

# FROM PRODUCT MANAGER TO **PRODUCT LEADER**

**Lessons from today's product experts**



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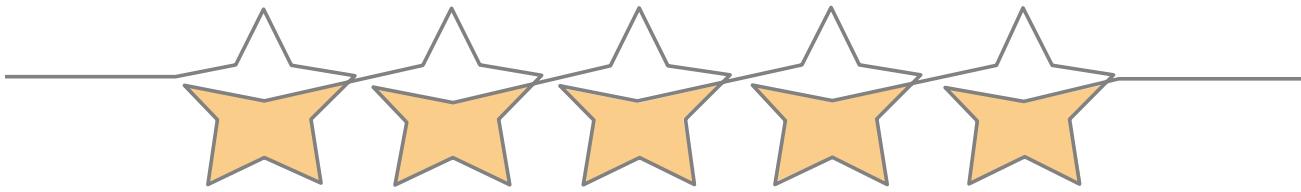


## TABLE OF CONTENTS

<b>Introduction:</b> Why we wrote this book.	<b>03</b>
<b>From Product Manager to Product Leader:</b> An inside look at the role of a product leader.	<b>05</b>
<b>Grow the Team:</b> Considerations to make as you grow and develop your team.	<b>12</b>
<b>From Chaos to Cohesion:</b> Evolving how your team works and plans (together) through thoughtful implementation of lightweight processes.	<b>27</b>
<b>Build Bridges and Burn Silos:</b> Mobilizing individuals across your organization to rally behind your product strategy and unlock the power of "us."	<b>52</b>
<b>Scale Customer Centricity:</b> Making customer-centricity part of your team's DNA.	<b>70</b>
<b>Rethink Innovation:</b> Making experimentation and learning a fact of life.	<b>81</b>
<b>Conclusion: Forever a Work in Progress:</b> Cultivating a culture of continuous improvement that extends beyond the product itself.	<b>93</b>
<b>Editor's Note and Acknowledgments</b>	<b>96</b>
<b>About ProductPlan</b>	<b>100</b>

# Introduction: Why we wrote this book

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## Great products don't happen by accident.

While there are many reasons products might succeed, it's the direction of great product leadership that truly makes a difference.

Throughout the course of my career I've been fortunate to work with and learn from some incredible product leaders. Between the leaders I worked with at previous companies, to the leaders whose teams are using ProductPlan, I've learned a lot about different approaches to product leadership across different industries, business models, and company stages.

If there's one universal truth I've learned about product leadership, it's that great product leadership can be learned. Great product leadership is intentional. It's also complex, the result of the perfect balance of collaboration, service, strategic focus, and great communication.

We wrote this book specifically for product managers that are ready to lead a product team, develop a valuable product, and be an empowered product leader. Who better to draw inspiration from than product leaders themselves?

In this book, nearly twenty product leaders tell their stories. They share in great detail about what makes for great leadership (and in turn great products). In the chapters ahead, you'll learn practical lessons from today's product leaders about how to:

- **Mobilize individuals across your organization to rally behind the product strategy.**
- **Evolve how your team works and plans (together) through thoughtful implementation of lightweight processes.**
- **Break down silos and encourage collaboration by fostering cross-functional partnerships.**
- **Make customer-centricity part of your team's DNA.**
- **Cultivate a culture of continuous improvement that extends beyond the product itself.**

Whether you're leading a product team now or aspire to be a great product leader someday, there's something in here for you.



**Jim Semick**

Co-Founder, ProductPlan

[www.productplan.com](http://www.productplan.com)



1

# From Product Manager to Product Leader

# 1

## From Product Manager to Product Leader

### An inside look at the role of a product leader.

What exactly is a product leader, anyway? Ask anyone who manages a team of product managers to describe what they do and you'll get a slightly different answer each time.

Even at its simplest, there's a number of variations to how product leaders describe their role.

#### How would you describe your job to a 3-year-old?

**"I help solve other people's problems."**

— Ronnie Regev, Director of Product, Construction Management at Procore

**"I try to make the internet a better place for people."**

— Rian Van Der Merwe, Head of Product at Wildbit

**"I build stuff that makes people's jobs easier and learn every day on how to improve it. It's all about building and learning."**

— Craig Daniel, VP of Product Management at Drift

**"We do something for the computer that's similar to Lego. You can build stuff on it, and some things fit together, and some things don't. And what I need to do is, I need to make sure that the ones who build things do it right. I need to make sure that what we can build the thing so well that people want to buy it."**

— Soren Tang, Chief Product Officer at Configit

**"I help my teams create products or applications that customers use everyday."**

— Justin Dilley, Head of Product at FullStory

But despite having different ways to communicate about what they do every day, most product leaders share the same common goal:

To help their teams, products, organizations, and customers be successful today and tomorrow.

## Think Like a Leader

True product leaders lead by influence. They inspire, empower, and serve their teams. True product leaders focus on impact and outcomes over output, and they do what they can to help their teams think this way too.

Strong product leaders know they cannot make every single decision themselves. They know that the best strategies are created with the collective wisdom from a top-notch team, rather than a single “strategic mastermind” hidden away in a corner office.

**“In my eyes, the key to being an effective product management leader is to be a servant leader. It means activating others and then trusting them. It means providing clarity around the ‘why’ and ‘what’ and then letting your team members do what they do best. It means knowing when and how to provide both encouragement and constructive feedback, so that teams can continue to improve. It means doing all you can to help your team be its best daily, but starting with the important steps to build a culture of trust.”**

– Alex McClure | CPO at Unanimous AI

Rather than thinking primarily about products, effective product leaders spend their time thinking strategically about the people and systems that create them. The strongest leaders know that even the best strategic plans are worthless in the absence of people, processes,

and partnerships needed to make those plans a reality. They also know the strategy itself is only as good as the team behind it. So, they make it their mission to help that team succeed by giving them the context, autonomy, tools, and processes they need to build better products together.

Effective product leaders hire and train capable teams, establish systems and processes that help them work cohesively, and provide the necessary context to make smart decisions. For instance, they share high-level guidance about business objectives and product vision. But influential product leaders leave the details of the strategy with those who are best-suited to make those decisions: their teams.

**“Product leadership should provide direction, but they shouldn’t provide so much direction that they’re telling teams what to do and micromanaging them.”**

- Aloka Penmetcha | Director of Product Management at Pivotal Software

In the upcoming chapters, we'll discuss some key areas of focus for product leaders and ways product leaders help their teams and products thrive:

- **Developing the product team and the people on it.**
- **Engineering structures, processes, and practices that help the team work better (together).**
- **Fostering collaborative cross-functional partnerships between the product development team and other departments.**
- **Helping customers win by promoting a culture of customer-centricity within the product development organization and beyond.**
- **Helping the business win by consistently experimenting and learning instilling a culture of continuous improvement.**

## **Develop the product team and people on it**

A leader is only as good as their team. Product leaders focus both on choosing the right people to work with and empowering those individuals on their teams to grow and be successful.

### **HOW**

- Recruiting, interviewing, and hiring the right product management talent
- Mentoring individuals on the team
- Supporting product manager career growth
- Creating the systems and processes to help these things scale

## **Engineer structures, processes, and practices that help the team work better (together)**

In addition to building a team of all-star product management professionals, product leaders need to think about the ways the individuals on the team will work together most effectively.

### **HOW**

- Structure the team effectively
- Define principles and frameworks for decision making
- Design and implement repeatable processes and procedures that unite the team

## **Foster collaborative, cross-functional partnerships between the product development team and other departments**

The product development organization is at the heart of a business, and as such they are well-suited to be the glue that holds the organization together. When Product leaders promote collaboration across various groups in their organization it can help their team and the organization as a whole be more effective.

### **HOW**

- Establish an organization-wide foundation of trust for the product management team
- Promote shared understanding across the organization
- Enable the product team to build healthy partnerships with other parts of the organization

## **Promote a culture of customer-centricity**

It doesn't matter how well-designed and efficiently-engineered your product is, if customers don't love it, it simply won't thrive. Product leaders work tirelessly to keep customers at the core of product decisions, and top-of-mind for their product teams.

### **HOW**

- Continuously message the importance of customer insight
- Make customer conversations part of the process
- Promote accountability

## **Consistently experiment and learn**

Product teams have a great deal of influence over whether a business succeeds or not, and in today's fast-paced business landscape, successful product teams make experiment-driven learning a high-priority. Product leaders find ways to empower their teams to learn new things every single day.

### **HOW**

- Sell the value of experimentation
- Make space for learning
- Promote accountability

## **Instill a culture of continuous improvement**

Today, most products are never truly done. Product leaders' products (their teams and systems) are never truly done either. There's always something that can evolve or improve, and a great product leader consistently identifies ways to improve.

### **HOW**

- Keep an open mind (as well as open ears and eyes) when it comes to change
- Providing regular opportunities to retrospect
- Consistently promote a sense of psychological safety



2

**Grow the Team**

# 2

## Grow the Team

Considerations to make as you grow and develop your team.

Hiring and developing the product team is a core responsibility of product leadership—it's also among one of the most complex and nuanced parts of the job.

**"As you scale it's all about the people and your team. You're only as good as your team."**

— Scott Williamson | VP of Product Management at GitLab

On one hand, you're tasked with finding and vetting candidates (and if they're a good fit, selling them on the role) which is a huge undertaking on its own. And on the other hand, you've got to be thoughtful about helping your existing team members succeed both within the organization and in their own careers—a task which could easily be a full-time job in and of itself.

How can you fulfill both of these critically important responsibilities in a meaningful and effective manner, while still leaving time for the other parts of the job?

In this chapter we'll give you a crash course on how to hire product managers, and share some advice on how to effectively mentor and develop your own high-performing product team.

# Hire Product Managers

It's up to product leaders to discover and recruit the right players for their team. That's why investing time into developing a thoughtful and thorough hiring process is a sound, strategic choice.

**"Getting the right people that fit your system and your mentality, and have the horsepower to do the job is your number one priority as a product leader. If you invest in a first class hiring process and you know how to hire well, your life is going to be a lot easier."**

— Scott Williamson | VP of Product Management at GitLab

## Know what you're looking for

Before you go searching for talent, pause and take an inventory of your team's current strengths and weaknesses. Where are you over and under-indexed on skills and domain expertise? Do you intend to have a highly-specialized team or would you prefer to hire generalists?

**"Early on, think about your team as a portfolio. Product managers have lots of strengths, but no one is world-class in everything. You really can get to a 'whole is greater than the sum of its parts' state if you build a team in this fashion."**

— Justin Bauer | VP of Product Management at Amplitude

## Diversify your sources of product management talent

There are typically four ways you can find a product management candidate:

- 1. Proactive applicants**—They saw your ad and applied.
- 2. Personal network**—You already know them and personally reached out to gauge their interest.
- 3. Social discovery**—While you may not personally know them, you've been connected to them through a mutual acquaintance (or a series of acquaintances).
- 4. Passively discovered**—Their LinkedIn profile looked like a match, so you (or your talent team) approached them.

While some people swear by one of these particular methods, there's no perfect way to find a prospect. Although someone who wasn't actively looking for a job might seem more attractive, they might also be harder to actually get since they aren't particularly unhappy with their current situation. And, while personal connections are great, there's plenty of other talents out there that may not be in your network.

Therefore, utilize as many sources as possible to give yourself the most diverse pool of possibilities, and actively make time to speak with candidates—even when you aren't actively hiring.

**“Always build pipeline—I reserve Friday mornings to meet with future candidates even if I don’t have an active role open.”**

— Justin Bauer | VP of Product Management at Amplitude

## Diversify your candidate pool

There's no perfect product manager resume, only personal preferences. Some people love hiring folks who can code. Others want people that can sell. Marketing experience is a plus for some, while analytical horsepower is a must for others.

With no universally agreed-upon blueprint for the ideal product manager, don't limit your candidate profile based on personal biases. Someone with a different background might surprise you.

A few words of caution. When considering an engineer-turned-product manager, it's essential to make sure the candidate actually wants to be a product manager and isn't just making the jump because it seemed like a better role than slinging code or managing other developers.

**"A product manager who's a former engineer needs to realize that he or she is just that—a former engineer. Product managers who come from engineering and still try to take charge of technical decisions and implementation details will crash spectacularly. For that reason, I like hiring technical people who've already made the move to product management at a previous job. They've already gone through the challenging adaptation period and by checking references you can get a feel for how well they've evolved."**

— **Ken Norton** | Senior Operating Partner of Google Ventures

For candidates coming from the non-technical side, the focus is different. Can they speak intelligently about technology fundamentals? Are they interested in learning how things work so they can communicate with the development team and explain things to customers?

