The Product Roadmap Playbook:

How to Grow Your Team's Impact
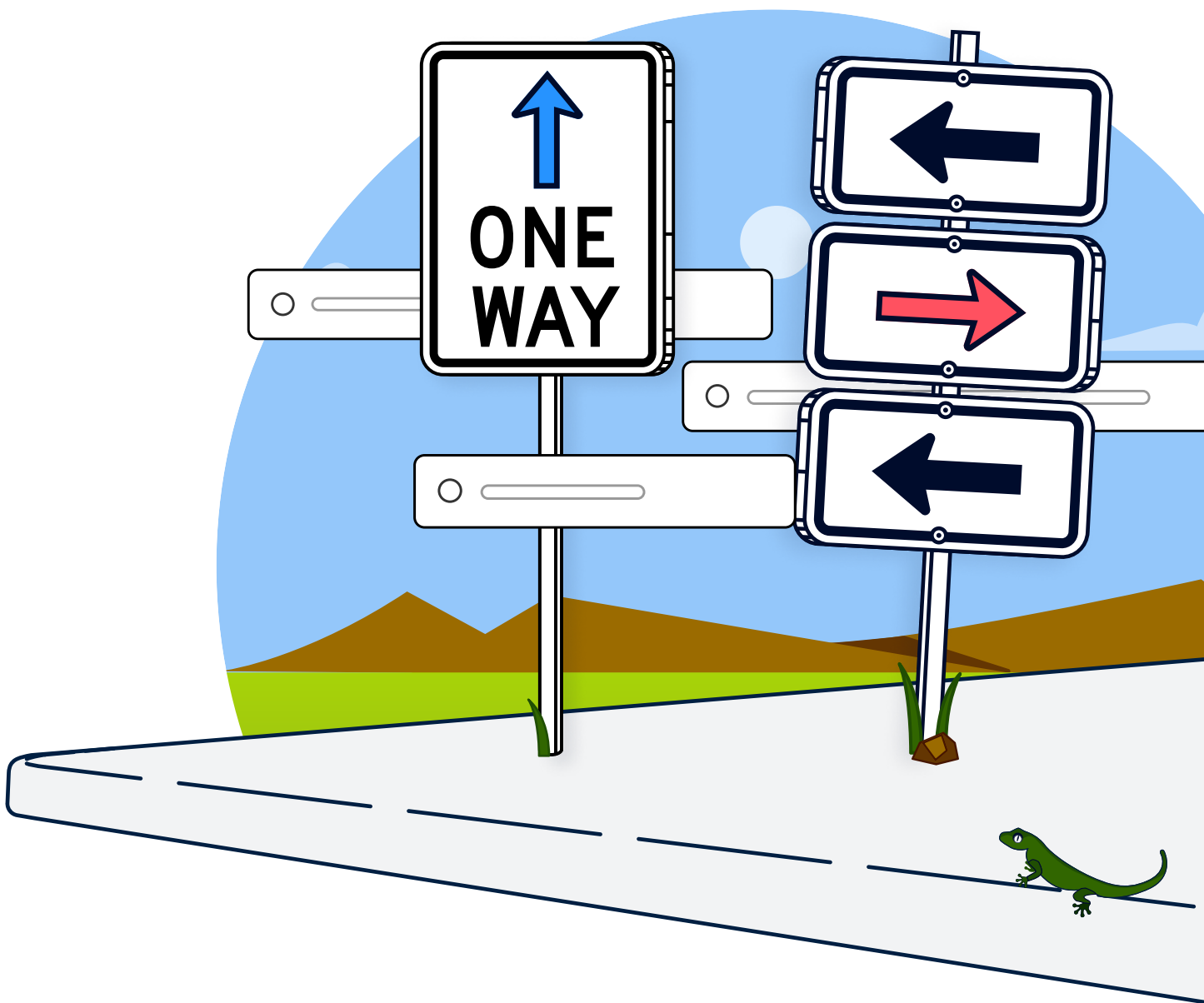
productboard

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Introduction

When the margins between product success and failure are so thin, it's critical to have a roadmap showing the tangible ways to success.

Product teams often struggle with creating a roadmap that aligns the business around the product vision, and providing both the level of detail each function needs while also staying connected to customer needs and business strategy. While effective product roadmaps can take time to create, they also give stakeholders on different teams the insights they need to position, sell, and expand the product.

