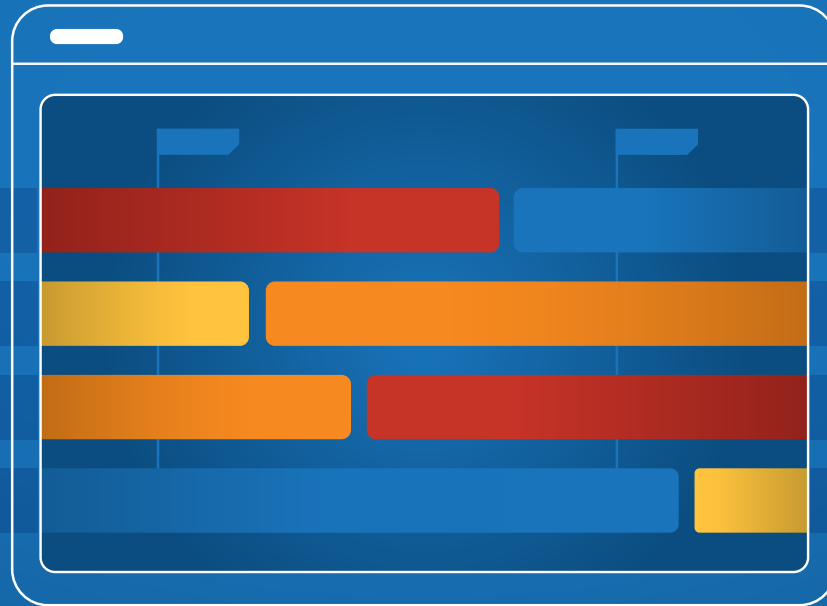


# BUILDING YOUR FIRST VISUAL PRODUCT ROADMAP





# BUILDING YOUR FIRST **VISUAL PRODUCT ROADMAP**

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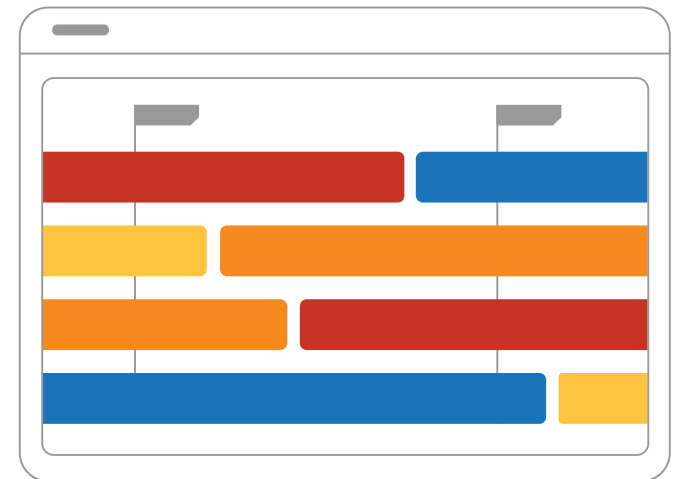
Your Visual Product Roadmap Checklist

# INTRODUCTION

Product roadmaps are a powerful tool for creating alignment, motivating teams, exciting customers, and setting the stage for flawless execution. But they can also be cluttered, inscrutable laundry lists of features and delivery dates that bog stakeholders down in detail and debate.

What separates a compelling and useful product roadmap from a cluttered and confusing one? It's all about the purpose, contents, structure, components, and presentation. As product managers, one of your key jobs is to be an evangelist for the product. A high-level, visual presentation is a powerful way to communicate and help get buy-in on your product strategy.

In today's agile world, there isn't time to hassle with updating a graphic, slide deck, or spreadsheet every time the roadmap is re-prioritized or your executives want to review it. This book intends to help product managers elevate their game, abandon their spreadsheets and co-opted project plans, and create beautiful, engaging visual product roadmaps that convey a clear, healthy vision and provide an embodiment of the product strategy.



# THE PURPOSE

## OF A VISUAL PRODUCT ROADMAP

A product roadmap is a strategic document designed to help you develop a plan for your product and to keep your team on track in executing that plan.

For many companies, the product roadmap is a unifying force for the entire organization and beyond. It serves as a microcosm for everything the company stands for, cares about, and is working toward. It's shared widely, referred to often, and used as a guidepost for everyone, from junior coders to sales executives to the C-suite.

### The importance of audience

Making a product roadmap valuable, useful, and relevant for such a broad range of stakeholders requires an understanding of your audience, as well as their motivations.

You want your management team to see a roadmap that gives them confidence that your product will help meet the company's strategic objectives. You want your sales teams to see a roadmap that clearly shows them how they can convince prospects that the product will meet their needs. You want your developers to see a roadmap that clearly explains what you'll need from them and why their work will matter to the product's ultimate success. And when you have a roadmap meeting with your development team, and they want to know what you're planning, your presentation needs to focus on what the product's development will

mean to them. For example, what technology you'll be asking them to use, what timeframe they'll have to get the work done, and what their day-to-day tasks and priorities will be.

Having conversations with each type of stakeholder can uncover exactly what they care about and what they need to know about the product's plans for the future. Armed with this knowledge, product management can create product roadmaps that fulfill these varied needs and expectations.

But building a product roadmap that serves that purpose for so many different types of people requires a few key things:

- **Grounding the roadmap in its reason for being**
- **Organizational alignment around the product goals and measures of progress**
- **Optimized presentation of information for relevance and comprehension**

It's worth pointing out that when you build your static roadmap this way, you will need to manually update all versions of it every time priorities, dates, or other elements change in your development. Failing to update all versions of your static-document roadmap can quickly lead to version-control problems with the roadmap.

This is where visual product roadmapping tools separate themselves from other formats for communicating product plans. You need the ability to present different views and varying levels of detail, depending on the team or audience you're presenting to—without forgoing their usefulness for stakeholders requiring more detail.

# BUILDING YOUR FIRST VISUAL PRODUCT ROADMAP

Updating existing roadmaps has its own set of challenges, but creating one from scratch is a tall order for any product manager. There's so much to include it can be hard to know where to start.

## Step 1. Starting with “why”

Before diving into the mechanics of creating a visual product roadmap, there are some fundamental concepts that product teams should keep in mind throughout the process. Some may seem like common sense for any product roadmapping exercise, but others may run counter to previous product roadmapping tenets.

First, your organization has to determine the product's vision of what the product will accomplish in the market. Second, you and your team have to identify a high-level strategy to make that product vision a reality. This strategy should determine the major components of your product strategy and the reasoning behind them.

**Determining your product's reason for being with your team upfront will make all of your downstream decisions more strategic and cohesive. Ultimately, it will lead to a more successful product.**

Now, it might seem appropriate to dive in and try to handpick an initial set of features and an arbitrary timeline. Most product roadmaps answer many questions beginning with “what” and “when.”

“What” questions include:

- What new features are we adding?
- What will the product be able to do in the future?
- What new verticals, industries, and user personas are we appealing to?
- What technologies are we investing in?
- What are the teams working on?

These are accompanied by “when” questions, such as:

- When is the next release?
- When will that new enhancement be done?
- When will we support that particular platform?
- When is our demanding customer getting what they asked for?
- When will resources free up for something else?

These are not bad questions. But they are essentially putting the cart before the horse.



Product managers should take a big step back. First, concentrate on the product's reason for existing at all. Just like it's important to define what is being built before worrying about who will build it or how it will get done, it's imperative first to understand why anything is being done in the first place and make that clear to the audience:

- **Why are we building this product?**
- **What are we hoping to accomplish?**
- **How will this help users?**

If you can't answer those questions—ideally with data to support your answers—then you can't reasonably justify spending any time and resources on the product. By answering these questions, it places the focus on what's most important.

With this in mind, it is a smart strategy to find ways to have your roadmap include your reasoning behind each of the themes, epics, and other initiatives you've chosen to include. If it's on the roadmap, your team, and anyone you've given access to view the roadmap, should be able to learn why you've chosen to prioritize it. When you have a clear explanation on the roadmap for why every item belongs there you are more likely to earn stakeholder buy-in. We recommend setting a rule that any initiative on the roadmap needs to articulate its "why" for existing on the roadmap.

Understanding why each item deserves a spot on the roadmap will help your team be more strategic in your product decisions and have your roadmap resonate and earn your stakeholders support.



## Step 2. Top-down versus bottom-up product roadmapping

One method for focusing on big-picture strategy with your roadmap instead of getting lost in a sea of feature specifics and implementation details is to adopt a top-down product planning approach. When you're creating a roadmap, it's helpful to know where you want to end up.