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<sup>1</sup><https://www.kennorton.com/essays/productmanager.html>

**“Good product managers do not know their product’s complete technical details on day one. Companies should focus on identifying product manager candidates with a zeal for learning. Good product managers know what they don’t know and are excited to learn about it. They have a basic familiarity with technology and are curious to understand how a product works. But their attitude has more impact than their knowledge.”<sup>2</sup>**

— Robert Brodell | Technical Product Manager at CapitalOne

Of course another way to expand your candidate pool is to let go of the “industry experience” requirement. Consider folks who haven’t worked in your particular space before. What they may lack in knowledge can be offset by a fresh perspective.

## **Create a structured process for hiring product managers**

A consistent, repeatable process for hiring great product management candidates will serve you well as you scale the team. Furthermore, a clear structure can help you set expectations and ensure you’re respecting everyone’s time.

Many product teams structure their interview process around three rounds of interactions with candidates:

- 1. The phone screen**—No major commitment on either side, they can understand what you’re looking for and ask a few clarifying questions, you can gauge their interest and clear up any unknowns sparked during your review of their resume.
- 2. Individual interviews**—A single half-day session where the candidate has three or four separate interviews with you and selected coworkers.

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<sup>2</sup><https://productcoalition.com/tell-me-about-your-technical-skills-a-non-technical-product-managers-approach-203badc920d9>

**3. Group interview and presentation**—A two or three hour session where the candidate presents on a predetermined topic and gets to interact in a group setting.

This is then followed by:

- **Reference checks**—A few conversations with the candidate's references to reinforce what you're already thinking and factcheck their claims.
- **The offer**—A phone call to let them know you want to hire them along with an email with details about the package.

Tell candidates about the process upfront and share an expected timeline. This takes the emotion out of wondering where they are in the pipeline, and sets clear expectations for when they can next expect to hear from you either way... and they will hear from you either way. While it might be nice to keep a candidate in your back pocket, it's not very respectful of their time, so provide closure after every phase.

## Be realistic and don't sell yourself too hard during the screening process

Your initial interaction with a candidate is just as much about making sure the potential hire wants to consider the opportunity as it is for you to determine if you want to proceed. It's far better to scare someone off early on before you've invested too much of you (and your team's) time on in-person interviews.

The call should end with you telling them you'd like them to come in for a first round of interviews (assuming they're interested) or with you letting them know that you're not sure it's a great fit at this time. There's really no reason to drag it out and leave them in suspense.

## **Use variety to make the most of your time with the candidate**

The initial interview round usually puts the candidate in front of multiple individuals from your company. But—left to their own devices—everyone is likely to cover a lot of the same material. So instead of multiple iterations of the “resume review”-style interview, divide and conquer to cover more ground with candidates and get a fuller picture of their viability.

## **Discuss the product management candidate in a group setting**

After the one-on-one interviews are complete, everyone should share their feedback (ideally the same day) to chat about their takeaways while it’s still fresh in their minds.

Comparing notes and hearing the impressions others had based on their particular discussion with the candidate can be eye opening. One thing to look for is whether candidates were able to expound on the details of products that delight customers and go in-depth with enthusiasm.

## **Finish with a presentation**

The second round of interviews is your chance to see how candidates operate in group settings. The session can consist of two parts:

- 1. A prepared presentation.**
- 2. A free flowing conversation to see how they handle a group dynamic.**

Ideally the people in the room are the same folks they’ll be interacting with regularly if they get the job.

**“I like to ask candidates to come and give a presentation in the office around a conference table for eight to 10 people. This is a good way to see how they do in a group dynamic, how they present their ideas, and how clearly they express themselves... But really you’re looking to see how deep the person goes in their thinking. How well do they communicate? Presentation matters. Most importantly, how do they deal with Q&A on the spot, because PMs have to be able to handle a constant flow of hard questions.”<sup>3</sup>**

— Todd Jackson | former VP of Product at Dropbox

The final session is a great opportunity to ask some questions that tell you about their personality and drive. For example, are they a really hard worker or do they throw in the towel when things get tough?

You can also put the candidate on the spot a little bit by asking them how they might change a senior stakeholder’s mind.

**“I pose a scenario where the team believes in a feature but the CEO wants it done in a different way that the team believes is ill-conceived. I then have the product manager explain what they would do in that scenario. As a follow-up I then ask for a real world example where they disagreed with an executive or manager and really drill into what the product manager did and why.”<sup>4</sup>**

— Anthony Schrauth | CPO of Betterment

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<sup>3</sup><https://firstround.com/review/find-vet-and-close-the-best-product-managers-heres-how/>

<sup>4</sup><https://medium.com/pminside/interviewing-product-managers-94fbe6971600>

## Close the deal

All interview processes end with one of three outcomes:

- You don't make them an offer.
- You make them an offer and they accept.
- You make them an offer and they decline.

If you're not going to send an offer, extend to your candidates the courtesy of letting them know (and ideally telling them why). Try to give them something more specific than "we went in another direction" or "it just wasn't a good fit." They gave you hours of their life, the least you can do is provide some constructive feedback.

**"When you are making an offer, it's not just about the salary; this is your final sales pitch on the opportunity."**

**"I like to think about the reward centers in the PM brain. There's several big ones I can think of: having impact, delighting users, sense of purpose/mission, having autonomy, getting recognition, financial outcomes, learning/growth, etc. In my experience, more than other disciplines, PMs tend to care most about impact and autonomy."<sup>5</sup>**

— Todd Jackson | former VP of Product at Dropbox



<sup>5</sup><https://firstround.com/review/find-vet-and-close-the-best-product-managers-heres-how/>

# Mentorship and Career Growth

As we discussed earlier on, great product leaders don't just hire talent, they grow and develop it. One of the most important parts of your job as a product leader is helping your product managers become successful.

For newer product managers, this means mentoring and teaching them what you know.

For seasoned product managers, it means clearing a path to do their best work, and staying out of their way so they can perform.

As a product leader, you should put a significant amount of time and energy into this aspect of your job. Helping product managers succeed is an awesome and rewarding responsibility.

## Mentor product managers

Mentorship is much more than an allocation of your department's budget to send your team to conferences and enroll in courses that hone their craft. It's something you want to create space for internally.

Teams grow and be successful when you expose them to thoughtful approaches to solving problems and help them understand how to find the answers they seek.

**"Successful leaders are good at asking questions. They focus on facilitating good conversations over having the right answers. It's a bit of an anti-pattern if you're always providing answers and people are always coming to you for answers as opposed to trying to discover them for themselves."**

— Aloka Penmetcha | Director of Product Management at Pivotal Software

One of the things Penmetcha put in place recently to help scale this mentality is a design-thinking exploration program for both new hires and existing employees who have expressed interest in learning.

**"We talk through design-thinking tools and practices and work together on problem statements. This program helps people make space to either refresh their knowledge or get an introduction to new skills. When they go back to their teams, they are then able to implement some of these practices that maybe they haven't done before."**

— Aloka Penmetcha | Director of Product Management at Pivotal Software

## Formalize a product management career path

While sharing skills, honing the craft, and providing coaching on product-thinking are all helpful ways to develop a team, you'll also want to think about how you want to recognize and promote product managers as they progress.



For Emma Medjuck, Director of Product Management at AppFolio, establishing a formalized career path and evaluation criteria was a challenge but ultimately helped her be a better mentor to her team.

**"My career progression at AppFolio happened so naturally because we were growing so much as a company, we didn't really have a set path for things like going from product manager to senior product manager."**

**"I think it's a challenging role to think about those things, because it's very qualitative and at the same time a product manager is doing the same day-to-day things as a senior product manager. It's different from sales where you say 'you're selling in to this line size at this level, and to get to the next level, you need to be closing this many deals and have this success rate.' It's hard to think of something that dictates that for product management."**

– **Emma Medjuck** | Director of Product Management at AppFolio

Ultimately, the AppFolio team put following structures in place to formalize this:

**Qualitative performance measurements:** Medjuck and other product leaders at AppFolio documented the skills they believe are important for product managers and senior product managers. The documented fundamental skills enables the product leadership to help individuals on their teams map out where they excel and identify the areas that could use a little more work.

**Define roles:** Medjuck also worked on defining how expectations of product managers and senior product managers differ. Articulating the types of problems or situations that senior product managers would tackle vs. those product managers would tackle helped her provide a better view of what product managers could expect as they grew into new roles.

In addition to creating a clear career path for product managers at AppFolio, Medjuck had to start thinking about how to assess the performance of her team.

**"The nature of the product management role also makes performance measurements tricky. As a manager of product managers, providing feedback can be tough because you're not going to be in all the meetings. That's the big difference between an engineering director and the engineers they manage—they're following along with the teams—but as the manager of all the product managers, I won't be going to all their team meetings."**

— Emma Medjuck | Director of Product Management at AppFolio

To navigate this, Medjuck says one of the best sources of information are the teams that the product managers work with. So, she does monthly sync-ups with the engineering directors and regularly meets with the team members her product managers work with.

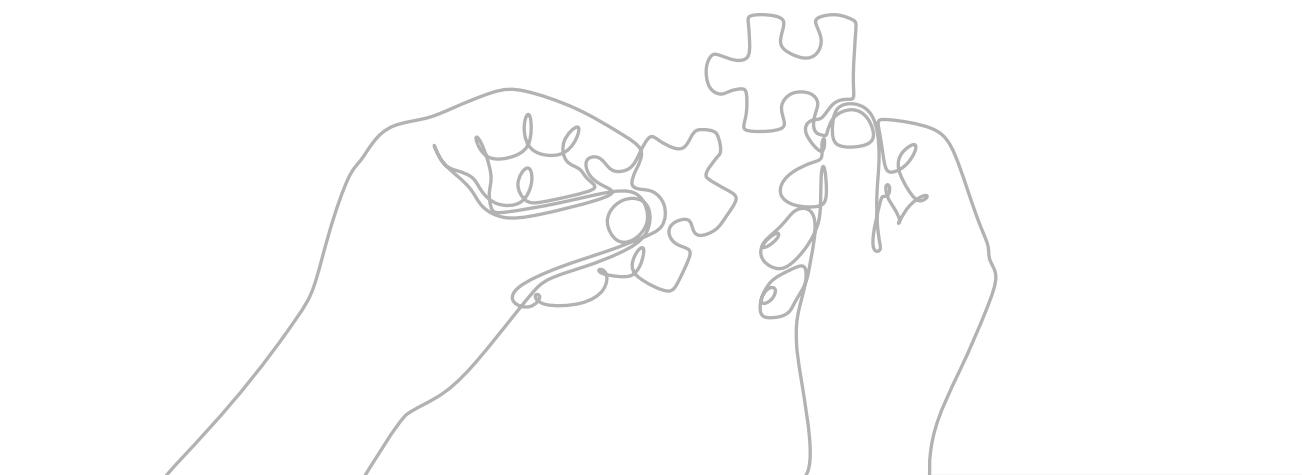
These sync-ups allow her to gather feedback and real examples that can help her to help members of her team improve. She encourages the team members of the product managers to provide feedback directly to their PM. While she also conducts annual 360 reviews, Emma believes providing timely feedback to her team is important and as such she has frequent feedback sessions during 1:1's with her team.

# **Building a Team is About More Than Hiring**

You're only as good as the team you build. Hiring the right people is a great starting point, but helping your team learn, grow, and be successful both within your organization and wherever their careers take them next is important too.

If you're being mindful and strategic in your hiring process and providing learning and growth opportunities to your team, you're on the right track to building a high-performing product organization. The next step is putting structures, processes, and frameworks in place to help the individuals on your team work better (together).

In the next chapter, we'll share some inspiration to help you identify the practices that will help your growing product team succeed.



3

## From Chaos to Cohesion



# 3

## From Chaos to Cohesion

Evolving how your team works and plans (together) through thoughtful implementation of lightweight processes.

As your product team grows, roles shift, output increases, and many other pivotal changes can happen within the product development department as well as the broader organization. As exciting as it may be, growth (especially rapid growth) can present some challenges for product leaders. Pretty soon you might find yourself asking these questions:

- **How do you ensure everyone keeps things moving at the same pace as the team grows?**
- **How should you structure the team?**
- **As the headcount increases beyond just one or two product managers, how can you maintain a consistent product culture?**
- **How can you empower your growing team to make decisions without your oversight?**

These are all valid questions for product leaders at growing organizations. And the good news is, you're not the first to ask them, nor will you be the last.

