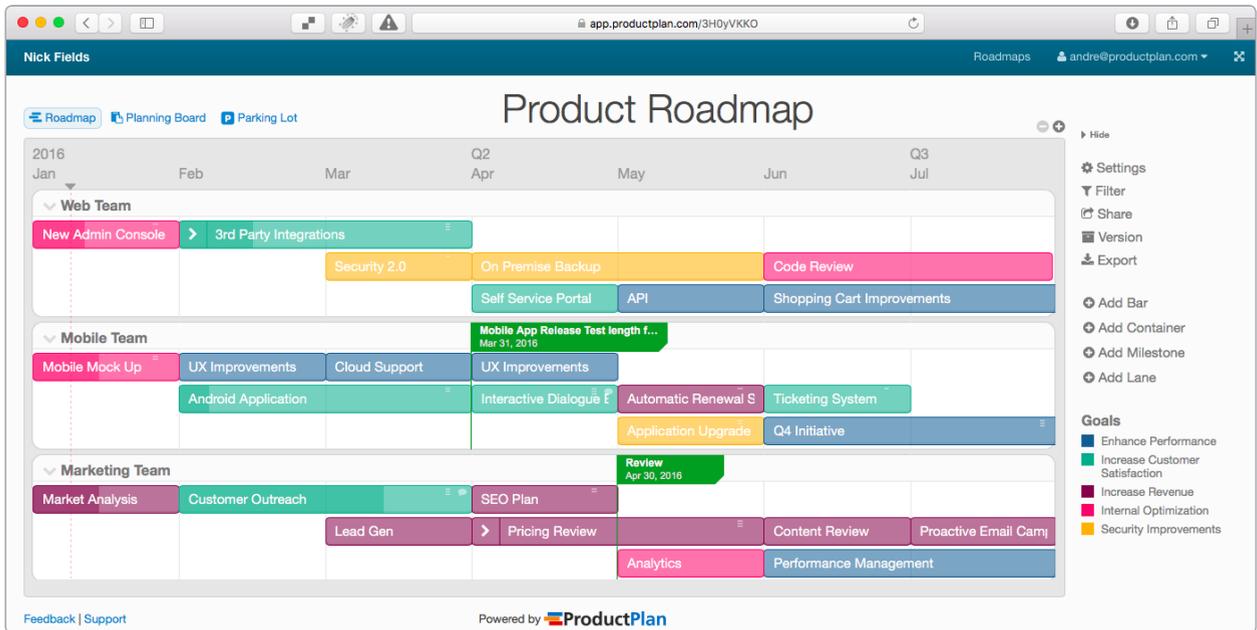


FIG. 16 — Single Product Roadmap Example

If you're a product manager responsible for one specific product, this is the roadmap for you. The example roadmap shown in Figure 16 is a timeline-based roadmap that communicates the status of the different initiatives for your product in relationship to all the other efforts going on concurrently.

Let's assume you're a product manager at a large software company. One way we've seen our customers categorize their roadmaps is by grouping different initiatives for each of the functional areas together in different swimlanes.

For example, if you have a web application as well as a mobile application for your software, you could slice your roadmap that way. Each of the individual initiatives across all functional groups are often color-coded in order to be correlated back to the company's overall strategic goals.

Single Product Roadmap:

- Time Horizon: Long-term
- Example Swimlane Grouping: Teams
- Level of Granularity: High-level
- Example Legend: Company Goals

Multiple Product Roadmap

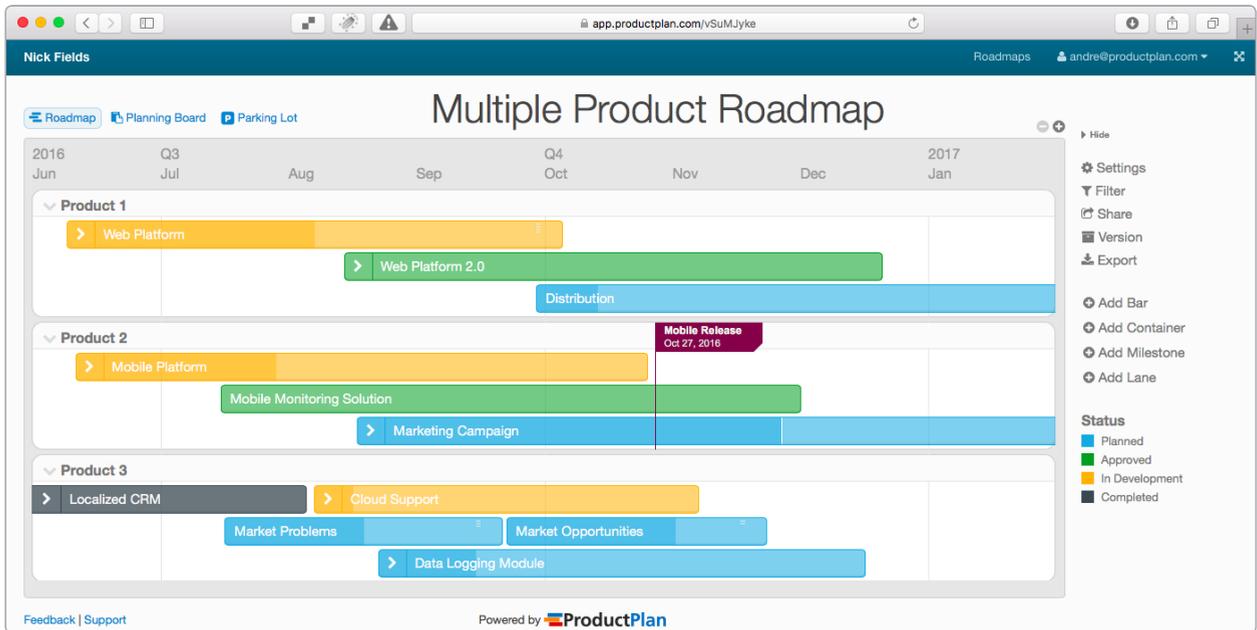


FIG. 17 — Multiple Product Roadmap Example

Another common example is one roadmap to coordinate efforts among the different products or initiatives in your company’s portfolio. A roadmap that visualizes multiple products is a great communication tool for organizations with a single product manager responsible for multiple products or product categories.

For example, a startup with multiple initiatives happening simultaneously will likely incorporate it all into one roadmap. This single roadmap is easy to share and communicate with stakeholders. In this example (see Figure 17), each product has its own swimlane. The colors symbolize the status of each initiative. The time horizon in this example is one year.