### Bottom-Up

Product roadmaps conceived of and constructed in a less strategic fashion tend to begin with all the stuff that could be built. Product teams cull through the product backlog, selecting items they think will make a meaningful impact, appease pushy customers, satisfy internal stakeholders, and are "doable" for the engineering team.

Project managers, development leads, and architects then provide rough estimates of the scope of work. Then they tell product managers how much bandwidth is available. It's followed by some prioritizing and triaging, eventually bucketing features into releases.

With features and enhancements slotted for specific releases, the product roadmap takes shape.

This definitely qualifies as a product roadmap. Anyone can look it over and know when something is going to be available, or if something else didn't cut it. Sales teams can start making promises to customers and prospects. Marketing can spin up press releases and plan out which trade show is the best fit to announce the latest versions. Executives can show investors and board members when they'll have this feature and that capability on the market.

These bottom-up product roadmaps serve a utilitarian purpose. They tell everyone what's coming and when. However, these product roadmaps lack context. They don't communicate what the expected ramifications of these releases might be. There's no connection between the items and timelines included and the goals and desired outcomes the organization cares about.

***That's why the best product roadmaps don't start with the journey, but begin with the destination.***

## Top-Down

A top-down product roadmap is driven by the outcomes of what the product strategy is trying to accomplish. There are several significant components of this.

The business has objectives, such as increasing revenue, improving profitability, usage growth, or reducing churn and abandonment. These motivations matter, because they're tied to the overall corporate objectives.



The second tranche consists of what users care about. It will vary a lot depending on the type of product and target market. But customers generally want to solve problems and make their current tasks more accessible, more efficient, or more enjoyable to complete.

The third building block of the strategy is positioning the product for future success. These are the investments in technology, functionality, and integrations supporting the long-term goals of the organization.

These projects may not pay dividends immediately, but without laying the groundwork in the interim, they will become costlier and more difficult to implement eventually. Technical debt could also be thrown into this category. Failing to address issues sooner rather than later can make them both harder to fix down the line and more problematic if they continue to remain unaddressed and break or disrupt things.

Of course, any initiative can only be truly successful if there is a way to measure that success. Thus, aligning the product roadmap with the metrics that track progress toward organizational goals is key.

Whether the company has a North Star metric, KPIs, or OKRs, they should all play a prominent role in both the roadmapping process and the product roadmap itself. By clearly and visibly linking items on the product roadmap to these metrics, it demonstrates the projected value they will deliver.

From here, get agreement with your team on the specific goals needed to make that vision a reality. By prioritizing certain items over others, the roadmap prioritizes work that gets the product to those goals. The rest can simmer in the backlog.

Creating these linkages between why things are planned and how they relate to organizational objectives is a primary reason visual product roadmaps are powerful and useful tools. They complement the storytellers from the product team while also standing on their own as meaningful and useful artifacts.

An extra benefit of utilizing a top-down strategy is helping get stakeholders on board with the plan. The roadmap's contents no longer seem arbitrarily placed or the output of a context-free prioritization exercise. Instead, they line up with the vision and goals the company has already established for the product. There may still be some disagreement over why Feature A trumps Feature B. But it's all grounded in the underlying rationale of advancing the product toward meeting goals and realizing the vision.

### **Addition through subtraction**

In some organizations, the expectation may persist that every good idea will eventually be pursued. Therefore, stakeholders presuppose to find it somewhere on the product roadmap, even if it's not slotted for years in the future.

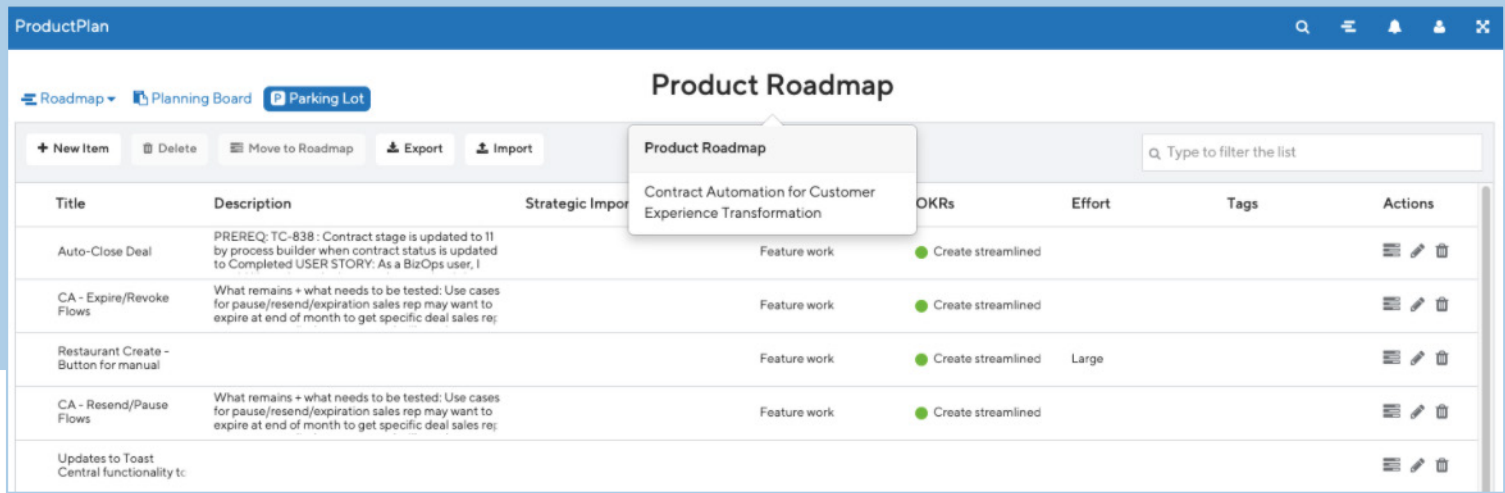
But a visual product roadmap can't include everything, nor should it.

First of all, it would never fit on a single page (or it would be printed in such a tiny typeface, you would need a magnifying glass to decipher it). But, more importantly, a visual product roadmap isn't intended to be a catch-all for everything the company will ever build.

Instead, it's a strategic vehicle for communicating the big picture goals and major initiatives intended to help the organization accomplish them. And that strategy doesn't include doing every little thing someone thinks is a good idea. Ideas might be good yet irrelevant to the goals and objectives the company cares about at the moment.

Just because every good idea shouldn't be on a product roadmap doesn't mean it is cast into the unknown either. Instead, use a parking lot to store items worthy of future consideration. Parking lots also provide product teams with an ability to answer the "what about XYZ?" questions that pop up when an executive or customer checks in on the status of their pet project. A quick search lets the product team speak to its current parked status.

Having a single, categorized repository of potential features and enhancements ensures these ideas aren't lost over time, stored on random sticky notes, or stranded in spreadsheets saved on someone's hard drive.