In this chapter we provide some tips for navigating some of the most common product team growing pains: team structure and organization, empowering teams to make decisions, defining product principles and prioritization frameworks, and finding the processes that help teams work better (together).

## Channel Your Inner Goldilocks

Before we explore some specific strategies you can use to promote cohesion across your team, let's talk about a certain picky fairy tale character with golden hair and a penchant for trespassing.

As Goldilocks rummaged through the bears' house in search of the chair, porridge, and bed that felt just right, she wasn't exactly portrayed as a great protagonist. However, when it comes to searching for the organizational structures, principles, and processes that will help our teams find cohesion, she's just the hero we need to channel. Here's a few takeaways from our dear friend Goldilocks.

- **You are allowed to be picky.** It's perfectly fine to keep trying variations until you find something that's just right. You don't need to settle for something that doesn't meet your team's needs. Why should you?
- **Different teams, different needs.** What works for another team may not work for your team. Be aware of your team's unique needs.
- **Balance is key.** Too little structure can lead to chaos, too much structure can leave your team demotivated and moving at the pace of molasses. So, you need to search for the point of enough.

Not enough structure	Structure is just right	Too much structure
<p>Lack of alignment and shared understanding.</p> <p>Leadership finds it difficult to provide support and mentorship consistently.</p> <p>Disconnect between objectives, strategy, and plan (or lack of any of these things).</p>	<p>Team is empowered and has the context and principles they need to make decisions autonomously.</p> <p>Team and organization are aligned around common objectives, and the plan and strategy work cohesively.</p> <p>Leadership is able to support, mentor, and grow team effectively.</p>	<p>Team feels lack of autonomy and lack of motivation.</p> <p>Extra organizational hierarchies create information silos.</p> <p>Slower pace of progress due to too many "checks and balances."</p> <p>Too much time spent in meetings.</p>

One thing that may help you and your team along on your quest to find the Goldilocks of processes and structure, is taking inventory of your current state. Envision what an ideal future state may look like. Identify your product organization's specific needs and preferences and then work backwards towards a more ideal state. That way, you can understand quickly what is important to your team, and be able to tell if your processes are too lightweight or too rigid. Together figure out what that balance means to you and your team and how you can all work toward it.

**"When building up the product organization, establishing consistent practices that are teachable, but also don't limit a team or individual's flexibility is a difficult balance to achieve."**

— **Ronnie Regev** | Director of Product, Construction Management at Procore

Finally, it's important to note that as you shoot for your ideal level of structure, you're aiming at a moving target. The processes that work perfectly today most likely have an expiration date, and it's up to you and your team to be on the lookout and to anticipate when the next iteration of your processes should happen.

## Structure and organize the product team

The way you organize your product teams can have a big impact on their outcomes. As such it's up to product leadership to carefully identify how to structure and organize teams within the product organization.

**"As a product leader, the biggest impact you have on product roadmaps is how you organize your teams and define their missions."**

— **Matt Walton** | Chief Product Officer at FutureLearn<sup>6</sup>

<sup>6</sup><https://medium.com/@FutureLearn/roadmaps-for-product-leaders-2c0a85543d07>

There are a few things to consider when figuring out how to structure your team.

## You need to evolve your team's structure as you grow

It's not uncommon for managers to stress about team structure as they scale their team.

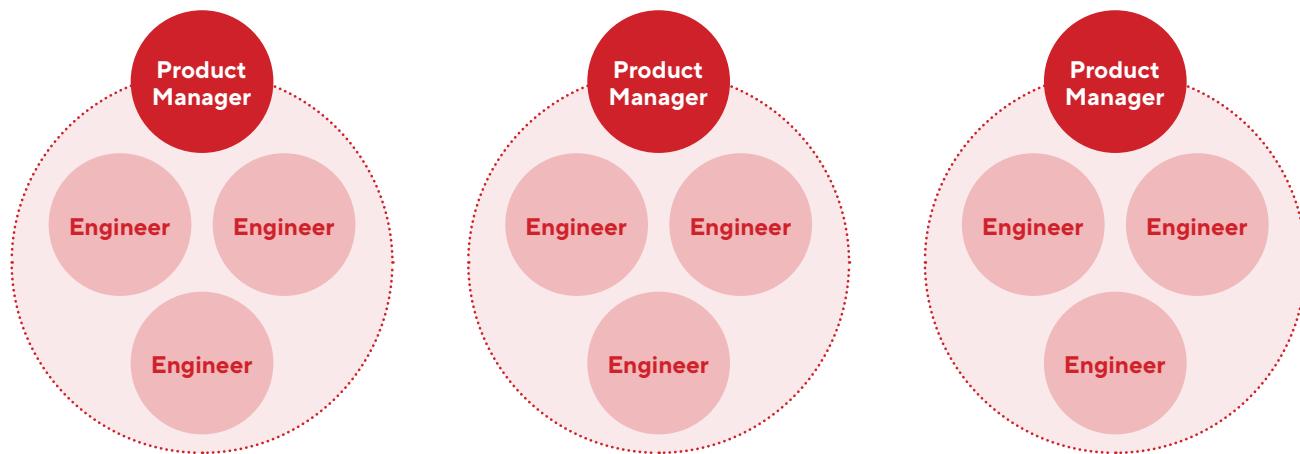
Product management leaders in particular may worry about "getting it right" the first time with their team's structure. But with endless possibilities, and no one-size-fits-all approach to product team structure, getting things "right" in the first iteration is unlikely. And that's okay, as long as you accept that your team will (and should) evolve over time, and embrace changes as they come your way.

When Craig Daniel joined Drift in 2017 as VP of Product, he was both a product leader and an acting product manager. At the time, there was only one other product manager on the team and a handful of small teams of developers.

Today, Drift has nearly 20 small teams in its product development organization. Despite the rapid growth, Daniel says the team at Drift was able to evolve the team's structure and organization in a very organic manner.

Let's take a look at that journey.

### Many small teams

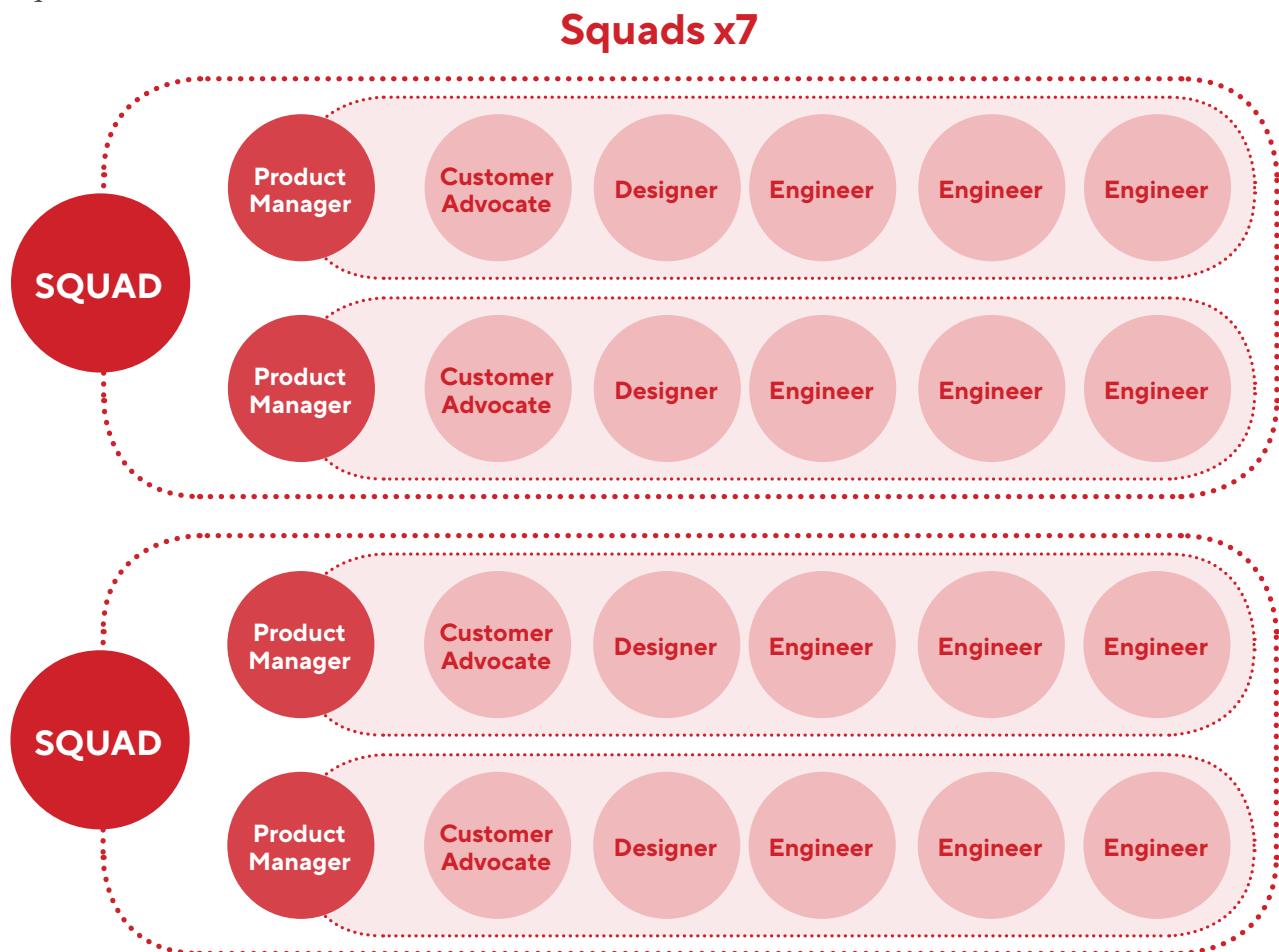


In the first iteration "many small teams" was incredibly lightweight with few constraints:

- **Product teams could be no more than 3 engineers.**
- **The team would huddle for 15 minutes every Friday to discuss plans for the next week.**

According to Daniel, this method of operating broke somewhere between 6 and 8 teams.

The team needed a touch more structure to keep things focused, so Drift's notion of squads was introduced.



- Each squad contained 2 teams.
- Each team consisted of one product manager, one product designer, and one customer advocate.

There were 2 small 3 person teams (eng) + product, design, advocate) on each squad and there were 3 or 4 of them.

Eventually this broke too. When there were between 5 and 7 squads, Daniel says he felt adding more squads didn't make sense. What did make sense, was adding in another level of structure. Enter, the product director (Drift calls this the product group leader)—each product group leader has a number of squads under them (usually 2 or 3) and there are 3 product groups.

## Preserve autonomy

As the product team grows, preserving a sense of autonomy and empowerment is important. Too many layers of management and lack of access to resources can slow down product teams. Not enough guidance from the top can lead to the delivery of the wrong solutions. As Amplitude VP of Product, Justin Bauer, explains, the structure of your team has a lot to do with how well it will perform in the future.

That's why Bauer decided to organize the product team at Amplitude in "pods," focused around a single "North Star Metric." He said, "We define pods as small autonomous groups of people defined by their common objective and measure of success. These objectives are tied to the broader product strategy, and as such can shift around depending on the needs of our users and the business."<sup>7</sup>

There were several underlying goals behind Amplitude's pods. First and foremost, the team agreed that autonomy and the ability to innovate quickly is of utmost importance. The pod approach, which is modeled loosely after Spotify's product squads, ensures each team has sufficient resources to work autonomously.

In addition to the cross-functional nature of pods, the form of the goals they pursue also helps encourage autonomy. Each pod has its own set of goals and objectives to pursue, but has the freedom to decide how they approach them. While executive stakeholders hold the pods responsible for high-level objectives, they do not dictate the specific initiatives the team must pursue to accomplish them.

Finally, borrowing from Amazon's [two pizza rule](#), Bauer's team keeps their pods small. This way, they can minimize communication overhead and stay as productive as possible.

One reason Amplitude's pods work well is the teams within them know what they must achieve but have flexibility around how. This flexibility helps support the team's creativity, encourage experimentation, and empower the team to make decisions on its own. At the same time, the team is on the same page about the desired outcomes, and executive

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<sup>7</sup><https://amplitude.com/blog/how-to-organize-product-team>

stakeholders have bought into those outcomes. Therefore, development is focused on moving the right metrics.

