

Effectively Communicating Product Roadmaps

Product Management Festival 2014

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By the End of This Sessions, Attendees Should:

- Understand why **roadmaps often lead to confusion and conflict** due to the way they are documented and communicated
- Understand recommended best practices for how a roadmap fits into the **broader product lifecycle**
- Understand **four key elements to consider** when documenting and communicating a roadmap
- Be able to apply **best practices to documenting and communicating** their own roadmaps

What is a Roadmap?



How is the Roadmap Used Internally?

Engineering	<ul style="list-style-type: none">✓ To clarify what should be worked on next✓ To plan for potential technology infrastructure that may be needed✓ To determine future resource allocation
Marketing	<ul style="list-style-type: none">✓ To plan for campaigns with marketing
Sales	<ul style="list-style-type: none">✓ Sales enablement of a direct sales force✓ Sales enablement of channel sales
Senior Leadership	<ul style="list-style-type: none">✓ To “sell” a vision and strategy✓ To request funding from senior management✓ As input into annual budgeting/planning

How is the Roadmap Used Externally?

Customers/Prospects

- ✓ To entice prospects to buy
- ✓ To entice customers to stay

Partners

- ✓ To align plans with market-facing partners
- ✓ To align plans with suppliers

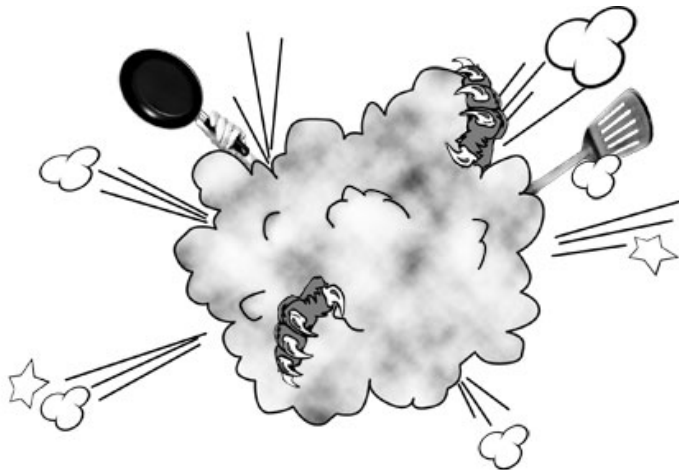
Market Influencers

- ✓ To get external validation of strategy/vision
- ✓ To influence and get feedback from analysts (Analyst Relations)
- ✓ To influence positive media coverage (Public Relations)