Multiple Product Roadmap:

- Time Horizon: Long-term
- Example Swimlane Grouping: Products
- Level of Granularity: High-level
- Example Legend: Project Status

Agile/Sprint Roadmap

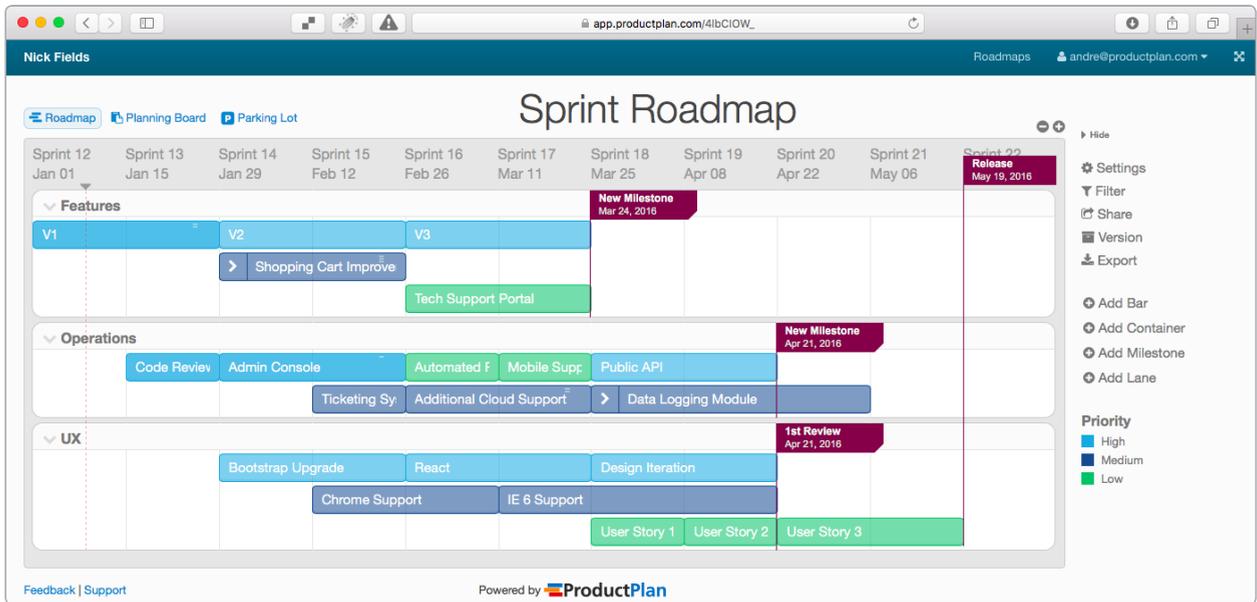


FIG. 18 — Agile/Sprint Roadmap Example

Even though development teams have project management software to track their backlog, agile teams still require a roadmap to show the direction of the product. This is a living roadmap. Agile companies need to strike the right balance in their roadmaps between long-term vision and short-term execution. You need to be able to adjust your course and respond to feedback or change your roadmap quickly.

The example shown in Figure 18 is a timeline-based roadmap across a shorter time-horizon that shows sprints as time markers. It is not unusual for some features to span across multiple sprints. The colors can represent teams or status. For features that span across multiple sprints, you can use milestones to visualize each release.

Agile/Sprint Roadmap:

- Time Horizon: Short-term
- Example Swimlane Grouping: Application Categories/Teams
- Level of Granularity: High-level
- Example Legend: Priority/Status/Teams

Example Technology Roadmaps

Besides product management, another common use of roadmaps is for strategic technology initiatives. These roadmaps are often for an internal stakeholder audience, partners, or enterprise customers.

Technology Roadmap

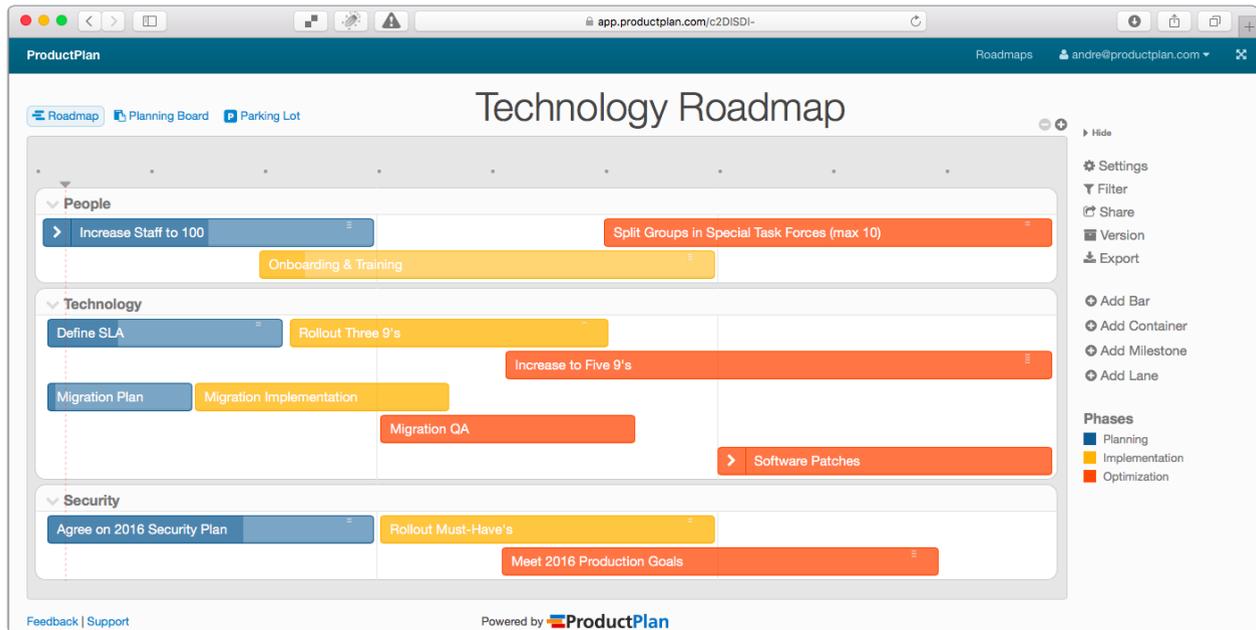


FIG. 19 — Technology Roadmap Example

You can use a technology roadmap to plan out strategic initiatives for the year, such as migrating different software systems, or rolling out software updates. The audience for a technology roadmap will often be stakeholders looking to the IT team for delivering internal-facing systems and solutions. The technology roadmap may also be shared with partners and vendors who rely on integrations and other technology from the organization.

In the example illustrated in Figure 19, the roadmap is divided into three different categories: People, Technology and Security. The colors indicate the status of each initiative. The roadmap can have a time horizon such as the next year, or have no dates if it's important not to communicate timeframes.