What product teams are consistently doing WRONG

- Too focused on hitting deadlines above all else, which can cause a lot of anxiety for the team

- Build a roadmap once and then never look at it again or rarely update it

- Roadmaps are created and shared with static tools, like spreadsheets and presentation software — resulting in stale data and lack of trust from stakeholders

- Roadmaps miss the why behind what the team is building and just focus on features — which end up disconnected from the business strategy and customer needs, with no clear goals

What high-performing product teams are doing RIGHT

- Roadmaps are a product of collaboration and include the input of many stakeholders and cross-functional teams

- Roadmaps are always up-to-date, not one-time documents that are outdated once you hit the save button — when these plans are up-to-date, this builds trust between the stakeholders

- Roadmaps reflect the outcomes the organization wants to achieve, not simply outputs

- Roadmaps support both customer needs and business strategy

To maximize your product team's impact, it's critical that you stop taking costly detours–such as shipping features that your customers don't even want–that lead you away from your product vision.

Instead, you need to start building scalable roadmapping processes to help you successfully – and swiftly – reach your ultimate product destination together with the rest of the business.
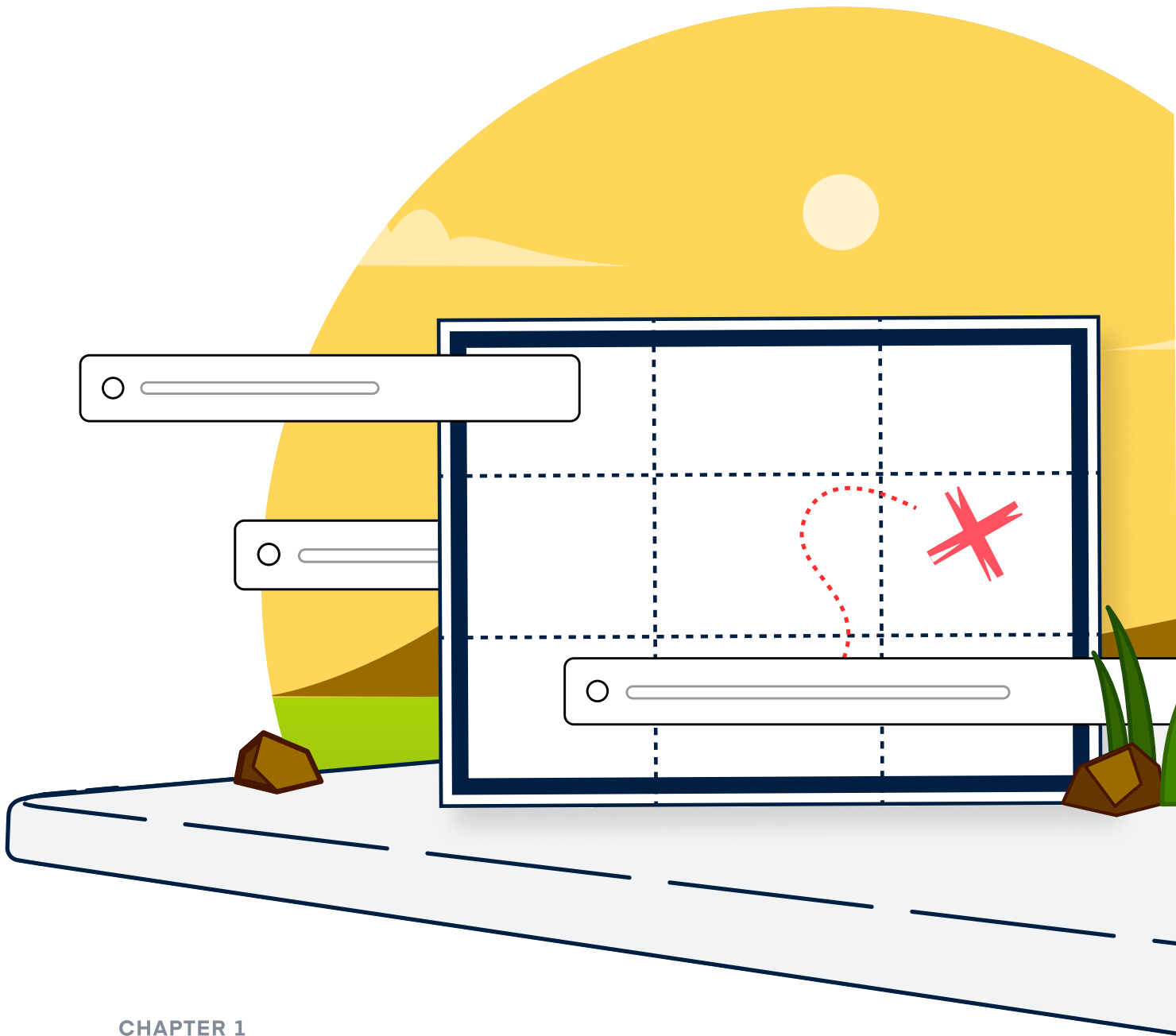
Best Practices for Building Efficient Roadmapping Processes

Understanding the fundamentals of effective product roadmapping will give you the confidence you need to build products that drive results.