Miscommunication About Roadmap Use = Conflict

Senior Leadership

- ✓ To “sell” a vision and strategy



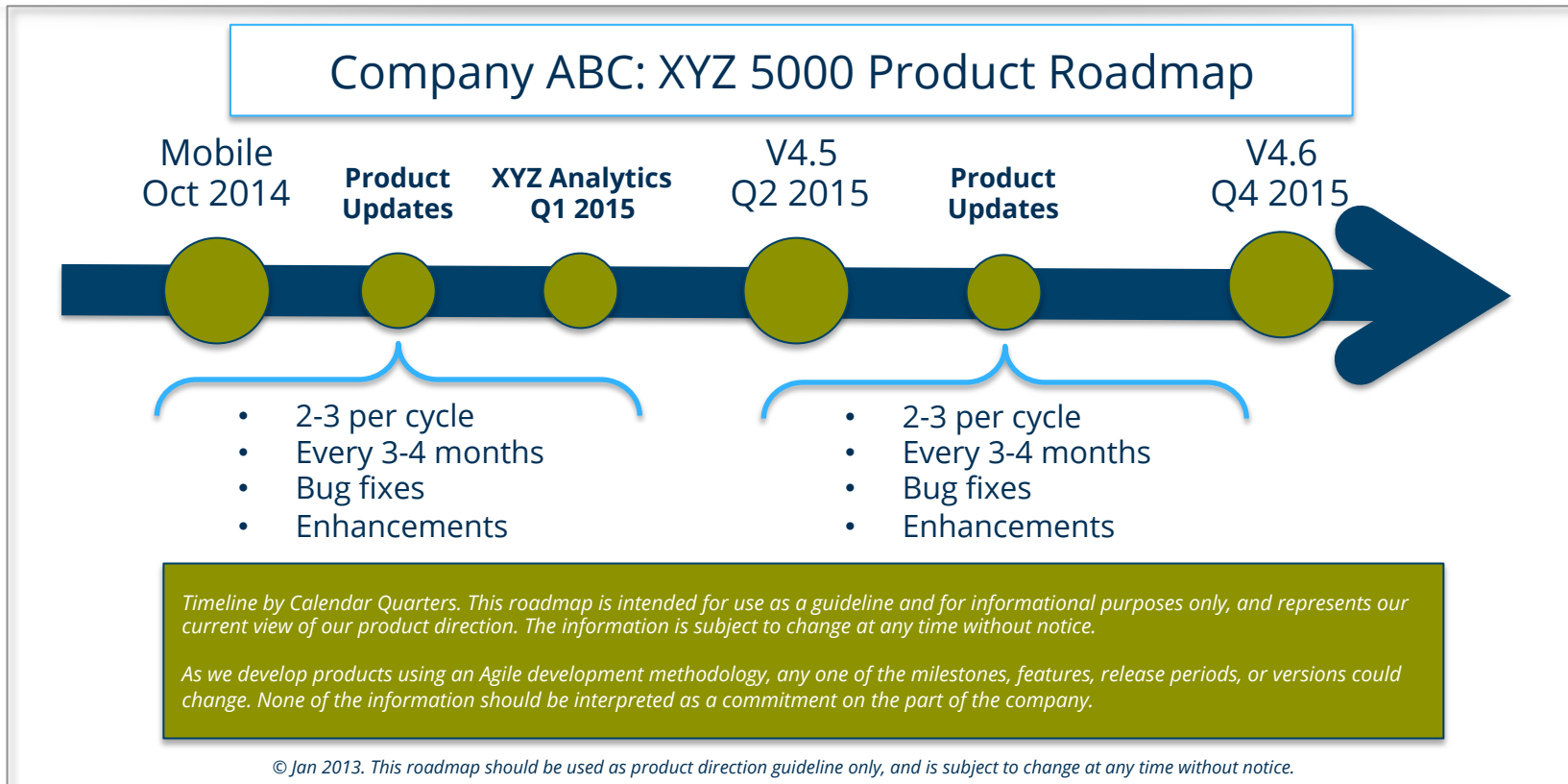
Customers/Prospects

- ✓ To entice customers to buy
- ✓ To entice customers to stay

Roadmaps Mean Different Things To Different People



Roadmaps Mean Different Things to Different People



Roadmaps Mean Different Things to Different People

Timeline by Calendar Quarters. This roadmap is intended for use as a guideline and for informational purposes only, and represents our current view of our product direction. The information is subject to change at any time without notice.

As we develop products using an Agile development methodology, any one of the milestones, features, release periods, or versions could change. None of the information should be interpreted as a commitment on the part of the company.

© Jan 2014. This roadmap should be used as product direction guideline only, and is subject to change at any time without notice.

