

A cheatsheet to develop a roadmap for the next quarter. Chart your course to success and align your team's efforts.

1. Pre-Planning Process

a. Gather Input

- i. Review previous quarter's performance metrics
- ii. Collect stakeholder feedback and expectations
- iii. Analyze market trends and competitive landscape
- iv. Assess team capacity and skills inventory
- v. Document technical debt and maintenance needs

b. Set Strategic Context

- i. Align with annual company objectives
- ii. Identify 3-5 key priorities for the quarter
- iii. Define success metrics for each priority
- iv. Determine resource constraints and limitations
- v. Consider relevant external factors or deadlines

2. Roadmap Development

a. Define Objectives

- i. Create SMART goals (Specific, Measurable, Achievable, Relevant, Time-bound)
- ii. Balance strategic initiatives vs. operational requirements
- iii. Identify dependencies between objectives
- iv. Establish relative priority rankings
- v. Set clear acceptance criteria for each objective

b. Timeline Construction

- i. Break quarter into sprints/time blocks
- ii. Map key milestones onto timeline
- iii. Identify critical path items
- iv. Build in buffer time for unexpected issues
- v. Mark review/checkpoint dates

c. Resource Allocation

- i. Map team members to initiatives
- ii. Identify skills gaps requiring training/hiring
- iii. Allocate percentage of capacity to innovation vs. maintenance
- iv. Reserve resources for unexpected urgent matters
- v. Consider external dependencies and partnerships

3. Documentation & Communication

a. Roadmap Visualization

- i. Create high-level timeline view for executives
- ii. Develop detailed breakdown for direct teams
- iii. Use consistent color-coding for different types of work
- iv. Highlight dependencies and critical paths
- v. Make progress tracking visible

b. Communication Planning

- i. Schedule regular progress updates
 - ii. Define escalation paths for roadblocks
 - iii. Create dashboard for real-time visibility
 - iv. Prepare stakeholder-specific views
 - v. Plan for change management communication
- 4. Execution & Adaptation
 - a. Progress Tracking
 - i. Implement weekly checkpoint meetings
 - ii. Track velocity and burndown metrics
 - iii. Use visual management tools
 - iv. Document risks and mitigation strategies
 - v. Celebrate completed milestones
 - b. Adjustment Mechanisms
 - i. Set criteria for roadmap adjustments
 - ii. Define process for evaluating new requests
 - iii. Establish impact assessment for scope changes
 - iv. Create reprioritization framework
 - v. Document lessons learned for future quarters
- 5. Team Alignment
 - a. Kickoff Process
 - i. Host roadmap presentation meeting
 - ii. Connect individual roles to roadmap objectives
 - iii. Address questions and concerns
 - iv. Create shared understanding of priorities
 - v. Build enthusiasm for quarter's goals
 - b. Ongoing Alignment
 - i. Regular team retrospectives
 - ii. Individual 1:1 goal alignment
 - iii. Cross-team coordination meetings
 - iv. Skill development planning
 - v. Recognition for roadmap contributions
- 6. Success Factors
 - a. Critical Elements
 - i. Executive sponsorship and visibility
 - ii. Clear ownership for each initiative
 - iii. Transparent communication channels
 - iv. Regular progress celebrations
 - v. Balanced workload across team members
 - vi. Flexibility to adapt to changing conditions
 - vii. Last edited just now