Technology Roadmap:

- Time Horizon: Long-term
- Example Swimlane Grouping: Functional Areas
- Level of Granularity: High-level
- Example Legend: Project Status

Architecture Roadmap

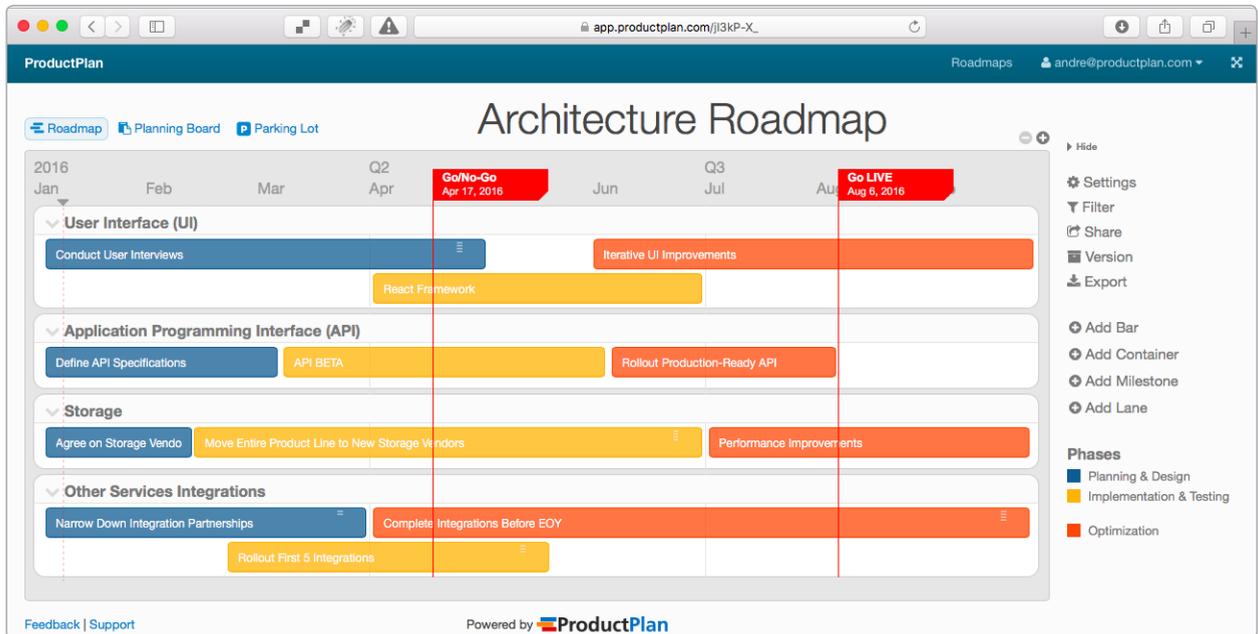


FIG. 20 — Architecture Roadmap Example

In many software companies, the software architect is tasked to build a solid foundation that becomes the backbone of the company's products. Common architectural roadmap components are the Application Programming Interface (API), User Interface (UI), Storage and third-party services integrations.

These platform components are often part of other product roadmaps in the organization because features may rely on them.

In the example shown in Figure 20, the roadmap is color-coded based on project status: Planning & Design, Implementation & Testing, Optimization. It is common that the timeframe for an Architecture Roadmap is long-term.

Architecture Roadmap:

- Time Horizon: Long-term
- Example Swimlane Grouping: Application Components
- Level of Granularity: High-level
- Example Legend: Phase

Enterprise IT Roadmap

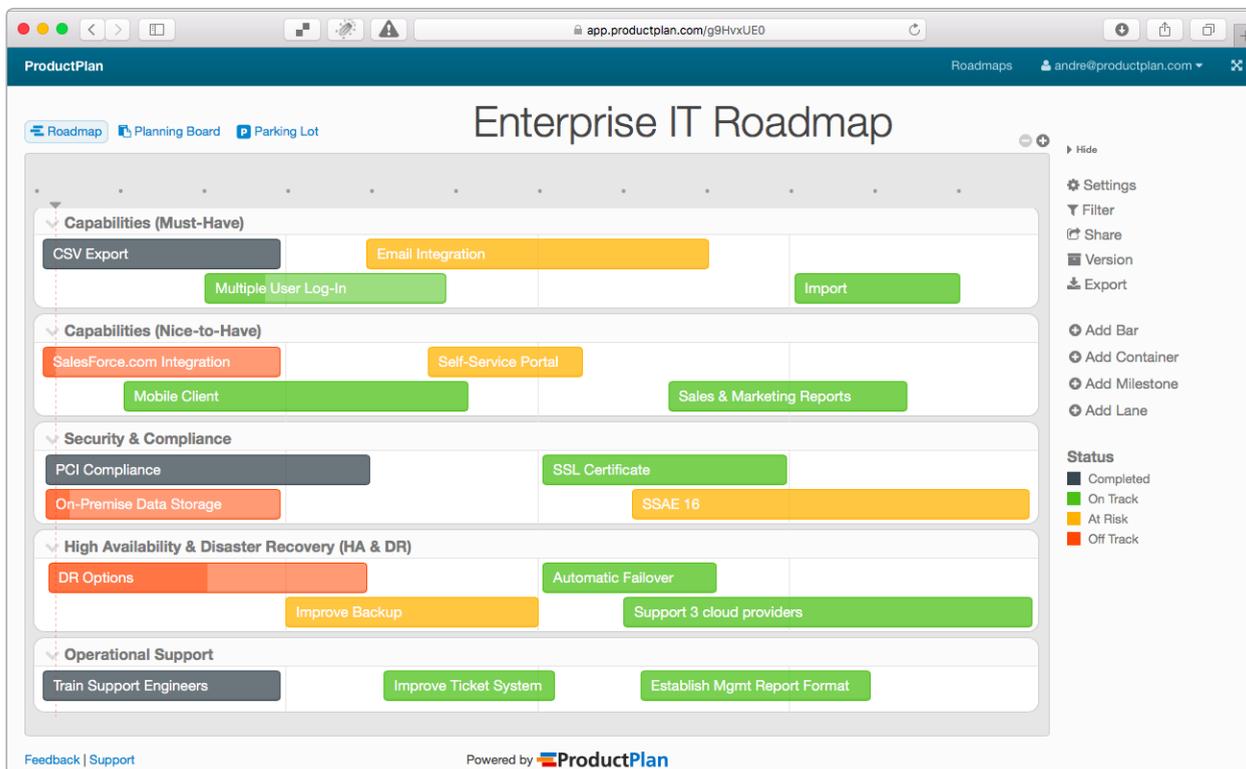


FIG. 21 — Enterprise IT Roadmap Example

It is not unusual for large enterprises to lose sight of all the important initiatives going on. An enterprise IT roadmap allows you to visualize your strategic initiatives. The audience for an enterprise IT roadmap will often be internal stakeholders looking to the IT team for delivering internal-facing systems, security, and other solutions.

In the example illustrated in Figure 21, the roadmap outlines capabilities based on their strategic importance. Those could be grouped, for example, by security and compliance initiatives, High Availability & Disaster Recovery (HA & DR), as well as operational support tasks. The timeframe for these strategic roadmaps is longer, often 12-18 months.

Enterprise IT Roadmap:

- Time Horizon: 12-18 Months
- Example Swimlane Grouping: Functional Areas
- Level of Granularity: High-level
- Example Legend: Project Status

Example Marketing Roadmaps

Marketing strategy is another category we commonly see represented in roadmaps. The marketing roadmap use cases include marketing plans, product launch plans, content calendars and marketing-program-based roadmaps.

