

Drive product growth with product roadmapping

PRODUCT ROADMAPPING

IN PRACTICE



PLANNING YOUR PRODUCT STRATEGY

BY GERARD CHIVA

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Preface

As a product professional you will agree with me that product roadmaps can easily become a nightmare and they are the source of many of your headaches at work.

Perhaps you think you are using roadmaps wrongly or they are just a waste of time and a continuous source of arguments. But bear with me, Product Roadmaps serve a purpose.

Product roadmaps are central to product management work. But every week I hear how product managers still struggle with planning, creating, and communicating a compelling roadmap.

The Product Roadmap sits in the interface between product strategy and execution. It provides visibility, alignment, focus, and it is a communication tool.

However, you cannot achieve the benefits of product roadmapping unless you do certain things properly.

This book is based on my experience working with Product Roadmaps in different organizations and it will provide you with a practical approach to introduce (or improve) product roadmapping into your product organization.

After working with many product teams, I learned that there is no single best way to roadmap.

Because there are so many different types of products, companies and product managers, every roadmap is different.

As a product professional you must be clear about the purpose of product roadmaps: To clearly articulate where you're headed, and to show your strategy to your stakeholders in a compelling way.

In this book we'll talk about product roadmaps from two perspectives:

Great
purpose
for a
roadmap

- *The process of discovering, designing, and building the roadmap*
- *The continuous process of managing, updating, and evolving the roadmap.*

You'll learn:

- *Product roadmap fundamentals*
- *Roadmap as a strategic tool*
- *How to design your roadmap*
- *How to manage your roadmap*
- *How to introduce and sell product roadmaps in your organization*
- *How to get started with product roadmapping, or relaunch your product roadmap*
- *How to improve product roadmapping with roadmap metrics.*

Why this Book?

The product roadmap is a very effective and necessary strategic tool, but in many cases its implementation is poor and causes friction and frustration.

The roadmap allows us to connect the product strategy and objectives with delivery in an agile and light way.

Its correct implementation goes far beyond a simple timeline with features. For that reason, I have written this practical book based on experience.

Here you can find everything you need to improve the product roadmap in your organization or to start from scratch.

This book is meant for companies developing software-based products or using software as an enabler of their product or service: market-facing B2B or B2C digital products and services, software products for internal use or embedded software.

Structure of the Book

The book is structured in five sections of three chapters each.

The [first section](#) is the most theoretical. But even though it is an eminently practical book, I think it is essential to start by exploring the [product mindset](#) and understanding the [key role the roadmap plays](#) and how it fits into the [strategic fabric](#) of the product organization.

In the [second section](#) we explore the fundamentals of the product roadmap from its fit into the [strategic gear](#), the [basic principles](#), and the [benefits](#) it brings to the modern product organization.

The [third block](#) is devoted to the actual [artifact design](#), with a special emphasis on [themes](#) (or initiatives) and the most common [design mistakes](#).

The [fourth block](#) is dedicated to [roadmap management](#), including [metrics](#) to assess the effectiveness and performance of the roadmap. An aspect that in my opinion is given very little attention and is as important as a good design.

[To finish](#), I offer you a [method](#) to effectively introduce the practice of product roadmapping in your organization, including an [assessment](#) to evaluate the current situation.

Enjoy!

Gerard Chiva

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Product Organization



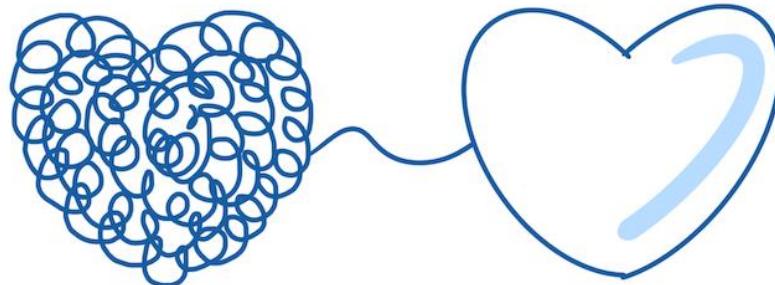
Product Mindset

In my experience as a [Product Coach](#), the greatest impact I have on my clients is to make them approach product development as an activity from the outside in rather than from the inside out.

Many companies are used to developing new products or features without considering the problem they solve for the customer. A solution is proposed from the point of view of the organization, which in most cases has nothing to do with the context and the needs of the client.

Product mindset means, above all, approaching new product development from the customer's standpoint. We must fall in love with the problem, instead of falling in love with the idea or the solution. That is the fundamental change to move towards a product mentality.

We must learn to love the problem. But that is easier said than done because the problem space is potentially very large and ambiguous, while the solution space is small and concrete.



We must use the appropriate processes and tools to understand the problem and discover possible solutions.

In many organizations there exists a mentality of execution, a mindset of delivery. Too little time is spent in the problem space, and the time spent is poor and full of assumptions, politics, and pressures that hinder the process of learning what customers really need.

That is the work with the greatest impact as a coach, which I then accompany with methodology and techniques.

That does not mean, however, that we should ask customers what they want or need. That is our responsibility as producers.

We need to make sure that we understand the context of the client, the job they are trying to get done, the pains they are facing, and the opportunities to improve their experience.

But a product mindset is not only characterized by the focus on the problem, there are also **other key characteristics** of organizations that have developed a product mentality:

- *Love the problem*
- **Strategic context**
- **Flexibility and responsiveness**
- *Iterative and incremental*
- **Time to value**
- *Product leadership*

We will look closely at each characteristic of the product mindset. But first, let's see the reality of a team without a product mentality.

The Wrong Mindset

Many companies operate based on [dangerous assumptions](#)¹, especially in times of great volatility and unpredictability like the 21st century.

People think they can predict the future, they know what customers want, they know how to build it and that nothing will change along the way.

That's a recipe for failure.

Let's see what happens in a team that has not integrated the product mindset. Here's what they're saying:

- *What is the requirement?*
- *That's not in scope*
- *It's on the roadmap, so we have to do it*
- *We did exactly what the ticket said*
- *Go talk to someone else about your problem*

These conversations are limiting and restricted; people are just trying to check boxes.

¹ <https://aktiasolutions.com/product-organization-anti-patterns-mindset/>

Let's see what happens in a team with the product mindset. You will hear questions like:

- *How can we improve [metric]?*
- *What customer problem are we addressing?*
- *Why are we doing this?*
- *How do we make it easier for customers to ...?*
- *Could we try ...?*
- *Can we boost our conversion by ...?*
- *If we want to achieve (an outcome) how about...?*

Getting Stuff Done: Focus on Outputs

Many companies still operate with the old customer-vendor anti-pattern. The client-vendor anti-pattern separates those with problems from those who solve them.

In this model the client is responsible for the value, and the vendor is responsible for time, cost, and quality. Together they must agree on scope.

The old IT (vendor) mindset often leads to an ill-connected series of initiatives and projects designed to maximize output.

When success is measured by time, scope, and budget, the entire organization is constantly “trying to get their stuff done.”

This attitude fosters isolation of teams, which impacts each team’s overall engagement with strategy.

The IT Mindset also encourages a risk-averse mentality. Ultimately, each team in the organization is concerned with checking off its requirements on time and under budget.

They can't risk a bad release, whether or not the product ultimately has value.

*important to understand
where inertia comes from*

Product Mindset: Focus on Outcomes

I've witnessed the magic that happens when product teams focus on solving actual customer problems² and driving real business results.

Effective product development is focused on maximizing outcome and impact. Unfortunately, that is not the mindset most companies have. Sadly, most teams are rewarded not for outcomes, but for outputs.

To a certain extent I understand that chasing outputs is more comfortable than chasing results. Outputs are easier to measure. We know how many user stories were released or how many sprints were made.

It's scarier to be held responsible for outcomes for the business, like revenue growth or market share, because you can't control the buyer's behavior.

Product goals are also harder to measure and achieve, but the reward is far greater.

Product teams³ do not exist to write code. They exist to help the business grow and to serve customers.

The product mindset promotes flexibility. Companies that embrace this mentality may have a plan, but their approach encourages experimentation as teams work together toward a common goal.

By leveraging the product mindset, these companies create a culture of smart risk-taking.

The product mindset sharpens focus, minimizes distractions, and prevents companies from trying to be all things to all people or serve thousands of customers before they've served tens.

It encourages leaders to concentrate on what really matters and will make a difference for business growth.

² <https://aktiasolutions.com/framing-ideas/>

³ <https://aktiasolutions.com/product-teams/>

Product Mindset is Growth Mindset

Mindset is a set of beliefs that orient our behavior.

*Start and to
the point ref. for
mindset*

In general terms, we can identify two types of mindsets: *fixed mindset and growth mindset*.

Someone with a growth mindset views intelligence, abilities, and talents as learnable and capable of improvement through effort. On the other hand, someone with a fixed mindset views those same traits as inherently stable and unchangeable over time.

Many organizations still rely on a fixed-mindset approach to strategy⁴. They believe that if they have the right solution, roadmap, and go-to-market plan then they will be successful.

But reality is stubborn. In a world that is continuously changing, having the right mindset to guide decision taking is as critical as having a solid strategy.

You cannot succeed in the digital era with a fixed mindset. Only those companies with a growth mindset will thrive.

A product team with a growth mindset can deal with complexity and change. They will constantly improve, learn, and adapt. They are willing to take risks, work hard, and overcome adversity to figure out the answers.

Getting to the right mindset starts with asking the right questions or suggesting ambitious goals⁵. We should ask product teams to reach a revenue target or to solve our customers' problems.

The product mindset allows everyone to view their ultimate goal through the same lens and connects the whole organization through a shared language.

The entire organization needs to embrace it.

⁴ <https://aktiasolutions.com/the-seven-sins-of-strategy/>

⁵ <https://aktiasolutions.com/how-to-select-the-right-okrs/>

Characteristics of a Product Mindset

If you want a successful product, you need to detach from your ideas and solutions, and fall in love with your customers and their problems and needs. That, in a nutshell, is the product mindset.

Customer centricity is not an entelechy — it's the governing spirit of the whole company. Everyone, from engineers to the CEO, is focused on the customer.

Now, let's see the key tenets of a product mentality in more detail.

Explore the customer!

Love the problem

Undoubtedly, the main characteristic of an organization that has integrated a product mindset is the obsession with the customer's problem or need.

Even if the starting point is an idea for a solution, it is always approached with empathy towards the client and integrating the client in the development process.

Any development must generate a positive impact on the customer's life and an impact on the business.

Which brings us to the next point.

Strategic Context

Product Teams and everybody else in the organization must understand the strategic context and how their work relates to that.

Strategy⁶ guides key decisions across the company, such as what initiatives make it into the roadmap, what product organization⁷ is best, or what new products are to be developed.

Nothing is left to chance.

⁶ <https://aktiasolutions.com/decalogue-of-a-good-strategy/>

⁷ <https://aktiasolutions.com/becoming-a-product-led-organization-the-lean-product-organization/>

Strategy is a design process to overcome certain challenges⁸. From there we get several strategic hypothesis which must be validated with the scientific method based hypothesis formulation and continuous experimentation⁹.

Flexibility and Responsiveness

An empirical approach permeates the whole value chain.

Strategy, business discovery, product discovery¹⁰, product delivery and product marketing depend on the identification of the riskiest assumptions and the reduction of uncertainty by defining an hypothesis, designing an experiment, testing it and analyzing results.

The engine of modern product development is the legendary built-measure-learn loop¹¹.

This loop is continuously running from strategy to market. But it is not a sequential approach, it is incremental. We build in response to the learnings of previous iterations.

Product-led organizations can rewrite the roadmap when it needs to adapt. Instead of working with known requirements, today's product-led approach requires you to run an endless series of experiments.

That's because you can't base product decisions on what you perceive to matter, but rather on what user behavior, sentiment, and direct feedback say matters.

These data points give a live view into the value your product is delivering and where it is falling short.

A product-led roadmap is a flexible roadmap. It adapts to the customer, picks up on both their explicit and implicit needs, and ensures that the product delivers exactly what they want.

⁸ <https://aktiasolutions.com/what-is-strategy-business-strategy-product-strategy/>

⁹ <https://aktiasolutions.com/continuous-discovery/>

¹⁰ <https://aktiasolutions.com/product-discovery/>

¹¹ <https://aktiasolutions.com/lean-startup/>

Iterative and Incremental

Product mindset regards perfection as the enemy of good. We are always looking for ways to learn the most with the least resources.

When companies are not working incrementally, it's often because they have an excessively grand vision that they are committed to delivering before launching their product.

A common pattern we see in traditional businesses is that they try to do too much, too late, instead of working iteratively and incrementally seeking early and fast value delivery and business return.

By cramming in more and more features, they try to match every option that every competitor has instead of concentrating on their own value proposition.

Successful companies [cannot be all things to all people](#)¹². A product mindset requires saying "no" to features that may be valuable at some point but aren't part of the value proposition you need right now.

Winning companies are remarkable; they conquer a niche and then leverage what makes them unique to build momentum.

Minimize Time to Value

Product Discovery minimizes time to value — the time it takes to deliver monetizable value to the customer. Which is different from '*time to market*'.

When we understand the main problems of our target segment, we can quickly produce an [MVP](#)¹³. Therefore, minimizing the time to value.

But in order to deliver value iteratively and incrementally there must be a mindset shift toward learning and rapid delivery rather as opposed to the traditional approach of chasing the perfect full product. Perfection is the enemy of progress.

¹² <https://aktiasolutions.com/the-seven-sins-of-strategy/>

¹³ <https://aktiasolutions.com/minimum-viable-product/>

Product mindset is all about risk-taking and experimentation, with a goal of creating revenue and driving business growth.

To achieve this, we must establish new reward, performance evaluation and investment mechanisms.

Product Leadership

Product teams need to be more than just influential. They must have the formal authority to drive the product's strategy.

There, "product" must have a seat at the table. A [chief product officer](#)¹⁴ can ensure that creating a successful product remains the central concern and advantage of the business.

Consequently, a product-led strategy reorients your organization around each step in the product journey. It does this by unifying R&D, sales, marketing, and customer success around [product metrics](#)¹⁵ like feature adoption, breadth and depth of usage, stickiness, and customer satisfaction.

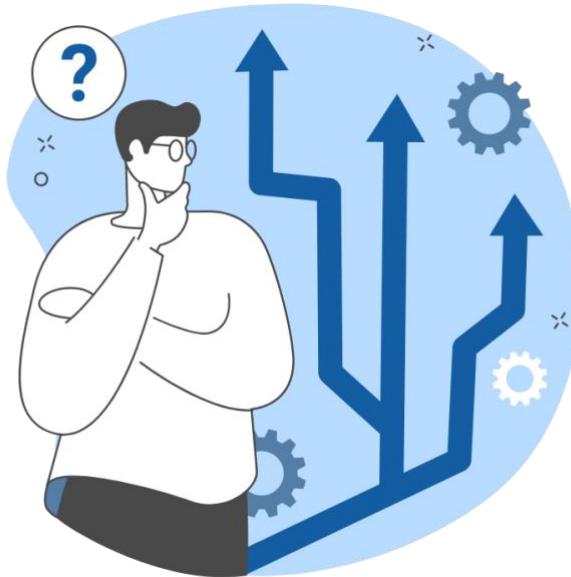
At product-led companies the product is no longer just one part of the customer experience; it is the experience. Everything your organization does should lead back to it. Sales, marketing, service, support, and education must now converge both at the surface of the product and deep within the user experience.

The product should communicate its value, teach its users, provide assistance, and more. In other words, efforts like selling to and educating customers that used to happen outside of the product should be now part of the user experience inside the product.

The customer experience should become indistinguishable from the product experience itself.

¹⁴ <https://aktiasolutions.com/product-leadership/>

¹⁵ <https://aktiasolutions.com/product-metrics/>



Agility Levels

When we talk about organizational agility, we must first be able to differentiate between the different levels of agility that exist.

In the management of an organization there are different levels of decision making. Known by some as 'flight levels.' The problem comes when we focus on the lowest level and forget about all the others.

Whenever agility topic comes up with my clients, I explain that true agility is not in operational excellence¹⁶ or in adopting Scrum. True agility is in decision making. In short, it is about having options at a strategic level and from there being able to choose the opportunities to develop to improve the lives of customers and have a positive impact on the business.