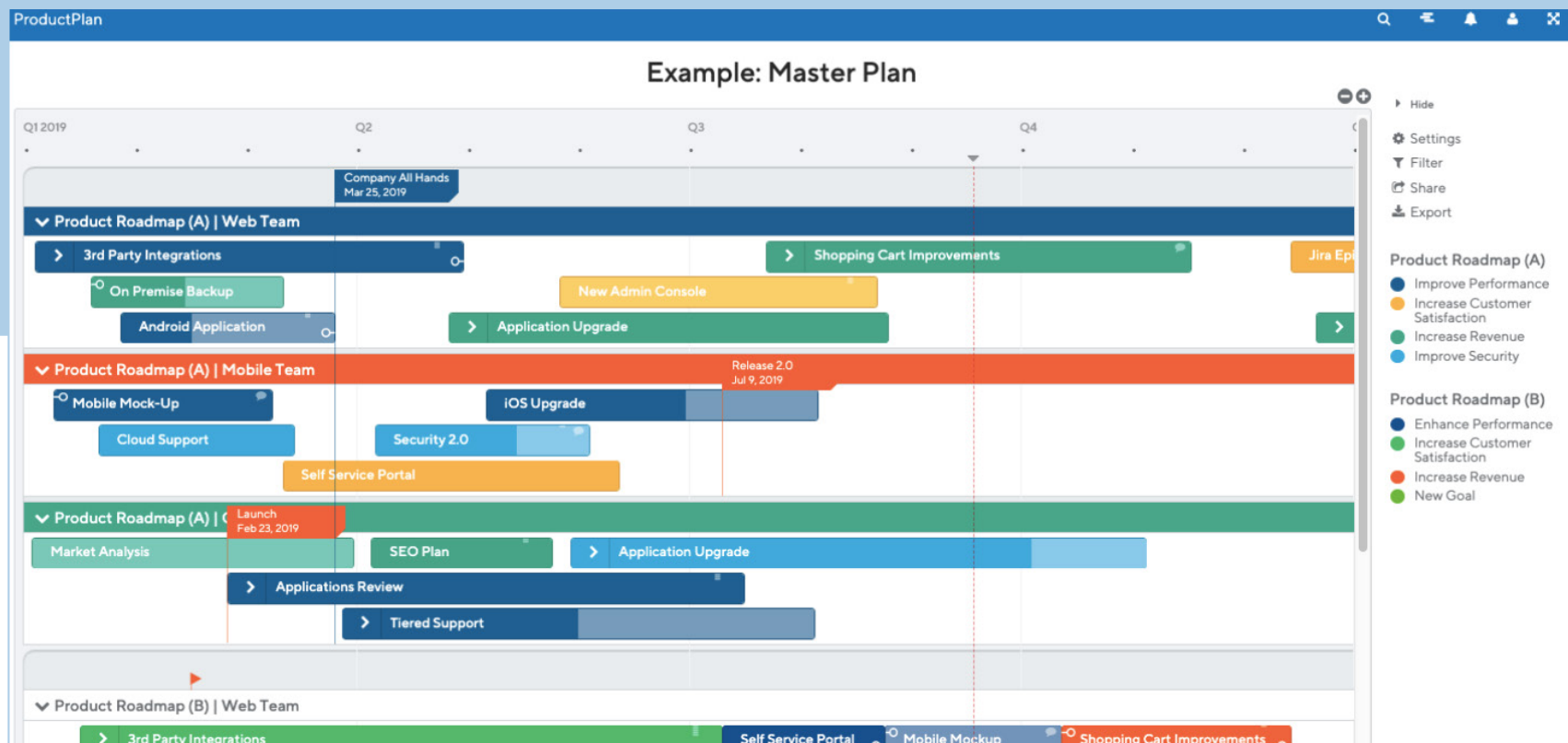
## Creating a Master Plan

Many organizations offer multiple products. While some might be 100% independent of each other, they often complement each other or are even part of a more extensive product suite.

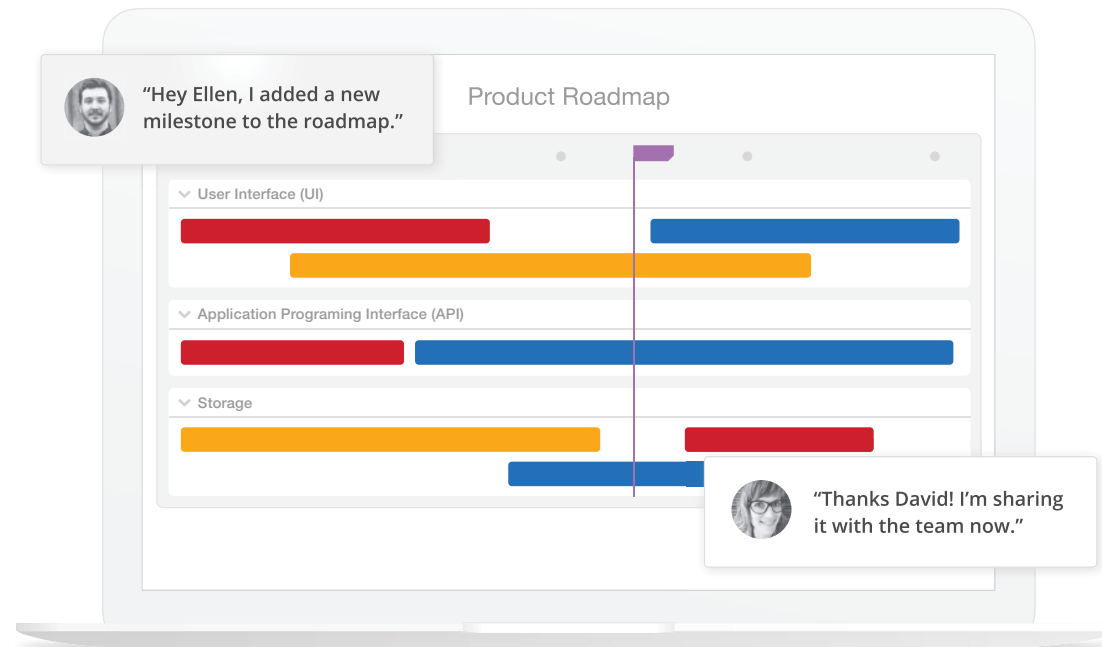
But squeezing everything into a single visual product roadmap is sometimes untenable to maintain readability. Moreover, there might be a need for distinct visual product roadmaps for different products, components, or variants.

With a visual product roadmapping tool, different products can have their own roadmaps, but roll those individual plans up into a single view known as a Master Plan. These still have all the same elements as a standalone visual product roadmap, but it puts everything on one screen.

Decide if you need to create a Master Plan roadmap from the start. Master Plans are particularly handy for resource and budget planning, as well as providing senior executives with a comprehensive picture of everything that's happening with the product organization. But, because the Master Plan is automatically generated based on the individual visual product roadmaps created and maintained by each product manager or team, it doesn't require much collaboration to put together a synergistic view.



In the next few steps, we've included examples from ProductPlan's visual roadmapping software in order to more effectively explain how to build your first visual roadmap. If you don't have your own roadmapping software and would like to practice alongside, try our [14 day free trial](#).



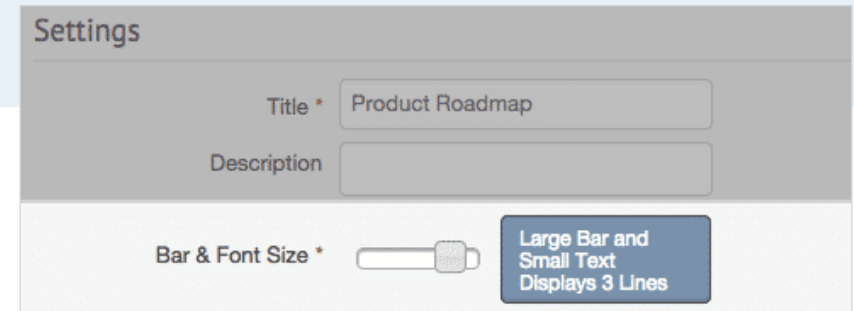
Try it free →

## Step 3: Structuring Your Product Roadmap Content

Visual product roadmaps are constructed as an output of incredibly complicated vision crafting, goal setting, consensus building, and prioritization. But no one should see all of that when they're looking at the finished product.

Sticking with the “less is more” theme, visual product roadmaps are elegant in their minimalism. They can be quickly and easily reviewed. They’re understandable at a fundamental level without much need for further explanation. There’s always an opportunity to dive deeper, but the main ideas and concepts are pretty obvious.

**A quick aside:** people have a limited amount of time to digest your strategy. 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.



### Timeframes

Another strategic question you will need to answer when building your roadmap is whether to include timeframes and deadlines in your plan. There is no one-size-fits-all answer to this question.

Healthcare, manufacturing, and non-profit organizations love rolling out five-year, ten-year, or even longer plans. That’s because their long-range planning requires carefully orchestrated strategies that unfold across decades.

Product teams, however, don’t have the luxury of thinking that far ahead. Typically, there are way too many unknowns to project with any level of certainty beyond a year or two. Most teams plan a year out according to our [2020 product management report](#).



The truth is that the further out a product roadmap's timeline extends, the less accurate and reliable it becomes. Each month or quarter into the future that gets tacked on comes with diminishing confidence and certainty that those priorities, goals, and plans will remain valid.

But once something makes its debut on a product roadmap, expectations get planted in the minds of internal stakeholders, customers, and whomever else gets a peek at the plan. Removing something from the product roadmap requires explanations and apologies that could have been avoided by never putting things on there in the first place.

While a product roadmap always comes with some level of risk, product teams can minimize their exposure by shortening the chronological scope. But the sweet spot of figuring out just how far out a product roadmap should extend will vary based on the type of product.