There are 3 essential product roadmapping best practices that put outcomes in full focus, and outputs in the rear view–which will help you create the strongest roadmap possible.

Before diving into the best practices, take a moment to review the **five levels of roadmap proficiency**–a rubric developed by Productboard to help you determine where your roadmapping practices currently stand. Be honest with yourself about which level most accurately describes your current practices, so you know where your starting line is.

The five levels of roadmap proficiency

Level 1: Lack of understanding around the product roadmap leads others to question it

Level 2: Roadmap lacks clear objectives; long-term goals are private and undocumented

Level 3: Roadmap is shared, but focuses on outputs rather than outcomes

Level 4: Product roadmaps clearly communicate why some ideas are prioritized over others

Level 5: Everyone rallies around both the product strategy and roadmap

Understand the "why" behind your roadmap

Once you've determined your roadmap proficiency level, ask yourself these questions up front:

◆ Why do I need a roadmap in the first place?

◆ What's the best format?

◆ How far in the future should it go?

◆ Who has access?

◆ Is it user-facing?

◆ How will changes be communicated? And how often?

◆ What criteria will we use to add something to the roadmap?

◆ How does the roadmap clearly represent customer needs?

◆ How does the roadmap clearly show it delivers on business strategy?

Every organization has unique priorities, so make sure you're able to answer these questions based on your business and customer needs.

Additionally, effective roadmaps should enable stakeholders to quickly understand how the voice of the customer is influencing what the product team is working on.

By leveraging customer-centric roadmaps–grounded in user feedback–product managers can justify why certain features are being prioritized over others. This also enables product teams to grow trusting relationships with stakeholders–and build confidence that the team is shipping products that solve real customer problems.

Make sure your roadmap is OUTCOME rather than OUTPUT-driven

Confidence in roadmaps is lower than it needs to be. According to a survey of over 1,000 product professionals, less than one third of respondents reported being confident that the products and features on their roadmaps will deliver the desired business outcomes.

As you embark on your roadmap journey, one of the biggest fundamentals you need to keep in mind is that all roadmaps should be outcome-driven rather than output-driven.

Outputs are the things we produce for a customer (like car seats for babies) while outcomes are the impact our products have on our customers (like keeping kids safe in cars). Ideally, your roadmap should effectively communicate both outcomes and outputs – so stop merely focusing on "what" you need to build.

An outcome-driven roadmap focuses on the "why" instead of just the "what." It provides clarity to your stakeholders around where you are headed and what success looks like. An objectives timeline roadmap is a great example of an outcome-driven roadmap because they are a great way to communicate your product strategy and goals across teams. This will also help drive organizational alignment around the product vision.
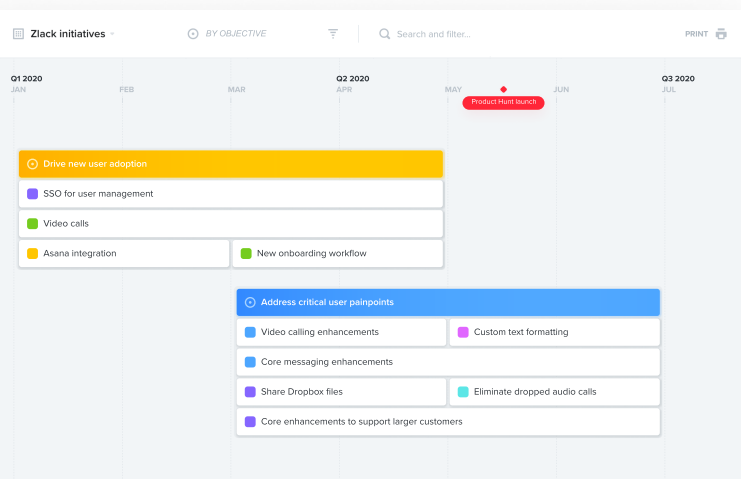
With Productboard, you can organize each feature by key business objectives–which also provides transparency for other stakeholders looking for information around what's being built and why. Focusing on outcomes not only helps product managers prioritize which features to build next, but also ensures the organization as a whole stays focused on achieving higher outcomes, rather than becoming a feature factory.