¹⁶ <https://aktiasolutions.com/the-age-of-agile-is-gone/>

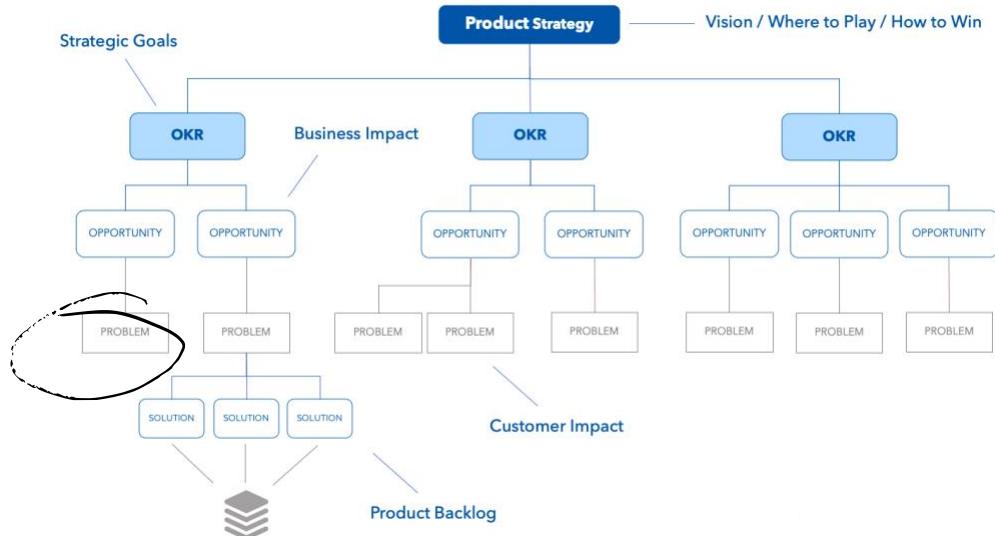


Figure 1 - Agility levels

In the agile school of thought, the focus has always been on iterative and incremental implementation. But that is the lowest level of agility and the one that provides less strategic leverage to the organization.

The ability to be able to deliver quickly, iteratively, and incrementally something that nobody wants is of no use.

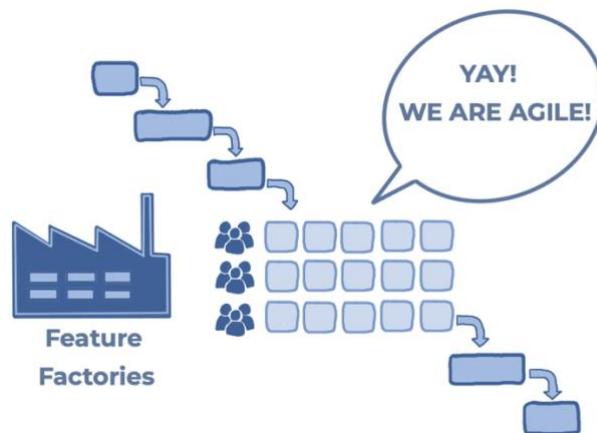


Figure 2 - Feature factories

As we move up the decision ladder towards the top, the more power of impact we have.

It is at the higher levels of the hierarchy that we must be able to react quickly and have several options. That is true business agility.

Organizational Structure

Although it is true that for purely digital products we prioritize small and multidisciplinary teams, the same does not happen in other industries or types of product, in which teams of teams or value streams are necessary.

It is important to be clear about who makes what decisions and to ensure¹⁷ that communication, collaboration and feedback mechanisms are frequent and effective.

And, above all, ensure strategic alignment, so that everyone in the Value Stream is working in unison towards the same destination.

In the following table we show the agility levels along with their activities, artifacts and main responsible.



Level	Activity	Artifact	Responsible
<i>Product Strategy</i>	Strategy design	Kernel or WTP/HTW	Chief Product Officer
<i>Objectives</i>	Strategy deployment	OKRs	Chief Product Officer
<i>Opportunity (business)</i>	<ul style="list-style-type: none"> • Screening • Business Discovery 	Roadmap	<ul style="list-style-type: none"> • Chief Product Officer • Product Manager
<i>Problem (customer)</i>	Product Discovery (Exploration)	Impact Map	Product Manager
<i>Solution</i>	Product Discovery (Validation)	User Story Map	Product Manager
<i>Implementation</i>	Product Delivery	<ul style="list-style-type: none"> • Release Plan • Product Backlog 	Product Team

Figure 3 - Responsibilities by agility level

¹⁷ <https://aktiasolutions.com/product-owner-vs-product-manager/>

This table is a guide so you can get an idea. Items and responsibilities may vary. In addition, each activity can be performed with a combination of various techniques.

The important thing here is to be clear about the different levels of agility, how they relate to each other, and agree on management policies among all those involved.

Agility Levels

Agility is about taking an iterative and incremental approach at all decision levels, from strategy¹⁸ to delivery.

All levels are interconnected and executed in feedback cycles from longer to shorter duration. In such a way that from top to bottom we can answer the question “HOW?”, and from bottom to top we can answer the question “WHY?”.

The upper level informs in the definition of the lower level, and the lower level, once the corresponding cycle has been executed, provides insights to the upper level, in a continuous process.



Figure 4 - Agility levels

It is not possible to be agile at the strategy level if at the lower levels we do not implement OKRs¹⁹, we do not have an agile roadmap based on outcomes and we do

¹⁸ <https://aktiasolutions.com/what-is-strategy-business-strategy-product-strategy/>

¹⁹ <https://aktiasolutions.com/okr-framework/>

not practice [product discovery](#)²⁰ to determine which customer segments and which problems to address in the first instance.

Lower levels enable higher levels, and higher levels inform lower levels.

Product Roadmap

We cannot speak of business agility if all decision levels do not implement an empirical work method based on experimentation and data-based decision-making.

Business agility revolves around the product roadmap.

The product roadmap is the meeting point between strategy and execution. And it is also the place where agility begins to fail in many organizations.

We need a flexible and lightweight roadmap that allows us to always know what is being done, what is intended to be done and why.

The [design of the artifact](#) is as important as the [roadmapping process](#) itself.

Next, we will see an example of possible implementation.

²⁰ <https://aktiasolutions.com/product-discovery/>

Implementation of Agility Levels

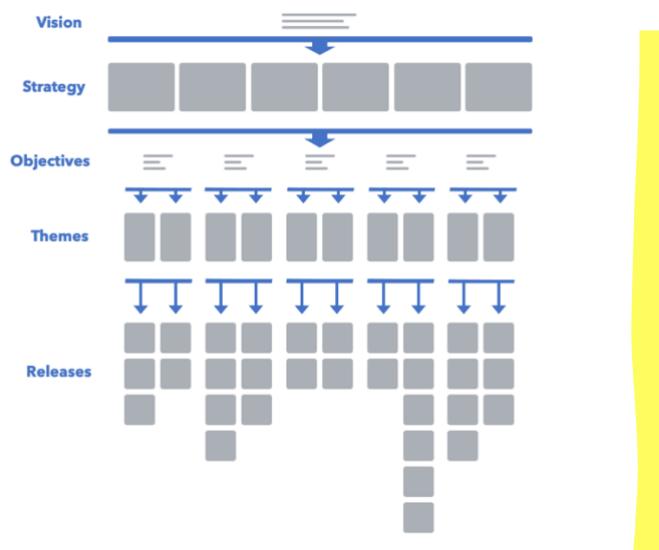


Figure 5 - Implementation of agility levels

As you can see, themes are the building blocks which connect strategy with execution.

The roadmap is the plan of what will be built in the coming months and is usually organized in several time frames.

As an example, we will see one organized by quarters:

- *The next 3 months are solid, with clear releases.*
- *The following months are planned, with high-level proposals that describe the problem and the opportunity, and that require a more intensive product discovery process.²¹*
- *Beyond six months, there are loose, speculative ideas that align with the product vision*
- *Everything in the roadmap is broken down by team goal, which is broken down into multiple initiatives, which are further broken down into individual releases.*

Let's take a closer look at each of the decision levels.

²¹ <https://aktiasolutions.com/product-discovery-process/>

Strategic Themes

The strategic themes represent the main strategic guidelines to follow to achieve the product vision.

It could be about developing new capabilities, positioning the product in a specific segment, or entering a new market.

e.g.: Cong. us ?

Team Objectives

Each product team has its goals that will take a few months to achieve.

Themes

Themes are essentially initiative summaries. My recommendation is that the themes include a briefing document detailing the fundamental aspects of the initiative.

It should be limited in size (1-3 pages) and should succinctly cover the problem we are solving, how we will measure success, and scope.

It never includes solutions because this comes later.

The goal of the document is to have a shared understanding of what we are building and why.



The Product Roadmap

As you will see throughout the book, the product roadmap is a tool to introduce, develop and accommodate a new product mentality.

I often refer to the **product roadmap as 'the single source of truth'** because it is important to have a strategy and goals, but the roadmap is the artifact that ultimately helps driving product growth and **connects strategy with execution.**

How exactly does a roadmap make the product mindset a reality?

- *The roadmap smoothly integrates the practice of product discovery²² into the development process of a product.*
- *The roadmap makes visible all the stages of an initiative's path from its acceptance down to the market.*
- *The roadmap is light and flexible to quickly adapt to strategic changes and to be able to respond to competitive pressures.*

²² <https://aktiasolutions.com/product-discovery/>

- *The roadmap provides all the information so that stakeholders can make the relevant decisions quickly and efficiently.*

In short, the roadmap is the most faithful expression of the [product mindset](#).

The Ruthless Reality

Before we jump into the next section, let me clear up a few basics so you can benefit from [implementing product roadmaps](#). Otherwise, it will be a worthless effort.

First thing you must do is to face the **ruthless reality** about product development:

1. *Most product ideas are just not going to work*
2. *Even with ideas that have the conditions to work it will take an undetermined amount of time to achieve the expected business return*
3. *The moment you put a set of ideas in a document called 'roadmap' people will interpret the items as a commitment.*

The result is that we often ship stuff nobody wants, or we cancel a development after a huge investment and effort.

To overcome these problems and truly benefit from roadmaps you must understand the needs and problems roadmaps help address, understand what an effective product roadmap is and, how to make it happen.

The next thing is to understand the purpose that product roadmaps serve in a modern product-led organization.

Roadmap Purpose

Roadmaps serve three key purposes:

1. You must know and be able to explain how you are planning to realize your product vision
2. You must be able to demonstrate you are working on the highest business value items
3. There are times when you need to make time-based commitments

Hence, any alternative approach to traditional roadmaps needs to address these three fundamental needs.

What is a Product Roadmap?

Finally, we must be clear about what we mean by '*product roadmap*' as opposed to what a traditional roadmap would be.

A modern product roadmap is:

1. A strategic communication tool
2. A prototype of your strategy
3. A statement of intent and direction

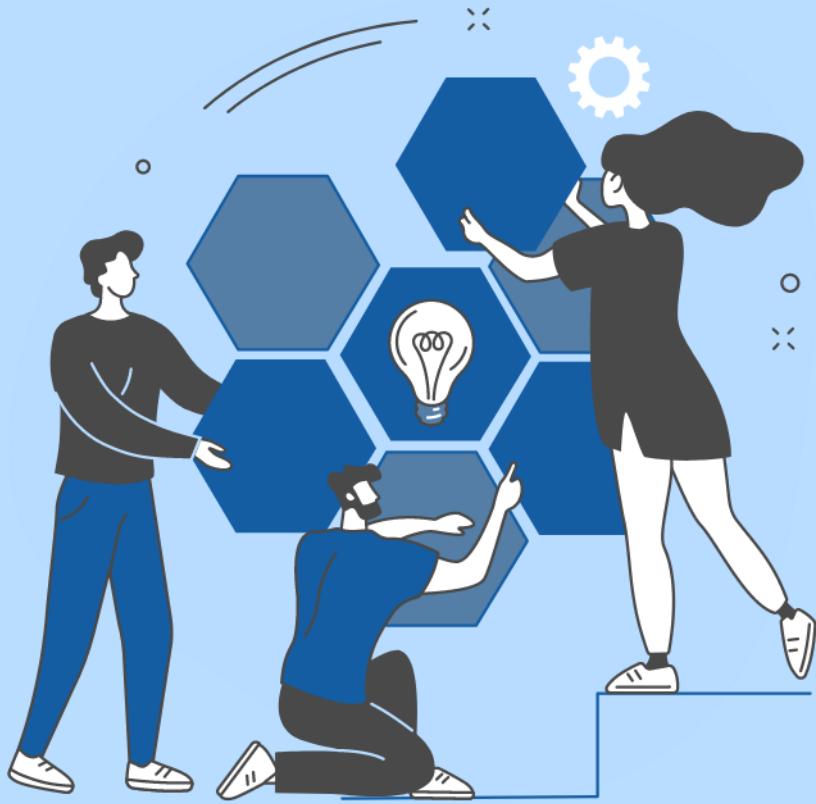
A product roadmap is not:

1. A Release Plan or a Project Plan
2. A Product Backlog
3. A Gantt chart
4. A set of features organized in a timeline

In summary a roadmap explains how you will realize your product vision by implementing your strategy. It is a plan for your strategy.

As opposed to a [product backlog](#) or a traditional product roadmap which are based on outputs, a modern product roadmap is based on business outcomes.

It must be flexible and adaptable to quickly react to market feedback, competitive pressure, and business goals.



Roadmap Foundations



Product Strategy

In this chapter we will take an introduction to the concept of business strategy, specifically product strategy, and discuss the entry point to product roadmaps – the selection product goals.

It should be noted that the strategic decision-making process is based on solving design problems by proposing hypotheses and validating them iteratively and incrementally.



Figure 6 - Strategy hierarchy

From the strategy to the objectives until reaching the product roadmap we are selecting the biggest challenges and identifying the guiding policy to address them.

Business Strategy vs Product Strategy

In an organization there are two fundamental levels of strategy, business strategy and product strategy, which we must learn to differentiate, since this separation is often a source of frustration.

- **Business strategy** determines how the organization will succeed and it is the responsibility of the executive team
- **Product strategy** determines how the product will be successful and is the responsibility of the product manager or value stream manager.

Business Strategy

A business strategy describes how a company wants to achieve its overall aspiration and create value for its customers, employees, and shareholders. It establishes how the company will succeed, while the product strategy describes how a product will achieve success.

When the company is small the business strategy is almost equal to the product strategy. As the company grows, the traditional approach is to separate businesspeople from product people, and separate responsibilities between them.

Problems arise when an opinion on the product strategy is given to people who are not responsible for product development. For example, Sales, Marketing or Business Managers.

The business strategy provides the company with the basis for making the right investment decisions. This includes determining whether a new product idea should be pursued and how much money should be spent on an existing product. At the same time, it offers the product manager the context necessary to make the right strategic decisions about the product, for example, the market that your product should serve and the strategic objectives that it must meet.

Imagine the case of a company in the food consumption sector. Its business strategy may involve focusing on low-calorie healthy eating for small merchants and chains of healthy products.

Product Strategy

Product strategy is something alive that evolves according to the life cycle of your product, competitive pressures, and changes in the environment.

Product managers will define their product strategy focusing on two fundamental aspects in alignment with their company strategy:

- *Where to play – Which clients represent our objective?*
- *How to win – Value proposition and business model*



Figure 7 - Product strategy components

Elements of a Product Strategy

Below we describe the basic elements of a product strategy:

CHALLENGE – What are the challenges, problems, or obstacles your product faces?

Identify the challenges and make a diagnosis. To have an adequate diagnosis, we need to understand the context, the strengths and trends in the market, the market situation where we want to access and the strengths and weaknesses of our organization.

MARKET – Where will you play? Describe the areas in which the product will compete to fulfil your aspiration. Who is the target customer? Do you intend to address existing markets or create new markets (also called blue oceans)? What distribution channels will you need.?

WIN – How are you going to win? What is your competitive advantage? For example, better costs (low prices), differentiation (higher value products and services) or focus (specialized markets). To answer this question, you must understand the strengths and weaknesses of your organization, your product, and the competition you face.

CAPABILITIES – What capabilities should you have? What do you need to be really good at? What will you do to multiply your competitive advantage.?

ACTIVITIES – What management systems are necessary? What processes and structures are necessary to develop the appropriate capacities and increase the strategic options of your organization. Among these activities we highlight two: the selection of product objectives and the product roadmapping that we will explore throughout the book.

How to Select the Right Product Objectives

Objectives should not come out of a brainstorming session; they should be the consequence of a structured strategic thinking process.

Setting goals is not strategy, and neither is a very common fill-in-the-blank way of creating strategic plans that starts with a "vision" statement, then a "mission statement", then a list of "strategic objectives", then, for each objective, a list of "initiatives".

We must define a strategic intent and from there we will determine some challenges to overcome in the medium term, for each challenge we will need a diagnosis, a guiding policy and a coherent set of actions that we will implement with some methodology such as [OKRs](#).²³



Figure 8 - The kernel of a good strategy (Richard Rumelt)

Frequent Problems when Defining OKRs

OKRs is an apparently simple methodology, but there are many problems related to its practical implementation.

The main issues are actually how to select the right OKRs.

Let's start by reviewing three of the common mistakes in the implementation of OKRs:

- **Goals are set arbitrarily, sometimes with no clear relationship to a challenge or the organization's capabilities. This is often the result of a lack of in-depth**

²³ <https://aktiasolutions.com/okr-framework/>

knowledge of the business, or a lack of understanding of the organization as a system, or both.

- **Lack of focus on just a few high-leverage targets.** It is a natural tendency to commit the organization to more than it can achieve. The result is often that not much progress is made on any of the goals. This creates stress and discourages people.
- **Selecting the wrong targets.** Without a consistent system for relating the organization's higher-order goals to operational activities, it's easy to do the "wrong" thing and engage major parts of the organization in underperforming, or even counterproductive activities.