## **Consider organizing the team around objectives rather than features**

Emma Medjuck, Director of Product Management at AppFolio, has seen a lot of change throughout her tenure at AppFolio. When Medjuck joined AppFolio in 2013, as an Associate Product Manager, the product team was a small fraction of the size it is now.

“There was a director and then two of us on the team and we all did a little of everything. We decided as the three of us what things we wanted to tackle each year and then what teams we thought would be best for that,” she recalls, “There were really no lanes of ownership.”

For a while, that worked for Medjuck’s team. But as the organization and team grew, the team structure had to evolve. While many growing organizations elect to break up their products into pieces and build specialized teams focused on specific parts of their products, AppFolio took a different path.

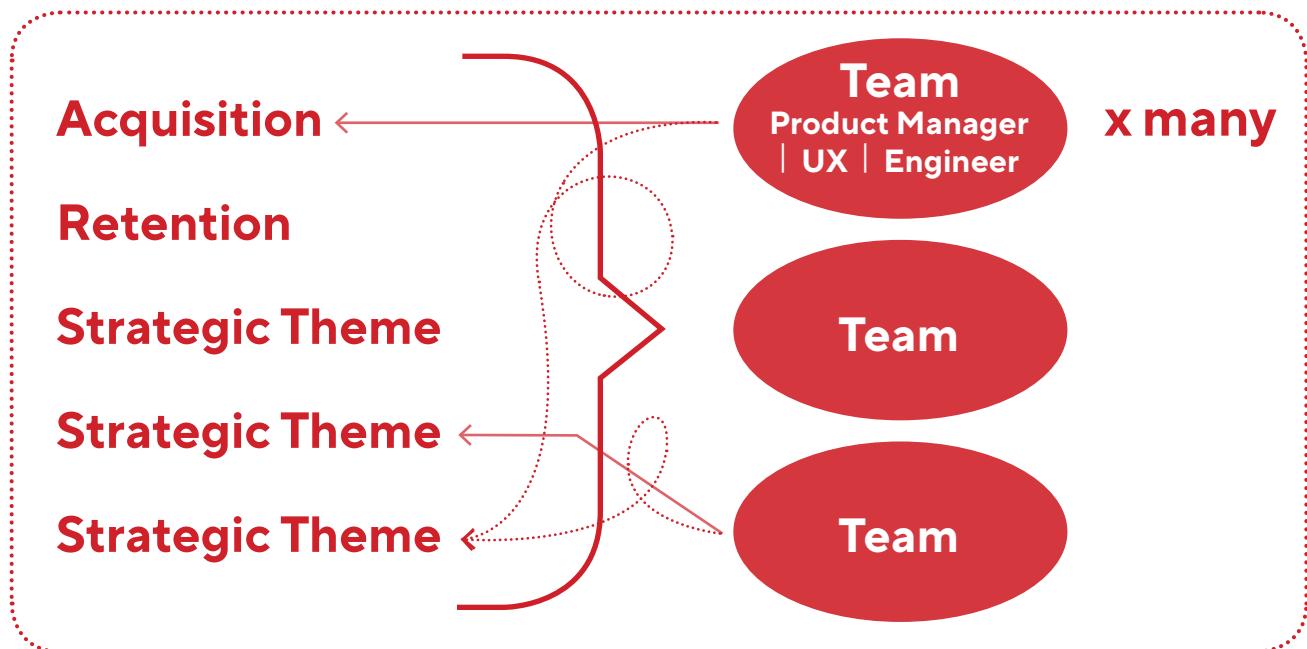
**“One thing we’ve tried to keep a priority as we’ve grown is not completely specializing the product managers. We have a really large product that could be broken up, but we think about it from the customer’s perspective. Customers use the whole product and see it as one product. Having product managers understand the cohesive experience of the customers is really important.”**

— Emma Medjuck | Director of Product Management at AppFolio

Instead of focusing on a specific part of the product or experience, cross-functional product development teams (triads of product managers, UX designers, and engineers) at AppFolio specialize in themes.

"We have about 5 themes at any given time and we adjust them as we need to, but they represent the longer term strategic things that we focus on," says Medjuck.

Each theme represents a specific, high-level and long term business goal such as "making sure that customers are incredibly happy" or "growing the number of new customers." Themes stay fairly consistent because they represent core business needs, however there are evolving sub-categories, or missions, under each theme that change more often.



In addition to helping the team maintain a cohesive experience, Medjuck says the team structure gives the organization a lot of flexibility, "Our structure makes it easy to spend the right amount of time on things. We figure out allocation of resources based on which of the themes we believe is the lever that is the most important for us to pull as a business," says Medjuck, "If sales are killing it and everything is going really well under the acquisition theme, but we see that there is starting to be an increase in churn, we can shift and have more teams focus on the things that the retention team is identifying."

Medjuck's team at AppFolio isn't the only one to take this approach. Matt Walton, Chief Product Officer at FutureLearn took a similar approach. "From very early on at FutureLearn, we started to organize our product teams around our strategic objectives,

with a cross functional team working towards each objective, rather than on a specific set of features or part of the product.” He explains, “We have found this successful as it focuses the team on the impact that they are creating rather than the features they build and maintain. Each team’s mission mirrors the strategic objective. In addition to this, each team has a metric that is their key measure of success.”<sup>8</sup>

## Drive consensus through culture, principles, and frameworks

They say two heads are better than one. And in many cases, adding more minds to your team can help provide a broader perspective. However, as you’re rapidly bringing more product people on board, how do you empower and convey to them how to make the right decisions on their own? As your team goes from one person to five or more, how can you maintain consistency across the board?

There are two key tools for supporting consistent decision making as a product leader that are scalable: principles and frameworks.

## Values and principles aid decision-making and align growing product teams

How did Intercom successfully grow its product team while maintaining a product roadmap that the entire organization could rally behind? According to Intercom VP of Product, Paul Adams, one of the team’s secrets to success is a standardized set of guidelines for product decisions.

**“In order to grow and scale our product teams, people need a set of values to help them make good decisions that align with what we believe.”**

— Paul Adams | VP of Product at Intercom<sup>9</sup>

<sup>8</sup><https://medium.com/@FutureLearn/roadmaps-for-product-leaders-2c0a85543d07>

<sup>9</sup><https://www.intercom.com/blog/how-we-build-software/>

The guidelines his team follows share similarities to the values and principles laid out in The Agile Manifesto. For example, “we optimize for face-to-face collaboration” and “many small steps are better than bigger launches.” Beyond helping the team make smart decisions, the guidelines also help support a healthy product culture that is unique to the product team at Intercom.

**“Guiding principles are principles that help provide enough direction that people have a sense of what they’re optimizing for and therefore can make decisions for themselves without having to look towards leadership.”**

— Aloka Penmetcha | Director of Product Management at Pivotal Software

Penmetcha aligns and empowers her team by providing a set of ‘guiding principles’ and thinks of guiding principles as a scalable policy that her team can use to make decisions. Pivotal Software, currently has more than 100 product teams, and continues to grow, so having these scalable policies to keep the entire team aligned is critical. When defining product principles, Penmetcha starts by asking a simple question: “What are we optimizing for?”

“For me guiding principles tend to relate to what I’m trying to drive. What is my goal? What is the current state or diagnosis of the issues that are causing the delta of where I am and where I want to go? Then the guiding principles tend to be things that help people to drive towards that ultimate goal.” Penmetcha explains.

One of her team’s current guiding principles relates to maintaining a cohesive experience across the platform even as the product portfolio expands.

**“We have a guiding principle around what we call ‘one platform,’ and this is the idea from the customer’s perspective, we want them to think of this as one platform where they get a shared, unified experience across all products. As they’re working through things, this helps teams understand where the business wants to go. They’re able to apply the principle of ‘one platform’ in day-to-day decision-making.”**

— Aloka Penmetcha | Director of Product Management at Pivotal Software

Your team’s shared principles and values are the foundation that your product culture will be built upon, so choose them wisely (and, don’t be afraid to let them evolve over time).

## A shared prioritization framework

**“Coming up with a framework that you can use to ruthlessly prioritize all the time, and focus the team or at least the majority of the team in a small handful of high impact areas is key.”**

— Justin Dilley | Head of Product at FullStory

In addition to principles, you may find it makes sense to define a unified, objective, prioritization framework to help your team not only navigate tough prioritization challenges, but also have a consistent answer to “why was feature A prioritized over feature B?” when communicating with others across the organization.

We won't do a deep dive into how each different prioritization framework out there works, but if you're hoping to learn more about the various frameworks, we suggest getting a copy of our [free guide to prioritization techniques](#).

Committing to a prioritization framework made a huge difference in his team's ability to quickly make decisions and stay focused on the things that truly matter.

**"You need a repeatable way to quickly get a true sense of which ideas are truly high value. It's different for every team. Find a way to focus the team on identifying those sets of things and teach them to ruthlessly de-prioritize the things that are less valuable."**

— Justin Dilley | Head of Product at FullStory

Dilley added that even if you don't have firm processes in place, a prioritization framework is non-negotiable for growing product teams.

### A few example prioritization frameworks

- MoSCoW method
- RICE prioritization
- Weighted scoring
- Buy-a-feature
- Value vs. complexity
- Opportunity scoring
- Affinity grouping
- Kano model

# Establish Repeatable Processes

In addition to careful consideration of your team's structure and the principles that help guide team decisions, formalized processes can also help drive cohesion. As we mentioned at the beginning of this chapter, there's a delicate balance between too much process and not enough. It's up to you and your team to determine which activities need formalized processes, and how structured those processes should be.

Over the next few pages, we'll share the processes that work for product organizations at various phases. These examples should be inspiration, not prescriptive solutions to every challenge.

## Align the organization around Objectives and Key Results (OKRs)

When Head of Product, Justin Dilley, joined FullStory in 2018, he was tasked with building out the product management function from scratch.

At the time, product decisions had been largely driven by the core engineering team. This team, which consisted largely of former Google engineers, was used to working somewhat autonomously from traditional product managers.

"When I joined, the team (and the company) felt that they'd grown to a point where the decisions about what we build and how we build those things were starting to hit a little bit of a law of diminishing returns," explains Dilley, "they were craving the notion, or at least what they had in their heads about what good product management is and our philosophies on product management meshed very well."

Knowing his product management principles aligned well with the existing team's thinking, Dilley was able to forge on right away and begin developing the function. He spent his first 90 days thinking critically about how to thread the product management practice through the organization and determine how many product managers to hire.

**"In the early stages it was a lot of just listening, learning, and understanding where the problems were at a macro level all the way down to a micro level. From there it became about trying to create the norms and values on the product management team that could help really level up the entire organization around the why we decide to build what we build."**

— Justin Dilley | Head of Product at FullStory

Today, the product team (or as FullStory calls it, the product family) consists of roughly 60 people in product, engineering, and design roles. They've implemented a quarterly planning process and what they call OKR cycles to help the team plan and execute better (together).

### **How it works:**

At FullStory, Objectives and Key Results (OKRs), are so deeply embedded in day-to-day operations, one may even venture to say they're part of the organization's DNA. FullStory focuses heavily on OKRs, setting organization-wide OKRs annually to keep high-level business objectives front and center. Each team within the organization then commits to their own OKRs to align with those of the company as a whole.

For Dilley's team, annual OKRs are further dissected and discussed during a thorough quarterly planning exercise. He explains, "At the beginning of every quarter, we take two weeks to think about planning. We take a top-down approach and typically bring out some of the bigger, meatier projects or features that touch a lot of different subfamilies during this time."

Once the larger must-do projects are defined across the product organization, the smaller squad-like teams (FullStory calls them subfamilies) within the broader product development function are able to take charge and take this top-down planning approach to their own projects.

“During these two weeks, they’re off doing a somewhat similar exercise on a smaller scale and thinking about their missions and the things they really care about as a subfamily. They’re asking themselves, ‘What are the things that we think are most important to get done?’ and going through a similar exercise of stack ranking the list of things,” explains Dilley.

Once planning is done, the team goes into execution mode for five weeks, says Dilley, “everybody is heads down on the things they said they’d deliver from an outcome or OKR perspective. During this time we really try to minimize distractions and shiny objects. We try and spend those five weeks totally in execution mode.”