"Focusing on the "why" in your roadmap instead of the "what" communicates more clearly where you are headed, and what success looks like. It also means your roadmap changes less often."

— Bruce McCarthy
Founder at Product Culture

Incorporate stakeholders into your roadmap process

Cross-functional collaboration is one of the most important keys to product roadmap success - so it's important to collaborate with stakeholders early and often! It's the ideal scenario when all major stakeholders – including leadership, sales, marketing, and engineering – understand exactly what is on the roadmap and why, and see how their previous feedback has been accounted for.

C. Todd Lombardo, product leader and author, recommends that product managers have a lot of one-on-ones.

> "You build trust and rapport with each of these stakeholders because you're listening to them and you're asking them why things are important and how they'd think about it."
>
> **— C. Todd Lombardo**
> Co-Author of *Product Roadmaps Relaunched*

While it takes more time, this will build trust with your stakeholders, help you better understand what problems you can solve for them, and enhance team alignment.

Because buy-in from stakeholders is crucial, engaging them from the get-go can help you uncover new insights, reduce risk, and increase your overall speed to execution.

Check out the **Product Survival Kit: Building Effective Roadmaps** to discover more modern roadmapping best practices.

Building Effective Roadmaps: A Product Survival Kit

The tactics you need to create effective product roadmaps that drive results.
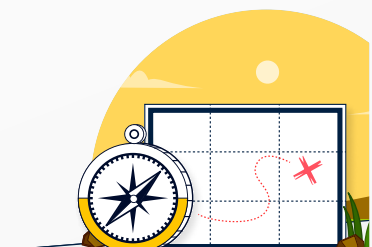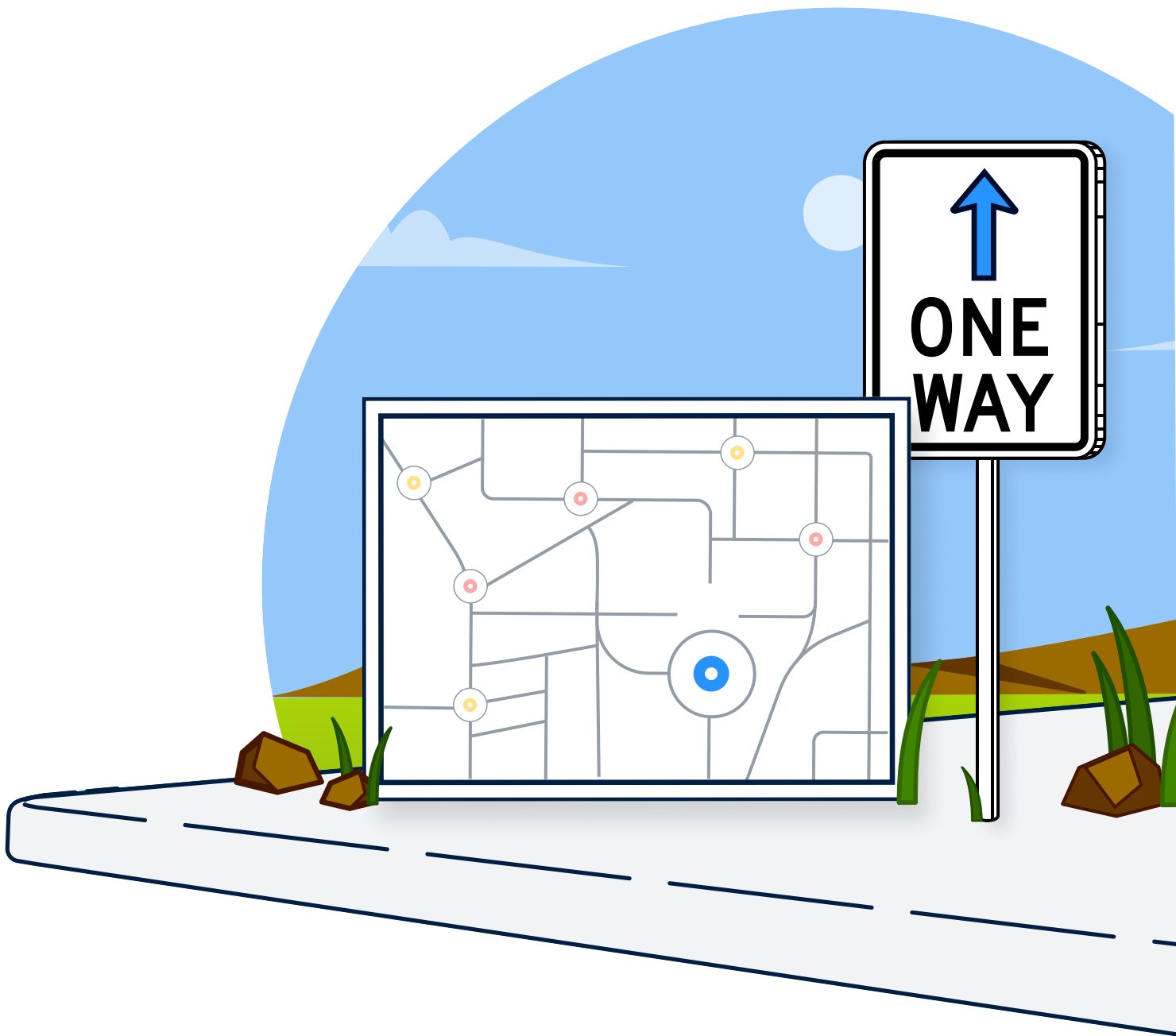
Make Smarter, Data-Driven Prioritization Decisions