To avoid these first-tier problems, the first thing to do is understand the **difference between strategic thinking and strategic planning**.

Strategic Thinking vs Strategic Planning

Albert Einstein once said:

"If I had an hour to solve a problem, and my life depended on the solution, I would spend the first 55 minutes thinking about the problem and 5 minutes thinking about the solution"

Good connect. to fall,
 work
 project

OKRs are a methodology for strategic planning and organizational improvement, but they are not a tool for strategic thinking. They help us to activate or execute a strategy, but not to design it.

OKRs allow us to implement a strategy ensuring that the entire organization is aligned.

What is often lacking is the identification of the challenge to be overcome and the diagnosis of the problem. And, for that we need strategic thinking tools and a process.

For some companies, it seems, the best way to set direction is to develop a shared vision of what the organization will be like in the future, contrast it with the way the organization is now, and then create a plan to close the gap: *The Strategic Plan*.

But there is a problem with this approach. The missing part is designing a winning strategy. The strategic thinking required before developing the strategic plan.

Strategy is not setting goals. But, to understand this, we are going to have to differentiate between three important concepts related to strategic thinking:

- *Strategic Intent*
- *Challenge (Problem)*
- *Strategy*

Strategic Intent

The strategic intent (or the winning aspiration) would be the equivalent of the product vision.

Strategic intent is a concept coined by Gary Hamel to explain how many Japanese and Korean companies managed to dominate Western markets between the 1970s and 1990s.

Gary Hamel argues that many companies focus on trimming their ambitions to match capabilities and, as a result, seek only the advantages they can sustain.

In contrast, leading companies harness resources by accelerating the pace of organizational learning and trying to achieve seemingly impossible goals.

These companies foster the desire to succeed among their employees and maintain it by spreading the vision of global leadership.

Strategic intent incorporates ambitious goals, which force companies to compete innovatively.

On the one hand, strategic intent envisions a desired leadership position and establishes the criteria the organization will use to chart its progress.

At the same time, strategic intent also encompasses an active management process that includes:

- *focusing the organization's attention on the essence of winning*
- *motivating people by communicating the value of the goal*
- *making room for individual and team contributions*
- *maintaining enthusiasm by providing flexibility as circumstances change*

- consistently using intent to guide resource allocation.

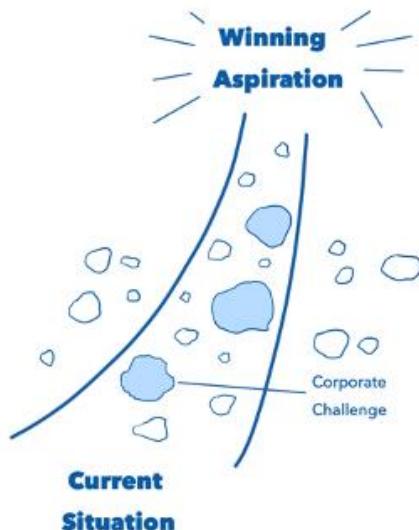


Figure 9 - Strategic Intent (Winning Aspiration)

Strategic intent creates an extreme mismatch between capabilities and ambitions.

Top management challenges the organization to bridge the gap by systematically building new competitive advantages.

It's like a marathon in 400-meter races. No one knows what the terrain will look like at Km 27, so the role of top management is to focus the organization's attention on the terrain that will be covered in the next 400 meters.

It does this by presenting the organization with a series of corporate challenges, each specifying the next milestone in the race to achieve the strategic intent. One year the challenge might be quality, the next it might be total customer service, the next entering new markets, and the next a rejuvenated product line.

Corporate challenges are a way to organize the acquisition of new competitive advantages, a way to identify the focal point for the efforts of employees in the short and medium term.

Challenges

Once you have defined what winning means for our company (or your product vision), a series of challenges (or problems) appear along the way.

These challenges translate into 3–5-year iterations that lead us to gain a competitive advantage.

Now it's time to devise strategies to overcome those challenges. This is where we apply strategic thinking.

We look for those levers in which applying focus, strength and coordination will allow us to achieve a competitive advantage.

Strategy

Simply setting ambitious goals is not a strategy.

Strategy implies giving a coherent response to an important challenge. Unlike a goal, a strategy is a coherent set of analyses, concepts, policies, arguments, and actions that respond to a high-risk challenge.

It is about identifying one or two critical problems in a situation, the key points that can multiply the effectiveness of the effort, and then focusing and concentrating action and resources on them.

Executives who complain of "execution" problems have generally confused strategy with goal setting. When the "strategy" process is basically a game of setting performance goals, then there remains a huge gap between these ambitions and actions.

Of course, a leader can set goals and delegate the work of figuring out what to do to others. But that is not strategy. If that's how the organization works, let's be honest: call it "goal setting".

The Kernel of a Good Strategy

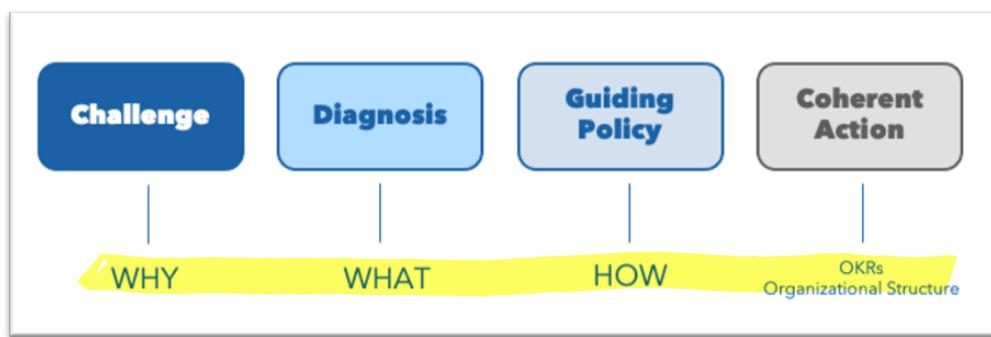


Figure 10 - The Kernel of a Good Strategy from the book "Good Strategy/Bad Strategy"

A **good strategy** is a **coherent action** backed by an argument. An effective mix of thought and action with a basic underlying structure, which Richard Rumelt refers to as **The Kernel**.

The core of the strategy: challenge, diagnosis, guiding policy, set of coherent actions.

A **diagnosis** that defines or explains the nature of the challenge. A good diagnosis simplifies the overwhelming complexity of reality by identifying certain aspects of the situation as critical.

A **guiding policy** to meet the challenge. This is a general approach chosen to address the obstacles identified in the diagnosis.

A set of **coherent actions** designed to carry out the guiding policy. These are steps that are coordinated with each other to work together to comply with the guiding policy.

To a doctor, the challenge appears as a set of symptoms along with a history. The doctor makes a clinical diagnosis, identifying a pathology. The chosen therapeutic approach is the guiding policy of the physician. The doctor's specific prescriptions for diet, therapy, and medication are the set of consistent actions that need to be taken.

In business, the challenge is often dealing with change and competition.

The first step toward effective strategy is diagnosing the specific structure of the challenge rather than simply naming performance goals. The second step is to choose a general guideline policy to deal with the situation that is based on employing or creating some form of leverage or advantage. The third step is the design of a configuration of actions and resource allocations that implement the chosen guiding policy.

OKRs help implement that consistent action and give us coordination, concentration, and focus.

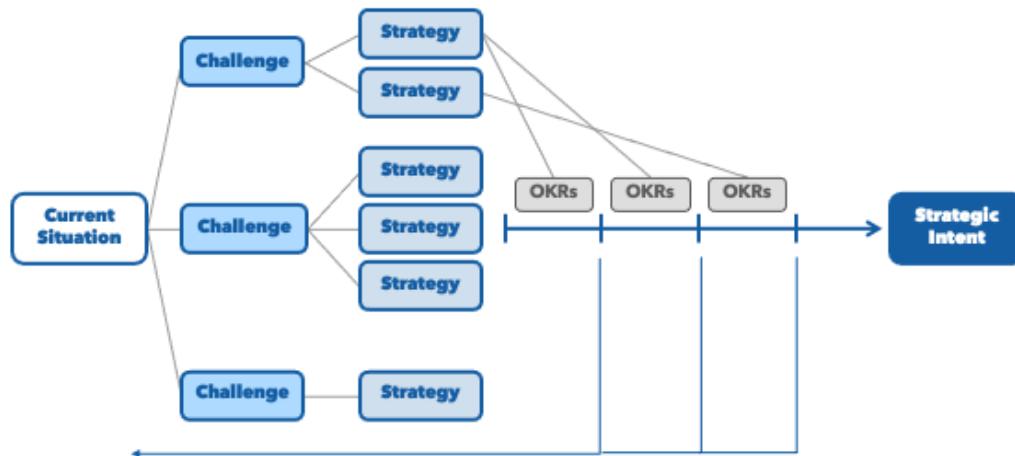


Figure 11 - Strategy process

But how can we identify those levers that will allow us to overcome the challenges?

Let's talk about the sources of strategic strength.

The Sources of Strategic Power

The essence of strategy is the application of strength against weakness, pursuing the most promising opportunity, or exploiting the strength of the adversary against you.

In the book Good Strategy / Bad Strategy, Richard Rumelt explains some of the sources of strategic power.

Other authors, such as Mike Porter, refer to these sources of power as competitive advantages.

Let's look at the three fundamental sources of strategic power:

- *Design*
- *Leverage*
- *Focus*

Design

A winning strategy builds strength through the consistency of its design.

You must think of a strategy as a design problem and not as a planning process. A design problem, in which various elements must be organized, adjusted, and coordinated to solve a specific problem or challenge.

A strategy is not based on deciding or choosing from a list of possibilities. A good strategy has coherence, coordinates actions, policies and resources to achieve an important goal.

Leverage

Good strategy draws power from focusing minds, energy, and action at the right time and in the right place.

Three key points of good strategic leverage are:

- *Anticipation - anticipating changes in demand and reactions of the competition.*
- *Pivot Points - find a pivot point that will amplify the effects of concentrated force.*
- *Concentration - focus our efforts on fewer or more limited goals, generating greater profits.*

Focus

Focus implies attacking a segment of the market with a business model that provides more value to that segment than the other players.

It is characterized: first, by the coordination of policies that produce additional power through their interaction and overlapping effects. Second, it denotes the application of that power to the correct target.

Competitive Advantages

There exist many ways to achieve competitive advantages sustained over time.

With the three sources of strategic power, I wanted to highlight those that are most related to OKRs.

But to give you an idea, here is an additional list:

- *Low cost & Differentiation*
- *Blue Ocean Strategy*
- *Defense mechanisms*
- *Under the radar*
- *Collaboration*
- *Change the rules of the game*
- *Ride a wave of change*
- *Network effects*
- *Vertical Integration / Disintegration*
- *Chain Link Logic*

For more details you can consult the bibliographical references or participate in my workshops and product strategy training courses.



Product Roadmap Fundamentals

Product roadmaps translate strategic decisions into actionable plans that provide direction for the development team and the other stakeholders. Roadmaps help everyone involved in making the product a success understand how the product is likely to grow and how this will affect their work.

The product roadmap can be an incredibly useful tool for implementing the [product strategy](#)²⁴ and aligning the stakeholders.

A roadmap communicates the “why” behind what you’re building. It’s a plan for your strategy. A roadmap is a high-level visual summary that maps out the vision and direction of your product, often over time.

²⁴ <https://aktiasolutions.com/elements-product-strategy/>



Figure 12 - Strategy hierarchy

Your roadmap needs to convey the strategic direction for your product. And it must tie back to the [strategy](#)²⁵ of the company.

The roadmap has several ultimate goals:

- *Describe your vision and strategy*
- *Provide a guiding document for executing the strategy*
- *Get stakeholders in alignment*
- *Facilitate discussion of options*
- *Communicate progress and status of product development*

²⁵ <https://aktiasolutions.com/the-art-of-strategy/>

Why You Need a Product Roadmap

Having a shared vision, a [winning strategy](#)²⁶, and a few [product goals](#)²⁷ is necessary, but it is not enough.

You need to detail the journey you want to take your product on, describe how the strategy is to be executed, and come up with an actionable plan that aligns everyone involved in developing the product. In other words, you need a product roadmap.

Probably when you think of a product roadmap, the first thing that comes to mind is a series of initiatives organized on a calendar.

In its traditional form, a product roadmap communicates how a product is likely to evolve by mapping product releases onto a timeline.



Figure 13 – Traditional timeline roadmap

However, as we will see below, this is not our preferred approach to product roadmapping.

The biggest pitfall for timeline-based roadmaps is that it focuses on deadlines and outputs rather than emphasizing strategic priorities and business outcomes.

²⁶ <https://aktiasolutions.com/product-strategy-how-to-win/>

²⁷ <https://aktiasolutions.com/okr-framework/>

Different Types of Product Roadmaps

There exist two basic types of product roadmaps: feature-based roadmaps and goal-oriented roadmaps.

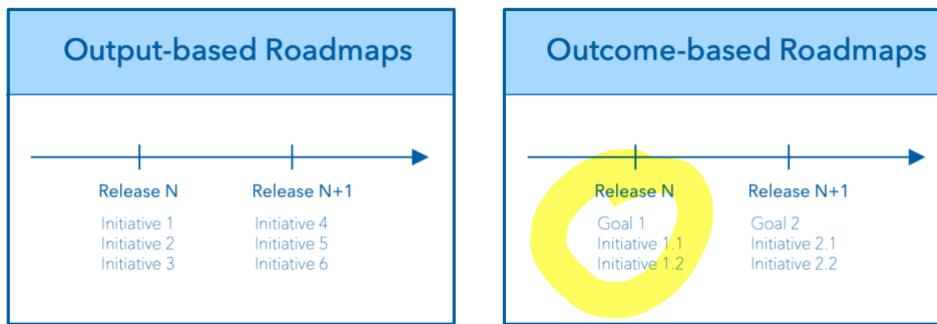


Figure 14 – Output-based vs outcome-based roadmaps

Output-based roadmaps are built on product features, such as registration, search, or reporting, which are then mapped onto a timeline to indicate when each feature will be released.

Outcome-based roadmaps take a different approach. These roadmaps focus on outcomes, such as: acquiring customers, increasing engagement, or increasing conversion.

Features still exist, but they are just components of the roadmap items.

Outcome-based vs Output-based

As a rule of thumb, we will prioritize outcome-based roadmaps for products in highly dynamic markets, products in discovery and growth stages.

On the contrary, we will prioritize output-based roadmaps in products in the maturity or sunset stage and in platform products that serve market-oriented products.

Roadmapping Tools

When it comes to choosing a roadmapping tool, I prefer to start with a whiteboard-based product roadmap whenever possible, like Miro or Mural. Such a roadmap facilitates collaboration and visualization; it makes it easy for others to contribute to the plan; and it makes it visible and accessible.

But if you decide to work with an electronic tool, I recommend that you start with a simple spreadsheet or Trello board so that you can easily experiment with different roadmap formats before you decide which (if any) of the commercial tools is right for you.

The biggest mistake you can make is to select a tool and hope that it will fix your roadmapping challenges.

Relationship between the Roadmap and the Product Backlog

Product roadmaps and product backlogs serve different purposes; hence they have different designs, users, and management policies.

While the product roadmap is a strategic high-level plan that describes how your product is likely to grow, the product backlog is a tactical tool that contains the items necessary to create releases. These items include epics, user stories, and nonfunctional requirements.

Product Roadmap	Strategic tool: describes how the product is likely to grow as certain goals are achieved
Product Backlog	Tactical tool: describes the details, including features and user stories, that must be implemented to create one or more releases

The product backlog is too detailed to offer a clear, longer-term view. The purpose of the product backlog is to organize product delivery and provide visibility around dates.

The roadmap communicates the big picture — the strategic initiatives that move the needle. That big picture can't be distilled in the backlog, because it's quite challenging to communicate strategy in a list that's 300 items long.

Unfortunately, we typically find that product roadmaps oftentimes contain too many details, including epics and user stories, and that product backlogs look too far into the future.

This blurs the line between the two artifacts; it results in a product roadmap that is difficult to understand, susceptible to change, and hard to manage.

Good news is that both tools can nicely complement each other when designed properly.

If you make an effective design of both the product roadmap and product backlog, you will prevent product backlog from cluttering and you will significantly limit its size. In our experience, the product backlog should only contain items for the next 3 months at most.

You should thus keep the two tools separate and leverage their respective strengths. Employ the roadmap to describe your product's overall journey and the backlog to capture the details.

As mentioned above, the main consequence of not having a proper product roadmap is a cluttered product backlog of unrelated items which extends over time more than it should.



Benefits of Product Roadmapping

You like it or not, if you want to successfully introduce product roadmapping in your organization, you will have to convince powerful people to collaborate and use it.

You will have to sell it.

Hence, you must be able to match key users' needs, problems and expectations with the value provided by the roadmap.

Even if the artifact is the same, you must be able to provide different information to each user segment.