Marketing Plan

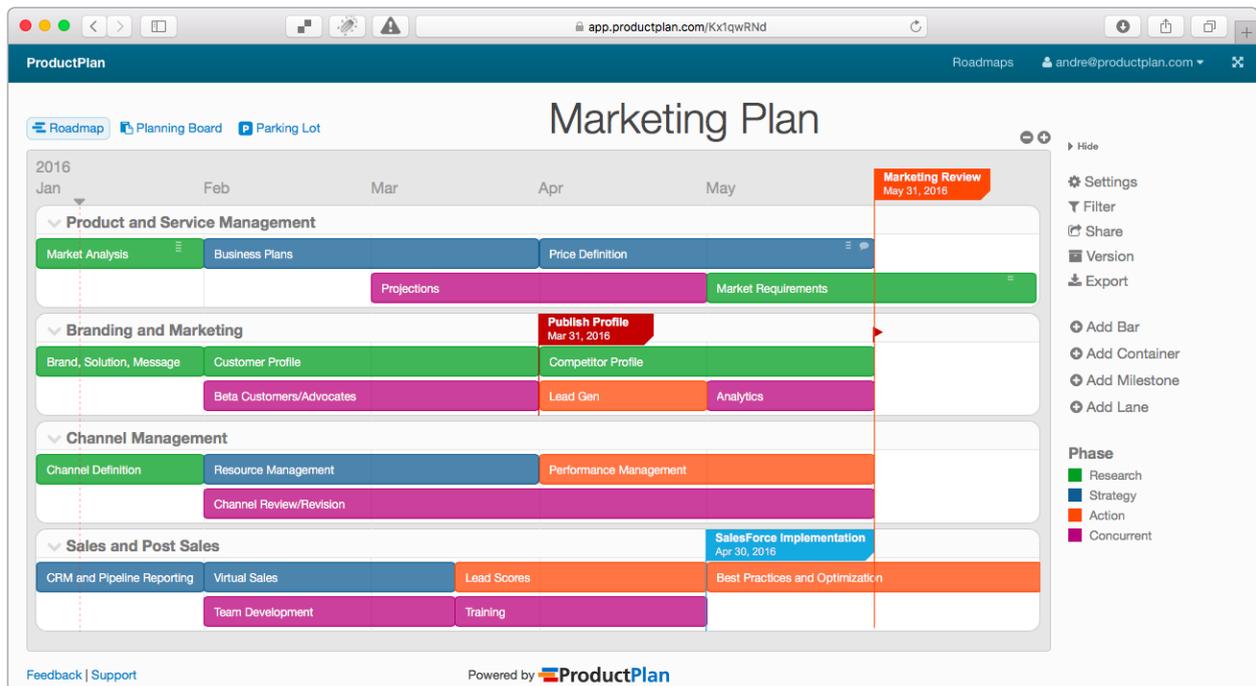


FIG. 22 — Marketing Plan Example

A marketing plan is a blueprint that outlines your marketing strategy and efforts. For example, your marketing plan can outline your company's positioning and messaging, your digital marketing programs, or your sales strategy.

Visualizing your marketing plan in a roadmap provides you with a structured overview of all your marketing initiatives. In this example, the roadmap is organized by the type of initiative and color-coded by the owner of the initiative. Milestones indicate specific goals.

Marketing Plan Roadmap:

- Time Horizon: Less than 6 Months
- Example Swimlane Grouping: Project
- Level of Granularity: High-level
- Example Legend: Project Phase

Product Launch Plan

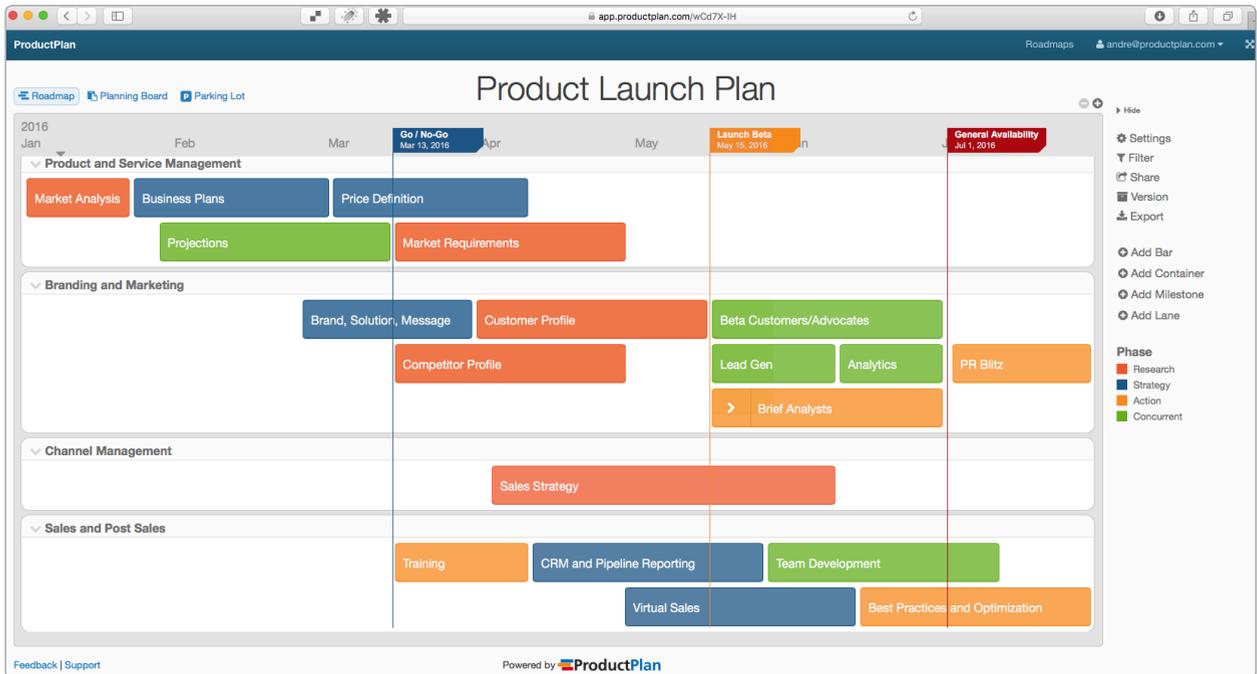


FIG. 23 — Product Launch Roadmap Example

When launching a new product, you need to make sure that all your initiatives are in sync and that all team members know when they need to complete an initiative that they are driving. Often a product launch roadmap is managed by product marketing to coordinate efforts across different teams.

A product launch plan usually is a timeline-based roadmap that clearly communicates the deliverables in relation to time. This example roadmap is organized by the type of initiative (e.g. branding and channel management). The time horizon is six months, and the colors represent the phase of the initiative.