But Dilley is quick to mention that decisions made during quarterly planning exercises are not set in stone. Dilley embraces agile and lean principles and had baked in opportunities for course-correction to his team’s processes.

After five weeks of execution mode, it’s time to come up for air and think about results for a week, says Dilley, “we’ll take a pause and use that week to ask ‘Hey, do we still feel good about where we’re at from a quarterly progress standpoint? Let’s make any adjustments that we need to make.’ Then, we jump right back into execution mode.”

### **Why it works:**

Dilley believes the cadence of quarterly planning and OKR cycles work well for his team for several reasons.

First, the team knows when to focus on execution and when to think more strategically, making it easier to focus. “Essentially we have two five-week periods where we’re working super hard on our OKRs at a quarterly level, and we have the one week in the middle and the two weeks at the beginning to plan and be pragmatic about what we’re doing,” says Dilley.

Second, since the OKR framework is a familiar concept for every team at FullStory (not just the product development teams), communicating about the “why” is much easier.

“We’re a very OKR-heavy company at FullStory, everyone has quarterly and annual OKRs, which means that OKRs are a pretty good communication mechanism to signal to the rest of the company what we’re building, and then the details behind why we’re building it,” he explains.

Finally, one of the best parts of this approach, it gets the product organization thinking about both the larger “meatier” projects and features that need to get done, and the smaller, subfamily-level initiatives as well, “the practical reality is that we get the big things done, but each of the subfamilies can go off and make individualized team decisions about what they think is important and then resource those appropriately.”

### **How to get things done:**

- Drive organizational alignment and shared understanding on product strategy.
- Enable the product development organization to spend sufficient time on strategic planning.
- Eliminate distractions and promote focus during “execution mode.”
- Provide frequent opportunities for course-correction.

### **Standardized opportunity assessment documents help teams plan collaboratively and communicate clearly**

Ronnie Regev, Director of Product, Construction Management joined Procore in 2017 is armed with years of experience leading product at other organizations that saw periods of rapid growth in their product development departments.

One of the biggest changes he’s observed in his career is the shift toward agile practices and iterative development. “Understanding that value can be delivered to customers progressively rather than at once, is a mental shift I’ve seen over time,” explains Regev, “That change in the understanding within businesses that value can be delivered iteratively, as opposed to at one time—that’s a major shift I’ve seen in how organizations understand value delivery.”

This mental shift is among the many reasons Procore's planning process continues to evolve. The team has made many adjustments over time to consistently improve both the product they deliver, and the processes that help them deliver. They currently conduct both annual and quarterly planning exercises, and have taken measures to maintain transparency and collaboration as they've grown. One thing they've implemented that has made a huge impact in helping the product team plan and communicate better (together) is opportunity assessment documents.

### **How it works:**

"Historically, annual planning was always done by product leadership in isolation, but we learned through a lot of employee feedback and other sources that we can do better. People wanted more inclusive decision making and transparency brought into the planning process," explains Regev.

So how did Procore create a more inclusive and transparent planning process that still works at the scale they're operating on?

According to Regev, the teams worked together on creating opportunity assessment documents.

Each of Procore's product lines consist of between 2 and 7 squads (small teams of people), and each of those squads can work together to create their own opportunity assessment documents. These opportunity assessments are one-pagers following a standardized format and containing critical information like:

- **What is the market problem?**
- **What is the value in solving it to customers?**
- **What is the value in solving it to the business?**
- **What is the hypothesis?**
- **What is the Go-To-Market plan?**
- **What are potential business impacts?**

Then, those opportunity assessments are brought together across the various squads under each product line, before being reviewed by product line-level leadership.

“Ultimately we end up producing 10x opportunities, or ideas, then we actually have the resources to pursue.” explains Regev, “So then as a group, we look at annual and quarterly corporate OKRs, and the product line objectives that we have in terms of revenue and retention, etc.” says Regev.

Based on the (standardized) information in each opportunity assessment, the team can work together to prioritize the opportunities that they feel can provide the most value to the customer and to the business.

“We ask ourselves, ‘Which of these do we feel is going to be the most impactful to our customers, or the most benefit for the business? And decisions are made as a group. That said, there’s also an awareness that the executive, engineering, UX, and product leadership has a bit of a heavier weight on the scale in some decision making.” Regev explains.

As those decisions are made, product line-level leadership is able to advocate for the resources (such as headcount) they need to deliver on the line-level objectives.

### **Why it works:**

- **Facilitates collaborative planning and ideation.**
- **Provides a standardized set of information to produce and structure for communicating that information.**
- **Ensures consistent type and quality of information is communicated throughout organization, regardless of who is sharing.**

In addition to creating a more inclusive, collaborative planning process for all members of the product development organization, opportunity assessment documents help promote information quality and consistency. “If the product team doesn’t have that structure to work through, then the recipients of the information will end up with highly variable

information, depending on what the individual product manager may or may not do,” explains Regev. This helps ensure teams have done their due diligence in assembling the information needed to make thoughtful prioritization decisions.

**“In a larger sized organization where information has to be communicated to multiple groups and then cascaded out, it’s imperative to have consistency in the quality of information being produced in the first place.”**

— **Ronnie Regev** | Director of Product, Construction Management at Procore

## **Involve executive stakeholders in early-stage planning**

In some cases, the need for structure (and a product leader) is not realized until a product team is already in place. When Scott Williamson, currently VP of Product Management at Gitlab but formerly VP of Product Management at SendGrid, joined SendGrid in 2013 to lead product management, it was clear the existing 3-person product team was in dire need of structure.

“When I joined SendGrid, they were well past needing a product management leader. They had a few product managers but they weren’t really working together. I had the chance to build out the product management function from scratch which was awesome,” he explains. “My first year involved putting a lightweight product process in place. It couldn’t be too heavyweight because the environment was chaotic at the time and we had to iterate our way to a more rigorous product approach. Decisions around what to build were often based on intuition and there wasn’t a real rigorous planning process. So, I started to try to lay foundation for putting together a roadmap, dealing with dependencies, taking feedback from other parts of the organization, and trying to insert ourselves as a hub where none had existed before,” recalls Williamson, noting that he also spent this first year interviewing as many customers as he possibly could and getting a grasp on the market and competition.

In the years since Williamson joined, the product team at SendGrid (which was acquired by Twilio in 2019, but operates as its own business unit within the organization) has come a long way. Not only has the team grown in size (currently 30 product managers and 5 product directors work on SendGrid), but also in structure and process. According to Williamson, there have been many adaptations and iterations along the way, but things are working well today. In the beginning, there was no formal structure or even a product roadmap. Today, the team has formalized a strategic planning cycle that helps them plan and prioritize better (together).

### **How it works:**

SendGrid's product organization operates around what Williamson calls an "annual-ish" planning cycle.

The first part of this planning cycle is spent working with executives on resource allocation and budgeting. According to Williamson, the big question during this phase is, "How much money should we spend this year on product lines and on charters underneath the product lines?" It's important to involve executive leadership in this part of the planning process because Williamson believes it is ultimately the CEO who should be determining how much money is spent in a given area (and ultimately, how many people will focus on each charter).

Most often, these decisions are made based on each charter's overall market opportunity:

- **How big is the market?**
- **How much revenue potential is there?**
- **What is the big-picture value the charter will provide?**

After getting executive alignment on which charters to fund and creating budget envelopes for the various product lines and charters, Williamson believes the next layer of detail should be left up to the product team.

**"It's up to the owners of the charters (usually director-level types) to make charter-level decisions because they're much closer to the details. The executive team shouldn't be deciding on which specific epics and themes to work on under a charter, as they just don't have enough context"**

— Scott Williamson | VP of Product Management at SendGrid

With their budgets in mind, the owners of each charter are then able to articulate back to the executive team a high-level view of the larger initiatives they intend to work on within their charters and keep them up-to-date on the team's projects.

Prioritization decisions about specific projects are left up to the teams working within each charter. SendGrid's product team uses the RICE prioritization framework to prioritize the specific projects underneath each charter.

### **Why it works:**

- Executive involvement in early stages of planning.
- Responsibility for feature-level decisions cascades out to product teams.
- Repeatable and objective way to prioritize.

Williamson thinks his team's current process for planning and prioritization works well for two main reasons. First, executives are part of the process from the very beginning, reducing the likelihood of misalignment later. Second, there is an objective and a repeatable, consistent way to make prioritization decisions.

**"Shrinking the surface area of the prioritization debates helps us a ton. If you can't do this and it's basically one epic or one story against another one anywhere in the company, it's really hard to prioritize. But we're able to say 'hey, we agreed we're spending X on charter Y. Within that, here is our RICE prioritized list of opportunities.' That becomes a much easier conversation to have and a much easier prioritization thought process for whomever owns that charter."**

— Scott Williamson | VP of Product Management at SendGrid

## The little engines that drive the team forward

Processes don't need to be overly-complex. Drift's product team has implemented multiple "engines"—systems of lightweight, repeatable process—across the product development team to give them structure. Here are a few of those engines:

### Quarterly goal process engine

Like some of the other teams we've discussed in this chapter, Drift's product organization has a quarterly OKR-style goal process. Each quarter, product leadership determines the high-level, strategic things that need to happen in order to meet goals, and then the individual product teams take things from there—responsibility cascades outward.

### Bi-weekly product review engine

Every two weeks, the product managers from each team get together to share what they've been working on with each other and with the CTO and co-founder.

Each product manager has 30 minutes to present, says Daniel, "They kick it off with a 3-4 minute video which is a recap of work they've done."

These short videos follow a consistent structure across teams—answering a series of relevant questions:

- **How is adoption?**
- **What are the bugs?**
- **What are customers saying?**
- **What's in progress and what will ship soon?**
- **What is the team learning and researching?**
- **Any new customer insight?**

After sharing the videos, the product managers discuss their work, ask questions, and get feedback.

“It re-orients the team on their mission and gets them answers to their questions. For example, ‘I don’t know if I should chase this thread based on what I’ve learned,’ that’s how we operationalize that.” says Daniel.

“Bubbling up learnings from each product team is a really critical thing,” Daniel explains. So, after the bi-weekly product review, all of the team’s videos are shared on Slack and published on a team wiki page so the rest of the organization can see.

## **Shipyard engine**

For many organizations who operate under continuous delivery (CD) or continuous integration (CI), communicating about what gets shipped can be tricky. One way Drift keeps everyone on the same page about things being shipped is with a Slack channel, aptly named ‘Shipyard.’

When engineers ship new things (which happens between 5 and 15 times a day at Drift), they share what they ship in this channel.

- **What they shipped**
- **Why they shipped it**
- **Who it's available to**

This keeps the whole organization in the loop regarding releases, and gives the engineering team some visibility.

**"All of our engines are like gears—and like gears in a watch, they all work into each other."**

— Craig Daniel | VP of Product Management at Drift

## The Journey Never Ends

**"Trying to match the growth of the team with some more standardized ways of getting things done so that we can be more efficient and effective is a key challenge for us as we continue to grow."**

— Justin Dilley | Head of Product at FullStory

We hope you're able to take some of the success stories into consideration as you establish your own processes and ways of getting the team working better (together), but we also would like to warn that processes alone don't make the team perform. Great leaders and great people make teams perform.

In the next chapter, we'll zoom out and look at how product leaders and product teams work together to drive cohesion and better outcomes by informing, motivating, and empowering individuals throughout their organizations.



4

## Build Bridges and Burn Silos

# 4

## Build Bridges and Burn Silos

Mobilizing individuals across your organization to rally behind your product strategy and unlock the power of “us.”

Product leaders and their teams are expected to be strategic masterminds, make informed and strategic decisions to build an overarching product strategy that aligns with organizational goals and customer needs. But a product leader’s duties don’t begin and end with developing the strategy. Successful product leaders know even the most foolproof product strategies can fall flat in the absence of one key element: alignment.

As organizations grow and expand, keeping stakeholders and employees on the same page with product strategy becomes an even more demanding responsibility. During growth periods, a lot changes; culture shifts, often new offices pop up in different locations, and new people are hired.

As new hires join the organization, they may not always have the same vision for the product. And it’s up to you and your team to fix this and unite everyone around the product strategy.

**“The only constant you see throughout the growth of a company is the need to align strategy and vision throughout all of the groups, as product managers, we need to make it part of our core goal. We need to be the glue that holds this together.”**

— Daniel Elizalde | Product Management Coach

Whether your organization is growing or not, driving true alignment around product strategy requires much more than hosting a quarterly company-wide product roadmap

presentation. It means embedding a mindset of transparency, communication, and partnership into every step of the product development process. Then bake it into both product and organizational culture.