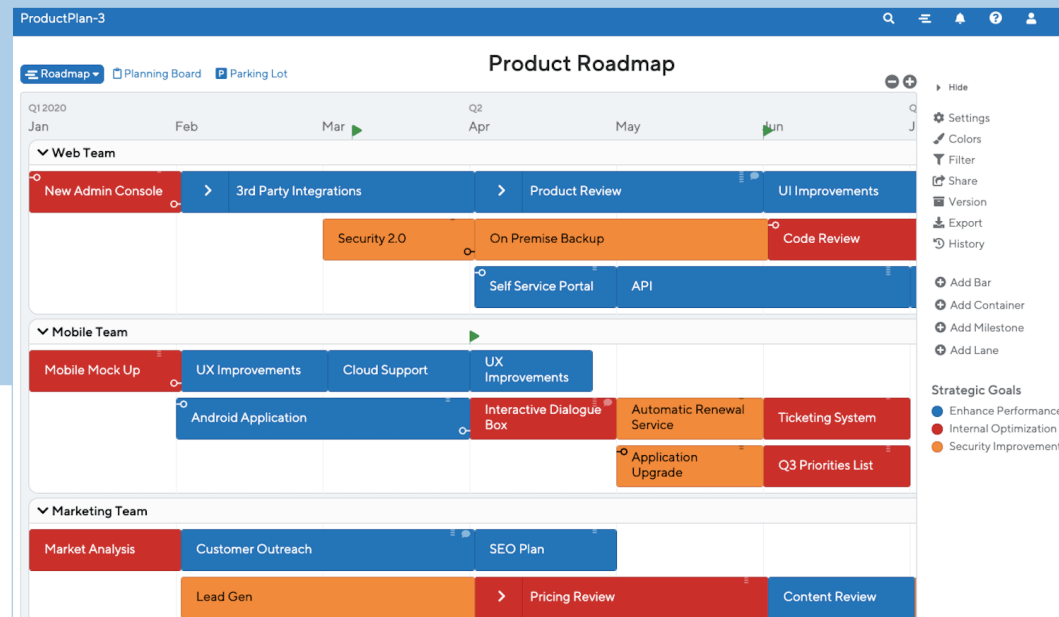
As a rule, consumer digital products should have the shortest timelines. They must react to changes in consumer preferences, popular trends, and market forces with extreme nimbleness. Plus, they don't have any key customers they're making commitments to.

Enterprise software usually requires a slightly longer scope—18-24 months is typical—as the products themselves are more complex and take longer to develop significant new enhancements. Additionally, significant customers may demand visibility or require the product roadmap to sync up with other initiatives.

When hardware is part of the solution, product roadmaps tend to extend further into the future. The product development cycle is much longer—it includes prototyping, testing, and supply chain considerations that don't apply in a SaaS environment.

If your company's executives or other stakeholders demand to know what you expect your product to offer and when, you might need to build these time-based details into the roadmap.

For as long as anyone can remember, product roadmaps tended to be presented as timelines, sequentially depicting what's to come as time goes on. This primary view is used for visual product roadmaps as well.



## Kanban-style list view

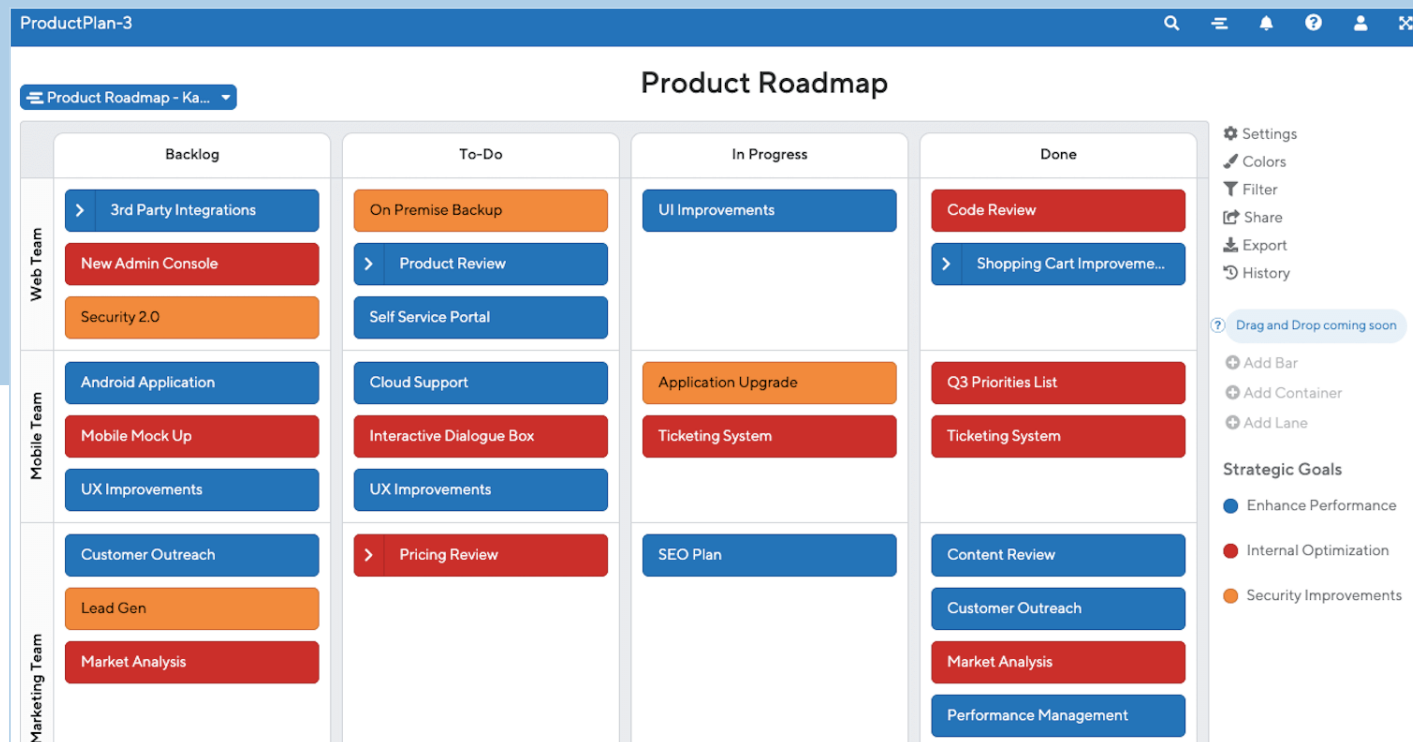
With a fully-featured roadmapping tool, there's also an option to show things in a different format. The same roadmap information can be instantly pivoted and presented in a Kanban-style list view. List view might be a better fit for your team if the focus of the roadmap is more on achieving specific strategic goals with your products than on the timeframes needed to accomplish these goals. If that's the case, you might want to structure your roadmap based on criteria other than time.

Columns can be set as months or quarters to keep things in chronological order. They can also be viewed by sprint, for a detailed look at what's happening with each chunk of development. Additionally, the columns can be designated by tag to show roadmap initiatives by team, status, or strategic goal.

Even when a visual product roadmap adopts a list view, the swimlanes remain. A swimlane is a method of grouping tasks together in your product roadmap. You can group swimlanes according to several different criteria, such as by stories or features, by the department, or by priority level.

Kanban-style list view proves yet another way to tailor things for each audience or to make it easier for your team to make sure the plan matches up with your vision and strategy.

Anyone involved in the product's development can quickly view your vision for the overall project hierarchy—to see what they should be working on, and where it fits into the bigger picture.



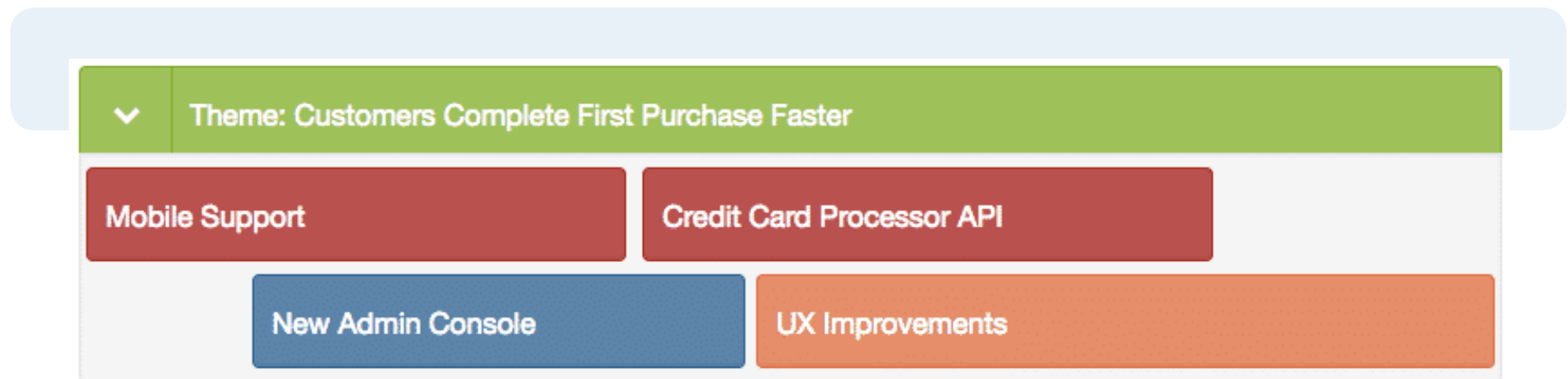
## Step 4: Product Roadmap Content: *Themes, Epics, Stories, and Features*

Up to this point, you have approached every step in the roadmap creation process from a top-down, strategic point of view. You should use that same approach when building the actual details of your visual roadmap.

