Agile Product Planning
The foundation for Product Managers

⚠ what is a Persona

- fictional character
- based on user research
- represents a segment or target market
- understand user's needs, experiences, behaviors & goals

⚠ benefits of Personas

- Know experiences, behaviors, and goals

- Understand needs of your users

- Guide the ideation process

- Identify design needs for different people

- Design for a unique person in mind

- Generate empathy

- Help prioritize EPICs and User Stories

- Provide a structure to communicate user research and product priorities

⚠️ How to create a persona

- Conduct user research
- Define the persona group (web designer, entrepreneur, content writer, engineer, etc.)
- Create a fictional name with a headshot/avatar
- List the job title and responsibilities
- List demographics (age, education, ethnicity, marital status, location, etc.)
- Define environment (physical, social, & technical)
- Write your persona's motivations
- List your persona's activities or daily tasks
- List your persona's pain points
- List your persona's goals or needs
- Write a short story for your persona.
- Write a quote that sums up what matters most to the persona in context of your product or offering.

⚠️ What is customer journey mapping

- Visual representation of your customer's or prospect's interactions with your product

- Strategic approach to better understand customer expectations, pain points, motivations, and needs

- Maps all possible customer touchpoint & journeys

- Leveraged to visualize and improve the overall customer onboarding and experience

⚠️ How to create a customer journey map?

- **Define primary and secondary personas**

- **Outline key events, persona's needs, and possible interactions with your product across different traffic sources**

- **Create a comprehensive visual diagram that describes the journey of your primary and secondary personas**

⚠️ Customer journey mapping canvas — existing customer

Product Name	Insert the name of your product here

Persona	Touchpoints	Pain Points
List your primary persona here	Outline your persona's current interactions with the product. Think different entry points such as social media channels, email marketing, paid ads, inbound links, promotions, website, etc.	What are your persona's pain points during different interactions with the product? Consider reaching out to your existing customers to understand their pain points.

Events	User Experience
Which events do you want to target for your product marketing emails or campaigns that may influence your persona to interact differently with your product?	Considering your persona's interactions and pain points, list ideas to improve existing customer experience.

⚠ Customer journey mapping canvas - Potential customer

Product Name	Insert the name of your product here

Persona

List your primary persona here

Touchpoints

Outline your prospect or buyer persona's possible interactions with the product. Think different entry points such as social media channels, email marketing, paid ads, inbound links, promotions, website, etc.

Motivations

What are your prospect persona's motivations or needs?

Consider reaching out to your prospect customers via social media, surveys, networking events, email marketing, etc. to understand their needs.

Events

Which events do you want to target for your product marketing emails or campaigns that may influence your persona to interact with your product?

Lead Conversion

Considering the prospect persona's needs and his/her potential touchpoints with the product, how can we influence his/her decision and convert him/her into our customer?

⚠ Types of journey maps

- current state
- future state
- day-in-the life
- service blueprint
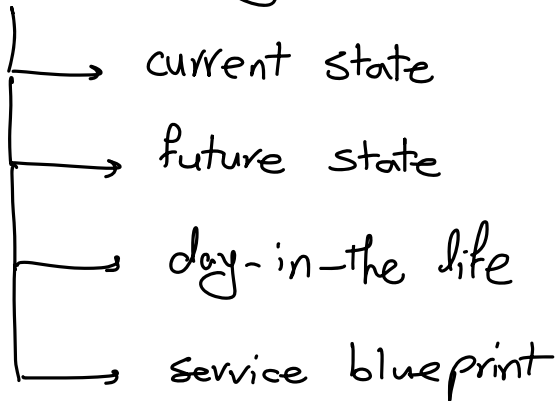
what is OKR?

- **OKRs stand for Objectives and Key Results**
- **Simple management methodology**
- **Founded by Intel CEO, Andy Grove, in 1970s**
- **Introduced to Google by John Doerr in 1999**
- **Objectives define 'what' is to be achieved**
- **Key Results define 'how' we achieve the objectives**

⚠ OKR - Objectives

- Define the 'what' or the purpose
- Each objective could have 2-5 key results
- Characteristics:
  - Qualitative
  - Significant
  - Short
  - Inspirational
  - Memorable
  - Ambitious

⚠ OKR - key Results

- Define the 'how' or the process
- Measurable milestones for each objective
- Characteristics
  - Quantitative
  - Specific
  - Measurable
  - Time-bound
  - Aggressive, but realistic