In this section you will learn exactly that. How to put forward the value proposition of product roadmapping for the main roadmap personas: executives, engineering, sales, and marketing.

So, let's see what arguments we can use to convince them.

How Product Roadmapping Benefits Executives

Executives and board of directors are generally concerned with the investments the company is making and the expected return on those investments.

Hence, the information you provide to these stakeholders should be limited to the high-level vision, strategy, and strategic initiatives including key business metrics.

In addition, there are pieces of information that I recommend you include in the product roadmap to convince executives and the board of directors: the market opportunity²⁸ and the financial viability²⁹.

As you will see later, I recommend you implement a screening process to select items for the roadmap. The outcome of which is a roadmap submission form (or briefing)³⁰ which contains all the basic information to understand the initiative.



Q1	Q2	2H	Next Year
Theme #1 <u>Goals:</u> <ul style="list-style-type: none"> • Increase retention • Reduce call center calls <u>Stage:</u> On development	Theme #2 <u>Goals:</u> <ul style="list-style-type: none"> • Increase conversion Theme #3 <u>Goals:</u> <ul style="list-style-type: none"> • Improve engagement 	Theme #4 <u>Stage:</u> Discovery (Exploration)	Theme #5 <u>Stage:</u> Discovery (Validation)
Target market: Frequent flyers in Spain	Target market: Weekend leisure flyers in Europe	Target market: UK	Target market: Brasil
Opportunity: €10 million	Opportunity: €30 million	Opportunity: €7 million	Opportunity: €20 million
<ul style="list-style-type: none"> • Revenue (1y): 250K • Gross Profit: 200K • Time-to-Revenue: 2 months • Breakeven: 5 months 	<ul style="list-style-type: none"> • Revenue (1y): 900K • Gross Profit: 800K • Time-to-Revenue: 5 months • Breakeven: 9 months 	<ul style="list-style-type: none"> • Revenue (1y): 190K • Gross Profit: 150K • Time-to-Revenue: 1 months • Breakeven: 3 months 	<ul style="list-style-type: none"> • Revenue (1y): 700K • Gross Profit: 800K • Time-to-Revenue: 6 months • Breakeven: 12 months

Figure 15 - Sample product roadmap for executives

Market Opportunity

²⁸ <https://aktiasolutions.com/evaluating-a-market-opportunity/>

²⁹ <https://aktiasolutions.com/financial-viability/>

³⁰ You can find several templates for the *Submission Form* (or *Roadmap Theme Briefing*) in the Annex.



Geoffrey A. Moore in his bestselling book³¹ “Crossing The Chasm” defines a market as ‘a set of actual or potential customers for a given set of products or services who have a common set of needs, and who reference each other when making a buying decision.’

Evaluating a market opportunity is one of the first things you must do to assess the viability of a product, service, or initiative

A market opportunity is a group of potential customers for whom we can develop a viable value proposition for which they are willing to pay for.

It basically answers the question: *who is this for and how much is it worth.?*

Components of a Market Opportunity

In their book 'Where to Play' Marc Gruber and Sharon Tal explain how to analyze a market opportunity with tow dimensions: potential and challenge.³²

The potential of a market opportunity is shaped by three primary factors:

1. **Financial viability** - Is it worthwhile from a business perspective to pursue this market?
 1. *Margins (value vs cost)*
 2. *Customers' ability to pay*
 3. *Customer stickiness*
2. **Compelling reason to buy** - Will someone really want our offer and are willing to pay for it?
 1. *Real unmet needs*
 2. *Provide an effective solution*
 3. *Better than current solutions*

³¹ ['Crossing the Chasm', Geoffrey A. Moore](#)

³² ['Where to Play', Marc Gruber and Sharon Tal](#)

3. **Market size** - How big is this market, now and in the near future?

1. *Current market size*
2. *Expected market growth*

The **Challenge** of a market opportunity can be gauged using three main factors:

1. **Implementation obstacles** - How difficult will it be for you to create and deliver your offer?
 1. Product development difficulties
 2. Sales and distribution difficulties
 3. Funding challenges
2. **Time to revenue** - How long will it take until you can generate cash flow through sales?
 1. Development time
 2. Time between product and market readiness
 3. Length and complexity of sales cycle (B2C vs B2B)
3. **External risks** - What obstacles in your business environment can stand in your way?
 1. Competitive Threat
 2. Third party dependencies
 3. Barriers to adoption

Financial Viability

Executives and board members want to know the general financial projections of an initiative.

The purpose of evaluating the [financial viability](#)³³ is to first evaluate whether the business model is viable, and second to detect those risky assumptions that could be easily targeted as part of a [product discovery process](#).³⁴

Executives will be happy to know that you have done your job in assessing business viability and you can show the big figures in the roadmap.

It basically answers the question: *how much money are we going to make and when..?*

In the following image you can see an example of a roadmap with the necessary aggregate information for stakeholders and executives.

In addition, as you will see later, I recommend that you include this valuable information in the briefing document attached to each roadmap theme.

How Product Roadmapping Benefits Engineering

Engineers need concrete information on which to base delivery schedules, resource allocation, technical architectures, dependencies, and their own technology roadmap.

In addition, Product Owners will benefit from participating in the product Roadmapping process allowing them to have a smaller, much better structured, organized, and prioritized product backlog.

Development teams want something that begins with your high-level vision and strategy but then complements it with details including likely features, stage of development, technology, dependencies, and risks.

³³ <https://aktiasolutions.com/financial-viability/>

³⁴ <https://aktiasolutions.com/product-discovery-process/>

Additionally, as part of the roadmapping process in a product-led organization, we expect engineers to participate in the product discovery process to help validate higher-risk assumptions regarding feasibility (aka technical viability).

So, this is how you convince engineers. You help them with information they need to organize, and you also get them involved in the product discovery process.

In the following image you can see an example of a roadmap with the necessary aggregate information for engineering.



Q1	Q2	2H	Next Year
Real-time Help Opportunities: • Automated Support dialog • Support bot <small>Stage: On development</small>	Inspire Weekend Flyers Opportunities: • Inspiration for weekend flyers Upsell Ancillaries Opportunities: • Personalized Recommendations • Complement your trip	Theme #4 <small>Stage: Discovery (Exploration)</small> Theme #5 <small>Stage: Discovery (Validation)</small>	Theme #6 <small>Goals:</small> • Win a beach head in Latin America <small>Stage: Screening</small>
Product area: • Desktop homepage • Mobile booking	Product area: • Booking • Check-out	Product area: • Checkout • Post-purchase	Product area: • Operations
Technology: • Support automation on iOS • Bots	Technology: • AI-based recommendation engine	Technology: • New email marketing solution • Payment with cryptocurrencies	Technology: • Cloud Infrastructure
Traffic: +100,000 events/day	Traffic: +50,000 events/day	Volume: • 200,000 emails/week Traffic: +70,000 events/day	Traffic: +150,000 events/day
Dependencies & Risks: • Dependency on Team Saturn availability • Develop bot technology skills	Dependencies & Risks: • Dependency on Team Jupiter • Redesign home page		

Figure 16 - Sample product roadmap for Engineering

Opportunities (Features & Solutions)

Although we don't want to commit to specific features, the development team needs some idea of what they will be building to plan their work.

Including in your themes a short list of opportunities you believe will effectively address the business goals and customer problems will add the necessary level of realism to your roadmap, while allowing the development team to estimate the effort involved, understand dependencies, and negotiate scope and timing.

Stage of Development

Being clear about the product's (or initiative's) development stage in your roadmap sets helpful context and expectations for the development team.

- *In the earliest stages, the initiative is just a blurry idea that must go through the roadmap screening process.*
- *Next, the initiative is under active discovery, and it doesn't have any users outside the company.*
- *Later, the roadmap may be changing rapidly as early customers provide feedback on unmet needs.*

Custom features for large customers may become necessary in the growth stage, and the later stages may focus entirely on compatibility updates and bug fixes.

Armed with information on what stage you expect the initiative to be in at various points in time, your development, marketing, sales, engineering, operations, and/or manufacturing teams can plan their work accordingly.

Suggestion for stages

In the following table you can find some suggestions to identify stages within your roadmap themes.

Now	Next	Later
<ul style="list-style-type: none"> • In development • MVP • Production • Growth • Maturity 	<ul style="list-style-type: none"> • Ready for delivery • Product Discovery • Exploration • Validation 	<ul style="list-style-type: none"> • Idea • Screening • Ready for Discovery

Product Areas

Most of today's products are big and complicated. Although there are exceptions, it is rare for a single product team to develop a complete product.

Most products require multiple teams to work together. This means that each product organization must address the question of how to structure its product teams to better divide the work.

You can use swimlanes to visually represent the teams responsible for initiatives or goals. Alternatively, you can indicate the product area. In this way, the teams will be responsible for organizing themselves in the best possible way and manage dependencies.

Including this information on your roadmap in the form of tags, colors, or swimlanes makes it easy for development teams to map your roadmap to their organization.

Technology

Engineering, operations, and manufacturing teams need a good understanding of certain aspects in advance if possible. Such as:

- 
- Scalability
 - Infrastructure
 - New technologies
 - Partnerships and integrations with third parties

Make sure you involve senior engineers as early as possible if you anticipate any risk of this type and leave it clearly indicated in the corresponding item of the roadmap.

Dependencies and Risks

It is important to identify dependencies and risks that could affect your ability to deliver on your roadmap as early as possible so they can be prioritized, planned, and mitigated.

If a roadmap theme cannot be built until something else is, you must factor it into your sequencing.

How Product Roadmapping Benefits Sales and Marketing

Sales & Marketing are, without a doubt, the stakeholders most interested in specific dates and features.

It is important that they can obtain this information, but it is essential, in order not to fall into the mistakes of the past, to make it clear at what level of granularity we can offer this information.

As we have already mentioned, the roadmap themes contain a proposal for Features (or Opportunities), but until the development team analyzes it, we will not be able to offer a fairly accurate forecast.

We must emphasize the purpose of the roadmap as a strategic alignment and communication tool. We will be providing timeframes, but for more specific dates stakeholders should wait until development teams can make an educated assessment.

For big initiatives or new products, we recommend the adoption of methods such as Lean Inception or Agile Inception to create a release plan for an MVP³⁵. This process will help create a shared understand of the delivery plan, including major milestones and dates.

³⁵ <https://aktiasolutions.com/minimum-viable-product/>

In addition, your roadmap should help them understand what advantages your product will provide in terms of increased value and benefits for the customers.

The roadmap you share with your sales and marketing teams has the same timeframes and themes as all previous views of the roadmap, then adds details of interest to them, such as: external events, confidence, target market and opportunities (or features).

Q1	Q2	H2	Next Year
Real-time Help Opportunities: • Automated Support dialog • Support bot <u>Stage:</u> On development	Inspire Weekend Flyers Opportunities: • Inspiration for weekend flyers Upsell Ancillaries Opportunities: • Personalized Recommendations • Complement your trip	Theme #4 <u>Stage:</u> Discovery (Exploration) Theme #5 <u>Stage:</u> Discovery (Validation)	Theme #6 <u>Goals:</u> • Win a beach head in Latin America <u>Stage:</u> Screening
Product area: • Desktop homepage • Mobile booking	Product area: • Booking • Check-out	Product area: • Checkout • Post-purchase	Product area: • Operations
Target market: Frequent flyers in Spain	Target market: Weekend leisure flyers in Europe	Target market: UK	Target market: Brasil
Confidence: 90%	Confidence: 80%	Confidence: 60%	Confidence: 40%
External Events: • Easter • Industry conference	External Events: • Summer campaign	External Events: • EU regulation • Black Friday	

Figure 17 - Sample roadmap for Sales & Marketing

Target Market

At a certain point you will want to grow your product by expanding to other geographies, or markets with different types of customers.

The roadmap should be very explicit when the themes will allow you to serve new customers.

Confidence

You can easily manage expectations by adding a confidence estimate to the items on your roadmap, indicating how likely they are to achieve the expected outcomes.

Features and Solutions

Marketing and sales teams may have good intelligence on what it will take to effectively position the product in the market or to convey your value proposition to these market segments. So, it is important to involve them early and give them visibility into what solutions you have in mind to fulfill those marketing and sales needs.



Roadmap Design



Designing your Roadmap

Your organization needs to have an explicit and shared understanding of what a roadmap means and how it is to be used. In the absence of this understanding, roadmaps are not only useless, but actively harmful.

This is perhaps the key success factor number one.

A roadmap is an alignment and communication tool. Hence, it must be useful for its different types of users (mainly business stakeholders, senior management, and engineering).

In our experience, the design of the roadmap should be a collaborative effort including key users.

Whenever a roadmap user looks at it, she must be able to easily find the information they are looking for and the answers to her questions.

Remember, however, that the roadmap is a strategic tool, all details related to delivery are to be found in the product backlog.

Here are a few questions to help you create a clear understanding of how your organization intends to use its roadmap:

- *How far into the future should our roadmap go?*
- *What could somebody within the organization expect if they see an initiative on the roadmap three months from now?*
- *What could somebody within the organization expect if they see an initiative on the roadmap 9 months from now?*
- *Who needs to have access to the roadmap?*
- *How often is the roadmap reviewed and by whom?*
- *How are changes to the roadmap communicated and how often?*
- *How do we know to what extent the roadmap is being effective and how much?*
- *What criteria does something need to meet to be added to the roadmap?*
- *Should we include all the work in the roadmap? What should we visualize and what shouldn't we?*

The answers to these questions will vary based on your product, your organization, and your stakeholders.

What is most important is not how you answer these questions, but rather that you ask and answer these questions at all.

Let's start by looking at the key design aspects of the roadmap.

Roadmap Design Factors

While any roadmap should communicate the plausible development of the product, you should design a roadmap artifact and roadmapping process tailored to your context.

There are several fundamental aspects to consider when designing your roadmap:

- *the time frames*
- *the level of uncertainty*
- *display detail*
- *relationship with the Product Backlog*
- *information needs of stakeholders*

Time Frames

Structuring the roadmap in temporary compartments is perhaps the most important aspect of the design process.

The size of these compartments will basically depend on the uncertainty and volatility of your product's market.

More mature markets will use bigger time frames, whilst emerging and dynamic markets will require shorter time frames.

Typical configurations could be the following ones:

- *Months*
- *Quarters*
- *Expanding timeframes:*
 - *3 months – 6 months – 9 months*
 - *Q1 – Q2 – 2nd Half – Next Year*
- *Now – Next – Later*



Below, you can see two examples:

	NOW (3 months)	NEXT (3-6 months)	LATER (> 9 months)
Theme 1	Opportunity 1.1 Opportunity 1.2	Opportunity 1.3	Opportunity 1.4
Theme 2	Opportunity 2.1		Opportunity 2.2
Theme 3		Opportunity 3.1 Opportunity 3.2	

Figure 18 - Expanding Theme-based Roadmap



	Q1	Q2	2H	Next Year
Goal 1	Theme 1.1	Theme 1.2		
Goal 2		Theme 2.1 Theme 2.2	Theme 2.3 Theme 2.4	Theme 2.5
Goal 3	Theme 3.1 Theme 3.2		Theme 3.3	Theme 3.4 Theme 3.5

Figure 19 - Expanding Goal-based Roadmap

Uncertainty

The granularity of items on the roadmap may vary according to the level of uncertainty and how far away they are in time.

Next quarter items, for which we have already done some product discovery³⁶, should be expressed in more granular terms than strategic elements in future horizons which have not gone through product discovery at all.

³⁶ <https://aktiasolutions.com/what-is-product-discovery/>

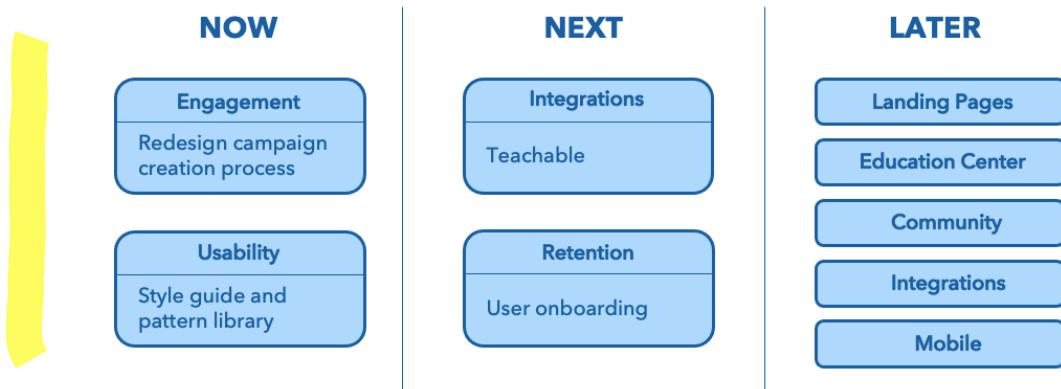


Figure 20 - Granularity of items over time

Visualization

A very common mistake when implementing the product roadmap is to focus solely on visualization, without asking ourselves what the needs and expectations of its users are, what problems it must help solve, and in what context it is going to be used.