So, where do you start? What goes into the roadmap first? Remember that you are telling a story about how your strategy fits with the product vision. Therefore 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.

### Themes

Themes are broad and tied to the goals defined in the product vision. They can be at the product level or identified for the broader organization (such as a platform-oriented initiative).



Think of a theme as a broad strategic goal for your product, which you can easily communicate to your various constituencies in plain language. In communicating this theme to constituents such as your executive stakeholders, you would also want to present

data to articulate the value of assigning resources to this initiative. For example, perhaps you're an enterprise software application with a large portion of your enterprise customers in the healthcare field where they're subject to HIPAA regulations for protecting the privacy of their patients' data. An example theme for a future release might be to "ensure the product complies with federal regulations such as HIPAA."

Sometimes themes may be a little more discrete and not last forever, such as expanding the types of supported payment options. But nearly everything can usually be linked with an ongoing goal for the product.

More common than a theme abruptly ending are new themes emerging as the product's goals expand and evolve. These new themes may take up more resources and energy since they're a more immediate focus for the organization and are starting from zero.

For each of those themes, create a swimlane on the roadmap. If you're using the right purpose-built roadmap tool, you can always move these themes around later with a couple of clicks or a drag-and-drop, if you need to change the order of priority or move everything back in the timeline.

Themes can be short (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.

## Epics

Now that you have a series of major themes, you can start layering in epics beneath them. An epic, like a theme, is typically a group of features or stories with a common strategic aim. You can think of an epic as one level of detail below a theme. A theme might be composed of several related epics.

Using our compliance example above, if one of the themes for your product roadmap is to build compliance into your product, you could break that into several epics—each addressing compliance with a different federal regulation.

HIPAA addresses data security for patient health records, for example, while Sarbanes-Oxley, or SOX, places similar demands for protecting customers' data on any publicly traded business. Your compliance theme, then, could be broken into an epic for HIPAA compliance and another epic for SOX compliance.

## Stories

A story is a self-contained unit of development work designed to accomplish a specific goal of the product. A story is a level more granular than an epic, which in turn is a level more granular than the theme.

Sticking with the compliance example, your product roadmap's stories might include, for example, the front-end work needed to complete the epic of SOX compliance. It could include building in a 2-step verification process, or other user security measure that limits access to regulated data, to ensure only authorized personnel within your enterprise customers' companies can access sites or databases that contain this data.

Another related story could involve back-end work, such as upgrading your encryption protocols for transmitting your customers' data—for example, from Secure Socket Layer (SSL) to the more advanced



Transport Security Layer (TLS) encryption. In the cases of many federal regulations, the more sophisticated the encryption of your data-in-transit, the more likely it complies with regulations.

By introducing increasing levels of granularity into the product roadmap tied strategically to the level above, you're effectively using your roadmap to explain the "why," or purpose of each proposed initiative for the product.

## Features

Ultimately the stories, epics, and themes for your product will be built on the features you add. But if you are following the hierarchy above, the features you include on your roadmap will have the appropriate context. In other words, the reasons you included these features in your roadmap will be clear.



## Step 5: Product Roadmap Components

In this section, we'll go through the main components that make up a roadmap in ProductPlan, but you'll find that these components (or ones similar) will be found in most modern roadmapping tools. When constructing a visual product roadmap, there are different types of building blocks at the product management team's disposal. These components should follow a consistent hierarchical structure; "Type B" always falls under "Type A" to ensure uniformity. Let's talk product roadmap nuts and bolts.

### Lanes

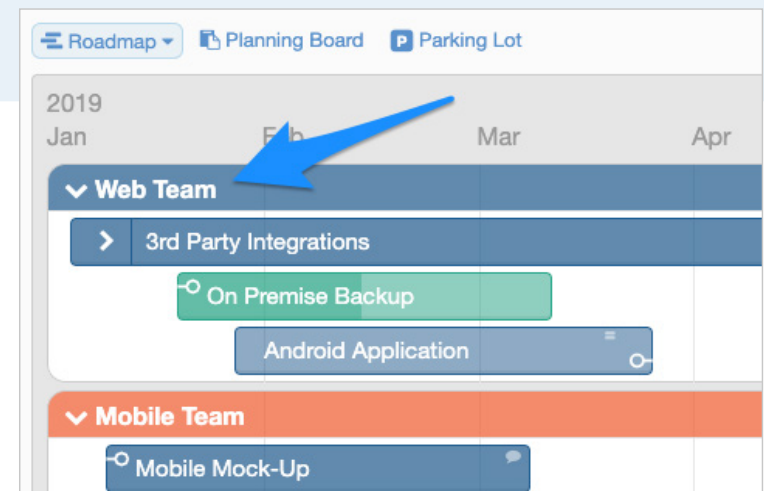
Lanes are the top-level component of visual product roadmaps. They are used to organize everything planned into a logical structure.

Lanes, sometimes referred to as swimlanes, are a useful way to divide the high-level categories of your roadmap's initiatives to show divisions of responsibility clearly. In the example here, the swimlanes divide product initiatives according to the teams responsible for them, such as the web team and the mobile team.

One option is assigning lanes based on teams' areas of responsibilities, geographic regions, or whatever categories make the most sense for your company or your product's division of work.

These teams can encompass more than just different product development groups. Marketing, sales, operations, finance, and account management may all have roles to play in the product's plans so that they can get a lane of their own.

It also lets those teams see exactly what's on their plates in the future.





Another approach is using strategic goals to determine the visual product roadmap's lanes. This method makes it clear which projects benefit each goal and guarantees that none get neglected. It's a particularly valuable view for stakeholder alignment, as there's a direct link between each initiative and the product strategy.

If the company has multiple products that must all appear on the same visual product roadmap, then each individual product can get its own lane. Although this won't result in a roadmap quite as granular as one dedicated to a single product, it illustrates the big picture quite clearly. It's also appropriate for organizations that are building multiple products on shared platforms or possessing a high degree of shared code and/or interoperability.



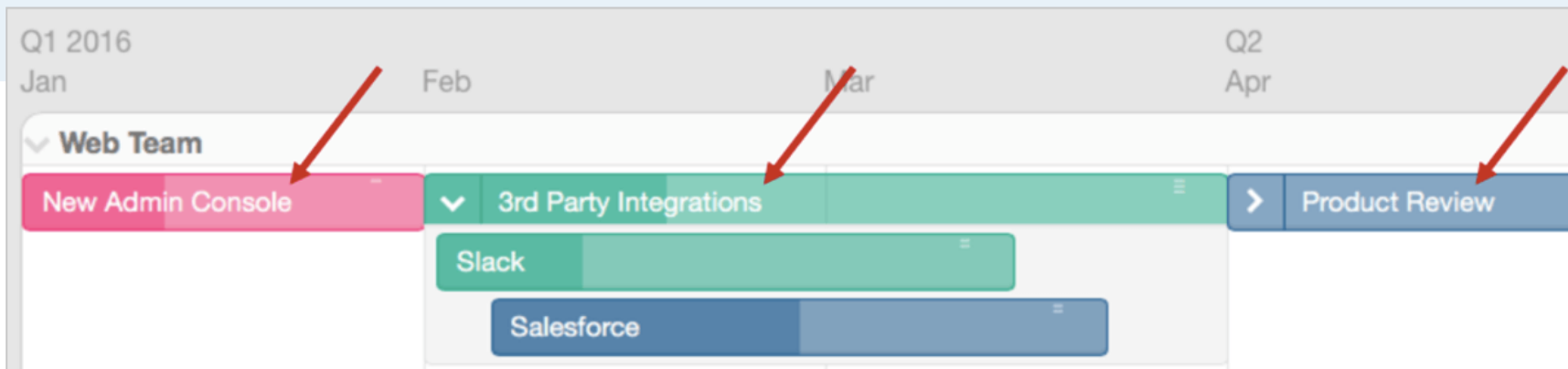
## Containers

Containers will represent the highest level groupings of your roadmap's initiatives. You can think of containers as the major themes of your plan, the high-level categories to which all the roadmap's other items roll-up. Themes are a common way to delineate what goes in each container. They implicitly explain why everything inside the container is prioritized and present.