- Enhancements

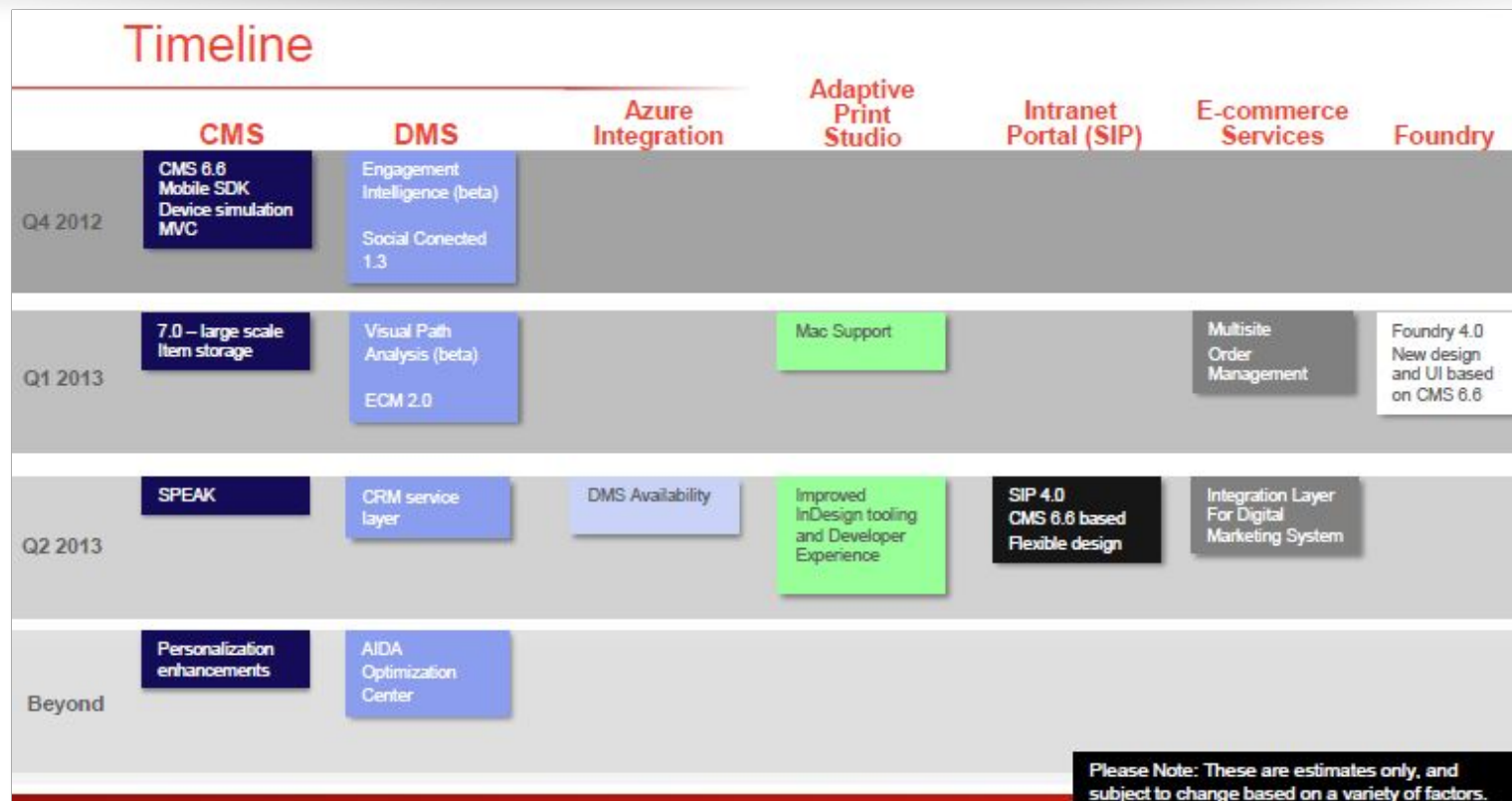
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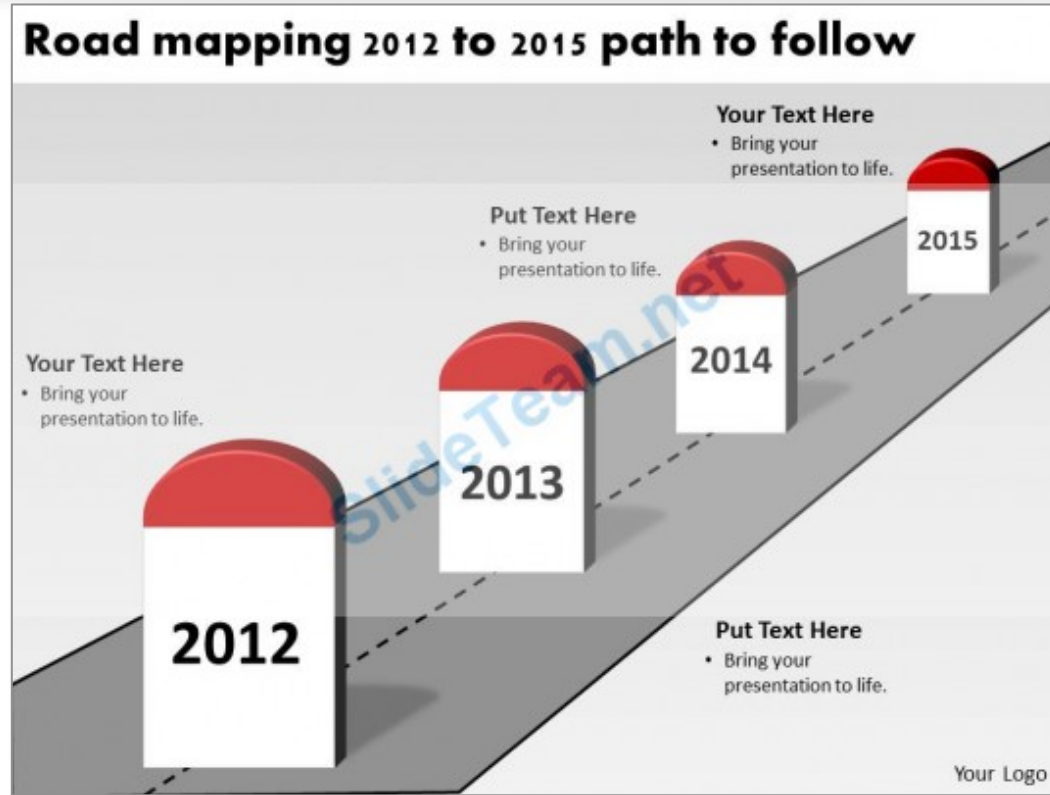
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THEME:	2012											
	Q1			Q2			Q3			Q4		
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
chris pagel												
Improve hosted service deliver...	my interesting requirement with stra...											
	Views of Working Calendars for use...											
Makes product easier to sell t...				Tablet resync								
				Support enterprise agil...								
Remove sales roadblocks				Support enterprise agil...								
				Resource Estimation -...								
				Update API fields to capture Agile and hierar...								
	my interesting requirement with stra...											
	Views of Working Calendars for use...											
				Element Selector [3]								
										Element Selector - Recently selected iter		
				Element Selector - Link...								
				Element Selector								
				Tablet resync								
	Support for child windows (i.e. detail...											