Project Launch Roadmap:

- Time Horizon: Less than 6 Months
- Example Swimlane Grouping: Teams
- Level of Granularity: High-level
- Example Legend: Phase

Digital Marketing Roadmap

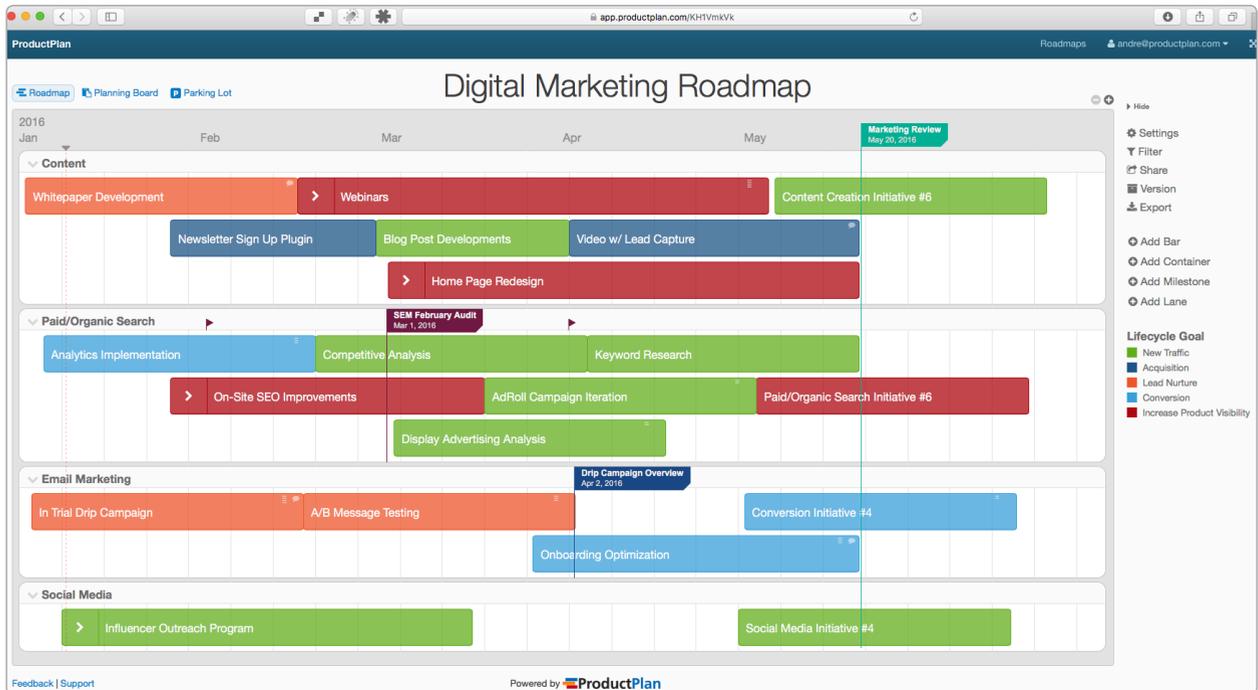


FIG. 24 — Digital Marketing Roadmap Example

Our last roadmap example is a digital marketing roadmap. Probably even more important than the specifics of an individual campaign is the right marketing mix. A digital marketing roadmap allows your program managers to better coordinate all the efforts across different marketing channels.

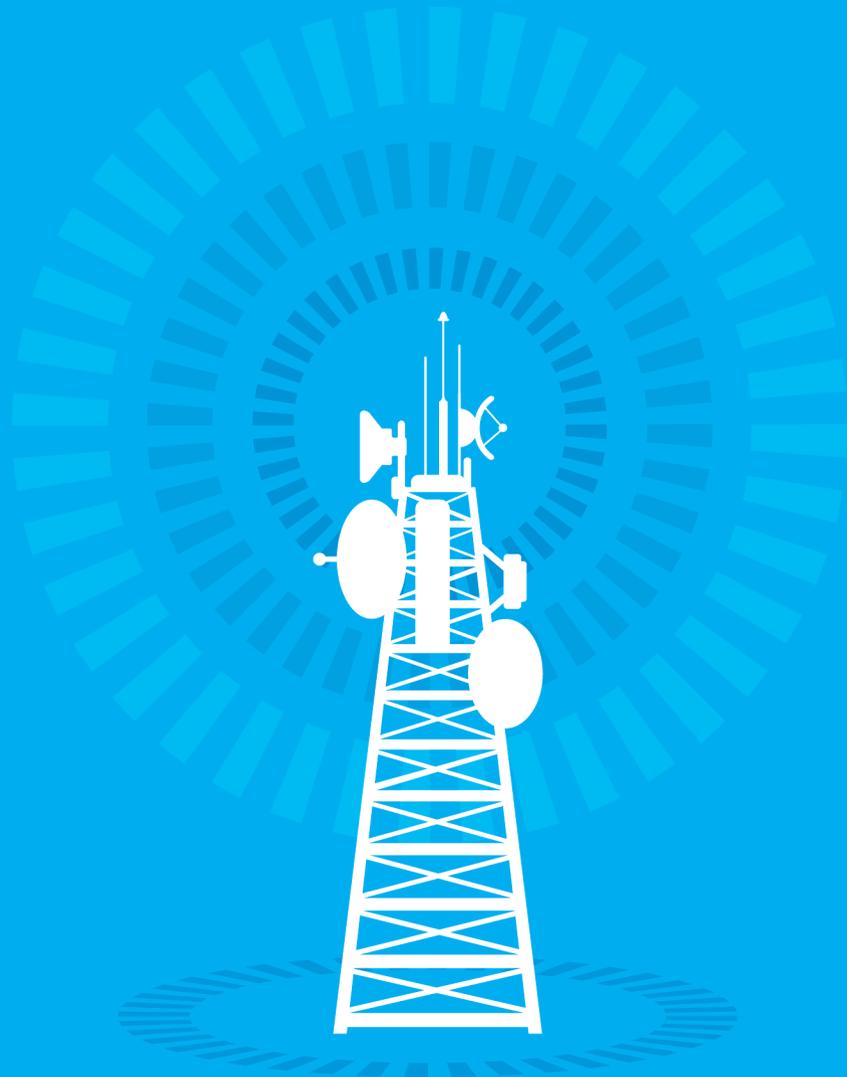
The digital marketing roadmap shown in Figure 24 visualizes your content marketing initiatives, your paid and organic search efforts, your email marketing campaigns, as well as your social media strategy. Each of the efforts will be categorized based on their stage in the marketing funnel.

Digital Marketing Roadmap:

- Time Horizon: Near-term
- Example Swimlane Grouping: Marketing Programs
- Level of Granularity: Detailed
- Example Legend: Stage



COMMUNICATING THE ROADMAP



Communicating Your Roadmap

In today's agile world, communicating your product strategy is not an isolated phase of the product lifecycle. As you can see from Figure 25, it's not as if you move neatly from creating your roadmap to sharing your roadmap to executing your plans — the process is iterative, and communication is part of every step.

Successful product managers are constantly monitoring feedback from several different channels (see Chapter 3). That said, you can't change your plans too often, or you'll ship a clunky product with no overarching vision. And you can't listen to everyone all the time, or you'll end up with too many cooks in the kitchen.

So who should you talk to, when, and what should you be talking about? This chapter covers how to communicate with stakeholders at each stage of the product lifecycle, as well as how to secure stakeholder buy-in on your roadmaps and avoid common communication pitfalls.

