Vision & Roadmap

Overview

Use this template to help your team define the team vision - the ultimate goal that you want to achieve as a team.
Once you have your team vision, use the template to translate it into an actionable roadmap.

For every step use whatever approach fits your team to craft the item. This could just be an open discussion, but you could also use a Liberating Structure like 1-2-4-all.
The goal is to collect the insights of the whole team and create a vision the whole team believes in.

Note that all the information you collect in the template is only the best guess you can make based on the information you have right now. It is important to keep revisiting the template as you discover more information. The Sprint Planning is a very good moment to do this.

let's get started - the Team Vision

The Team Vision is meant to create focus and alignment in your team, bringing them together into an eager and highly motivated unit.

Step 1
Start by filling in the four sections of the quadrant.

The goal is to be as broad as possible and collect the insights of the whole team. These insights will give you a robust understanding of your product, helping you guide your decisions.

It is also an understanding that you will need to continuously refine as your product evolves.

Step 2
With the information in the 4 quadrants, create a team vision together which is lofty enough to afford flexibility in how to achieve it, while also being concrete enough to be useful to guide your decisions. Add that to the vision field on the big blue post-it.

the product goals

While the vision may be useful to guide your decisions, serving as your North Star, it does not say much about how to achieve it.

For this you need to think about the actual steps we need to take to achieve our vision. These are your Product Goals - a prioritised sequence of concrete results which seem the most promising with the information you have in the current moment.

Step 3
Start by thinking about what concrete, decisive actions are need to achieve your vision.

This is creative brainstorming, an exercise in which you just want to collect as many ideas as possible, so don't worry about things like how big they are and what is required for them. We will look at all that later.

Step 4
Once you have a nice bunch of ideas, see if you can organise them into groups.

The goal here is to end up with goals which are grand, exhaustive and independent.

To help you, look for ideas which depend on each other. Perhaps there are some that form a logical sequence of steps? Empathy mapping is an effective technique to use here.

Step 5
For each goal, think about the following:

- **Date**: how long you expect the goal to take to deliver. This need only be a very rough approximation. It is not meant to be a deadline, but merely a measure of the investment you want to make. Simply put, it is meant as a warning beacon beyond which the costs start to outweigh the value, helping you avoid slowly getting lost down a rabbithole.
- **Value**: the value (or values) you expect to get when you realise the goal. Expressed anyway you deem fit but concrete enough to be able to compare the goals.
- **Features**: two or three concrete results that you expect to see once you deliver the goal, to help make the goal clearer - more visible, and easier to explain.
- **Metrics**: a concrete way to measure whether you have delivered the goal.
- **Stakeholders**: who do you need to involve? This will help you to clarify the value and how the result of the goal is perceived, perhaps even creating personas. It will also help you invite the right people to brainstorm sessions and sprint reviews.

All these four things will help you think deeper about your goals, so don't be surprised if you end up tweaking them, changing some, merging others and even discarding a few.

This template is brought to you by Scrum Facilitators. It was heavily inspired by Roman Pichler.
Please get in touch with us if you have questions or need help.
And of course if you have any feedback!

*Find us at **scrumfacilitators.com** and at **scrum-professionals.com** and Roman at **romanpichler.com**.*

the roadmap

Step 6
Now comes the moment for hard choices, because as you probably noticed, there are only 4 columns in the roadmap. While you can easily add extra columns and create a huge roadmap, the goal here is flexbility.

Putting it simply:

- putting all the effort into creating that huge beautiful roadmap will only make it so much harder to change it later. And change it you must, because as your deliver your goals, you will gather lots of new information and insights.
- which also makes that huge beautiful roadmap a huge waste of effort.
- of course you will be proudly presenting the roadmap to your stakeholders. Making changes as you proceed will risk creating confusion among them and, especially in more conservative organisations, thse changes may be received quite negatively.
- and finally, that huge beautiful roadmap, staring you in the face when you revisit it to make changes, will also hamper your creativity.

Think of your goals as the best few next things you can think of with your current knowledge, a bunch of educated guesses, not a perfect recipe to achieve your goals. If it is a perfect recipe, then perhaps Agile is not the right approach and you should consider a more suited approach.

With that mindset, use the value, features and metrics, along with your vision and the quadrants attached to the vision to test how important each of your goals are, and add all the information to the roadmap.