Roadmap Definitions



What a Roadmap is NOT

- A PowerPoint slide thrown together 10 minutes before an executive presentation
- The output of your agile project management software
- Your wish list
- A list of features you need to add to close the next few deals in the pipeline
- A way to paint engineering into a corner and force them to commit
- A way to cover yourself when you know that engineering will never be able to deliver



The PMM Model: A Best-in-Class Go-to-Market Framework

	STRATEGY			EXECUTION		GROWTH	
	Discovery ▶	Design ▶	Align ▶	Build ▶	Launch ▶	Monitor ▶	Enhance ▶
MARKETING	Market Sizing Segmentation	Brand and Naming	Routes to Market	Campaign Planning	Reputation/ Advertising	Demand Measurement	Customer Marketing
	Relative Targeting	Messaging	Marketing Plan*	Thought Leadership	Demand Creation	Win/Loss Analysis	Retention Strategies
	Buyer Personas/ Needs	Competitive Positioning	Sales Enablement Plan*	Content Brief*	Content Activation	References and Advocacy	Upsell Cross-sell
	Buying Cycle	Market Requirements*		Solution Handbook*	Sales Content and Tools	Launch Dashboard*	
	Demand Type			Launch Plan*	Influencer Relations		
PRODUCT	User Personas/ Needs	Pricing	Product Roadmap*	User Stories/ Functional Spec*	Sales Support	Customer Feedback	Lifecycle Management
	Portfolio Architecture	Prototype	Business Case* (final)	Product Testing	Demos, Trials Proofs of Concept	Satisfaction Measurement	Enhancement Prioritization
	Competitive Analysis	Concept Testing		Release Readiness		High-Priority Updates	Future Roadmap*
	Business Case* (concept)	Product Requirements*				Offering Dashboard*	
SALES	Field Input	Sales Advisory Council	Financial Targets	Named Accounts	Sales Communications	Sales Adoption	Retention Programs
			Sales Coverage Strategy	Territory Alignment	Sales Training	Pipeline Analytics	
			Channel Partner Strategy		Certification Incentives	Field Feedback	