In this chapter we'll explore what your strategies for driving alignment might look like.

## Communication is just the Beginning of the Journey

**"There's an art and a science to product management. The communication aspect is 150% art."**

— Shivan Bindal | VP of Product Management at RentTrack

Positioned at the intersection of business objectives, customer problems, and the strategy serving both, product managers hold the keys to the castle in terms of both the volume and value of information they possess. As such, one of their key duties is transmitting the right information to the right people in the right way and at the right time.

**"Someone has to be the hub for cross-organizational communication, and I think product management is well-placed to do that because we understand the business, we understand the customer, we understand the constraints and capabilities of engineering. And if we're doing our jobs, we should also understand what all this means to the other functions."**

— Scott Williamson | VP of Product Management at GitLab

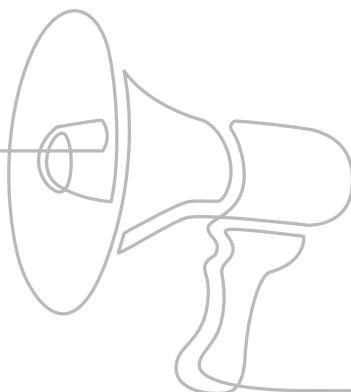
Product leaders need to not only convey the product strategy to the masses, but also drive enthusiasm around that strategy and align the entire organization around the big picture vision for the product. They need to be the glue that connects and unites the organization around a common goal.

**"What is most important, is that people understand that strategy and how the work that they are doing actually drives that. Because then they're going to have autonomy. They have this understanding of 'what I'm doing day to day is going to help the company succeed.'"**

— Justin Bauer | VP of Product Management at Amplitude<sup>10</sup>

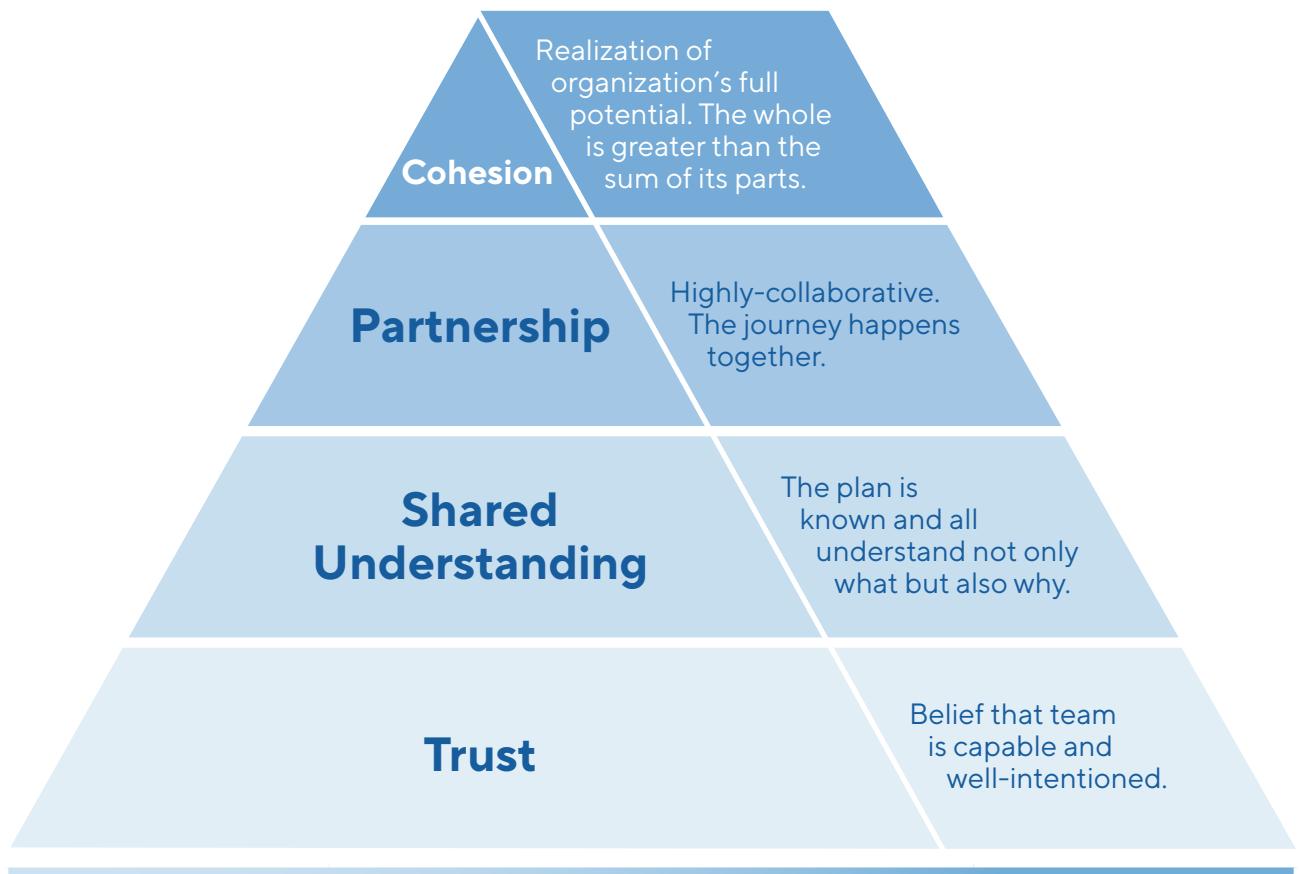
That's why true alignment goes far deeper than strategy. Successful product leaders also work to consistently demonstrate the value of product management to their organizations. They burn down silos by helping their teams build bridges and establish cross-functional partnerships, and they seek to make cohesion a way of life.

Communication is just the beginning of that journey. When we talk about driving this deeply-embedded system of organizational alignment, we're talking about so much more than broadcasting the strategy. So, you can put that megaphone away (for now at least).



<sup>10</sup><https://medium.com/speroventures/product-decoded-interview-with-justin-bauer-vp-of-product-at-amplitude-db5c9857f3b5>

## Tiers of organizational alignment



← Highly transactional		Highly collaborative →	
Trust	Shared Understanding	Partnership	Cohesion
<ul style="list-style-type: none"> <li>• Achievement</li> <li>• Transparency</li> <li>• Rapport</li> </ul>	<ul style="list-style-type: none"> <li>• Repetition</li> <li>• Context</li> <li>• Access</li> </ul>	<ul style="list-style-type: none"> <li>• Empathy</li> <li>• Listening</li> <li>• Transparency</li> </ul>	<ul style="list-style-type: none"> <li>• Consistency</li> <li>• Accountability</li> <li>• Transparency</li> </ul>
Organization sees the value of product management, believes product team is capable of making decisions with good intentions, and trusts the product team to act in good faith to help the whole organization be successful.	Organization knows what the plan is. Individuals have up-to-date information on the plan at the level of detail they need, and they understand both the why behind the plan and how the plan aligns with the work they do.	Product management actively collaborates with other parts of the organization to achieve common goals. Organization views product management as a trusted partner.	Trust, shared understanding, and partnership are a fact of life for the organization on a consistent basis.

## Build a Foundation of Trust

Like most relationships, product's relationship with the rest of the organization is built on a foundation of trust. The product team needs others within the organization to trust their ability to make solid decisions and lead product in the right direction.

A good starting point is to give the organization visibility into your team's wins, as well as the things they've learned. Many product leaders find that giving individuals on their team some time to present things they've shipped and lessons learned during company All Hands meetings or demo days is one way to promote awareness of the things the product organization has achieved.

However, achievement alone won't build and sustain a solid foundation of trust, and that's where transparency comes in. The individuals within your organization need to know more than what the plan is. They need to know why too. Be transparent about your team's decision making process. If you use a prioritization framework, share it with the organization so they can see the rational logic going into every decision. Describe the metrics and objectives that influence your team's plans. The stories you tell will be carried on across the company on a one-to-one informal basis. This knowledge is power, and empowering your organization with the why is undoubtedly one of the most meaningful ways you can build trust.

Finally, your coworkers aren't all robots—at least not yet—and most humans seek meaningful connections with others. Keeping conversations with your team at a purely transactional level doesn't imbue your colleagues with the warm-and-fuzzies that can pay off down the line.

Don't forget to spend time connecting with other teams on a personal level. Some organizations choose to go on outings and schedule team-building activities to promote rapport. While "mandatory fun" may not be how you want to spend your day, getting to know people outside of the conference room and cubicle setting can strengthen relationships and make people more likely to trust you and your team.

Building up that foundation of trust is not something that happens overnight. Trust takes a whole lot of time to build, and the inverse to destroy. Remember that trust can disintegrate in an instant if those principles are neglected. As soon as product team members start going freelance and ignoring the tactics that created trust to begin with, it can all come crumbling down. And rebuilding trust is way harder than creating it in the first place.

## Promote Shared Understanding

At face value, ‘promote shared understanding’ may sound like a fancy way of saying ‘communicate with the organization.’ — but communication alone does not create shared understanding. You’ve established a sense of shared understanding when the whole organization understands not only what the plan is and why, but how the strategy ties back to the work they’re doing.

So how do you make that happen? The short answer: over-communicate, be consistent in the things you share, and tailor your messages to your audience. Let’s explore a few different perspectives and suggestions for promoting shared understanding across your organization.

### Communicate more than you think you need to

You and your team have a (likely growing) group of constituents to inform and align with. As that group grows, plan to spend more time communicating with other parts of the organization, and don’t get frustrated when you (inevitably) have to repeat yourself.

**“Never assume that just because you already told someone, they’re going to remember what the story is, or the why behind it.”**

— Lea Hickman | Partner at Silicon Valley Product Group<sup>11</sup>

<sup>11</sup><https://www.productplan.com/product-lessons-learned-lea-hickman-invision/>

Lea Hickman is currently a Partner at Silicon Valley Product Group, but before that she led product management at companies like Adobe and Invision. During her tenure as VP of Product Management at Adobe, she led the charge in transitioning Adobe Creative Suite into a subscription-based model, a strategic shift that involved hundreds of people. Her takeaway from that experience? Over-communicate.

“Consistent and repetitive communication was absolutely critical, both verbally and written. I can’t emphasize that enough. A product manager has to be obsessive about getting their story out and repeating it.” she explains, “Over-communicate, make it extremely consistent, and do it again and again and again. Also, be sure to pre-vet key messages with your stakeholders—which is essential for making any major strategic shift. If you have an idea of how you want to shift something, meet with your stakeholders ahead of time and get their feedback prior to actually doing that broader communication.”

## Establish cascading information flows

**“Organizational structures exist in part to facilitate the flow of information.”**

— **Ronnie Regev** | Director of Product, Construction Management at Procore

As your organization grows, it tends to get more challenging to get the right groups of people together to share your strategy, and then have meaningful conversations about why decisions were made and how the strategy impacts other groups within the organization. Yet, the information needs to be spread somehow. Product Consultant and Coach, Joni Hoadley, recalls experiencing this challenge during her tenure at Sonos.

“Before the company got really big, it was very easy to get all the right people in a room and do a presentation. That was by far the best way for us to communicate. But as the company got bigger, it became very difficult to have all the people in the room.” She says,

“So then we had to start making decisions about who needed to be in the room. Then, those people needed to share with their teams too. The trickle of information became a challenge as the company grew. I can imagine at even larger companies, that becomes a huge challenge because I think a lot of people feel really removed from the flow of information at a certain point. Leveraging centralized tools for information sharing is absolutely critical.”

Ronnie Regev, Director of Product, Construction Management at Procore, believes that establishing cascading communication flows is one of the most effective ways to scalably create shared understanding. However, he warns that this technique only works if you have two key things in place.

**“You need consistent key people in roles who are responsible for empowering teams,” he says, “and information you communicate must be both consistent and consumable by different stakeholders to enable people to cascade the information effectively to their groups.”**

— **Ronnie Regev** | Director of Product, Construction Management at Procore

Another key part of making this work is trust. If you can’t trust these key stakeholders to communicate your information outwards, you’re going to struggle with this technique.