Within each lane, containers group different initiatives, keeping related items in the same bucket. There are also various options for defining what constitutes a container. You can use containers to group strategic initiatives that themselves contain other high-level initiatives—represented by “bars,” which we will examine next.

Releases can also set containers. This way, everyone knows that everything inside each container will be released together, giving users a “chunk” of new capabilities for marketing to position and sales to tout to prospects.

Long-term projects can also be the designation for each container. Since enhancements, functionality, and underpinning technology supporting these projects will be released iteratively, it illustrates how the puzzle pieces come together over time.

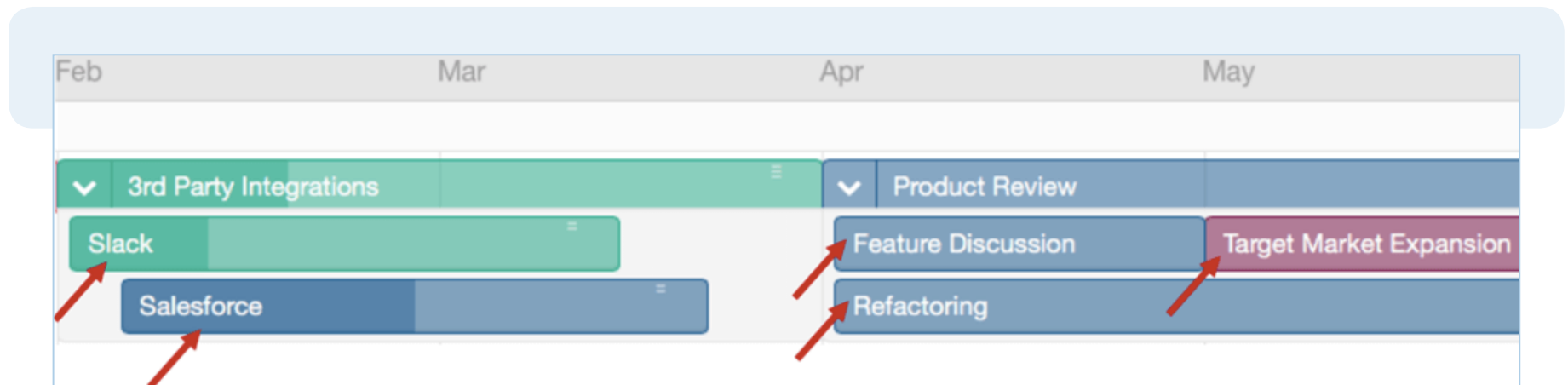


## Bars

The third tier of visual product roadmaps consists of bars. Bars represent specific initiatives and they make up the nuts and bolts of the roadmap. Sometimes they are standalone initiatives and other times they are part of a container. These items could represent anything for your product, but you can think of them as the initiatives that all roll up to a given roadmap theme.

In the actual visual product roadmap, which also separates bars from containers, the containers can be expanded or collapsed to display the bars categorized within them.

In this example, when you expand the “3rd Party Integrations” container, you can see that the product manager has included bars representing initiatives to integrate the product with Slack and with Salesforce.



## Timelines

While visual product roadmaps are not project plans or schedules with lots of exact release dates and targets, they're not valuable without some degree of chronological context. Simply slotting containers into lanes in order isn't quite enough detail to stand up to stakeholder scrutiny.

For various reasons, it is sometimes advisable for your roadmap to exclude specific dates, or to display deadlines only for particular initiatives.

As you can see from the example screenshots we've shown so far, our sample roadmap contains only high-level references to timeframes—grouping initiatives under months and quarters, as opposed to precise dates.

The question of when to include timelines on your roadmap, and how granular those timelines should be, will depend on such factors as the roadmap's audience. When sharing a roadmap publicly, for example, you might not want to display hard deadlines and dates because if you can't meet them, you risk losing credibility with your customers.

Another factor to consider will be whether a specific product release is tied to a more significant, date-driven event. If you want a product to launch during the week of a major trade show for your industry, for example, then including and even emphasizing specific dates on your roadmap might make strategic sense.

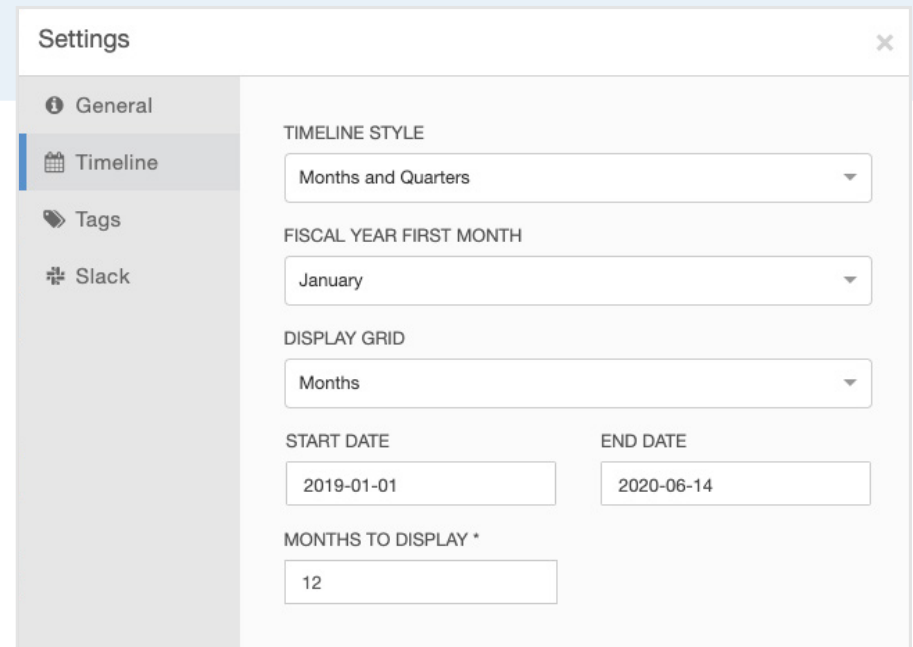
But in some cases, your roadmap will be accessible to internal audiences only and the product's release won't be tied to some other strategic date.

However, when it comes to dates, most visual product roadmaps tend to be as vague and non-committal as possible. That's why most use quarters or months as their standard demarcation of time.

After defining the fundamental unit of measure for the visual product roadmap, it's time to set a start and end date for things. Most roadmaps begin with the current date, although it can be helpful to include a few months or quarters in the past to remind the audience of what's been released.

As for the end date, we've previously discussed the benefits of a shorter scope to preserve the accuracy of the visual product roadmap. A shorter scope acknowledges the multitude of unknowns preventing accurate estimation of dates more than a year or so in the future.

However, with a powerful visual product roadmapping tool, custom views of the product roadmap can be generated using more granular dates. These Sprint or Weekly views make sense for the implementation teams and product management, but don't add much value to those outside the cohort building the product.



The screenshot shows the 'Settings' dialog box with the 'Timeline' tab selected. The left sidebar contains 'General', 'Timeline', 'Tags', and 'Slack'. The main panel on the right contains the following settings:

- TIMELINE STYLE**: A dropdown menu set to 'Months and Quarters'.
- FISCAL YEAR FIRST MONTH**: A dropdown menu set to 'January'.
- DISPLAY GRID**: A dropdown menu set to 'Months'.
- START DATE**: A text input field containing '2019-01-01'.
- END DATE**: A text input field containing '2020-06-14'.
- MONTHS TO DISPLAY \***: A text input field containing '12'.












## Legends

Colors add an extra dimension to visual product roadmaps. As previously discussed, product teams can opt to define their lanes, containers, and bars based on different elements. With color-coding, they have yet another visual cue to communicate with their audience. 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.

For example, when a visual product roadmap uses teams for lanes and releases for containers, bars could be color-coded by theme or strategic goal. It adds a sense of purpose to the more tactical visual product roadmap structure.