⚠ benefits of OKR

- Focus and Prioritization
- Transparency and Alignment
- Measurement and Tracking
- Motivation and Excellence
- Enhanced Agility
- Data-driven Decisions

⚠ Common OKR mistakes

- Setting too many objectives
- Defining non-measurable KRs
- Setting milestone or task-based KRs
- Not tracking against OKRs
- Creating team OKRs in silos
- Defining OKRs that are too easy
- Creating rigid processes around OKRs
- Expecting quick and perfect results
- Implementing OKRs in small pockets

⚠️ when not to use OKRs

- When OKRs are not agile
- When OKRs take time to cascade down
- When conflicting priorities are tough to resolve
- When you can't define well-written OKRs

⚠️ implementing OKRs

- → Partial rollout
- → full rollout
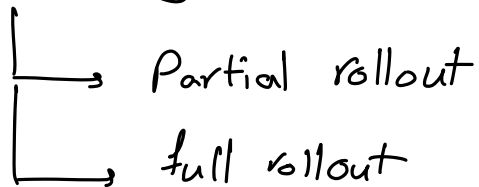
⚠️ Product vision

- Who are target customers?
- What is the overarching goal or the purpose?
- What problems will the product solve?
- What benefits would it bring?
- How it will shape the future?
- What are the key differentiators?

⚠️ The popular definition of product vision

For (the target customers),
Who (have a certain need),
Our product is a (product category),
That provides (compelling reason to buy).
Unlike (the product alternative),
Our product (has these key differentiators).

⚠️ Product vision — Agile template

<Product Name>			
Audience/Personas	<Group/Person #1>	<Group/Person #2>	<Group/Person #3>
Pain Areas / Opportunities	<Problem for Group1>	<Opportunity for Group2>	<Problem for Group3>
Product Goals	<Product Goal for Group1>	<Product Goal for Group1>	<Product Goal for Group1>
Mapping with Enterprise OKRs	<Mapped to Enterprise OKR #XX>	<Mapped to Enterprise OKR #YY>	<Mapped to Enterprise OKR #XX>
Key Results / Metrics	<KR# XXX>	<KR #YYY>	<KR #AAA>
EPICs	EPIC <A> EPIC <B> EPIC <C>	EPIC <B> EPIC <C>	EPIC <D>

⚠️ Product Roadmap

- **Communicate the high-level strategy**
- **Focus on outcomes; update often**
- **Answers below questions:**
  - **How a product is likely to grow?**
  - **How does it map to enterprise OKRs?**
  - **What are product priorities?**
  - **Which EPICs or capabilities can start?**

⚠️ Product roadmap - Agile template

Product Name, Link to Product Vision				
	PI #<XX> / Jan - Mar	PI #<XX> / Apr - Jun	PI #<XX> / Jul - Sep	PI #<XX> / Oct - Dec
Enterprise OKRs	OKR <XX>	OKR <XX>	OKR <YY>	OKR <YY>
Product Goals	Goal <A>	Goal <A>	Goal <B>	Goal <B>
Key Results /Metrics	KR <A>	KR <A>	KR <B>	KR <B>
Milestones	Milestone A	Milestone B	Milestone C	Milestone D
Features	<Feature #1> <Feature #2> <Feature #3>	<Feature #4> <Feature #5>	<Feature #6> <Feature #7> <Feature #8>	<Feature #9> <Feature #10>

⚠ Product Roadmap tips

- Focus on product goals

- Align with the product vision

- Keep it realistic and simple

- Discuss how to measure progress against roadmap

- Review and adjust regularly

⚠ Product backlog

- Prioritized list of work items

- Consists both EPICs and user stories

- Aligns with product priorities

- Holds the highest priority items at the top

- Prioritized user stories are estimated in terms of story points

⚠ An EPIC is a large piece of work or a large userstory that needs to be broken down into smaller pieces to deliver business value

△ A User Story is the smallest piece of business value that a scrum team can deliver in an iteration or a sprint