In order to prevent a risky investment in products that your customers might never use, effective prioritization is key when it comes to building a roadmap.

Implementing ruthless prioritization — a data-based mindset that will keep you and your team aligned around a clear strategy and course of action — will keep you oriented around impactful initiatives and showcase the way behind your product decisions.

Start with a clear vision

A clear vision orients your entire organization around where your product is headed and why. Yet according to our 2022 Product Excellence Report, a whopping 48% of product professionals report experiencing challenges with setting a clear product vision and strategy.

> **To help you define a clear product vision, consider the "3P" framework:**
>
> **P**eople — Who are the people that will become your customers?
>
> **P**roblems — What needs/problems are you going to solve for them?
>
> **P**roducts — What products or services are you going to offer to satisfy their needs?

An effective product strategy needs to contain a clear vision, outcomes you want to achieve, and the problems you want to solve for customers so that you can make the right prioritization decisions.

Integrate the voice of the customer

Richard Banfield wrote that "prioritization is personal," meaning that different people in your organization have their own product priorities. Unfortunately, you can't always drop everything to pursue a stakeholder's latest and greatest idea. That's why you must establish a streamlined process for gathering and organizing customer feedback.

Here is a starting point for collecting user inputs:

1. **Organize feature ideas in one place.** A good product management system, like Productboard, is a great source of truth for all incoming insights, feedback, and requests. Productboard even allows you to view Insights Trends, so you can quickly analyze customer feedback at scale.

2. **Require customer context and data to back up all incoming feature ideas.** Data, fuelled by customer insights, is key to product prioritization. So next time someone pushes an idea, ask them for data that demonstrates why it's a priority, and how it will address critical customer needs.

3. **Create a scalable culture of gathering insights.** Folks across the organization must develop a "product mindset" and understand the specific role they play in the product development process. They must be trained to recognize good feedback and learn to tease out important patterns.

Stop saying yes to everything

While saying "no" is hard, it is a crucial skill that must be mastered by every great product manager. Making decisions based on the loudest (or highest-paid) person in the room, rather than data, could lead to costly detours that don't align with your product vision.

To get better at saying no, follow these 3 simple steps:

1. **Understand why** your stakeholders are making a feature request, then **review the data-backed reasons** they're requesting it.

2. **See if it aligns** with your product vision. If any of those steps raise red flags, **say no** and **be transparent** with the stakeholder so they understand your decision.

3. Let your stakeholders know **what's being built** instead and **why.**

"Some of the things we want to achieve in a roadmap–in addition to saying here's what we're working on–is to be able to justify why we're working on those things."

— **Nils Davis**
Author of *The Secret Product Manager Handbook*

Don't reinvent the wheel

As a product manager, your time is extremely valuable — and often limited. That's why we suggest leveraging existing frameworks in your prioritization process, especially if you're new to product management.