Communicate With Stakeholders Throughout the Process

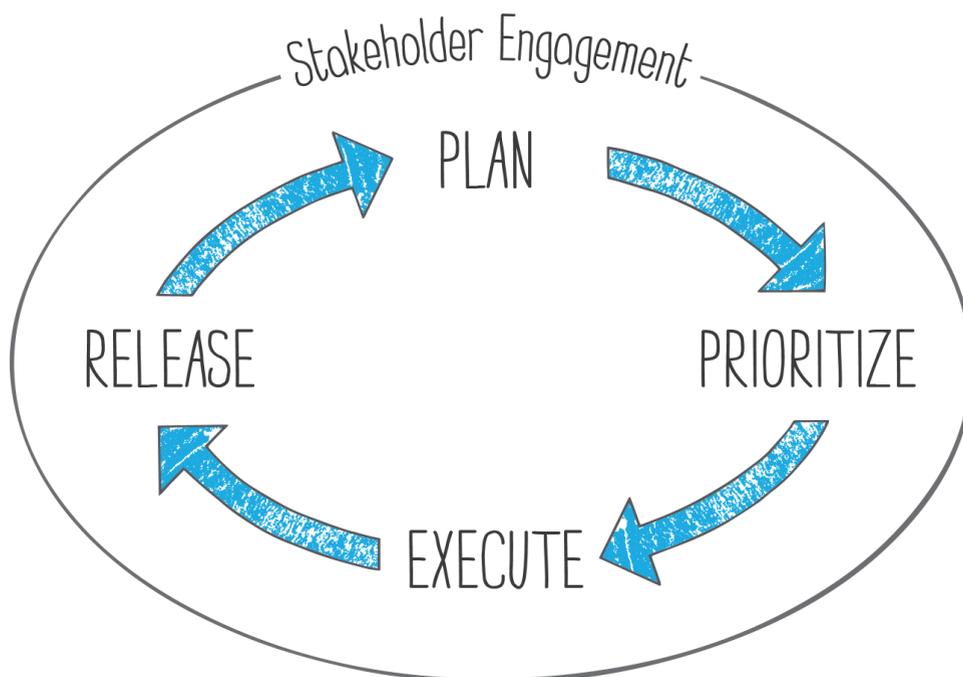


FIG. 25 — Communicate your roadmap to stakeholders iteratively.

Planning

As we mentioned in Chapter 3, it's important to work closely with your executives to understand where you're headed with your product strategy. Develop a clear product vision and identify the strategic goals that are most important to your organization — your metrics might be based around revenue growth, customer acquisition, reducing churn, etc. (see Chapter 2). If you and your stakeholders can agree upfront on vision and strategic goals, there will be less confusion about product priorities later on.

Use a high-level roadmap to talk your executives through a handful of themes that you've identified as most important for your upcoming planning period. How far out you plan will depend on your industry, company size and culture.

Make sure each theme on the roadmap fits with your product vision and relates back to a strategic goal. For example, if you are a software company and one of your themes is re-designing your mobile app, your reasoning should not be that it looks ugly or that it hasn't been updated in awhile. Instead, you want to be able to communicate to executives how the re-design will improve customer satisfaction, reduce churn, or otherwise contribute to your strategic goals.

At this stage in the planning process, avoid prioritizing discrete features or committing to specific deadlines. You might find it most effective to use a roadmap without dates, so the conversation stays at the strategic level. It's too easy to lose sight of your strategic vision when your executives are stuck prioritizing a laundry list of feature requests. Instead, organize potential features or updates into buckets that represent themes — you can move things in and out of a theme as necessary, but the theme itself remains intact.

Prioritization

As we discussed in Chapter 3, after you've agreed on your strategic goals and identified a set of themes that will help you achieve them, you can start prioritizing specific initiatives within those themes. This is where open communication with department heads in engineering, sales, marketing, and customer support becomes important. Discuss their top priorities and determine together how those priorities fit into your larger themes and strategic goals.

Working With Stakeholders to Prioritize

“As a product manager, you have to get cross-functional buy-in. I’ve been challenged by other departments. You have to get everyone in a room, and ask them what their top priorities are. You have to rank it, scorecard it, whatever it takes, and you’ve got to hold them to it.”

— Paul Niefeldt, Product Manager, Gentex

If you can involve your stakeholders in the prioritization process, they are much more likely to be on your side. Use a structured thought process to evaluate potential initiatives, such as the Effort versus Value model (see Chapter 3). The prioritization technique you use is ultimately less important than the conversation you have.

Product managers often ask us how to handle stakeholders who question why particular projects are being pursued over others. In our experience, the root cause of confusion about product direction tends to be a lack of transparency about how initiatives are prioritized. You can stand your ground by walking stakeholders through your thinking process.

Execution

Once you have prioritized initiatives to reflect your strategic goals and reached a consensus among key stakeholders as to what will be included on the roadmap, it’s time to translate product vision into actionable steps. The roadmap you use now must become more detailed. You’ll want to allocate resources for each initiative, assign ownership of initiatives to different team members, and designate release dates.

Make sure each team within the engineering department knows what they are working on, and understands how their projects contribute to the bigger picture. You might find it easiest to create custom roadmaps for technical audiences that are more granular than those used at higher levels of the organization. When using multiple roadmaps, make sure the color-coding and tagging are consistent.

You might find that project management tools are best suited to this phase of the product lifecycle. However, project management tools and product management

tools are not mutually exclusive. Your developers will benefit from using project management tools, which communicate stories and tasks, in conjunction with product roadmaps, which communicate the strategic direction of the product.

Release

Once plans have been determined and engineers have been set in motion, it's important to make sure all parties in your organization are on the same page. Schedule meetings with sales, marketing, customer support, etc. to explain what's coming next.

Use a high-level roadmap that communicates product direction, and be sure to exclude specific dates when presenting to customer-facing teams. The marketing team should understand the positioning of the new product or feature set so they can successfully bring it to market. And the sales team should understand how the product will solve customers' problems so they can show prospects its value.

As an organization gets very large, it becomes much more logistically challenging to include every single person from these departments, but you should involve the directors and managers so they can then pass the information onto their respective teams.

Providing self-service access to the roadmap is another way to build consensus and get stakeholders on your side. Tools like Google Drive and ProductPlan allow you to build and store roadmaps in the cloud, as opposed to emailing around slide decks or spreadsheets that might or might not be up-to-date. With self-service access, teams can check-in independently at any time and remind themselves of the current plan. This can bridge a lot of communication gaps, and it also might prevent awkward conversations with stakeholders telling you, "I didn't know we were doing that."

Strategies for Getting Stakeholder Buy-in on Your Roadmap

As a product manager, you will have to present a roadmap to different audiences. If your audience is comprised of executives, your goal will likely be to get them to buy in to your strategy or green-light your plans. If your audience is some other segment of your organization, your goal will likely be to communicate product direction and build consensus.

In either case, you need to be clear and persuasive, so stakeholders walk away understanding your strategy and agreeing with your priorities. Here are some tips:

Come Prepared

Hopefully this one is obvious, but what exactly does good preparation for presenting a roadmap look like? Creating the document alone is not enough; you should be prepared to tell a convincing story and justify why every initiative on the roadmap deserves to occupy space.