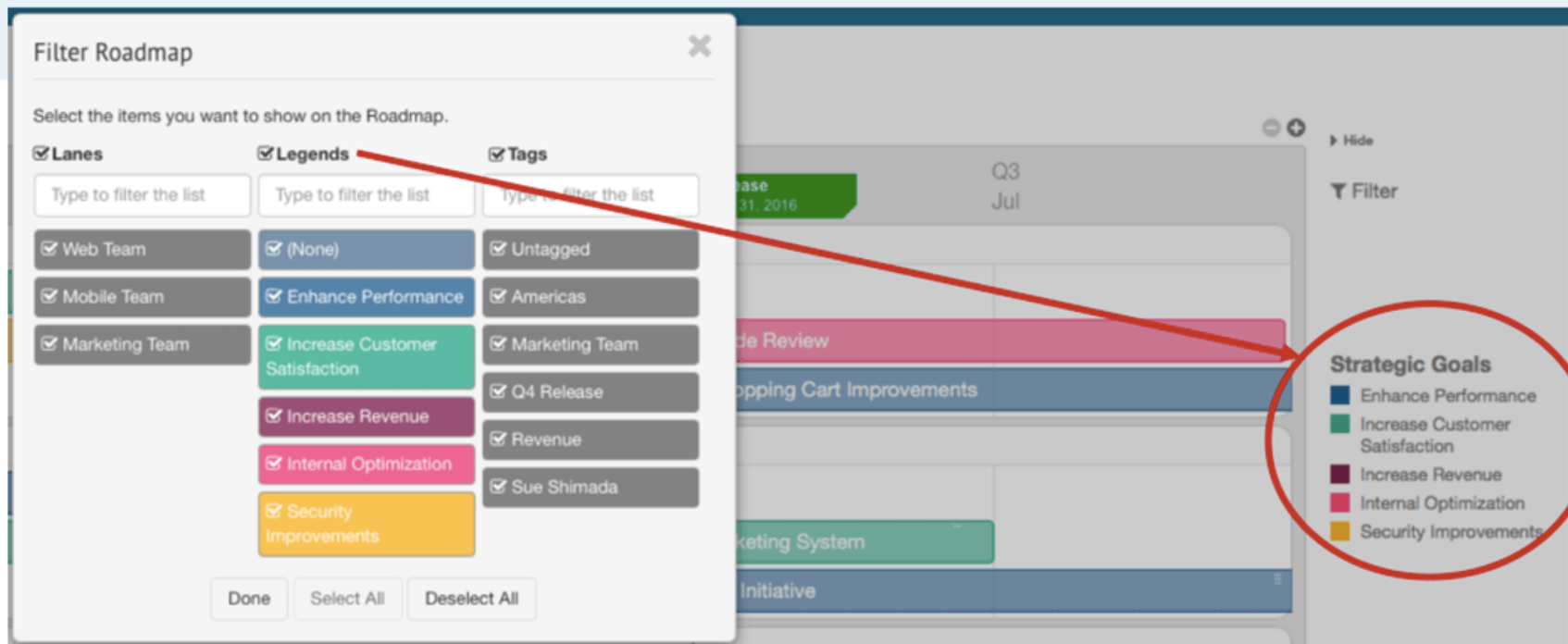
Likewise, if a visual product roadmap was constructed using strategic goals for lanes and themes for containers, bars can be colored accordingly to indicate which teams are working on each item—offering a glimpse into implementation details. At the same time, the focus remains on strategic objectives and outcomes.

Legends can also introduce an entirely new element to the visual product roadmap, such as the current status of the initiative, its priority, or which phase of the overall project it fits into. Regardless of the selection, it's another powerful communication device to enhance each visual product roadmap.

Status	Priority	Phase
 Planned	 High	 Research
 Approved	 Medium	 Strategy
 In Development	 Low	 Action
 Completed		 Concurrent

As you can see from the example below, this legend gives the reader a quick and visually compelling view of what the product owner is hoping to achieve with every initiative on the roadmap; prioritizing some items for their ability to increase revenue or others to boost the product's performance.

Moreover, if you're using a sophisticated visual product roadmapping tool, you will also be able to filter the view for each item in the legend. Depending on which route you take, you could, for example, see only the details that fall into a Revenue theme or that are assigned to the marketing team.

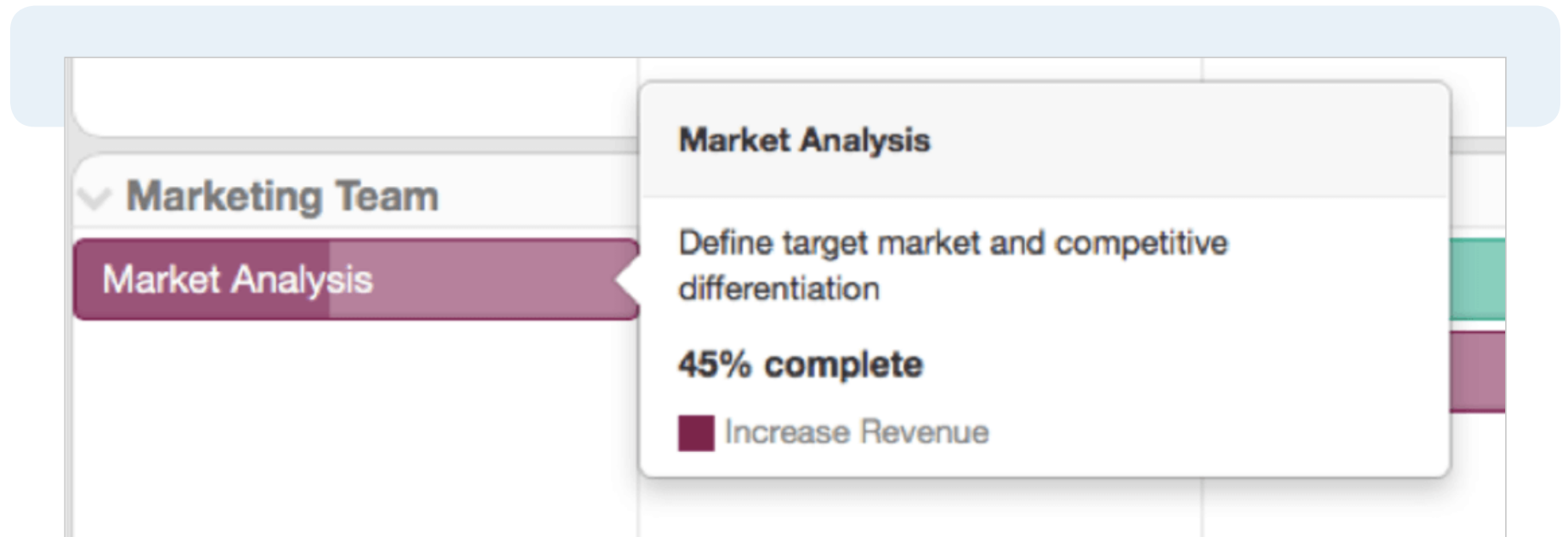


## Percent Complete

A well-developed product roadmap should also, ideally, contain up-to-date and immediately accessible information about the status of any initiative, task, or plan on the roadmap.

A reader should be able to click into any item and get a current picture of that item's progress. Is it complete? Has the team started work on it yet? If it's underway, what percentage of the task has been completed?

In the sample screen below, you can see that by clicking into the "Market Analysis" bar under the Marketing Team's swimlane, the reader receives a detailed view of that bar's current completion level—which in this case is 45%.