The value vs. complexity quadrant, for example, is a prioritization framework that takes the form of a simple matrix. This graph charts your feature ideas based on how much value they deliver vs. how complex they will be to build.
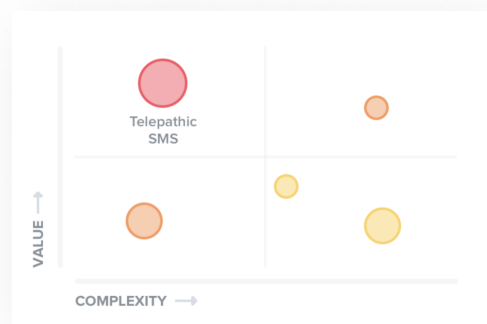
Another framework you can use is the RICE method, which helps turn subjective decisions into objective, data-driven ones by assigning a score to each feature idea.

With Productboard, you can prioritize in multiple ways – using segmentation, user impact scores, product objectives, and more – so you can be confident that what you're building next drives real business outcomes, and standardize a prioritization process across all teams, so that everyone is on the same page.

Remember, there's no such thing as the 'best' prioritization framework, and no framework is the end-all-be-all. Instead, use it as a starting point for your prioritization conversations.

Prioritization Tip #5

Back your priorities with data

Regardless of what framework you end up choosing, you need to support all of your priorities with data.

Here is a starting point for collecting data:

1. **Tap into customer feedback.** Identify trends in your feedback and dig deeply into the context. This is another thing that a good product management system can help you with.

2. **Surveys are a great way to gather data about feature ideas.** You can survey your customers, company stakeholders, your target audience, and more. Using a feedback platform like SatisMeter–which integrates with Productboard–will allow you to keep a pulse on customer satisfaction.
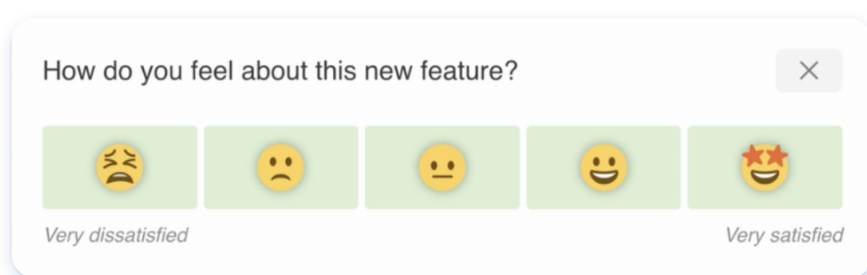
3. **Fake door testing involves adding a button to your product that looks like a new feature.** When a user clicks on that button, they'll get a message telling them it's in development. You want to track how many people click that button to gauge your users' interest in that particular feature.

Work closely with your EPD counterparts

When you don't have consistent prioritization discussions with your engineer and design teams, you risk creating a world where your primary counterparts do not feel bought in on what you decide to build.

To ensure that you and your EPD colleagues feel like they are part of the process you need to engage early in the prioritization process and ask them to help your prioritize.

Follow this quick 2-step model:

1. As a product team, you'll first want to set up prioritization criteria (e.g. user impact score, expansion potential of feature, acquisition potential of feature), as well as weights (e.g. 20%, 60%, 20%).

2. Then, run an exercise with your engineering and design counterparts, where each team determines the strength of each prioritization criteria on a scale from 1-5 for each feature in your backlog that relates back to your product strategy.

If you're not already doing so, it's important to have a recurring EPD meeting — to review quarterly plans across all teams at the start of each quarter, then review progress mid-quarter. This is not only a great way to facilitate prioritization discussions, but a great opportunity to keep EPD aligned on what your team should be building next.

Get the Product Survival Kit: Roadmap Prioritization to learn more essential prioritization tactics.