- **Structure your presentation:** Much like how you go about building a roadmap in the first place, a good presentation begins with the big picture and then narrows down into the specifics. At ProductPlan, we are big fans of the “why, how, what” framework. Start with the “why” — share your strategic goals — before jumping into a more detailed explanation of the “how” and the “what.”
- **Be concise:** If you can’t communicate your roadmap concisely, then you probably haven’t distilled a clear enough product strategy in the first place. Make the takeaways from your presentation obvious. Avoid wordy presentation slides and keep your verbal communication clear and direct.
- **Anticipate objections:** Be prepared to respond to concerns as to why some initiatives are being pursued over others. This goes back to knowing your market and using a rigorous prioritization framework. If your methods are truly robust and data-driven, (as opposed to based on your gut feeling), then you should have no problem justifying your priorities to stakeholders.
- **Provide specific examples:** Specific examples are some of the most powerful tools in your persuasive arsenal; use them liberally. Be able to describe your initiatives in terms of how they will benefit customers or relieve pain. Will a feature you’re building save customers time and money? Cite a customer interview or show data from your analytics tools as evidence.

Know Your Audience

Knowing your audience is a key principle for any type of communication, and roadmaps are no exception. Bottom-up communication, such as presenting strategic goals to executives, follows a very different protocol from top-down communication, such as presenting specific plans to developers.

- **Tailor the amount of detail shown:** In executive-facing roadmaps, focus on high-level themes and strategic goals. Your discussion should be around the market space, customer data, and potential return on investment for new projects. At lower levels of the organization, your roadmap needs to transition from theoretical to actionable. Engineering roadmaps, for example, need to communicate specific tasks, requirements and deadlines.

- **Use appropriate language:** The language you use on your roadmaps should be appropriate to those who will view it. If your audience is non-technical, use layman's terms to describe features and title initiatives; avoid jargon or buzzwords. In roadmaps that will be widely distributed, do not use acronyms or abbreviations that are not commonly known outside your industry.

Communicate Status

Roadmaps should generally communicate your high-level strategy, but when meeting with your stakeholders there is no avoiding some discussion of specific details and deadlines. Your executives will want to know the status of your current projects, how you're allocating your resources, and how the status of those projects could change if your resources were allocated differently. The reality is that your stakeholders want to see new features released and will be eager to know how close you are to getting there.

A lot of questions around resource allocation and how to track the progress of specific tasks fall under the umbrella of project management rather than product management. However, your roadmap has an important role to play in sparking scenario-planning discussions that will ultimately help you refine your strategy. A high-level roadmap also serves as an important springboard for defining stories and setting precise release dates within your project management platform.

- **Include the “percent complete” for each initiative on your roadmap:** Without diving too deep into the details, include the high-level completion status of each initiative on your roadmap. For example, perhaps the re-design of your billing page is 60% complete and the launch of your new account management system is 30% complete. By providing this information on the roadmap, you may spark important conversations around how the initiatives are dependent on each other and what can be done to move around resources or reprioritize projects in order to push them along. As necessary you will dig in deeper and walk your stakeholders through the specifics, but this should not be the starting point of your discussion.
- **Filter your initiatives by status:** Another common approach is to use a tagging or color-coding system to layer in information about the status of each initiative without cluttering your roadmap. For example, you may choose to distinguish planned, approved, in-development and completed initiatives from each other through color schemes or tags. You may also find it helpful to filter your roadmaps along these parameters, creating distinct views based on completion status so your stakeholders can clearly understand where everything stands.

- **Archive older versions of the roadmap:** Finally, be sure to save early versions of your roadmap as well as roadmaps from years past. By creating an archive of old roadmaps, you can easily track which initiatives have been completed, delayed, pushed back or canceled. You can also use this database to analyze how your strategy has changed over time, and if anything goes wrong, you will be better able to identify and correct for the decisions that led you off-course.

Utilize Visuals

People remember only a small percentage of what they hear, so visual aids are crucial to keeping your audience's attention and ensuring your key points stick in their memory. Your visuals should supplement and clarify what you say verbally, not present new information. Avoid putting up wordy or complicated slides — they compete for attention and detract from the speaker.

- **Use words sparingly:** Stick to short titles and descriptions for initiatives, and make sure they're big and easily legible. Remember, the more text you add, the less likely things are to be read.
- **Incorporate color schemes:** Use color schemes to show how initiatives relate to one another and to larger strategic goals. Include a legend so people can easily see what colors represent, and be sure to choose colors that are different enough to stand out from one another.
- **Show the hierarchy of initiatives visually:** Do a certain cluster of updates fall within a particular theme? Are some initiatives part of one release and other initiatives part of another release? Plot these relationships visually by grouping initiatives into containers or swimlanes.

Common Communication Pitfalls

Letting Sales Drive the Conversation

It can be tempting to make product decisions based on the latest sales prospect or the latest lost sale, but this is not a strategic approach. Your prospects might not know your business goals, your product vision or your positioning in the market.

If you went around building everything customers requested, you would have a clunky collection of features with no clear direction. Keep in mind that each additional feature you build dilutes your product's core function and complicates your positioning.

Focusing exclusively on requests from sales prospects is a short-sighted approach; successful companies think strategically and plan for the long-term.

“I can't just start a product roadmap by calling up my salespeople, asking them what customers are talking about, and then using that information to make a list of features. That's not strategic and it does nothing to help you prioritize across the departments and teams that you'll need to build the product.”

— Matt Feldman, Director of Product Management, MIND Research Institute

Perhaps your VP of Sales wanted to see a particular feature on the roadmap because a big prospect is requiring it to close the deal. It's certainly disappointing to lose a sale, but you can explain the other factors that went into your prioritization process.

Maybe the requested feature would only be used by a small segment of customers, and you determined that the effort to build a fairly niche feature outweighed the return of only a few new accounts. Or maybe you decided to focus on features that increase product stickiness this quarter, because customer retention is a higher priority than growth.

Another big problem with letting sales drive your conversation is that often customers request features that don't actually get to the root of their core problem. Problems can be solved in different ways; this is the value that you bring to the table as a product manager.

Sometimes prospects don't have the exact vocabulary to express the features they truly need because those features are not built yet. It's up to you to play detective and get to the bottom of their problem, rather than just building exactly what they ask for.

Sales is just one channel for potential product ideas, and while important, it should never be the only conversation that moves the needle in your prioritization process.

Engineering Missing the Bigger Picture

Another common communication pitfall is engineers being kept out of the loop on the strategic direction of the company. We commonly hear that engineers don't understand why they are building something.

As a product manager, it's your job to make sure your developers get the big picture, and that they're not just stuck in their own development silo. Creating a shorter-term engineering roadmap can help overcome this communication gap.

Oversharing Roadmap Details with Sales or Customers

Finally, it's important to avoid oversharing roadmap details with sales and other customer-facing teams. You don't want to set up false expectations or make promises to prospects that you cannot keep.

A common communication problem occurs when the sales department reveals upcoming features to prospects, and then the roadmap changes and those features get pushed out or cancelled. The result is angry customers and frustrated sales reps (who will likely blame product management for the mix-up).