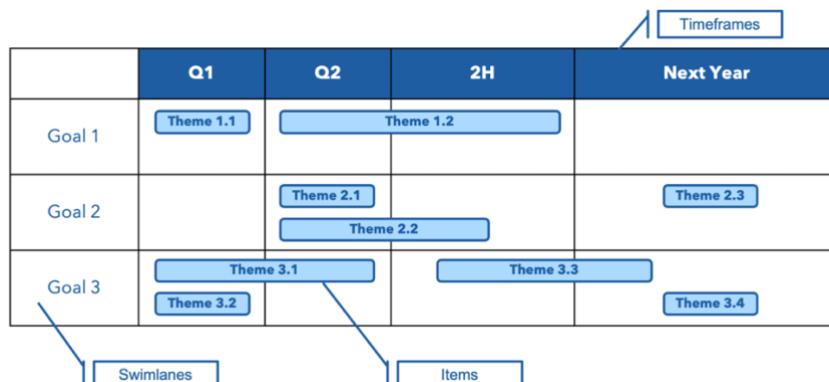


Figure 21 - Roadmap building blocks

The roadmap display should only be defined once the information needs and the expected uses of the product roadmap have been agreed upon.

These are the three main visual components of the product roadmap:

- **Columns:** timeframes
- **Swimlanes:** Goals, Teams, or Themes (or combination)
- **Granularity:** based on the timeframe (and uncertainty)

A common mistake we see is wasting swimlanes. Instead of using them to group by objectives, themes, teams (or a combination of all three) some organizations just ignore them.

In fact, as you can see below, it's even possible to have different visualizations for each flight level — product and team.

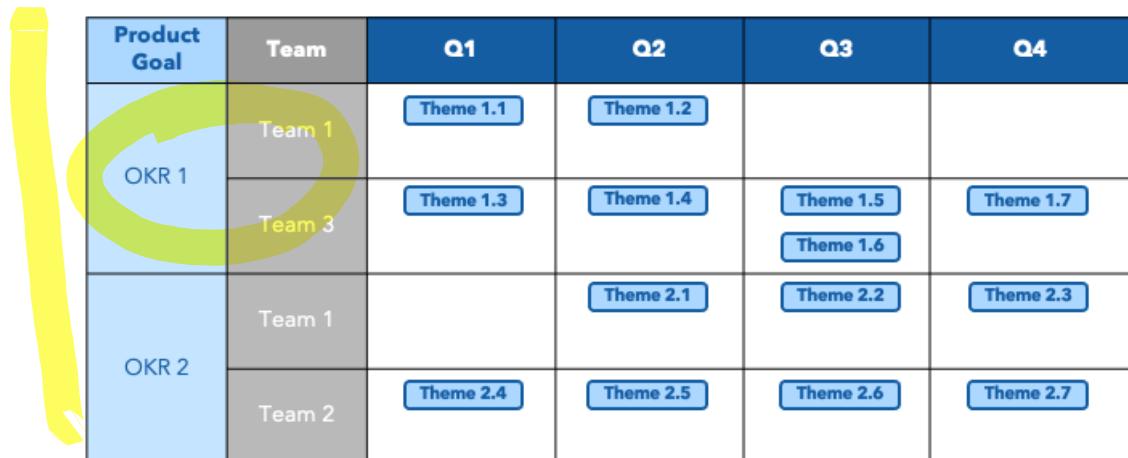


Figure 22 - Combined Product Level Visualization

Relationship with the Product Backlog

When we design the roadmap, it is essential to design the interaction with the product backlog, especially regarding possible overlaps.

We need both artifacts, but as we've said before, each one serves a different purpose. We do not want a very detailed roadmap, nor a very long-term backlog.

The main decision consists of determining which items are included in each artifact and how the items of both artifacts are related.



Figure 23 - Granularity and Uncertainty

A possible structure would be:

- *Objectives and themes in the product roadmap*
- *Epics (or Opportunities) within each Roadmap Theme*
- *Epics and user stories in the product backlog (linking back to their corresponding Theme)*

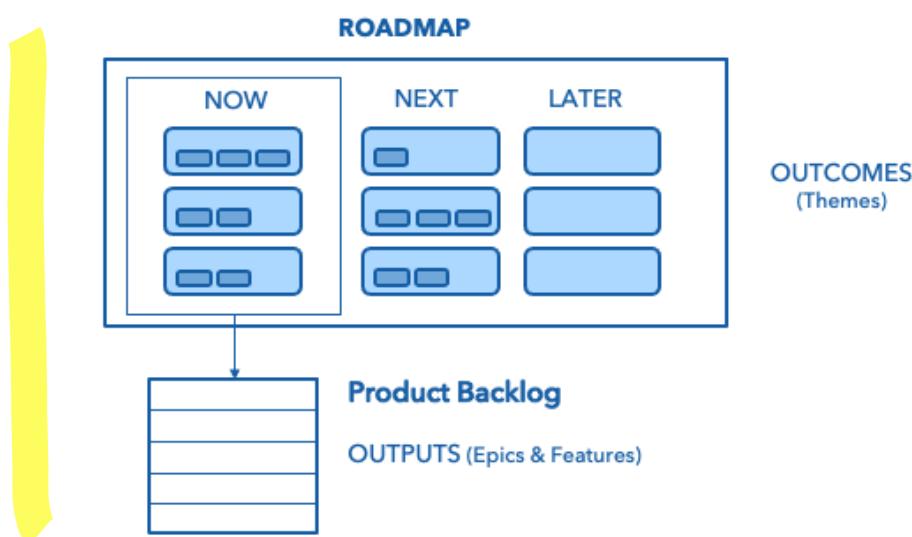


Figure 24 - Roadmap vs Backlog

It is also necessary to agree [who is responsible for each artifact](#).³⁷

Typically, in digital product teams, the Digital Product Manager will be responsible for both. In other types of teams, it would be common to have the Product Manager managing the product roadmap and the Product Owner managing the Product Backlog.

Stakeholders

To create truly successful products, people from different business groups must work together. Your product roadmap should facilitate this collaboration. It should create a shared understanding of how your product is likely to grow so that the stakeholders can plan their work accordingly.

Think of the stakeholders as the roadmap users.

In the following table you can take a closer look at the most common [stakeholders' expectations](#).

Stakeholder	Needs
Product Manager	<ul style="list-style-type: none"> • Communicate how the strategy to achieve the product vision is implemented • Communicate how the product is likely to evolve. • Achieve buyin and align stakeholders along a product direction • Manage arbitrary and urgent requests • Measure success of initiatives • Forecast and budgeting
Business Manager	<ul style="list-style-type: none"> • Decide on appropriate investments • Measure ROI • Easily change strategic course when required • Ensure strategic plan is aligned with business' strategy
Development Team	<ul style="list-style-type: none"> • Ensure technical feasibility of roadmap items • Know when engineers are required in product discovery tasks • Know what's coming early enough to be able to do the necessary research • Organize teams, people and resources to respond to strategic needs
Marketing & Sales	<ul style="list-style-type: none"> • Know what's coming early enough to be able to prepare marketing campaigns, trainings, sales collateral and events. • Ensure that marketing and sales needs and market insights are considered

Figure 25 - Stakeholders' needs

³⁷ <https://aktiasolutions.com/product-owner-vs-product-manager/>

Integration with Product Discovery

A key aspect in the successful introduction of the Product Discovery practice³⁸ in an organization is its effective integration in the value chain.

Product Discovery does not have to be seen as an occasional or extravagant practice, but as part of the normal operation of modern product teams.

For this reason, it is critical that it be given visibility and be effectively integrated with the main strategic product tool — the product roadmap.

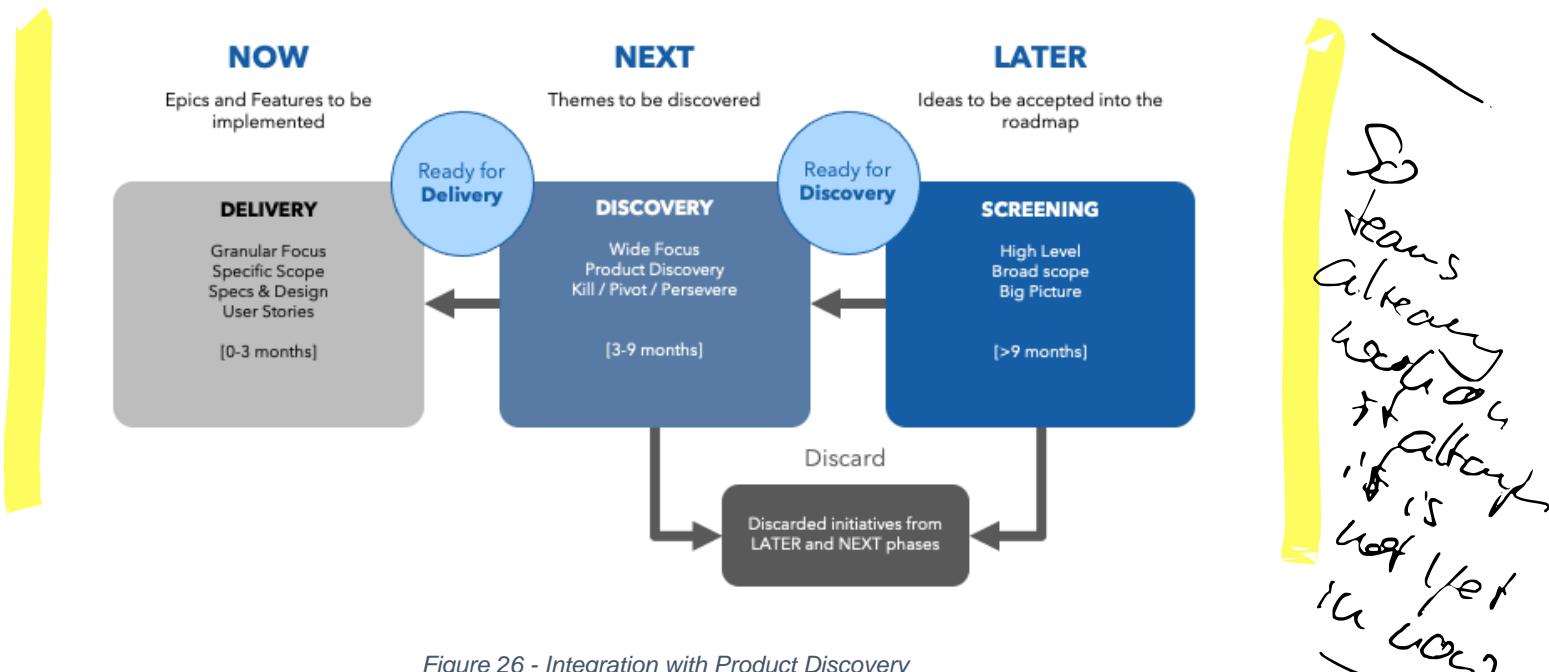


Figure 26 - Integration with Product Discovery

In the figure above you can see an example of a product roadmap implementation with the corresponding integration with the product discovery process that I helped one of my clients establish in their product organization.

As you can see, the initiatives that enter the pipeline go through a screening process that results in the decision to either incorporate it into the roadmap or discard it.

³⁸ <https://aktiasolutions.com/getting-started-with-product-discovery/>

All initiatives included in the roadmap must meet the necessary conditions to enter the '*Ready for Discovery*' buffer.

In this case, the '*Ready for Discovery*' checklist was as follows:

- *Business Model Canvas* (and/or *Opportunity Canvas*)
- *Assumptions mapping*
- *Strategy briefing*
- *Roadmap Submission Form*
- *Lightweight Product Discovery Plan*
- *Alignment with stakeholders*

The discovery process starts with an alignment kick-off with the product team.

The result of the discovery process will be the discarding of the Theme or its incorporation into the '*Ready for Delivery*' buffer.



Roadmap Design Mistakes

In this chapter we explore the most common mistakes in the design of a product roadmap:

- *Not involving stakeholders in the design process*
- *Carved in stone*
- *Absence of Product Strategy*
- *Too granular*

Not Involving Stakeholders in the Design Process

Product Roadmap is a collaboration and communication tool, and stakeholders are their key users. Hence, not involving them is like not involving customers in the design process of a product.

We must understand stakeholders' expectations so we can factor in the roadmap solutions for their specific problems and needs.

This also pursues the pedagogical objective of facilitating the change in mentality of the stakeholders towards an outcome-oriented roadmap and to overcome possible barriers in its adoption.

Carved in Stone

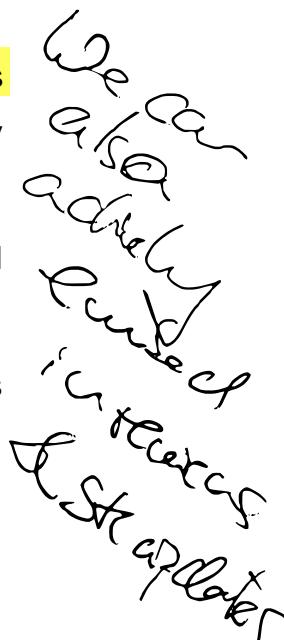
Your product roadmap is not fixed; it will change.

A product roadmap is not carved in stone, nor it is a commitment; it is a high-level plan that describes the likely growth of your product based on what you currently know.

You must ~~review~~ and update the roadmap regularly and involve the key stakeholders in the roadmapping activities to ensure all their questions and concerns are effectively answered.

You should choose the right roadmap format and the right level of detail to avoid making more roadmapping changes than are necessary.

An outcome-oriented roadmap is particularly useful when significant change is expected in your product direction.



Absence of Product Strategy

Don't create a roadmap if you don't have a valid product strategy³⁹ available.

You should not attempt to create a roadmap if you cannot confidently answer who the product is for, why customers would want to buy it, why they would choose it over their current solution, if it is feasible to build the product, and if it is viable to develop and provide the product.

As a result of a product strategy, you should also have a few product challenges to overcome in the next few months – the product strategic goals.⁴⁰

Instead of rushing to build a roadmap, recognize that you must first work on the product strategy and identify a few strategic goals to pursue.

Too Granular

A product roadmap should communicate how a product is likely to evolve. Hence, you must refrain from including epics and features in the plan, as this has several drawbacks:

- *It clutters your roadmap and makes it hard to see how you want your product to progress*
- *It makes it more difficult to achieve agreement with the stakeholders*
- *It is more prone to change*
- *It carries the risk of turning the roadmap into a tactical tool that competes with the product backlog*
- *It restricts the freedom of the development team to make a commitment and pull the right amount of work for delivery*

³⁹ <https://aktiasolutions.com/elements-product-strategy/>

⁴⁰ <https://aktiasolutions.com/how-to-select-the-right-okrs/>

As explained earlier, roadmap themes can include opportunities, epics, or features, but not as individual items on the roadmap. For that we already have the product backlog.



Theme Design

Themes are the main element of every roadmap. They allow to explicitly connect the strategy with the execution, linking the product objectives, the success metrics, and the development opportunities.

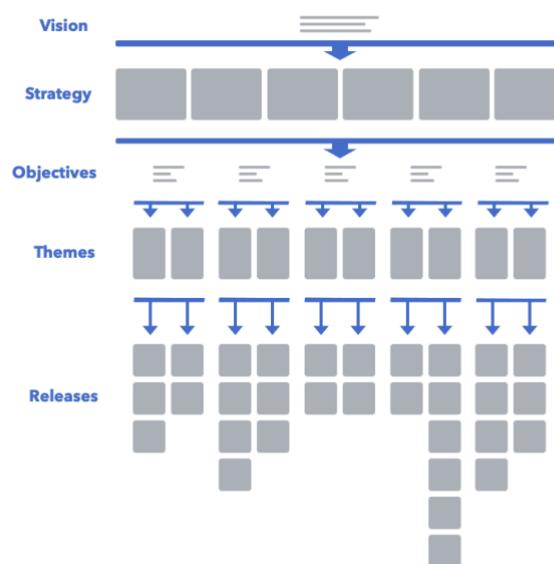


Figure 27 - Themes connect product goals with delivery

Themes

Themes (or initiatives) are the key building blocks of a roadmap. They might be developed individually or be part of a bigger release. They connect strategy with execution.

For every theme you should be able to provide the following information: *theme name, release date or time frame, product goal(s), metric(s), solutions, and briefing.*

Theme Name

One sentence description of the theme.

We recommend using either statements of direction or capabilities, typically starting with a verb. For example:

- *Provide quality content frequently*
- *Improve delivery on time*
- *Provide real-time personalized recommendations*
- *Inspire weekend flyers*
- *Upsell ancillaries*

Release Date (or Time Frame)

Specific date when Theme should be made available for customers or a broader time frame like "Q1 2023" or "two weeks before such event".

For outcome-based themes specific dates don't make much sense because it is quite difficult to say when a goal will be achieved, or a certain metric is going to be improved. The best we can say is "*in this quarter we are working to achieve these goals*".

If you need dates, you should look for the release dates of product increments.