Roadmap Prioritization: A Product Survival Kit

The tactics you need to build a product roadmap to success and reduce the risk of prioritizing at your own peril.
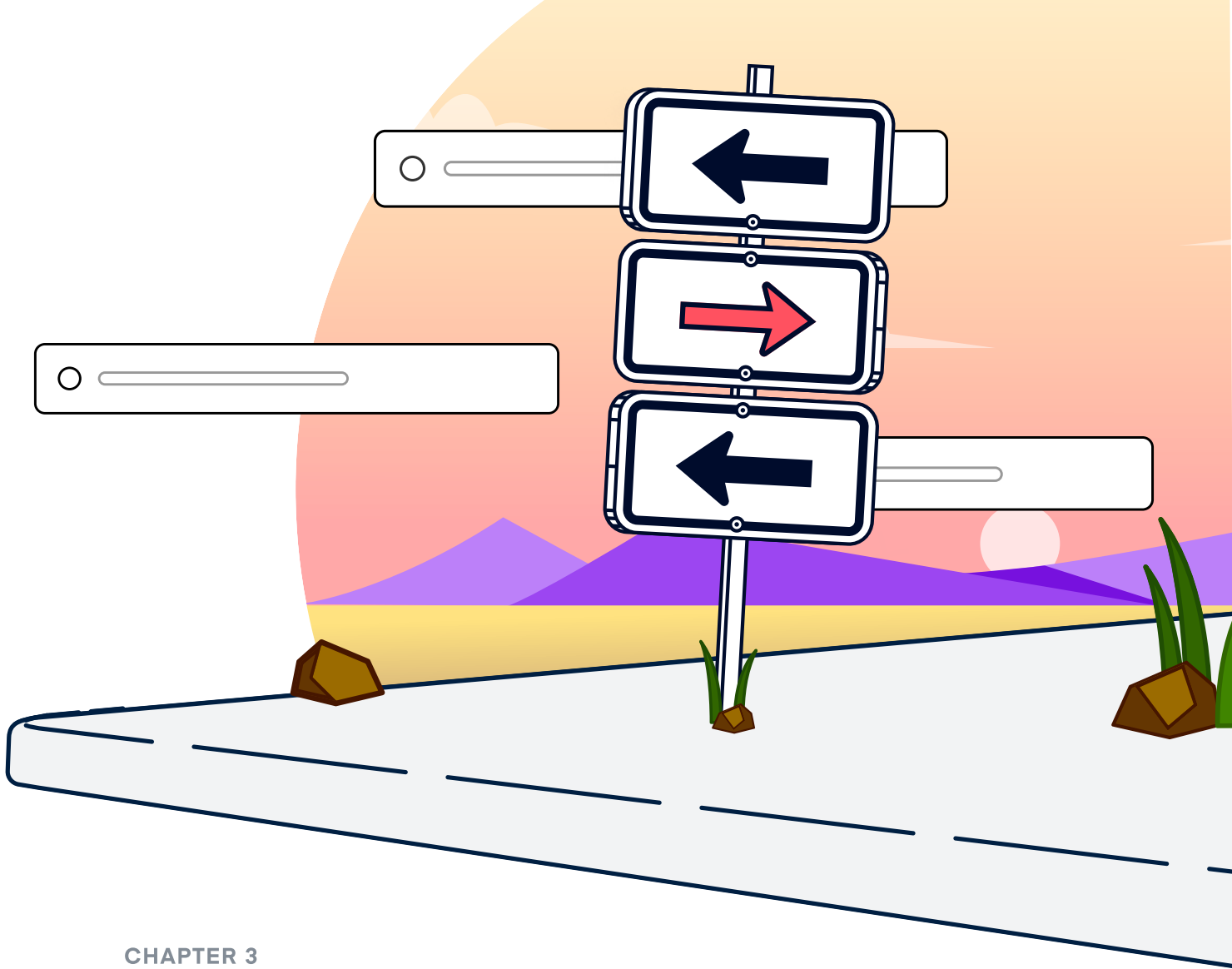
How to Become a Master Roadmap Storyteller

Roadmaps can't always speak for themselves, especially if you work cross-functionally with teammates who don't have an extensive product background. A strong roadmap narrative is then exactly what you need – done right, it better aligns your team, improves organizational efficiency, and reduces the risk of overpromising and under-delivering features.

Stories are a perfect design tool because:

◆ Everyone has the ability to create one

◆ It's easy to iterate on a story

◆ They provide more clarity about what you're trying to achieve

Follow these easy-to-follow steps to learn how to both strategize and craft effective roadmap narratives for multiple audiences, and the do's and don'ts of roadmap storytelling from experienced product leaders and practitioners.

Where to begin with roadmap storytelling

When you pair the visual impact of a roadmap with a strong narrative, it can be downright magical. Visualizations build shared understanding while stories foster emotional connections, and tailored stories take that power even further.