## Know your audience

**“The best communication I’ve seen around the roadmap and product deliverables have always been tailored to the audience.”**

— **Shivan Bindal** | VP of Product Management at RentTrack

Each group of stakeholders in an organization has its own set of unique interests and priorities. So why would you share the same information with every team in your organization? If you want to truly create shared understanding, you first need to learn how to speak the same language as your constituents. If you communicate a laundry list of technical specs for upcoming releases to your sales team, chances are you'll drive more confusion than understanding. And if you share only the high-level details of your strategy with the engineering team the lack of context may be frustrating.

Rather than approach your communications with a one-size-fits-all mentality, learn about your various audiences and tailor your messages accordingly. There are two key considerations to make when tailoring your messages.

- **What level of detail does the audience need?**
- **How does the product strategy relate to their needs and the work they do?**

**"You may want to make multiple variations of the roadmap, each one with a different level of detail. For example, C-level executives might want high-level details, but when you're talking to people within the company that are more tactical, perhaps you focus on the release level details. Start at the very highest altitude and make sure there's alignment with your C-level execs. Then you go down a level. Depending on the company, you might have three or four different levels in terms of the details that you're providing."**

— Joni Hoadley | Product Consultant and Coach

If you want to help your team better understand how to communicate the ideal level of detail and type of context to the various groups within your organization, consider doing some stakeholder analysis to create a matrix like the one below.

Group	Level of Detail	Context
<b>Executives and investors</b> Frequency of updates: quarterly	<b>Timeframe:</b> 1 year High-level	What is product doing, why are they doing it, and what is the impact of the plan on current organizational goals and business objectives?
<b>Sales and marketing</b> Frequency of updates: monthly	<b>Timeframe:</b> ~2 quarters Mid-level	What's coming up and why does it matter to the customer and market? What is delivering value and what are the value propositions?
<b>Customer success</b> Frequency of updates: weekly or monthly	<b>Timeframe:</b> ~2 quarter view and 3-4 sprint view Mid-level details of longer-term initiatives as well as detailed information on upcoming releases.	What customer problems are being solved? How will upcoming releases impact customers?
<b>Engineering</b> Frequency of updates: daily or weekly	<b>Timeframe:</b> ~3-4 sprints High-level strategy and tactical details	What's happening right now and what's coming up next? What is the business and customer impact of things being built?

*All groups within your organization should have a general sense of the high-level strategy, which you can share company-wide on a quarterly basis. This matrix focuses on the additional, supplementary communications you can have with individual teams to promote shared understanding.*

Finally, in addition to knowing what information and level of detail matters to the various groups, it's helpful to understand your team at an individual level. For example, if you know your CTO well enough, you may want to meet with them individually to talk specifics before your high-level roadmap presentation to the rest of the C-suite gets derailed.

**"Another piece of being a really good product manager is knowing who your internal audience is and tailoring your message to them. Not only at an altitude level, but also individually."**

— Joni Hoadley | Product Consultant and Coach

For Emma Medjuck, Director of Product Management at AppFolio, sharing the right information with the right groups is an important part of promoting shared understanding across the organization. Each department within the organization gets a tailored tour of the product roadmap and walkthrough of work in progress once a month—and these presentations are not always led by product leadership. She recommends, “Monthly conversations with each department are something I’ve been able to delegate to my team really easily because of our team organization. I have the product managers who are closest to each group of people present the roadmap to them. For instance, the product manager who focuses on retention is working closest with the services leaders, so they present to them. Or, the product manager who is focused on customer growth presents to the sales team.”

Medjuck says she still attends these meetings to hear the questions, but that it’s up to the individual product managers on her team to think about how to best present to their respective groups.

## Continue the conversation

Change is inevitable, and in today's agile world it tends to happen faster than ever before. Plans change, priorities shift, hypotheses are disproven, new competitors appear, and markets evolve. Rather than letting shared understanding go stale as plans change (which they inevitably will), successful product organizations seek ways to provide access to plans and context that's updated in real time.

**"Product organizations sometimes struggle because they think that the roadmap is something that is built once, communicated once, and that's it. But that's not really true. The roadmap is a living, breathing thing, and it changes. So you need to consider how to best continuously provide updates on the roadmap. Doing that is equally important as initially giving a sense of where the roadmap is going."**

— Shivan Bindal | VP of Product Management at RentTrack

Just like building trust (and keeping it!) is an ongoing effort, so is promoting shared understanding.



## Establish Partnerships

When the team is small, evangelizing the product vision and strategy is easy because you're often able to get the whole company in the same room. Similarly, partnerships between product development and the rest of the organization don't need any 'forging' as they tend to happen organically. When everyone is either co-located or closely-knit, collaboration is often at its peak.

But as organizations scale, silos often follow.

What's worse is if your alignment strategy doesn't evolve as the organization grows, your team's reputation and relationships can suffer.

**"My experience in enterprises is that as the organization grows, product often becomes a feared organization. Often in larger organizations, product management is seen as 'the horse trading' organization and there is this sense of 'product managers are the gatekeepers and they are standing between us and the things we want to do.'"**

— **Rian Van Der Merwe** | Head of Product at Wildbit

So, if you don't want to become known as the horse trading department, it's important to evolve your approach to ensure that the product team is seen as a trusted partner.

"In mature product organizations, the change I see is in the partnership nature of it. We're finally getting away from this idea that product managers are "mini CEOs." To me the partnership and standing between the gap is what product management is about—it's getting to the best outcomes. To get to the best outcome, it's not about winning. It's not about who to say yes or who to say no to. It's about knowing how to get input from the right places and channeling that to the best outcomes in a way that everybody understands. That's how I see the role growing in (maturity-growing organizations)," explains van der Merwe.

## What do healthy cross-functional partnerships look like?

It doesn't matter how many streamlined processes or best practices your product team puts in place. It doesn't matter how hard you and your product colleagues work or how dedicated you are. Your product can't reach its potential if you fail to tap into the collective knowledge and experience of the other teams in your organization.

Healthy cross-functional partnerships help product teams reap the full benefits of working closely with all of the other teams across the company. With trust and shared understanding already in place, establishing healthy, balanced, cross-functional partnerships should be fairly straightforward if you keep your team aligned on what type of partners they should be: outcome optimizers.

NO:	YES:	NO:
<b>Horse Traders</b> <ul style="list-style-type: none"><li>• Political</li><li>• About who to say yes to vs who to say no to</li><li>• Always needs to "win"</li></ul>	<b>Outcome Optimizers</b> <ul style="list-style-type: none"><li>• Trusted partners for others in the org.</li><li>• They use their partnerships to get the right input from the right places in order to determine and find the best outcomes</li></ul>	<b>Order Takers</b> <ul style="list-style-type: none"><li>• People pleasers who say yes to every idea that crosses their desk</li></ul>

When the product team leverages their partnerships to optimize outcomes, everyone wins.

The product team gets valuable insight and observations from throughout the organization. Effective product managers are looped in on customer needs and are included on customer visits and calls scheduled by other teams. Other groups within the organization feel empowered to share what they're seeing and hearing with the product team because they've learned what types of feedback matter to the product team. They know they'll be heard and their input will be considered. As a result of this collaboration, customer needs and business objectives are better served by what is built.

## How to operationalize cross-functional partnerships

Some organizations maintain cross-functional partnerships between product management and other parts of the organization through the ways they structure their teams. For instance, employing the concept of cross-functional beyond the product development organization and including marketers, sales professionals, and customer advocates on squads.

But cross-functional teams aren't a silver bullet solution to organizational silos, and many organizations are simply not set up to operate this way. Let's explore a few simple ways you can operationalize cross-functional partnerships.

- 1. Use the buddy system:** Pair up individual product managers with other functional teams. For example, one product manager on your team can own the relationship between product development and customer success, while another product manager is the point person for the sales team.
- 2. Leverage organizational structures:** Have the whole product team meet regularly with the heads of each department to have discussions about what they've seen and heard recently.
- 3. Consider communication tools:** If your team uses Slack, consider creating a dedicated channel for sharing feedback. Or, give your team access to an "ideas" backlog where they can contribute their ideas as they come up.

These are a few ideas for inspiration. What works for one team won't work for every team. What's more important than the means by which you create partnerships is the principles that govern them. Remember that trust is the foundation of this all, and it remains of critical importance on the partnership level as well. These principles may help you preserve that hard-earned trust:

## Manage expectations

From the very beginning, you need to align with other groups within your organization about current priorities and objectives and make it clear that you simply cannot build everything. As a leader, you need to make sure that your product team is completely aligned around communicating how decisions are made—and if you have a shared prioritization framework.

In addition to communicating about prioritization methods, product managers can make their lives infinitely easier by sharing key focus areas with other departments. The roadmap is a great starting point for these conversations, but it never hurts to reiterate priorities. If other teams know what the product development organization is working on, they can look out for and share more relevant insight.

## Close the loop

Repeat after me: **partnerships are not transactional relationships.**

Get your team in the habit of closing the loop with other teams and discourage them from taking feedback and running. If a group requests something and the product team determines it's not a priority right now, say so. It's never fun to be the bearer of bad news, but leaving people in the dark about what happened with their ideas is even worse.



# Reach for Cohesion

Our final layer, the ‘self-actualization’ level of our own hierarchy of alignment needs is cohesion. Product organizations that reach this level of alignment are able to fully realize their full potential and truly work together effectively.

They have this luxury because they’ve burnt down silos and built bridges in their place. They’ve forged connections, developed cross-functional partnerships, and united the organization to work toward a common goal. They’ve figured out how to make organizational alignment (and the trust, shared understanding, and partnership that fosters it) a part of their everyday culture.

Much like there is no magic formula for attaining self-actualization in Maslow’s hierarchy of needs, there is no single path to cohesion. However, there are a few things product leaders can promote to help you along the way, especially consistency and accountability.

## Consistency

Cohesion requires consistency. Consistency in the ways decisions are made. Consistency in the methods used to communicate those decisions. Consistency in the quality of information shared. And, consistency in meeting expectations you have trained the organization to have of your own department. All of these things are necessary in promoting cohesion.

## Accountability

As a leader you need to hold both yourself and your team accountable for maintaining both consistency and transparency. This doesn’t always mean operationalizing these things or implementing heavy-weight processes, but it does mean setting standards and sticking to them.

5

## Scale Customer Centricity



# 5

## Scale Customer Centricity

Make customer-centricity part of your team's DNA.

Product development teams need to talk to customers regularly if they want to build products that people will actually buy. While most organizations are aware of this simple truth, some unwittingly sabotage customer-centricity as they grow by either placing too many layers of process and boxes to check between wanting to talk to a customer and being granted permission to do so, or by simply forgetting to continue instilling the importance of customer perspective in product decisions.

**"Isolation is death for product management."**

– **Rian Van Der Merwe** | Head of Product at WildBit

As a product leader, enabling your team to have conversations with customers is of critical importance, and sometimes that means you must work to not only strip away layers of red tape between your team and the customer conversations they need to have, but also on promoting a culture that keeps customers front and center.

In this chapter we'll explore ways you can help your team develop deep customer insight and continue to see eye-to-eye with customers as your organization (and customer base) grows.

## Help Your Team See Eye-to-Eye With Customers

**"It's impossible for you to build a product without the product people being in front of your customers. If you don't have support for that, it's a very uphill battle."**

— **Shivan Bindal** | VP of Product Management at RentTrack

The product team at AppFolio and the broader product development organization at the company consistently put customers first. It's not just part of the company culture, it's a part of their process. Emma Medjuck, Director of Product Management at AppFolio recommends, "Customer-centricity should be a foundational part of the process—it's on the forefront for teams. They need to see that it's part of the process. They should know that as you're building a new feature, you spend time talking to the customers that you're building it for. That the first thing we do is go to them and hear about the problem they're experiencing from them. It needs to be embedded so we make sure we don't just build based on what we've heard, but we make sure we have a true understanding. It's up to leadership to make sure teams are empowered to do that. We can't make talking to customers be this big process, or say 'only the product manager can do it.' The UX designers get on calls. Engineers do calls. And it's because we make sure that everyone is empowered to do that."

Several of the product leaders we spoke to when writing this book suggested taking measures to bake customer conversations right into your team's daily routines. What follows are a few of their suggestions.

## **Have product managers work support cases**

Let's start with the simple tips first. Have your product team, or better yet, anyone involved with product development at all, respond to support tickets. It's one of the most simple and straightforward ways you help your team empathize more with customers. Some organizations choose to have each member of the product team spend a week out of each year focusing solely on handling support cases, while others find it best to have their product managers each tackle a few support tickets or email each day.