It can be hard to resist the urge to tell prospects about bright and shiny upcoming features, but the risk of not delivering on your word outweighs the potential benefit of closing a few new sales. If a customer gets the impression that your organization is disorganized and doesn't deliver — and, worse, perhaps even shares that impression with colleagues or on social media — it will be an uphill battle to repair your reputation going forward.

The safest route is to eliminate the possibility of over-committing in the first place. Omit specific dates when presenting the roadmap to teams that interact with customers.

Furthermore, only include features that have already been approved and are well on their way to becoming reality. For initiatives still under discussion, it's perfectly okay to be vague or to exclude them from the roadmap entirely.

SUMMARY



1

2

3

Summary

Product managers play an absolutely critical role in an organization's strategic direction. They are at the intersection of many important feedback streams — customers, colleagues, executives, and other constituencies. They are also constantly pulled in different directions by market changes and other external factors. Product managers need to digest this continuous stream of (often conflicting) data wisely, and lay the foundation for the company's product vision.

The Roadmap

A product roadmap allows you to communicate your product's strategy and map out its direction for your organization. But before you start building your roadmap, you need to tame the chaos. A product roadmap is not a document you simply sit down and start drafting — not without first developing a strategy and plan for what the roadmap needs to accomplish, why, and for whom.

Your product roadmap needs to convey your strategy in a compelling way. By grouping initiatives together into themes, you can organize your roadmap in a way that describes value to customers and other stakeholders. Themes can help you put together a roadmap that creates a story — the why behind what you're proposing.

Once you've settled on your product goals and prioritized your initiatives, it is important to familiarize yourself with the tools available. Building a roadmap often has to be a fluid conversation — sometimes even a compromise among different priorities. In order to build a perfect roadmap, you have to surround the roadmap with all your experts from start to finish.

In today's agile world, communicating your product strategy is not an isolated phase. It's not as if you move neatly from creating your roadmap to sharing your roadmap to executing your plans — the process is iterative and communication needs to be part of every step.

Using the Right Tools

The right software is critical to developing a successful product roadmap. Product roadmap software is a high-level tool designed to help product managers communicate a product's strategy to multiple constituencies across the company (and even outside the company).

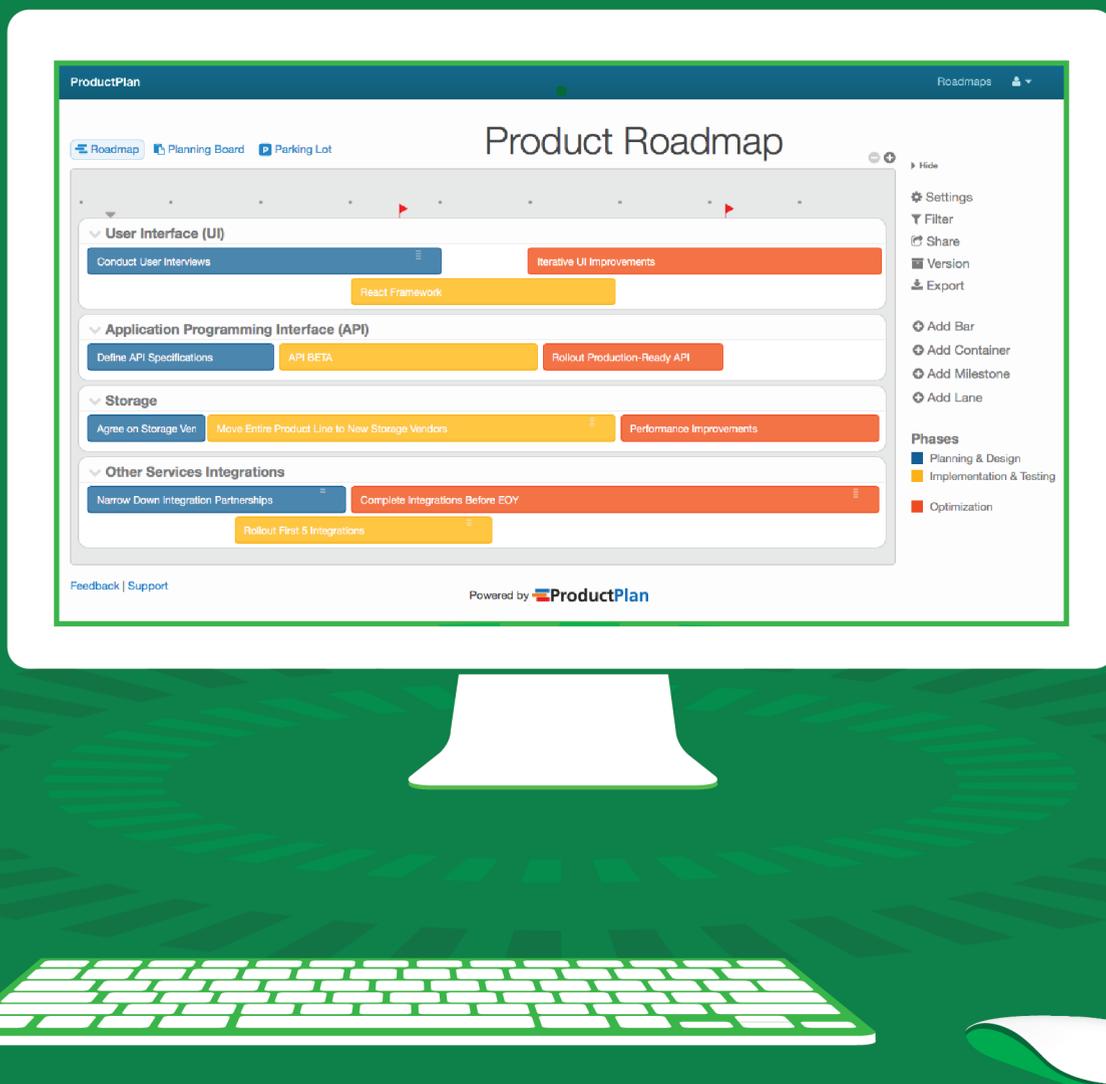
Because many organizations simply do not know about product roadmap software, many product managers develop their roadmaps using spreadsheets, slides, or project management software. But such tools (think Microsoft® Project®, Excel® or ticketing systems like JIRA) do not give the product manager the ability to communicate the product's high-level, strategic view.

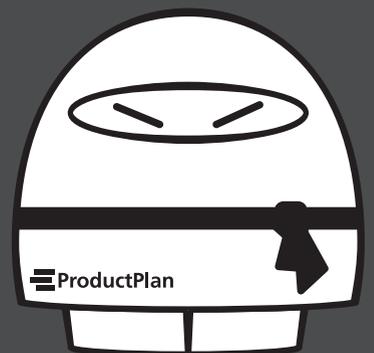
Build your product roadmaps in strategic-level product roadmap software, rather than the tactical and task-oriented project management software.



About ProductPlan

ProductPlan is easy-to-use roadmap software designed to help product as well as other teams better plan and communicate their strategies. Our drag and drop features are intuitive and let product managers get started building beautiful roadmaps quickly. ProductPlan roadmaps are highly visual, communication-focused and built for team collaboration. Visit www.productplan.com to find out more.





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