■ *Deliverables

■ Activities

Version 3.0

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Future Roadmap

	STRATEGY			EXECUTION		GROWTH	
	Discovery ▶	Design ▶	Align ▶	Build ▶	Launch ▶	Monitor ▶	Enhance ▶
MARKETING	Market Sizing Segmentation				Reputation/ Advertising	Demand Measurement	Customer Marketing
	Relative Targeting					Win/Loss Analysis	Retention Strategies
	Buyer Personas/ Needs	Competitive Positioning	Sales Enablement Plan*			References and Advocacy	Upsell Cross-sell
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Comparing Product Roadmap to Future Roadmap

	STRATEGY			EXECUTION		GROWTH	
	Discovery ▶	Design ▶	Align ▶	Build ▶	Launch ▶	Monitor ▶	Enhance ▶
MARKETING	Market Sizing Segmentation	Brand and Naming	Routes to Market	Campaign Planning	Reputation/ Advertising	Demand Measurement	Customer Marketing
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Best Practices for Roadmap Documentation & Communication



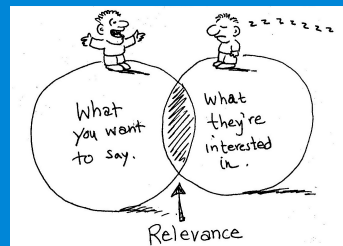
Four Elements of Best-in-Class Roadmaps

SiriusPerspective: There is no all-purpose template, but good roadmaps contain four key elements.

Appropriate Time Horizon



Buyer and Customer Relevance



Right Amount of Detail



Tailored to Audience



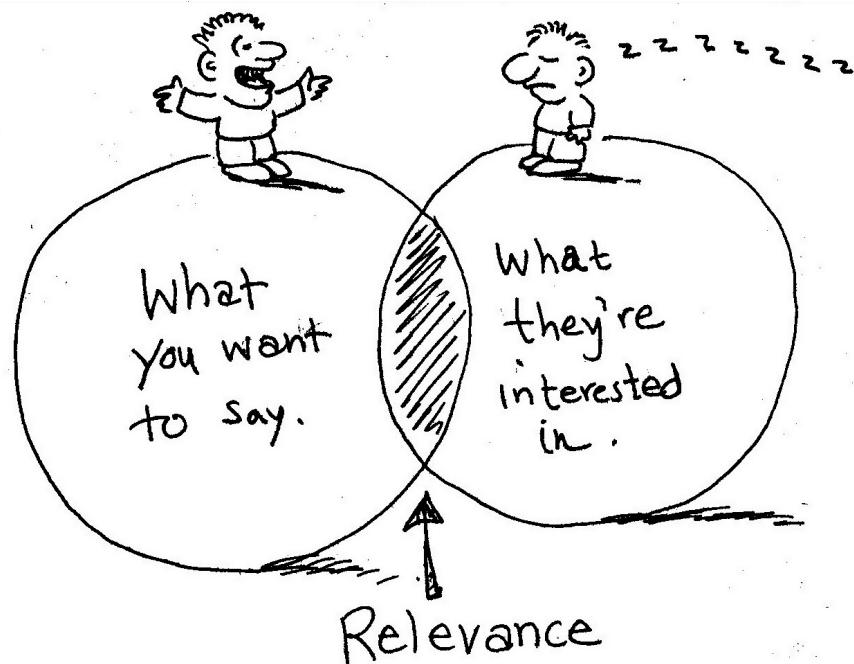
Specificity of the Time Horizon

SiriusPerspective: Specific dates are not required, but the time horizon should be determined based on internal and external factors.

