**Disciplined Entrepreneurship Workbook: Step 24 Worksheets**

# Step 24: Develop a Product Plan

## Worksheets

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| Product Plan – Version 2 for the Beachhead Market | | | | | |
| **#** | **Feature/Function** | **Benefit** | **How does it leverage your Core?** | **Priority** | **Est. Resources Needed to Develop** |
| 1 | Automated Report Generation | Saves time creating financial summaries | Core includes proprietary templating engine | High | 2 backend engineers, 1 designer (4 weeks) |
| 2 | Customizable Dashboards | Provides personalized insights for clients | Visual layer driven by modular analytics infrastructure | Medium | 1 frontend engineer, 1 UX designer (3 weeks) |
| 3 | Real-time Data Sync | Ensures data is always up to date | Sync engine built into data ingestion core | High | 2 engineers (6 weeks) |
| 4 | User Role Management | Supports collaboration and compliance | Core has permission-based access system | Medium | 1 engineer (2 weeks) |
| 5 | Manual Data Upload (CSV) | Enables early adopters without integrations | Leverages flexible input parser | High | 1 engineer (1 week) |
| 6 | In-app Guided Setup | Reduces onboarding friction | Uses lightweight workflow system built in core | Low | 1 PM, 1 engineer, 1 week (plus content) |

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| Product Plan – Version 3 for the Beachhead Market | | | | | | |
| **#** | **Feature/Function** | **Benefit** | **For Whom?**  **EU, EB, Champ** | **How does it leverage your Core?** | **Priority** | **Est. Resources Needed to Develop** |
| 1 | Native Integration with QuickBooks | Eliminates manual entry and errors | EU, EB | Utilizes flexible data ingestion pipeline | High | 2 engineers, 5 weeks |
| 2 | SLA-based Alerting System | Alerts users to anomalies or delays | EU, Champ | Core includes scheduling and alerting module | Medium | 1 engineer, 3 weeks |
| 3 | Monthly ROI Report | Demonstrates cost savings/value to buyer | EB | Aggregates usage and productivity analytics | High | 1 engineer, 1 data analyst, 2 weeks |
| 4 | Audit Trail & Version History | Enables compliance and error tracing | EU, EB | Leverages existing change-tracking architecture | Medium | 2 engineers, 3 weeks |
| 5 | Referral Program Portal | Incentivizes customer advocacy | Champ | Built on lightweight CMS and tracking system | Low | 1 marketer, 1 engineer, 2 weeks |
| 6 | Knowledge Base and AI Search | Empowers self-service, reduces support load | EU | Uses existing NLP layer for contextual queries | Medium | 1 engineer, 1 content creator, 4 weeks |

### Other Activities Beyond Functionality for the Beachhead Market

What other activities do you anticipate doing related to the product to help it scale after Version 1.0 for the beachhead market? (e.g., go-to-market activities, regulatory matters, additional complementary services to support the product, additional sales channels, etc. – anything not related to product functionality listed above)

1. **Develop onboarding webinars and video tutorials to accelerate adoption and reduce support requests.**
2. **Launch a partner program to integrate with financial consultants and fractional CFOs.**
3. **Seek SOC 2 compliance to satisfy security concerns from larger SMBs.**
4. **Build customer success function to proactively support renewals and upsells.**
5. **Experiment with alternative sales channels, such as marketplaces and VARs (value-added resellers).**

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|  | | Moving Beyond the Beachhead Market – Analysis & Prioritization of Follow-on Market Candidates Refer to your work from Step 14, Calculate the TAM Size for Follow-on Markets, for this worksheet, but build upon it with the knowledge you have gained since that first draft. | | | | | | | | | |
| **#** | **Name** | | **Which market does it follow from?** | **Pros** | **Cons** | **Does it leverage your Core?**  **(Y/N)** | **Priority** | **Key Factors Needed to Succeed** | **Resources Required** | **Risk** | **Reward** |
| 1 | Fractional CFO Firms | | Accounting SaaS market | Similar workflow needs, higher price tolerance | Longer sales cycle | Yes | High | Industry testimonials, premium packaging | 2 sales reps, 1 CS specialist | Medium | High |
| 2 | Legal Compliance Teams | | Financial workflows | Need audit trails, version history, documentation | Different language and terminology | Partial | Medium | Compliance language UI adaptation | 1 PM, 2 engineers | Medium | Medium |
| 3 | Nonprofits and Grant Admins | | Reporting automation | Require structured reporting and traceability | Lower budgets | Yes | Medium | Value pricing strategy, templates | 1 BD lead, 1 CS rep | Low | Medium |
| 4 | Healthcare Finance Depts | | Financial workflows | Large budgets, intense reporting needs | Regulatory hurdles | Yes | Low | Secure hosting, certification, sales trust | 1 compliance officer, 2 engineers | High | Very High |
| 5 | Real Estate Portfolio | | Dashboard or reporting tools | Strong need for visibility, good word-of-mouth | Requires real estate-specific data connectors | Partial | Medium | Partnership with software vendors | 1 BD lead, 1 engineer | Medium | High |

A diagram of a diagram

AI-generated content may be incorrect.

(Editable version of this graphic is available in an additional Powerpoint file)