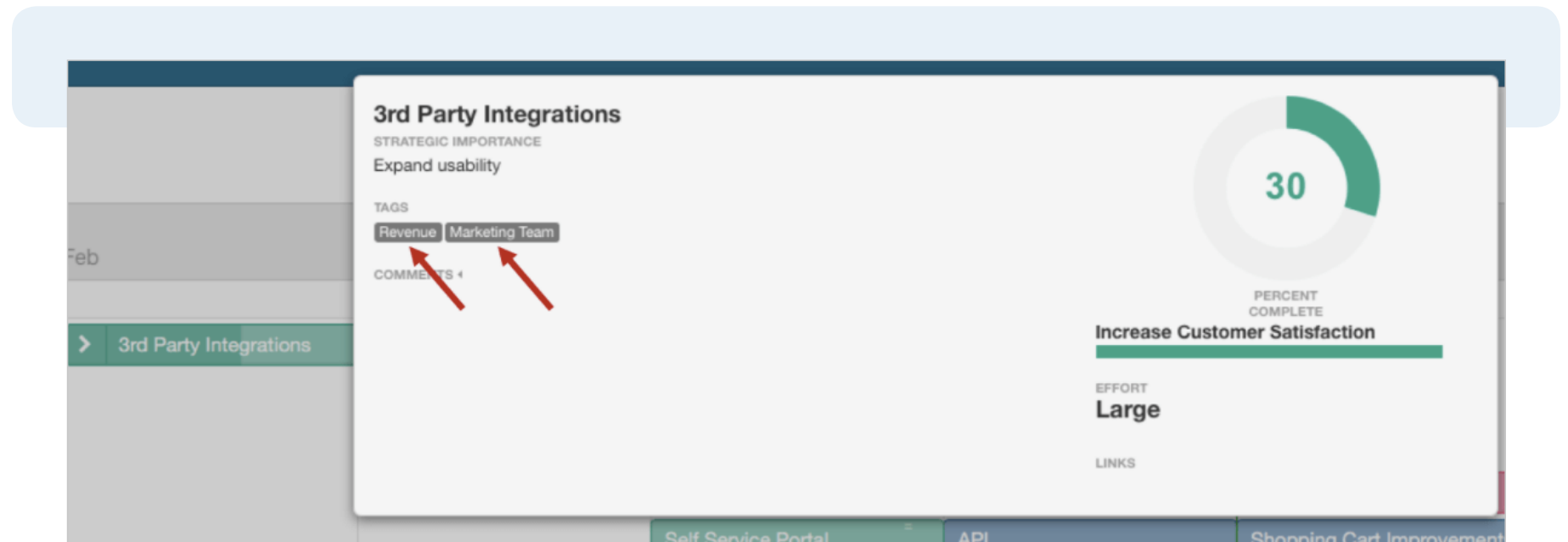




## Tags and Filters

Tags will help you and your cross-functional teams more easily track initiatives, goals, and areas of responsibilities. Both containers and bars can be tagged. This metadata can be helpful for product managers creating visual product roadmaps, but their real value comes through using them to create custom views. For instance, if you wanted to quickly review all roadmap items that were deemed as helping to increase revenue, then you could filter your roadmap by “Revenue.”

By simply creating a new view and selecting/deselecting which tags should be included, product managers can customize visual product roadmaps for different audiences in seconds. That way the sales team, for example, doesn't need to be distracted by infrastructure-related initiatives, and maybe you don't want them to see a new initiative still in the early stages of concept development. By deselecting items that have the corresponding tags, that view is scrubbed from the items you want to leave out.



## Interactivity

Visual product roadmaps are dynamic by their very nature, but one advantage they have over static files is commenting support. Comments can range from questions from different stakeholders to notes about the implementation details.

Regardless of how they're used, comments enable the audience to engage with the visual product roadmap directly instead of having to filter everything through product managers. And, instead of having to sort through email chains, the comments live on the visual product roadmap itself for maximum context and documentability.



## Step 6: Maintaining a Visual Product Roadmap

An out-of-date product roadmap is problematic for product teams. Failure to regularly update your roadmap could mean that everyone on your cross-functional team might be working with outdated or incorrect information leading to repeated questions, confusion around initiatives, and general misalignment.

Not only is it inaccurate, but it can also create all kinds of trouble for the product team, other departments, and customer relationships. Make sure you are reviewing and updating your roadmap frequently.

With the right roadmap tool, you'll have no excuse for not updating the roadmap as often as necessary. It plays such a critical role in the success of your product in each of its development steps. When the visual product roadmap lives online—versus in a saved file in someone's inbox—anyone who clicks the link will always be seeing the latest-and-greatest version. No longer is there a need to export, resend .pdfs, or search for email threads to send the updated roadmap after making a minor change. It will be up to date anytime anyone looks at it.

Better yet, stakeholders can get email alerts or Slack updates whenever there's an update to the visual product roadmap. These notifications can be set to daily, weekly, or monthly frequencies, ping the people who care and letting them know there's a change worth noting.

### Revisiting goals and themes

As products mature and evolve, their goals and focus areas may change as well. New products focus on growth and adoption, then move into monetization, before churn and increasing ARPU become the top priorities.

The visual product roadmap must represent the current product vision and strategy, speaking to how the product helps meet the desired outcomes for the organization. Adding new themes and strategic goals, along with the apparent addition of new

containers and bars (and possibly even lanes), is a must for the visual product roadmap to remain valuable and accurate.

This process is a cinch when you're using a purpose-built tool to create and maintain your visual product roadmaps. It's easy to edit, add, and rearrange things to keep the roadmap aligned with the rest of the operation.

## **Extending the timeline**

While a product roadmap's chronological scope doesn't need to get longer as the product matures, time passing does mean the product team needs to worry about what lies beyond the product roadmap's original horizon.

As the months and quarters unfurl, the timeline will extend as older containers and bars are completed and new ones conceived and prioritized. Likewise, product teams may want to trim the start date for the visual product roadmap's view, limiting how much of the past is presented to each audience.

## **New audiences**

At first, a visual product roadmap may only be viewed by a few sets of internal stakeholders. However, over time, new audiences may require access to the product's plans for the future.

For example, during the early days of planning a new product or product line extension, the roadmap might be kept relatively secret. But, once the product is nearing release, sales, marketing, operations, and other internal teams will need exposure to it, as may some strategic partners. Over time, the audience could grow even further, including crucial customers or media and analysts.

These new views must be defined, but by using a visual roadmapping tool, this task doesn't require the product team to recreate the wheel. Using the custom view features and leveraging tagging, these views can be easily generated without risking any transcription errors coming from trying to create new, edited copies from scratch.

## Time-traveling

With a continually changing visual product roadmap, it can sometimes be hard to remember who, what, and when was involved in each tweak and edit. But with a dedicated tool, all those changes are always tracked.

If someone wants to know when something changed or who changed it, a historical view of every minuscule alteration is logged and available for review.

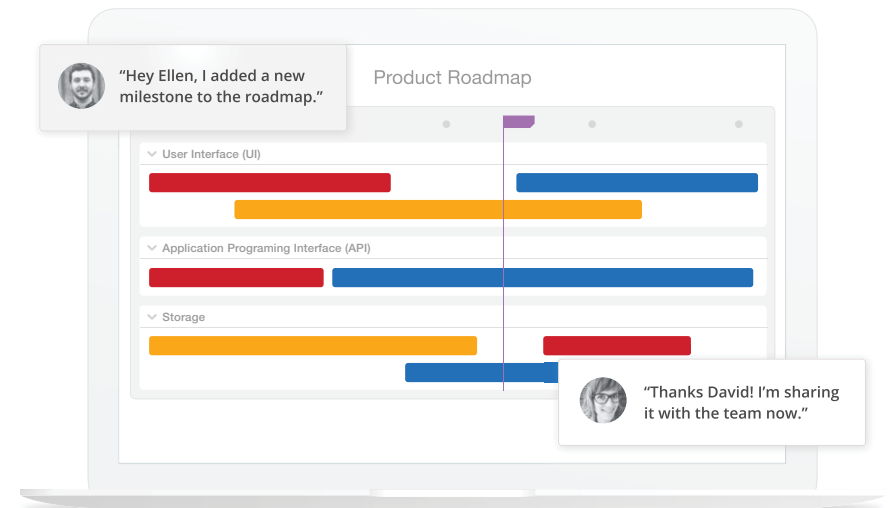


# CONCLUSION

Your product roadmaps will vary to some degree, of course, but this should be a helpful starting point, a good list of items to keep in mind when hammering out your next product roadmap. You can standardize your process with collaborative, web-based roadmap software and convey the big picture in one place.

ProductPlan lets you create and share beautiful roadmaps to build consensus across the entire organization.

Thousands of product managers worldwide—including teams from Nike, Microsoft, and Spotify—trust ProductPlan to help them visualize and share their strategies across their entire organization. With our intuitive features, product managers spend less time building roadmaps and more time shipping products.



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# YOUR VISUAL PRODUCT ROADMAP

## CHECKLIST

Now it's time to start building a visual product roadmap of your own. To make sure you've got everything you need and don't miss anything, here's a handy checklist to follow:

Agree on why you're building or improving the product

Define a product vision and get consensus buy-in

Identify the strategic goals that will turn that vision into reality

Understand which metrics matter and desired outcomes to meet those goals

Prioritize initiatives that will improve those metrics or generate those outcomes

Put everything else in the parking lot

Establish themes that encompass major areas of focus for the product

Organize prioritized initiatives under those themes

Define known and potential audiences for the product roadmap

Create tags to use for product roadmap contents that are both meaningful and helpful when filtering roadmap items for different audiences

Set an initial timeline for the visual product roadmap

Structure your visual product roadmap using lanes that fit your organization or product

Add containers to each lane, properly tagging them for filtering purposes

Add bars within each container, properly tagging them for filtering purposes

Generate custom views of the visual product roadmap for each audience type

Present and socialize the visual product roadmap to various audiences, always providing links to live views instead of hard or soft copies of the document

Set (and stick to) a review-and-update cadence for the visual product roadmap, ensuring it stays current and accurate