	Specificity of time horizon	
	More	Less
Track record for meeting dates	Good	Poor
Importance of dates to audience	Necessity	Desire
Internal agreement on roadmap	High	Low/Unknown
Likelihood of roadmap to change	Low	High

Relevance to Buyers and Customers

SiriusPerspective: Don't just list features and functionality; describe the relevance to customer needs.



Focus on Benefits, not Features

SiriusPerspective: Don't just list features and functionality; describe the relevance to customer needs.

Example

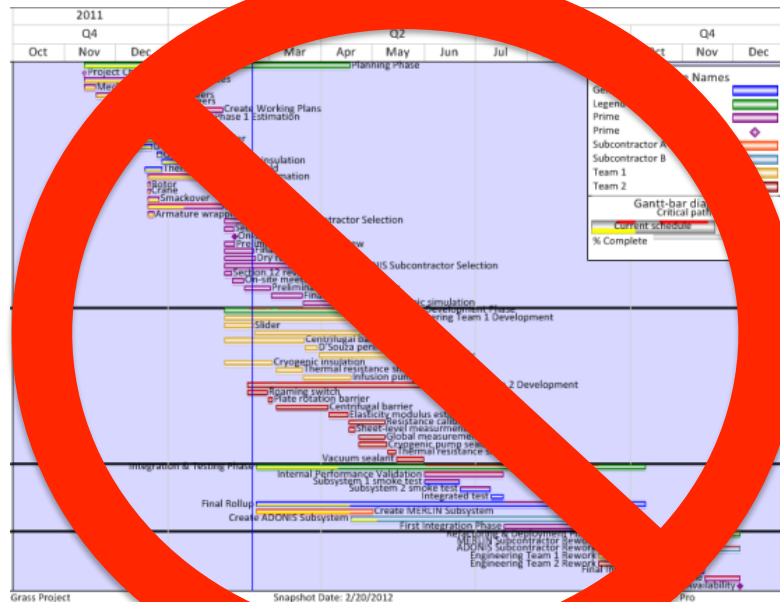
NAME	Compliance
LAUNCH	Q3 2014
WHAT	<ul style="list-style-type: none">• Increased storage capacity• New auditing capabilities
WHY	New regulations taking effect in 2014 re: information storage and reporting

NAME	Integration
LAUNCH	Mid-2015
WHAT	<ul style="list-style-type: none">• New APIs to support archiving• Additional data elements
WHY	Improve workflow for clients using existing third party, and support new partnerships

Include the Right Level of Detail

SiriusPerspective: Include only the level of detail required by a given audience.

- A roadmap is not a project plan
- Ask yourself: Does my audience *really need* to know this?
- The product roadmap should be supported by other deliverables (e.g. marketing requirements, product requirements) as needed
- Two principles apply – KISS (keep it simple, stupid!) and avoid TMI (too much information)










Tailor the Roadmap to the Audience

SiriusPerspective: A single future roadmap should be presented in different ways to different audiences.