Goal(s)

It states the goal of a theme, the benefit it should provide, and the reason for creating it.

We use product goals as a connection with product strategy challenges.

Oftentimes product teams get business goals to achieve (i.e., Revenue or Costs) but those are KPIs they cannot impact directly and depend on business strategy. However, they can influence product metrics⁴¹ such as conversion, retention, engagement, or quality.

OS
Opportunities
Goals
Roadmap
Plan
Outcomes

Metrics

Metrics to determine if a release goal has been met — conversion, engagement, retention, avg. basket size, and so on.

Stating the metrics ensures that the goals on your roadmap are specific and measurable.

Note: if you are using OKRs⁴² you can replace goals and Metrics by OKRs.

Solutions

Proposed high-level solutions. Also, known as Opportunities.

Keep them coarse-grained. More details, including epics and user stories, should be captured in your product backlog.

We prefer to avoid the term '*Features*' as much as possible, as it leads to thinking about a concrete implementation. And we want to leave that for the Product Backlog.

⁴¹ <https://aktiasolutions.com/product-metrics/>

⁴² <https://aktiasolutions.com/okr-framework/>

Briefing

One-pager document attached to the item, which is a summary of the initiative. This one-pager will evolve as it moves forward in the roadmap and uncertainty is reduced by product discovery⁴³ or inputs from delivery.

In the annex you can find a briefing template. Also referred to as '*Product Roadmap Submission Form*'.

This document justifies the investment of time, resources, and people in the product discovery process.

It consists of an explanation of the potential of the proposal, the resources needed for the discovery process and the key assumptions to be tested in exploration, validation, construction, or go-to-market.

A key principle of modern product management is that teams should not be asking for large investments to build their products early on. Instead, they should be asking for a minimal investment to test their key assumptions about business viability, customer jobs, pains, gains, and technical feasibility.

The briefing may include:

- *Concise details about the idea you plan to work on*
- *How the idea supports the strategic goals of your company*
- *Assumptions about customer segments and their needs*
- *Assumptions about the market (potential size and competitors)*
- *Assumptions about construction and go-to-market*
- *The assumptions you plan to test during Exploration and/or Validation stages*
- *Brief details of the tests you plan to run*
- *The resources and funding you think you will need to complete all*
- *The tests you want to run*

⁴³ <https://aktiasolutions.com/product-discovery-book/>

This is all the information you need for your submission, not a 40-page business case.

The product leadership or investment board will then review the application placing particular weight on three key aspects:

- alignment of the idea to company strategy
- the clarity of the proposed
- assumptions and the planned tests.

Get Themes on your Roadmap Right

Most product roadmaps come with themes — with good reason: goals alone are not sufficient to understand what needs to be done to successfully grow your product.

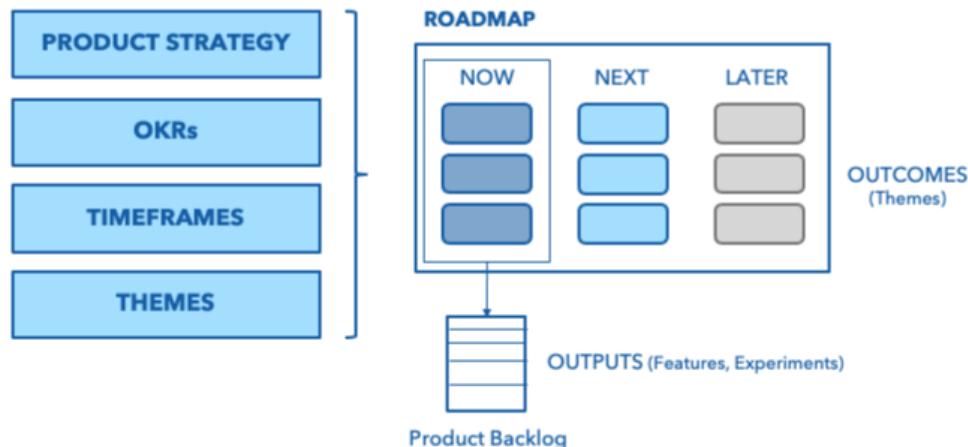


Figure 28 - Components of a roadmap (image adapted from 'Product Roadmaps Relaunched' by Todd Lombardo)

To get the themes on your roadmap right, start by making them high level.

Ensure that they are product capabilities or statements of direction; examples include “track what I eat” or “evaluate the food consumed” for my healthy-eating app.

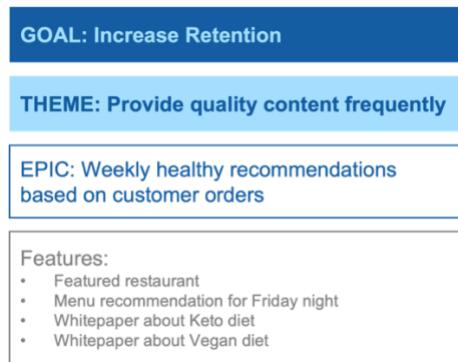


Figure 14 – Theme example including goal, theme title, epic and features

Don't make themes on your product roadmap too detailed. Otherwise, it will become difficult to see how your product should evolve, and your roadmap will overlap too much with the product backlog.

Don't mistake epics or user stories for themes. A theme is a product capability. You can think of it as a group of epics.

In the example above, the theme "Provide Quality Content Frequently" is clearly a capability. For this capability you can have several Epics, like "Weekly healthy recommendations based on customer history", "Monthly Webinar with Expert", or "Weekly Tip on Video". These Epics will then be broken down into features or user stories.

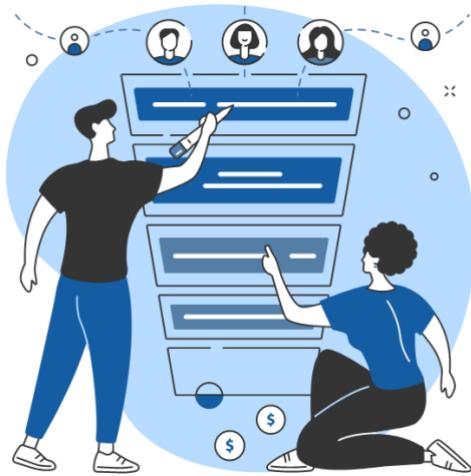
Outcome-based Roadmaps

On a goal-oriented roadmap, themes exist to meet a goal and generate a benefit. You should therefore state the goals first and then derive the themes from the goals.

Themes serve to connect the product goals with the concrete solutions to be implemented.



Roadmap Management



Roadmap Management

The product roadmap is not a fixed plan that is created once and then simply executed. It must be reviewed and adjusted on a regular basis.

In this chapter we will see how to define the appropriate review frequency, involve the right people, and use the right inputs to make the necessary changes.

Adding New Items

While it's great to come up with new ideas and themes, don't blindly add them to your roadmap. This not only clutters your plan but turns your product into a theme soup.

Instead, ensure that every item helps you move the product in the right direction.

My recommendation is that you keep separate parking lot for ideas, themes, and suggestions so you don't forget about them, and you can use them when needed. This way you keep the roadmap pipeline clear and neat.

If a stakeholder requests a feature, then ask why the feature is important and how it helps the product create value. For this, we recommend agreeing on a screening process which ends up with a decision to include the item in the roadmap, where and when to deliver it, or to discard or park it. In case it is submitted to the roadmap, you should attach a briefing document for the theme.

If you get a lot of pressure from stakeholders to implement specific features, this can be an indication that they don't understand or support the product roadmap. If that's the case, reflect on how you engage the stakeholders and explore how you can improve those relationships.

The challenge for a product manager is not so much to have ideas, but rather to establish criteria that can be used to consistently evaluate ideas against customer needs, product goals, and strategy — a screening process.

Consider providing a template to structure these ideas. The specifics of this template will vary depending on your product and your organization, but here is a generalized place to start:

- *Product idea:*
- *Suggested by:*
- *Which of our customers this is for:*
- *How this idea will make a positive impact on customers:*
- *How this idea will help the business:*
- *How we will measure success:*

Even a simple template like the previous one will help structure and filter the ideas around user needs and business goals.

Involving Stakeholders

You must involve stakeholders in reviewing and updating the product roadmap. This ensures that changes are feasible, and that people will buy into the updated roadmap.

If you use Scrum to develop the product, you can use the sprint review meeting to reflect on your roadmap.

This might save you from having to set up another meeting, and it connects the strategic activities with the tactical ones.

Review Frequency

The maturity of your product and its market will be the two main factors influencing how often you should be reviewing your product roadmap. As a rule of thumb, the more uncertainty and change, the more frequently you should review it.

A frequency between monthly and quarterly will be adequate in most situations.

When in doubt, I recommend reviewing it more often and spacing out revisions if you deem it convenient.

Caution note: If you have to adjust your product roadmap more often than once per month this may indicate that it is too detailed and carries too many features.

Review Inputs

In this section we discuss information and insights that typically affect product evolution.

When reviewing the product roadmap, consider:

- *changes in the product strategy*
- *progress of delivery work*
- *changes in product metrics*
- *stakeholders*
- *data you have collected from the customers and users*
- *product discovery insights*

Changes in Product Strategy

Changes in the product strategy inevitably require adapting the product roadmap accordingly. This ensures that the roadmap is still an actionable plan that states how the strategy is implemented.

Progress of Delivery Work

Product delivery progress shows to what extent and how fast you manage to achieve the expected business outcomes factored in the roadmap themes.

Additionally, it is necessary to take into account the possible delays when developing the functionalities.

For this reason, in the [metrics chapter](#) you will see how I propose to monitor both the *Time to Market* and the *Time to Revenue*.

Stakeholders

It must also be considered the progress made by the stakeholders:

- *Is the marketing and sales work on track, for example?*
- *Will the relevant deliverables, such as the marketing and sales collateral, be available as planned? And if not, what effect will this have on the roadmap?*

Customer and User Data

Data collected from customers and users helps you understand if the goals and themes on the product roadmap are correct, and if you are providing the right user experience and features in the right way.

Collect the data by exposing product increments to the customers and users. Then, adjust the goals and themes according to the insights you've gained from analyzing the data.

This is particularly helpful when your product is young or when you are revitalizing a mature product.

Product Discovery Insights

Typically, all the items that are in the intermediate zone of the roadmap will need or will already be going through a [product discovery process⁴⁴](#).

Each process will produce certain insights that will serve to define the initiative, but it is also common for them to provide us with insights that affect other roadmap themes or even the product or business strategy.

It is important to keep an archive of all insights so that it can be used later on as needed.

⁴⁴ <https://aktiasolutions.com/product-discovery-process/>



Updating the Roadmap

When conditions in the environment change, your roadmap must change as well.

In this section we will review ways to manage both expected and unexpected change.

Successful companies **revise their roadmaps on a regular cadence to reflect market changes and** shifts in strategy or priority, while also allowing execution to proceed steadily between updates.

Expected Change

Hopefully, most of the changes in the roadmap will be planned and in alignment with the product strategy.

A rule of thumb is that the refresh rate of your roadmap should match the time scale of your roadmap. For example, if you have structured the roadmap in months, the normal thing would be to review it monthly, since that is supposed to be the update frequency.

Unexpected Change

Late Delivery

A common reason for roadmap change is when work is delivered (or it becomes clear it will be delivered) later than planned.

If you have a hard deadline, you really can't move without serious consequences to your business, then you're going to have to look at scope.

If, on the other hand, scope is unnegotiable, you may want to give on schedule.

You can never have everything, but you can pick which goals to focus on and decide where compromise is the least painful.

Special Requests

Another frequent challenge to an established roadmap is the request to "slip in" a feature, fix, or one-off theme for a "special" customer.⁴⁵

Whenever a request comes in that way, we recommend asking three questions:

1. *What problem is this request trying to solve?*
-

⁴⁵ <https://aktiasolutions.com/product-organization-anti-patterns-sales-driven-organization/>

2. Does solving that need align with our objectives?
3. How exactly is this more important than what's on the roadmap now?

Keep in mind that the decision to incorporate a new theme in the roadmap affects everything that was already approved and, therefore, should be the result of an agreement between the stakeholders involved, since it would imply the delay of one or several initiatives in exchange to incorporate the new.

But this is an Emergency!

Every single organization must deal with ‘emergency’ requests.

Product managers might need to set up an official process and/or template for handling last-minute requests.

The following basic template can provide a good place to start:

- *What is the issue?*
- *Who reported this issue?*
- *How many users is it affecting?*
- *Is there revenue directly tied to this issue? If so, how much?*
- *What would happen if this issue were not addressed in the next two weeks?*
- *What would happen if this issue were not addressed in the next three months?*
- *Who is the contact person for further discussing/resolving this issue?*

This template assumes that the requests coming in are likely to take the form of “*this thing is broken*,” but you can customize it to accommodate for salespeople that request last-minute custom work, and even developers who want to prioritize a new bug that they discovered over the work agreed to do.

You can also ask questions about the number of users affected and the potential revenue implications.

In most situations the mere presence of a template like this makes the volume of emergency requests drop significantly.

Define Emergency

Imagine that you are the ER Director of a Hospital. The first thing you do is define the emergency criteria, the protocols to follow and detail a triage process to categorize each patient who arrives.

What you cannot do is that depending on how much the person who arrives shouts or how annoying they are, you let them enter before others.

My recommendation is that you hold a conversation with all the stakeholders of the roadmap to define "emergency" in your organization and/or product.

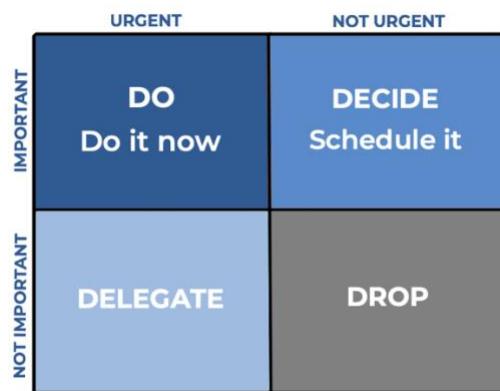


Figure 15 – Eisenhower prioritization matrix

Sometimes it will be helpful to explain the difference between urgent and important.

It is about not falling into the tyranny of the urgent.

To determine if an initiative is important, we have the strategy and the product objectives.

What is important and urgent must be done immediately, what is important but not urgent must be planned and will go on the roadmap or in the product backlog if it is a feature.

External Events

Unforeseen changes in the market will at some point affect your strategy and therefore your roadmap — and most of the times they won't occur on a nice quarterly schedule. What's should you do? Respond and adjust the roadmap.

Changes in Strategy

It doesn't make sense to wait for a regularly scheduled roadmap review when the product strategy just changed.

When it's time to change direction, revisit everything from the product strategy down, and be explicit about what is changing, what is not changing, and why these changes are necessary.



Product Roadmap Metrics

If one thing is conspicuous by its absence in most roadmap implementations, it is the metrics to monitor the performance of the product roadmap.

I recommend establishing a framework of metrics that allows you to improve the product roadmapping process and the strategic decision taking.

A product roadmap is so important that it has both upward (product strategy) and downward (product backlog) implications. Hence, we will not only measure the effectiveness of the artifact itself, but the implications around it.

Implementing Product Roadmap Metrics

When we decide to use metrics, we must be very clear about what decisions we want to make with the information they provide us.

In this sense, there are three categories of metrics that interest us: *process metrics*, *governance metrics* and *impact metrics*.

Process Metrics

These are the metrics we use to improve process performance like lead time, time-to-market, time-to-revenue, WIP and so on. They answer to the question: *How good are we working?*

Here is a list of the main process metrics:



Metric	Description
Lead Time	The time it takes for an initiative to go from roadmap ingestion to 'Ready for Delivery'
Time to Market	The time it takes for an initiative to go from roadmap ingestion to market
(Roadmap Stage) Cycle Time	The time an initiative spends in every roadmap stage.
Throughput	Number of initiatives leaving toward 'Ready for Delivery' per unit of time
Work in Progress (WIP)	Number of initiatives in progress in the roadmap on a given period
Arrival rate	Number of initiatives entering the roadmap per unit of time

All these metrics allow us to measure the performance of our learning engine.

We will be able to answer questions like the following:

- *Are we fast learning what to build?*
- *How many things do we learn per unit of time?*

- *Are we capable of processing all the strategic demand that arrives?*
- *Do we need to increase our product discovery capacity?*

Governance Metrics

Connected to the product team's day to day work are investment decisions that must be made.

The first decision is often whether to accept an initiative into the roadmap. Once the team begins their work, then ongoing decisions must be made on whether to continue investing in the roadmap theme.

These investments are incremental and connected to the product strategy and product goals. For governance metrics to work, you need to have success criteria for each roadmap stage.

As teams navigate through product discovery stages it involves making the decision to double-down investment, move the team to the next product discovery stage or stop the project entirely.

The first types of metrics we can track for governance, are simply the number of initiatives we have in our product discovery pipeline and the number of initiatives at each product discovery stage. We can also track metrics connected to decision making, such as the number of ideas submitted for investment, the number of initiatives moving between each roadmap stage every quarter and the average amount of money being invested in initiatives at each roadmap stage.