  └→ format : As a ⟨ user role ⟩,
              I want to ⟨ the goal ⟩,
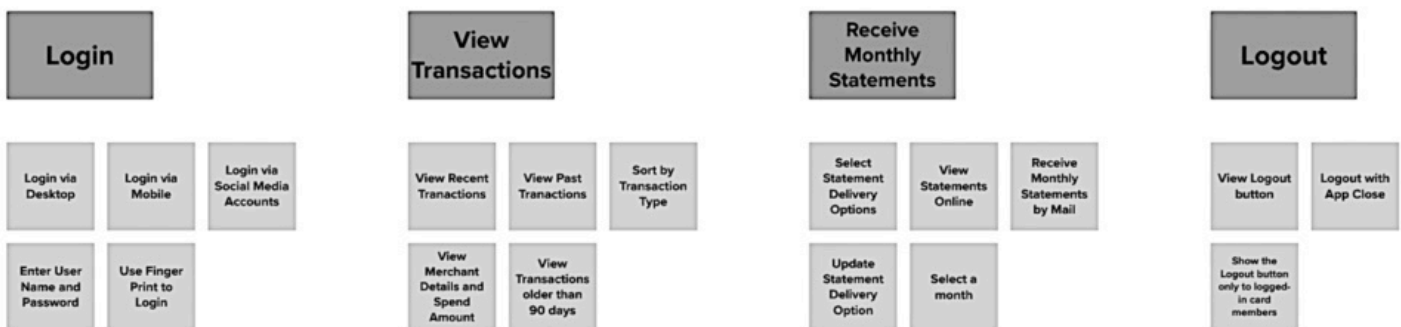   so that ⟨ the benefit ⟩.

△ writing user stories

- **Know Your Personas**

- **Conduct a Story Writing Workshop**

- **Facilitate User Story Mapping**

- **Follow the INVEST Principle**
    - I = Independent
    - N = Negotiable
    - V = Valuable
    - E = Estimable
    - S = Small
    - T = Testable

⚠ UserStory mapping

- **Visual tool**

- **End-to-end customer journey mapping**

- **Brainstorming and Prioritization**

- **Categorization of work**

- **Explore missing work items**

- **Multiple swim lanes**

- **Release Planning**

- **Collaboration and Alignment**

⚠ UserStory mapping – example

Login	View Transactions	Receive Monthly Statements	Logout

Login via Desktop	Login via Mobile	Login via Social Media Accounts	View Recent Tranactions	View Past Tranactions	Sort by Transaction Type	Select Statement Delivery Options	View Statements Online	Receive Monthly Statements by Mail	View Logout button	Logout with App Close

Enter User Name and Password	Use Finger Print to Login		View Merchant Details and Spend Amount	View Transactions older than 90 days		Update Statement Delivery Option	Select a month		Show the Logout button only to logged-in card members	

⚠ Business Model Canvas

- **Designed by Alexander Osterwalder and Yves Pigneur**

- **Comprises of nine segments or building blocks on a single page**

- **Covered in-depth with the book, Business Model Generation, available on Amazon**

- **Start with any segment first, and then brainstorm to fill the remaining ones.**

⚠ Business Model Canvas template

Product Name	Insert the name of your product here			
Key Partners • Who are your key partners? • Which activities are performed by partners? • What are we acquiring from our partners?	**Key Activities** What key activities are required by our value propositions? **Key Resources** What key resources do our value propositions require?	**Value Propositions** • What value do we deliver to our customers? • Which customer problem are we trying to solve? • Which customer need are we satisfying?	**Customer Relationships** • What are our relationships with each customer segment? • How do we establish and maintain relationships? **Channels** • Which channels do we use to reach out to our customers? • Which channels are the most cost-effective?	**Customer Segments** • Who are our customers? • Who are we serving? • Who is our primary persona?
Cost Structure • What are the most important costs in our business model? • Which key activities are most costly? • Which key resources are most expensive?			**Revenue Streams** • What do our customers pay for? • How do our customers pay today? • How do our customers want to pay in the future? • Which revenue stream(s) contribute the most to the overall revenue?	

⚠ Product Canvas

- **An alternative tool to create an Agile Product Vision and the Product Backlog**

- **Compatible with the Business Model Canvas**

- **Combines Agile Development & UX Design**

- **Leveraged for customer-centric efforts**

⚠ Product Canvas – Agile Template

Product Name	Insert the name of your product here

Target Group

The section or the persona group that you are building your product for.

Goals — What are your key product goals?

Key Results (Metrics)

How will you measure your product goals?

EPICs, Features — What are the key EPICs, capabilities, or features that need to be built to meet product goals outlined above?

User Journey, UX Design

- What is your customer journey?
- How does/will your primary persona interact with your product? (Include your UX designs here.)

Personas

Your primary and secondary personas

Program Increment (PI) Objectives

If you leverage the SAFe (Scaled Agile Framework), list down your PI (Program Increment) Objectives here. If not, list down objectives for your next product release.

Prioritized User Stories — What are the prioritized user stories for the upcoming iteration(s) that align to product goals and to the needs of the primary persona?