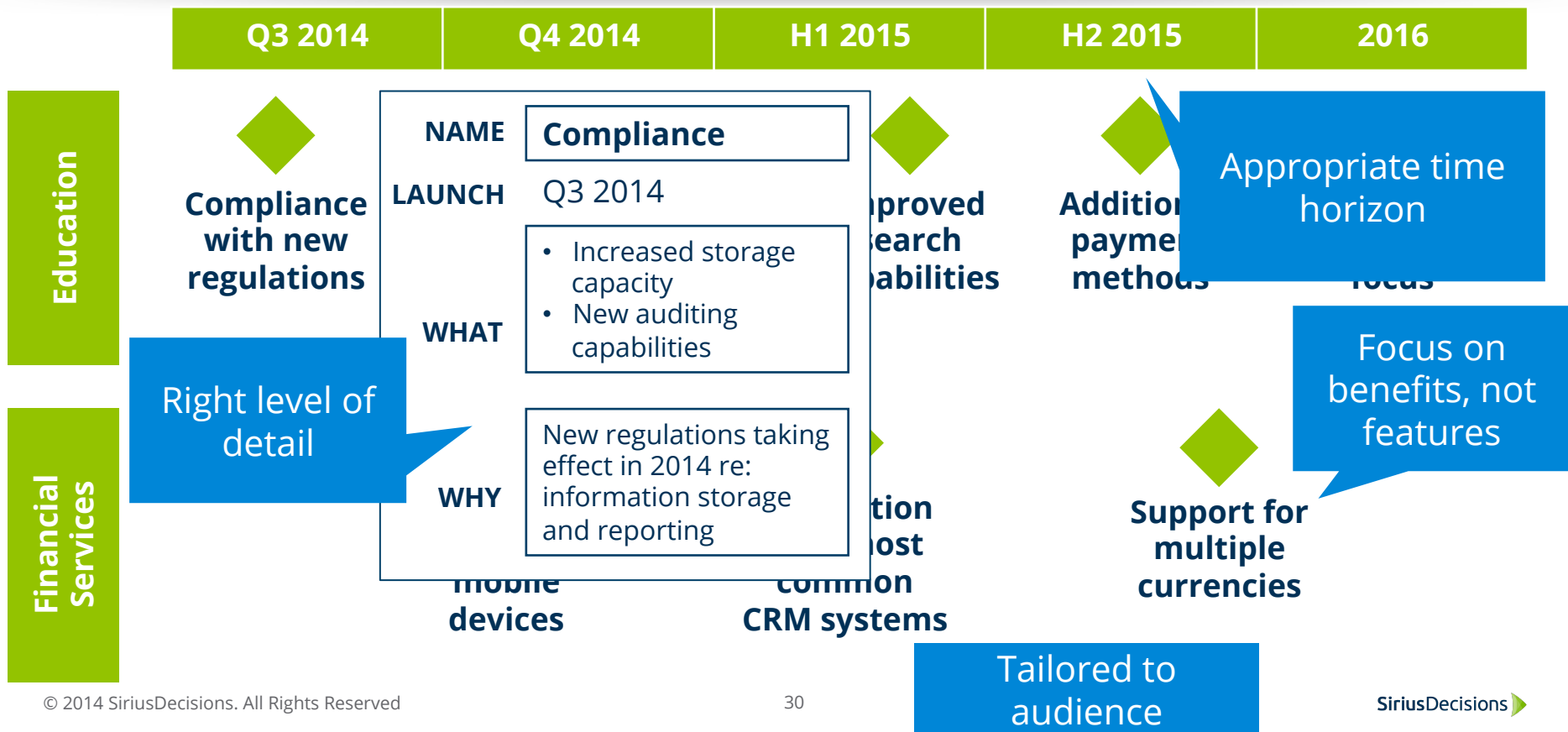
- Think of a single future roadmap as having different views vs. multiple versions
- At a minimum, there should be an internal and an external view
- Consider relationships with sales, customers, partners
- Writing “confidential” does not ensure confidentiality
- When in doubt, leave it out



Applying Best Practices: Example Roadmap

	Q3 2014	Q4 2014	H1 2015	H2 2015	2016
Education	 Compliance with new regulations		 Improved search capabilities	 Additional payment methods	 Higher education focus
Financial Services		 Access from mobile devices	 Integration with most common CRM systems	 Support for multiple currencies	

Applying Best Practices: Example Roadmap



Summary: Best Practices for Communicating Roadmaps

- Understand internal and external needs for a “roadmap”
- Establish a standard definition of a roadmap and ensure internal agreement and alignment
 - Product Roadmap vs. Future Roadmap
- Decide on the appropriate time horizon for the roadmap
- Ensure roadmap highlights relevance to customers and buyers
- Provide the right level of detail for the audience(s)
- Create a single “version” of a roadmap that is tailored to the audience