These metrics provide some visibility of the investment decisions we are making as a company. However, the main work of roadmap management is ensuring that investments are being made in initiatives that are aligned with our strategic goals and have the greatest chance of success.

Governance metrics allow us to assess both strategic alignment and progress toward success as we make each decision.

Beyond investment decision making, other metrics include a measure of the proportion of initiatives that are validated or discarded. Validation velocity is also a key impact

metric for governance (i.e., how quickly and at what cost teams are moving through product discovery).

Here is a list of the main governance metrics:

Metric	Description
# Initiatives in Pipeline	Number of initiatives waiting to be screened to access the roadmap
# Initiatives in Product Discovery	Number of initiatives going through a product discovery process
# Initiatives in Product Delivery	Number of initiatives in product development
Discard Rate	Number of initiatives discarded over the total number of initiatives submitted for screening
Kill Rate	Number of initiatives ‘killed’ as a result of product discovery over the total number of initiatives submitted for product discovery
Discovery Velocity	Time initiatives spend in product discovery
Delivery Velocity	Time it takes for initiatives from development start to first MVP delivered to customers
Success Rate	Number of successful initiatives over the total number of initiatives submitted for delivery

If the process metrics allow us to evaluate the performance of the discovery engine, the governance metrics allow us to evaluate its efficacy.

We will be able to answer questions like the following:

- *Are we effective in our decisions?*
- *Is the product strategy working?*
- *To what extent do we avoid building things that won’t help the business grow?*
- *Are investments in new developments having the expected return?*

Impact Metrics

Impact metrics measure how well our product roadmap is contributing to the overall health of the company.

Here is a list of the main impact metrics:

Metric	Description
Time to Revenue	The time it takes for an initiative to go from roadmap ingestion to revenue generation
Time to Break Even	The time it takes for an initiative to go from roadmap ingestion to break even
Return on Product Development Expense	Revenue captured with respect to the total investment in the development of the initiative
Product Backlog Size	Size of the product backlog
Product Backlog Age	Average age of product backlog items

Impact metrics allow us to answer questions such as the following:

- *Is product development benefiting from current roadmap implementation?*
- *Are investments in new developments having the expected return?*
- *Are we able to provide value to the market quickly and effectively?*

How to Get Started with Metrics

My recommendation to start using roadmap metrics is to start small and add metrics as you go along.

If you don't know where to start, choose 1 to 3 metrics from each category that allow you to measure progress on those problems and needs detected during the initial design phase of the product roadmap.

Look at the questions you can answer with each category of metrics and choose the ones that give you more information.



Roadmap Implementation



Getting Started with Roadmaps

In this chapter we will see a method that you can use to introduce product roadmaps in your organization or to improve existing ones.

The method begins by assessing the current situation and investigating the needs and expectations of stakeholders. Then we define the implementation strategy, we get buy-in, and we finally define the initial implementation of the roadmap.

I suggest the following steps for getting started with product roadmapping in your organization:

1. *Evaluate current situation*
2. *Understand stakeholders*
3. *Decide implementation strategy*
4. *Get everyone on board*
5. *Validate a solution*
6. *Implement a Minimum Viable Roadmap*
7. *Continuous improvement*

Evaluate Current Situation

In many situations, it may be enough to have several people to do the [Product Roadmap Scorecard](#) and get the overall score, but I recommend that you combine the assessment with a round of interviews with stakeholders, product managers and senior management to try to identify the main pains, needs and objectives that the product roadmapping process could solve.

In the last chapter you can find a detailed description of the [roadmap assessment](#) and how to use it.

Understand Stakeholders

The best thing you can do to understand stakeholders is to talk to them. In this way you involve them in the process, and you also obtain invaluable information for the design of the roadmap.

For this we recommend the practice of *Qualitative Interviews* of product discovery.

[In the Annex you can find a recommended script](#) for this type of interview, which you can adapt to your needs.

The objective of these interviews is to discover insights in relation to the expectations, needs and problems of the stakeholders that can be addressed with the implementation of a product roadmap.

Decide Implementation Strategy

Now is the time to decide whether to go for an incremental or a disruptive strategy.

It is necessary to evaluate the risk/benefit and explain very clearly the expected results, necessary activities and involvement by stakeholders and teams.

If we combine the results of stakeholder interviews with the results of the [Product Roadmap Scorecard](#), we obtain the following matrix that can help us make the decision.

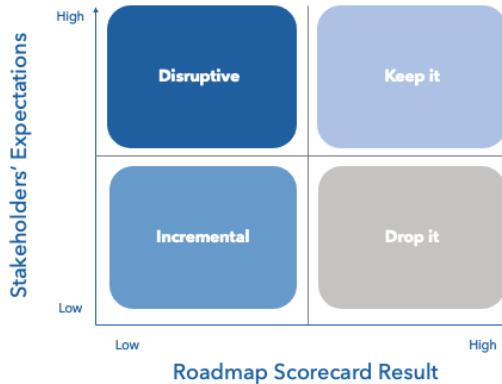


Figure 16 – Implementation strategy decision matrix

Obviously, this matrix is a very rough representation of the situation, but it will provide you with broad idea of what is happening, and it will force you to consider the situation, which you might otherwise take for granted.

Drop It

If the expectations of the stakeholders are low and you obtain a good evaluation of the roadmap, you should seriously consider the circumstances, since stakeholders don't seem to need it (or don't know they need it) but instead you have produced an outstanding implementation.

The most radical option would be to simply stop using the roadmap, but first we should try to resolve the possible [barriers to adoption](#) that we discussed in previous chapters.

Incremental

If the expectations of the stakeholders are low and you obtain a poor evaluation of the roadmap, you could try to embark in an incremental improvement of the roadmap together with the stakeholders.

The goal would be to engage stakeholders in the process as you address the barriers to adoption and slowly win them over.

In this situation, a disruptive strategy would not work because it would meet with a lot of resistance.

Disruptive

Instead, if we find that stakeholders expectations are high, but your roadmap implementation is poor, you can suggest a disruptive strategy.

You must start from scratch and propose a solution that meets the needs of stakeholders and helps you provide visibility, alignment and focus on the likely growth of the product.

Keep It

Finally, if you fall into the top right quadrant, what you must do is continue as you are doing.

Get Everyone on Board

Now that you have decided on the implementation strategy it is time to make sure that everyone is on board and rowing in the same direction.

Whether you decide to improve an existing process or start fresh, you will be making change. And, as you well know, in any process of organizational change, alignment is necessary.

For now, you have already made a first step by interviewing the stakeholders.

What you can do next is make a presentation of the results of the assessment, the interviews, and your conclusions. Without missing the opportunity to [explain the benefits](#) that an effective product roadmap would bring to the organization and to the stakeholders.

Validate a Solution

After this initial phase of exploration and alignment, it is recommended that you design a prototype of the roadmap and its management process and test them with stakeholders.

This step would be the equivalent of the [product discovery validation phase](#)⁴⁶, where we validate the proposed solutions with users by prototyping and testing.

In the case of adopting an incremental strategy, the prototype can be just a presentation to the stakeholders. Afterwards, you would move to the next step in the process.

On the other hand, in a disruptive strategy we recommend a prototype with which to begin to validate the product strategy management process and that provides us with feedback but for a limited group of 'customers'.

We should validate the prototype for a minimum of one period of the time frame. In other words, if we have structured the roadmap in quarters, then the validation should take at least three months.

Implement a Minimum Viable Roadmap (MVR)

The time has come to roll out the product roadmap to the rest of the organization.

We recommend that you think of this roadmap as the [first version of a product](#)⁴⁷ that reaches the market and still requires a lot of adaptation to achieve [product-market fit](#).⁴⁸

To go from prototype to MVR you can use an adaptation of [Lean Inception](#) or [Agile Inception Deck](#).

In a collaborative way and involving stakeholders, you can design the first version of the product roadmap that will be used throughout the organization.

Remember that here we are not looking for perfection, but continuous improvement based on feedback from stakeholders, product managers and the positive impact on the organization. Therefore, start with a minimum version that covers the value proposition so that stakeholders can perceive the value as soon as possible.

⁴⁶ <https://aktiasolutions.com/product-discovery-framework/>

⁴⁷ <https://aktiasolutions.com/minimum-viable-product/>

⁴⁸ <https://aktiasolutions.com/product-market-fit-lean-product-management/>

Continuous Improvement

The process of introducing or improving the product roadmap in your organization has only just begun.

From now on, it is a question of carrying out periodic reviews of the design and the management process. My recommendation is to do a review coinciding with the strategic review.

It is about making a retrospective of the last period including the experiences of stakeholders and the [roadmap metrics](#).

Actions should emerge from this retrospective to improve the effectiveness of the roadmap as a strategic tool.

In addition, between revision and revision it is normal that you have to coach stakeholders, especially if you come from an organization oriented towards projects and outputs.



Barriers to Adoption

In this chapter we review some of the barriers to product roadmap adoption that we usually find so that you can design mitigation strategies appropriate to your context.

Barriers of adoption are those forces that might prevent roadmap stakeholders from collaborating in its design and eventually using it.

Even stakeholders who might benefit from a product roadmap may choose the old way or non-consumption⁴⁹ in the face of these obstacles.

Therefore, it is important to find ways to reduce or eliminate them.

Some of the most frequent product roadmap adoption obstacles are the following ones:

- Awareness
- Behavior change

⁴⁹ Nonconsumption is the inability of an entity (person or organization) to purchase and use (consume) a product or service required to fulfill an important Job to be Done.

- *Decision makers*
- *Switching cost*
- *Risk*

Awareness

One of the reasons that stakeholders don't use a product roadmap is that they don't know they need it. They are not aware they have a problem or need that can effectively be addressed by a modern outcome-based product roadmap.

Stakeholders had just gotten so used to the old way of doing things they don't even appreciate alternatives.

Mitigation Strategy

If you must explain the benefits of a product roadmap in your organization, I'm quite sure there isn't even a product strategy in place.

In this type of organization, work is done on projects that come from the different business units, but there is no strategic plan that explains how the product will grow to achieve the vision. Therefore, the roadmap is not deemed necessary.

The first thing you should do in this case is to start by evangelizing about the importance of thinking about products instead of thinking about projects. To give the product the importance it deserves.

Then you must make sure to design a product strategy aligned with the strategy of the organization.

Finally, you must ensure that the business objectives are transformed into product objectives and that this is what guides the development, and not arbitrary initiatives of the different business units.

Behavior change

Getting people to change their behavior can be difficult.

Most people don't embrace change easily due to deeply ingrained ways of operating, cultural issues, or contextual constraints. So, discovering upfront what those behavioral patterns are, can save you a lot of time and money.

Mitigation Strategy

Probably one of the biggest obstacles is the traditional mindset of rewarding productivity instead of results.

This mentality, still ingrained in many organizations today, is the main change in behavior that stakeholders and managers must make, and it also has implications for reward systems.

A strategy that can help you convince stakeholders to move to an outcome-based approach is to make it clear that there are still outputs. Those are the solutions, features, epics, and user stories that can be found inside the themes and in the product backlog and release plan.

Actually, the product roadmap helps connect the dots between strategy, goals, and execution. In other words, it helps translate outcomes into outputs.

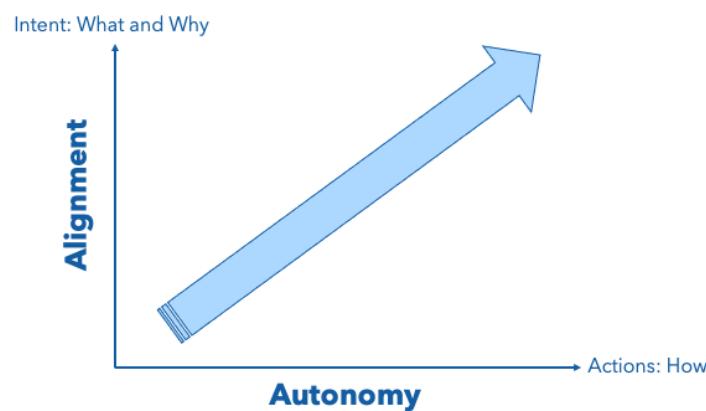


Figure 29 - Alignment drives autonomy

You must encourage leaders to concentrate on what really matters and leave details on the *How-to* to teams. Because alignment drives autonomy.

Autonomy means that we can offer teams problems to solve, and they have enough control and knowledge to solve the problem in any way they see fit.

We hope that teams will use [product discovery](#)⁵⁰ tools to explore different options and approaches before committing to a solution.

Why is this Important?

Effective product development is focused on maximizing outcome and impact. Unfortunately, that is not the mindset most companies have.

Historically, most teams are rewarded not for outcomes, but for outputs. But product teams do not exist to write code. They exist to help the business grow and to serve customers.

The way you think about and measure success — building for either output or outcome — determines the path you follow and whether you reach your ultimate destination.

To a certain extent I understand that chasing outputs is more comfortable than chasing results. Outputs are easier to measure. We know how many user stories were released or how many sprints were made.

It's scarier to be held responsible for outcomes for the business, like revenue growth or market share, because you can't control the buyer's behavior.

Product goals are also harder to measure and achieve, but the reward is far greater.

This modern product mindset promotes flexibility. Companies that embrace this mentality may have a plan, but their approach encourages experimentation as teams work together toward a common goal.

By leveraging the [product mindset](#)⁵¹, these companies create a culture of smart risk-taking.

⁵⁰ <https://aktiasolutions.com/product-discovery-practices/>

⁵¹ <https://aktiasolutions.com/product-mindset/>

The product mindset sharpens focus, minimizes distractions, and prevents companies from trying to be all things to all people or serve thousands of customers before they've served tens.

Decision makers

Product roadmapping can easily turn into a nightmare when we need to bring many decision makers on board with different goals, needs and incentives.

Mitigation Strategy

First of all, you must understand that as a product manager, your job is not to covet and defend the roadmap; rather, it is to open the roadmap to a shared, company-wide discussion about what you are building, who you are building it for, and why.

The product roadmap should be something that encourages collaboration and focuses that collaboration on high-level goals.

Let's see what tools you can use reduce the likelihood of stakeholders sabotaging product roadmapping and making it a success for your product and for your organization.

Policies

The roadmap management policies are as important as the artifact design itself.

As a document that represents the likely development of the product strategy, items cannot be admitted in any way and at any time.

There must be an objective process linked to the product strategy to admit items in the roadmap and prioritize them.

Structure

As discussed previously, there is no point in implementing a product roadmap if there is no product strategy and product goals.

As it is a strategic tool, the first cut-off level of the initiatives will be the strategic alignment and the expected impact.

Any initiative that does not meet the minimums should be discarded immediately.

Hence the importance of the '[Submission Form' \(or Briefing\)](#) document that every Theme of the roadmap must have attached.

Switching cost

Switching costs represent the difficulty for the stakeholder to change to a new product roadmapping approach.

It might require a steep learning curve, spending a lot of time in meetings, getting used to it, or changing deeply engrained behaviors.

Mitigation Strategy

In this case, what happens is that stakeholders are already using a product roadmap, or something they call a product roadmap.

We must ensure that the change is as smooth as possible and that they can appreciate the value of the new roadmapping proposal as soon as possible.

The value proposition of the new solution must be much greater than the previous one, and we must explain it as many times as necessary, in the language that the stakeholders understand.

Risk

Stakeholders will be reluctant to adopt a new roadmapping approach if it involves a lot of risk or a high probability of failure.

Mitigation Strategy

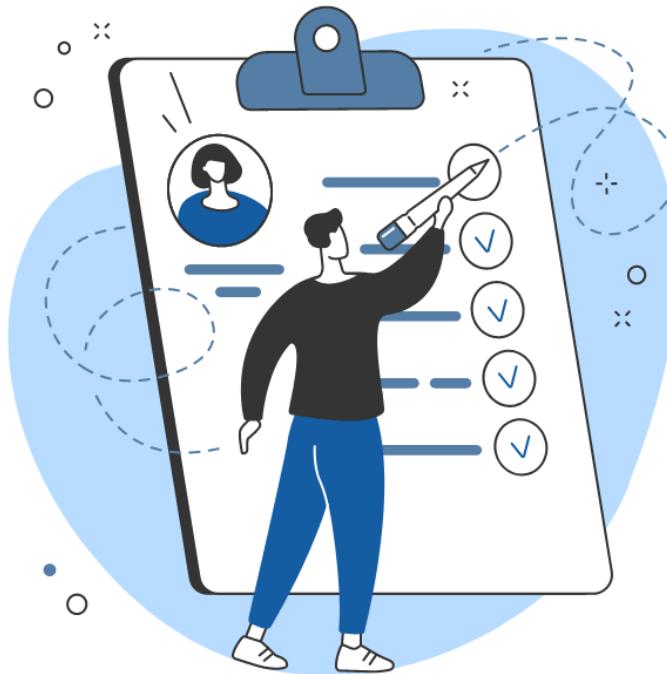
Very often risk is just a perception, not a reality.

What we must do in this case is to understand the origin of that perception and provide data that refutes their beliefs.