So where do you start? We suggest:

◆ Take cues from your product vision: everything on a roadmap should go back to your company's product vision, as the ultimate "why" for what you're building, when

◆ Focus on impact and value: clearly define and communicate these when you share your roadmap

◆ Leverage personas and customer segments, to stay aligned around who you are building for and why

◆ Context is key: consider who your audience is and how much background and technical information they need (or even want) when sharing a roadmap

To help get your audience excited about your idea, your story needs to include certain key elements. Petra Wille, Author of STRONG Product People, suggests asking yourself the following questions:

◆ *Have I painted a picture of a desirable future?*

◆ *Is it clear why the listener should be part of this future?*

◆ *Does the story acknowledge the current situation while describing the potential difficulties that may arise and why it's worth overcoming them?*

◆ *Does it suggest a common goal, while providing enough clarity on the next steps?*

Next, you need to craft different versions of the story–so you can effectively deliver your message, whatever the occasion:

SHORT — Your elevator pitch should be no more than approximately 150 words and take about 75 seconds to deliver.

MEDIUM — This version can be about 900 words and take 6 minutes to deliver, but don't assume you'll have everyone's full attention throughout.

LONG — You may have the room booked for an hour, but resist the temptation to make your story longer than 18 minutes.

Understand how to tell the best roadmap story

Remember that as a product professional you have a deeper knowledge of the products and features that you're building that not everyone else has. Especially when working with cross-functional teams, consider using simplistic terms instead of technical jargon and keep the focus on the positive impact for customers.

Be sure your roadmap story follows a narrative arc with a clear beginning that sets up customer pain points, as well as an end that shows how planned products and features solve these problems.
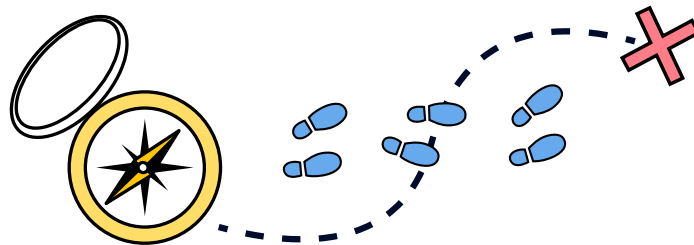
The narrative arc should outline what's happening without getting too specific; consider a "now, next, later" framing to avoid overpromising and under-delivering. Want a real-world example? Check out Prospecta's roadmap to telling a compelling product story.

"The best innovation stories do a good job at giving specific problems in the set up, and then solve for them in the solution."

— **David Riemer**
UC Berkeley Haas School of Business'
Executive-in-Residence

Learn from the experts with the dos and don'ts of roadmap storytelling

Need a quick breakdown to get you started? Try these tips and tricks from experienced product leaders and practitioners.

Do:

- Showcase your progress as well as your plans

- Focus on outcomes and business impact

- Recognize the relationship between timeline and accuracy

- Focus on the benefit to specific personas or customer segments

- Tell a story that aligns with your overall vision

Don't:

- Put specific dates on your roadmap

- Have too many versions of your roadmap floating around

- Expect all stakeholders to receive the roadmap the same way

- Treat your roadmap like a to-do list

> "What would happen if a company didn't have a product strategy or roadmap? I think they would still deliver some features, but they would never contribute to a higher goal. They would never go in the same direction. It would be chaotic."
>
> **— Adam Krbusek**
> Senior Product Manager at GoodData

Practice makes perfect

Becoming a great roadmap storyteller doesn't happen overnight – your skills will improve and evolve over time and with practice. Here are a few ways to continue to build your storytelling skills:

1. Practice in a low-stakes setting:

You don't have to start with the boardroom or your biggest customer. Start with smaller audiences who can offer constructive feedback.

2. Gather feedback and iterate:

Parts of your roadmap story that seemed clear to you might not have come across that way to a particular audience. Incorporate that feedback into the next version of your roadmap story!

3. Go retro (when it makes sense to do so):

Hold a retrospective to gather formal feedback from important stakeholders once you do share with them, to ensure your roadmap aligns with your product vision when it really counts.

It doesn't matter if your roadmap is for a feature at your startup or a new product at your more established company, the principles for great product storytelling are broadly the same. Use the principles above to up-level your roadmap storytelling and make products that matter.

> "Telling great stories about a product creates evangelists: people who believe in your idea or product and promote its value to others."
>
> **— Petra Wille**
> Author of *STRONG Product People*

Check out the **Product Survival Kit: Roadmap Storytelling** to learn more tips for crafting a stronger roadmap narrative.

Roadmap Storytelling: A Product Survival Kit

Bring your product vision to life by telling the best roadmap story possible.

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your roadmapping process today!**

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