Some questions that may be helpful:

- *What does failure mean exactly?*
- *How do you currently measure the success of a roadmap initiative?*
- *What is the success rate of the roadmap initiatives in the last year?*
- *How many initiatives were canceled midway because they fell far short of expectations?*
- *What are the strategic objectives of the product for this year and the main indicators of success?*
- *How often is the roadmap reviewed and updated based on delivery results or strategic changes?*

The cool thing about asking those questions is that the benefit of using outcome-oriented roadmaps is implicit in the question itself.



Product Roadmap Scorecard

Before you can decide where to begin with your product roadmapping effort, you must assess your current situation.

In addition to interviewing stakeholders, I recommend a more formal approach that allows you to objectively assess the key components of a product roadmap.

The purpose of this assessment is to provide you with a gist of your roadmap's unique strengths and areas for improvement.

The result of the scorecard will help you decide the implementation strategy and the specific areas of focus and/or improvement to convince the stakeholders.

The questions will tell you how well positioned you are in each of the following dimensions:

- *STRATEGY*
- *DISCOVERY*
- *DESIGN*

- *MANAGEMENT*
- *STAKEHOLDERS*

The Assessment

There are a total of 25 questions. Five for each evaluation dimension.

Strategy

This dimension measures the extent to which your product roadmap is an effective representation of the product strategy.

1. *We have an inspiring product vision that everyone understands*
2. *There exists an actionable strategy that guides us towards the product vision*
3. *Product strategy is reviewed and updated as needed*
4. *Product strategy is effectively translated into a few objectives to be pursued by product teams*
5. *Product objectives are regularly reviewed and updated*

Discovery

This dimension measures the extent to which your product roadmap is an effective representation of the product discovery process.

1. *Roadmap items clearly describe the expected impact on the customer*
2. *The design of the roadmap allows knowing which items are in the process of product discovery*
3. *There exists an explicit policy that determines the conditions for an item to enter discovery*
4. *We allow time in the roadmap to learn whether solutions might work before submitting to delivery*
5. *Roadmap items are kept up to date with product discovery results and insights*

Design

This dimension measures the extent to which you have considered the fundamental design principles to create an effective product roadmap.

1. *The roadmap has differentiated time scales that represent increasing levels of uncertainty*
2. *We use roadmap metrics to monitor the efficiency of the product roadmapping process*
3. *Roadmap themes effectively connect to product goals, customer needs and solutions to be implemented*
4. *The roadmap and the product backlog perform their function interdependently and without friction*
5. *Every topic on the roadmap has a document attached (briefing) justifying the decision*

Management

This dimension measures the extent to which you are effectively managing the roadmap.

1. *The roadmap is updated regularly*
2. *Stakeholders participate in roadmap reviews*
3. *There is an objective method to prioritize roadmap items*
4. *All initiatives go through a screening process to categorize them and prioritize their entry into the roadmap*
5. *There is a clear and agreed policy to deal with unexpected changes*

Stakeholders

This dimension measures the extent to which you are managing stakeholders adequately.

1. *There is an effective policy to achieve alignment and stakeholder buy-in*
2. *Stakeholders understand what it means for an item to be in a specific time block*
3. *Stakeholders can find the information they need for each roadmap item at any time*
4. *There exists a fluent and effective communication with stakeholders around the roadmap*
5. *Stakeholders can easily find out whether investments in new developments are having the expected return*

Instructions

You can do the assessment on your own, but our recommendation is that you ask each team member to do it and then discuss results.

You can also ask management to do it so you can contrast opinions.

Please, follow the next instructions:

- Assign a rating to each statement from 1 to 5 using the scale below to indicate how each statement applies to your team.
- Evaluate statements honestly and be as objective as possible. Be thoughtful about your responses, but don't agonize over each response. Your initial "gut feel" is usually right.

The Rating Scale

I use the Likert Scale to score responses.

In this scorecard there are two types of questions — agreement and frequency.

For each type of question there is a different scale.

When Question is About Your Level of Agreement with the Statement

1 – Strongly Disagree	2 - Disagree	3 - Neutral	4 – Agree	5 – Strongly Agree
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When Question is About How Often the Statement Occurs

1 – Never	2 - Rarely	3 - Sometimes	4 - Usually	5 - Always
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Scoring Instructions

To get the result for each dimension of the product roadmap scorecard, you just need to add the ratings for each question and divide by the number of questions within each dimension.

To determine the average team score for each dimension, add the individual's total scores and divide by the number of participants.

Interpreting Results

With this scoring method we consider **high** any result higher or equal than 3.75, **medium** any result between 3.25 and 3.74 and **low** and result equal to or below 3.24.

In the following table you can find an interpretation of the results that can help you identify implementation strategy and/or specific improvement actions.

SCORING INTERPRETATION			
	HIGH	MEDIUM	LOW
	Average score of 3.75 and above	Average score of 3.25 – 3.74	Average score of 3.24 and below
Strategy	<p>Your strategic architecture provides a compelling direction and alignment across the board.</p> <p>Everybody understands what you want to achieve and why.</p> <p>Teams have guidelines and boundaries that enable initiative and self-direction across the whole organization.</p> <p>The product roadmap connects the strategy with the execution in an agile, fast, and effective way.</p> <p>The product roadmap is the reference artifact for any questions regarding the evolution of the product.</p>	<p>Your organization might need to get more comfortable with uncertainty.</p> <p>You still must improve in providing teams with direction and trust them to decide what's best.</p> <p>Your teams might struggle at times to make the right decisions, to prioritize roadmap themes or to decide to kill, pivot or persevere.</p> <p>Make sure the product roadmap stays at the strategic level and don't let it include features and implementation requests.</p> <p>Make sure product roadmap themes connect product goals with solutions.</p>	<p>Your product direction is set with arbitrary goals and vision statements full of fluff.</p> <p>You do not really understand what your most important effort must be, and hence you are very busy doing stuff which is not going to create a sustainable competitive advantage.</p> <p>You are operating blindly.</p> <p>Short-term goals and efficiencies in core products are all that really matters.</p> <p>Everyone is very busy working on things that do not matter to the company or the market.</p> <p>As management expectations are not met, more controls and requests for information and are introduced, which causes a lot of time to be spent reporting and monitoring and less time working on what really matters.</p>

			Focus is on productivity, time-to-market, and efficiency regardless of whether that efficiency translates into strategic effectiveness.
Discovery	<p>Your organization has evolved their own effective product discovery process that enables continuous learning and drives growth.</p> <p>Product discovery is smoothly integrated into the product roadmapping process.</p> <p>Your company is frequently evaluating the shape and health of the product roadmap and making informed investment decisions based on the learnings of the product teams, market, industry, and technology trends.</p>	<p>Although product discovery is part of your normal team operation it is still a bit chaotic and not quite well integrated with the roadmapping process.</p> <p>There seems to be a willingness to move towards managing by outcomes and continuous learning although forces from the past are still present and hinder innovation and growth. You should check your reward systems and make sure the right behaviors are promoted.</p>	<p>Product Discovery is the exception rather than the norm and it only takes place occasionally in dedicated events.</p> <p>Product Discovery is not integrated with product roadmapping.</p> <p>Your company operates under the assumption that it can predict the future and punishes failure whilst rewarding delivery to plan and budget, regardless of the outcomes.</p> <p>Your teams are most probably feature factories who do what they are told to without proper support to enable continuous learning and drive product growth.</p>
Design	<p>The roadmap is the strategic tool it is meant to be connecting strategy with execution.</p> <p>It enables collaboration with stakeholders and drives alignment.</p> <p>It provides all information required by stakeholders without losing lightness, agility, and speed.</p> <p>You can monitor product roadmapping process performance and adjust as needed.</p> <p>The product backlog is a tactical tool and the product roadmap a strategic tool.</p>	<p>You have taken some steps to make your roadmap the core strategic tool that it is, but you still have a long way to go.</p> <p>You should continue to improve the roadmap by adapting it to your context according to the design principles we have seen.</p>	<p>The design of the roadmap is the result of improvisation and inertia.</p> <p>Instead of being a communication and strategic alignment tool, it is nothing more than a list of projects or features ordered over time.</p> <p>The focus is on scope, time, and budget. Hence, there is a huge overlap between the product roadmap and the product backlog.</p>
Management	<p>You take control of the roadmap management collaboratively with all stakeholders.</p> <p>The roadmap is updated according to strategic needs and competitive changes.</p> <p>The new initiatives follow an explicit and objective policy to join the roadmap regardless of their origin.</p>	<p>Product teams are still suffering from unnecessary interference and from management and stakeholders.</p> <p>The roadmap isn't yet a representation of the product strategy.</p>	<p>The product roadmap is a fixed plan that is created once and then simply executed.</p> <p>New items are blindly added to the roadmap.</p> <p>In summary, you don't have control over the evolution of the product.</p>

Stakeholders	<p>Stakeholders use the product roadmap to make strategic decisions.</p> <p>They proactively participate in its management, updating and revision.</p> <p>Everyone knows that the roadmap is the product's growth guide and there are no hidden agendas.</p> <p>The roadmap is the single source of truth.</p>	<p>The roadmap is on the way to becoming the strategic communication tool that it is, but there is still a long way to go.</p> <p>Stakeholders are beginning to perceive the value that the roadmap can bring them.</p> <p>Be sure to review the chapters on stakeholder benefits and adoption barriers so you can move forward.</p>	<p>Stakeholders use the roadmap out of obligation, and it is not a useful tool for them.</p> <p>They do not find the information they need when they need it, which causes them to tend towards traditional output-oriented management.</p> <p>They worry about scope, budget, and deadlines, forgetting what really matters — business outcomes and strategic goals</p>
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Annex

Product Discovery Submission Template

Definition

This document (aka *Briefing*) contains the information that justifies the investment of time, money, and resources in the product discovery process.

It consists of a summary, an explanation of the potential of the proposal, the resources needed for the discovery process and the key assumptions to be tested in exploration, validation, construction, or go-to-market.

Description

If you have gone through the screening process, your team is pretty much ready to justify the investment of time, resources, and people in a product discovery process.

A key principle of modern product management is that teams should not be asking for large investments to build their products at this stage.

Instead, they should be asking for a minimal investment to test their key assumptions about business viability, customer jobs, pains, gains, and technical feasibility.

The investment request may include:

- *Brief details about the idea you plan to work on*
- *How the idea supports the strategic goals of your company*
- *Assumptions about customer segments and their needs*
- *Assumptions about the market (potential size and competitors)*
- *Assumptions about construction and go-to-market*
- *The assumptions you plan to test during Exploration and/or Validation stages*
- *Brief details of the tests you plan to run*

- *The resources and funding you think you will need to complete all the tests you want to run*

This is all the information you need for your submission, not a 40-page business case.

The product leadership or investment board will then review the application placing particular weight on three key things:

- *alignment of the idea to company strategy, the clarity of the proposed*
- *assumptions and the planned tests.*

Template

Proposal Ownership

Investment Board	
Key Stakeholder	
Digital Product Manager	

Proposal Overview

Title	
Description	
Strategic Fit	

Target Customers and Jobs to be Done

Describe your potential segments and their needs or jobs to be done.

Customer Segments	Jobs to be Done

Potential

Market Description

Does your target customer represent a market that is large enough to build a sustainable business?

Market Opportunity

Please, detail the market size below:

Total Addressable Market (TAM) in \$	Serviceable Addressable Market (SAM) as % of TAM	Serviceable Obtainable Market (SOM) as % of SAM

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Look deeply into two main questions:

- What is the size of the current market?
- How much is it expected to grow over time

Business Outcomes

How are we going to measure success of this initiative?

What key indicators and targets? (i.e., revenue, cost, customer satisfaction, etc.)

Please, explain:

Time to Revenue / Time to Cost Reduction

How long will it take until you can generate cash flow / cost reduction?

LOW	MID	HIGH
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Please, explain:

To estimate the time to revenue for a market opportunity, you need to consider three main questions:

- What is the estimated time for development?
- Will we need to wait until the market is ready for our offer?
- How long is the sale cycle expected to be?

Resources

Resources Requested

To complete the product discovery process (exploration, validation, and construction), we are asking for (e.g., *skillset, time, people, etc.*)

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We need the resources to do the following:

Exploration	
Validation	
Construction	

Assumptions

Assumptions to Test During Exploration

Provide an overview of the assumptions (research questions) about problems you plan to test during Exploration phase, how you will test them and your success criteria.

We believe that:	
To verify that we will:	
And we will measure:	
We will know we are right if:	

Assumptions to Test During Validation

Provide an overview of the assumptions (validation questions) about solutions you plan to test during Validation phase, how you will test them and your success criteria.

We believe that:	
To verify that we will:	
And we will measure:	
We will know we are right if:	

Assumptions to Test During Construction & Go-to-Market

Provide an overview of the go-to-market assumptions you plan to test during Delivery phase, how you will test them and your success criteria.

We believe that:	
To verify that we will:	
And we will measure:	
We will know we are right if:	

Roadmap Stakeholders Interview Script

In the following script you have the questions to discover the needs, problems, and expectations of the current situation regarding the product roadmap.

You should book a 2-hour session with each roadmap user/customer to give yourself enough time (or perhaps discard some questions.)

This interview script is based on the [Four Forces Model](#)⁵² technique by Alan Klement.

Interview Script

Warm up

- *Concise intro on the purpose of the conversation*
- *Tell me a little about yourself and what you do*

Context & Background

- *How do you measure success of your team's work?*
- *How do business stakeholders measure success of your work?*
- *How would you describe your team's relationship with stakeholders? Would you change anything there?*
- *How would you describe your organization's comfort level with change?*

Introducing Change in the Company

- Problem (push):
 - *What motivates your organization to change the way of working? Why now?*
 - *What are the main difficulties now?*

⁵² <https://itbd.info/the-forces-of-progress-4408bf995153>

- Attraction (pull):
 - *What do people expect with the new way of working?*
 - *How will your business unit benefit?*
 - *How will the organization as a whole benefit?*
- Uncertainty (anxieties):
 - *What are people most insecure about when adopting this change?*
 - *Where do you see possible challenges or obstacles in this process of change?*
- Habit (familiarity):
 - *What existing practices do people need to change?*

Making a Personal Change

- Problem (push):
 - *What problems are you looking to avoid when implementing a product roadmap?*
- Attraction (pull):
 - *What benefits do you expect to obtain from the implementation of this initiative?*
 - *How will you measure the success of the initiative?*
- Uncertainty (anxieties):
 - *What could go wrong?*
 - *What worries you?*
- Habit (familiarity):
 - *What habits do you personally need to change for the success of the initiative?*

About Product Roadmapping

- *We will know product roadmapping is working when ...*
- *If you had to change three aspects of the current product roadmapping what would those be?*

Bibliography

The discipline of product management and specifically product strategy would not be what it is today if it were not for the great authors on whom we base our practice today.

Here are my top sources for product roadmap and product strategy consulting work.

I encourage you to read all of them.

References

- Competing for the Future (Gary Hamel)
- Competitive Strategy (Michael Porter)
- Crossing the Chasm (Geoffrey A. Moore)
- Empowered (Marty Cagan)
- Good Strategy / Bad Strategy (Richard Rumelt)
- Inspired (Marty Cagan)
- Loved (Martina Lauchengco)
- Playing to Win (A.G. Lafley)
- Product Direction (Nacho Bassino)
- [Product Discovery \(Gerard Chiva\)](#)
- Product Leadership (Richard Banfield, et al.)
- Product Management in Practice (Matt LeMay)
- Product Roadmaps Relaunched (Todd Lombardo, et al.)
- Strategize (Roman Pitchler)
- The Art of Action (Stephen Bungay)
- [The Art of Strategy \(Gerard Chiva\)](#)
- The Jobs to be Done Playbook (Jim Kalbach)
- The Product-led Organization (Todd Olson)
- Where to Play (Marc Gruber and Sharon Tal)

About Aktia Solutions

[Aktia Solutions](#) was born in 2018 with the purpose to inspire a modern product mindset and practice in companies developing software-based products or services.

We are a boutique management consulting firm with a pragmatic business approach focusing on the most important opportunities for our customers today and setting the ground for future growth.

We work with you to achieve your strategic objectives in this fast paced and uncertain world, by helping you become a modern product-led organization.

We help you develop your [product leadership](#), [design a value-driven product organization](#), [unleash new sources of growth](#), and [make sure value reaches the market fast and effectively](#).



About Gerard Chiva



Product Discovery and Strategy Coach

*I help companies build
better products and
executives to build leading
product organizations*

I am Managing Director of [AKTIA Solutions](#), a Management Consulting Firm.

I collaborate with companies as Product and Strategy Coach.

I developed my professional career for the last 20+ years in roles related to technology. As an engineer, manager, consultant, Agile Coach, Product Coach and Executive Coach.

I have extensive experience, combining professional coaching, management, consulting, engineering, and entrepreneurship.

I have worked in different types of industries and different roles, giving me a broad perspective on how organizations work.

I am also an [author](#), startup mentor and investor.



Driving Product-led Growth