## **Create rituals and routines**

Many product teams find it beneficial to make customer interactions part of their routines. Whether you elect to do that through setting up weekly user-testing sessions, scheduling lunch-and-learns for the whole organization to join in and learn about their target audience, or by another means completely, these rituals and routines can help promote customer-centricity both within the product development organization and outside it.

Emma Medjuck, Director of Product Management at AppFolio, says regularly-scheduled customer panels are a great source of customer insight for her organization. Her team conducts two types of customer panels.

Product development and engineering-specific panels during which folks can ask real customers questions about their business and their software.

UX-hosted lunch-and-learn style events called 'Humans of Property Management,' where customers join and talk about various challenges they face.

According to Medjuck, these panels help the team at AppFolio get a broader understanding of their customers, "We do this to ensure that we not only talk to customers about how they use the product, but also about what their life is like in general. We want to get a sense of what their challenges are even outside of the things they use our software to solve."

## Establish a customer advisory board

In some situations, it may make sense to establish a customer advisory board as a means of getting your team close to real customers on a regular basis.

For Nis Frome, Co-Founder and Head of Experimentation at Alpha, creating a customer advisory panel was a key part of empowering and enabling the team to talk to customers. In fact, creating this panel was one of the first things the experimentation team did when it was first formed.

The 11-person panel is composed of some of Alpha's most forward-thinking and active users, and gets together once a month for a webcast.

The team at Alpha can reach out to individual members as needed, “their phone numbers are accessible to the team and they expect text messages from us when we need input on something.”

One thing that is unique to the customer advisory panel for Frome’s team is that it is skewed by design. “It’s skewed toward the customers we want in the future—our future customer base, because we took a rather opinionated stand and said ‘we want to be wanted by companies that are customer-centric and experiment-driven.’ In our eyes, the future will be won by those and the companies that aren’t won’t exist in the future.” says Frome.

Skewing membership of a customer advisory board is something Frome says won’t work for every team, but was ideal for his.

**QUICK TIP:** One thing that helped Frome’s team when forming their board was talking to other companies that had boards already and learning from their experiences, “We asked them what they thought they were doing right, what they would have done differently and all that, so we could start from step three on a lot of this stuff.” recalls Frome.

## Promote Accountability

Product professionals usually are well-aware of the importance of having customer insight to inform product development decisions. But at the end of the day, they're busy people.

**"Product managers will typically succumb to the easiest type of work that's impactful. And oftentimes that's working with engineering to build product. What they sometimes lack is perspective on what's important and what's not, so they will go and find that perspective in the easiest ways possible, which is often going to others within the organization—your sales leaders, your sales folks, your marketing folks, your engineers—the quintessential personas that you're building product for within your four walls. And that's a trap. That is a strong trap."**

— Shivan Bindal | VP of Product Management at RentTrack

Even if they're busy, it is critical that product managers get out of this silo.

For this reason, many product leaders elect to find ways to hold product teams accountable for regularly speaking to customers. Some enforce accountability by building in minimum customer conversation requirements into the early stages of their development process, while others choose to keep tabs on how much time each week their teams are spending with customers.

## Build customer conversations into your process

**"If you staff correctly and you embed customer interviews into the system, they will get done."**

— Scott Williamson | VP of Product Management at GitLab

For product managers and designers at SendGrid, talking to customers (and lots of them) is a mandatory step in their product development process. According to Scott Williamson, former VP of Product Management at SendGrid, the team conducts approximately 200 customer interviews each quarter, something that he is extremely proud of.

The product leadership team spent a lot of time articulating the steps his team needs to go through before they ship something, ultimately coming up with a process called The SendGrid Way.

"We've articulated the flow product managers must go through to get something built and broken it down into three high-level phases: learn, build, and launch." Williamson says.

Before anything is built, product managers and designers must conduct a series of customer interviews. First, they interview 10 customers to understand the problem they're hoping to solve. If they're able to validate the problem in those 10 interviews, they conduct at least another 10 interviews to shop solutions for that problem.

"Product managers talk to probably 20 customers before getting projects into development. As a result, we're at a point where our designers and our product managers have talked to hundreds of customers and have generated really powerful customer intuition. Customer interviewing is time consuming, so product managers will often not take the step because they're busy. You've got to build it into the expectations of the system to ensure it gets done." Williamson says.

Of course, your team's ability to conduct this quantity of customer interviews will depend on how you staff your team. Williamson warns that you need to be realistic about your expectations, "You have to hire enough product managers to be able to do this. You can't expect a product manager that's supporting 20 engineers to do this." He believes the healthy product manager to developer ratio for customer-facing areas of the product is one to six.

## Measure customer interactions

Being customer driven is a core principle for the team at Drift, and has been since day one.

Drift VP of Product Management, Craig Daniel, recalls the team talking to about 10 to 20 customers a week during his first year and a half at Drift, "It was very customer-led, that's how we iterated. Most of the new bets were from either big customer insights or from David (CEO of Drift) saying 'we've got to make some bets in this area.'"

As the team learned more about the market, competition, and ideal customers, they were able to hone in on what matters to them and think more strategically. Daniel explains, "We've evolved from very customer-driven and testing a lot of stuff, to very focused and metrics-driven."

But being metrics-driven has actually helped the team be more customer-centric as it's grown. Daniel says the team tracks and measures their customer conversations with a weekly Slack poll.

The poll is sent out on Fridays to product managers and product designers and asks "How many hours did you spend with customers this week?" The team then responds to the poll with an emoji reaction, (1-2-3-4 emojis) and the results are tabulated in a Google Sheet.

"Essentially we can track every single week how much time people are spending with customers. That gives me a signal. If I am in a 1:1, I can say 'hey it's been a few weeks and

you haven't talked to any customers, what's going on?" says Daniel, "We want to make sure it's a few hours a week that we're spending with customers."

**"If you're not talking to customers, there's no way that you can do the 'why' part. Data is not going to give you the answer. Data will give you a signal of the questions to ask customers, but it's not going to give you the answers."**

— Craig Daniel | VP of Product Management at Drift

## Promote accountability through principles

If the above two measures for promoting accountability feel a bit too heavy-handed for your team's culture and current state and your team is still relatively small, it may make more sense to simply promote customer-centric thinking and push for more customer conversations by promoting this as a key product principle.

**"I have a rule with my team, and really for most of our organization, that I never want anyone to discover anything from a dashboard. If you discover something from a dashboard, it means you are not talking to customers enough and you don't have enough qualitative insight. The dashboard should verify what you've already learned qualitatively."**

— Nis Frome | Co-Founder and Head of Experimentation at Alpha

# Nothing Interesting Happens in the Office (NIHITO)

In addition to ensuring your product team has ample time and access to customers and holding them accountable for connecting with customers, it's important to make sure you get your team out of the office as well. While calls are helpful, nothing beats physically visiting a customer in their office (if you're managing a B2B product) or otherwise natural environment. So, get your team out of the office when you can.

**"Onsite visits are non-negotiable, you need to see customers using the product in the context they would."**

— **Mark Barbir** | Senior VP of Engineering at ProductPlan

One technique for getting the team out of the office and talking to customers is pretty simple: get your product team to industry events.

"Getting your team out to events exposes them to a number of important conversations and enables them to connect with your target personas. There, they can take these discussions to a level of depth that nobody else really can." suggests Shivan Bindal, VP of Product Management at RentTrack. He advises product leaders to coach the team on how to have these deep conversations with target users to get the most out of these interactions. "Help your team fall out of the trap of simply just talking about high-level marketing speak, and go into the brass tacks of, 'well, how do we do this?' and 'can you talk to me a little bit about what you do here?' And 'this is how our product works, how would this potentially work in your organization?' And, 'hey, do you mind if I show you some designs for a new feature we're working on?' Having the product team going to that level of depth is invaluable in being able to conduct discovery and validation. Doing this in an environment where there's lots of your target users and personas is also very good." Bindal recommends.

Emma Medjuck, Director of Product Management at AppFolio, says her team often leverages conferences and industry events to do double duty on the customer conversation front.

**"Any time we're planning a trip, we try to tag on customer visits so we're not always visiting people local to us. If we're going to a conference, say in Atlanta, we'll find some customers nearby and maybe even do 2-3 visits on that trip."**

— Emma Medjuck | Director of Product Management at AppFolio

## Put customers first

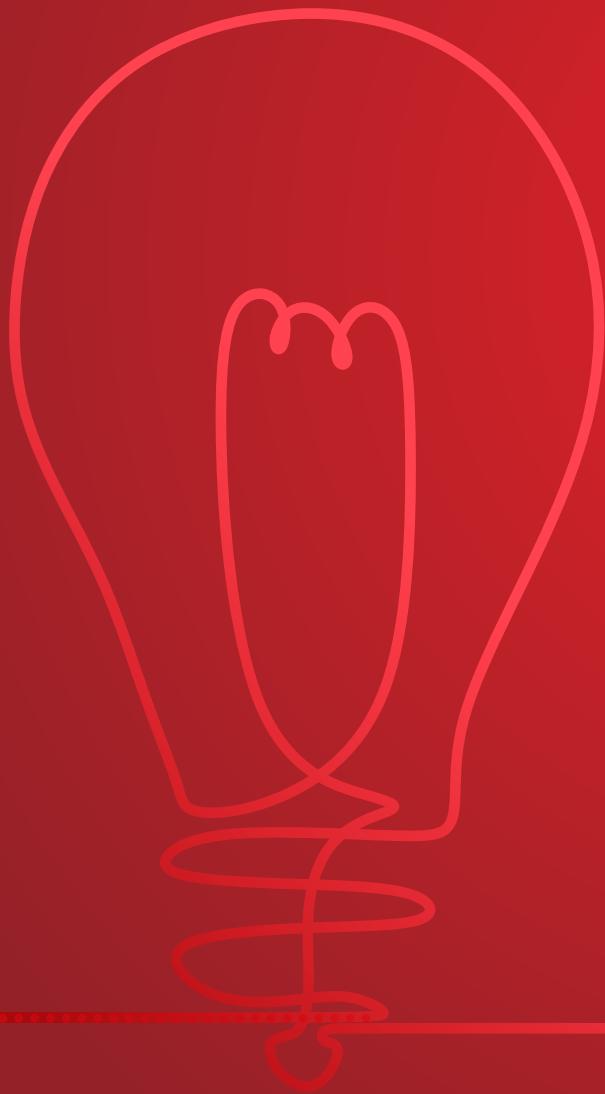
When customers are at the core of a product team's process, everyone succeeds. We've shared a few pieces of advice for fostering a customer-centric culture, and maintaining that culture at scale. Of course, our suggestions are by no means an exhaustive list, and the tactics that work best for your team may vary. What's important is that you first understand the importance of getting organizational support for customer conversations and then actively work to make those conversations a key part of your team's process.

In the next chapter we'll explore another mindset and thinking pattern that can help your product team achieve greatness. This one is a bit more abstract than 'go talk to customers.'



6

## Rethink Innovation



# 6

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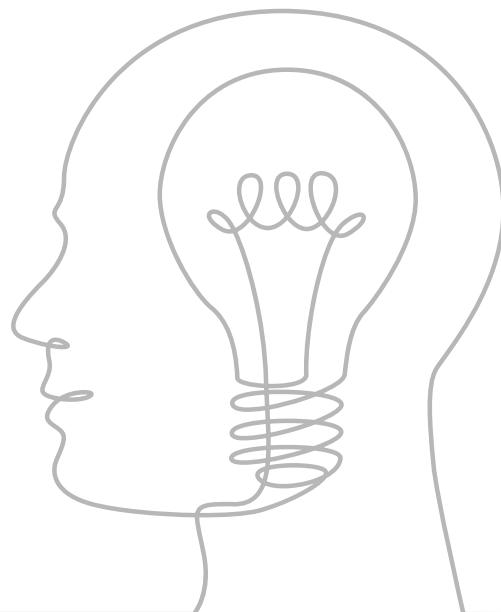
Make experimentation and learning a fact of life.

While researching and writing this book, we spoke to countless product leaders and uncovered several themes in regards to the challenges they experience. One of those themes remained consistent across product leaders in various industries and sizes of organizations: **making time to learn and innovate is tough.**

Furthermore, in our digital age, learning, experimenting, and innovating is mandatory for an organization's survival.

**"The world is moving fast, your competitors are moving fast, customer expectations are changing in real time, and you as an organization need to be able to move faster than that."**

— **Nis Frome** | Co-Founder and Head of Experimentation at Alpha

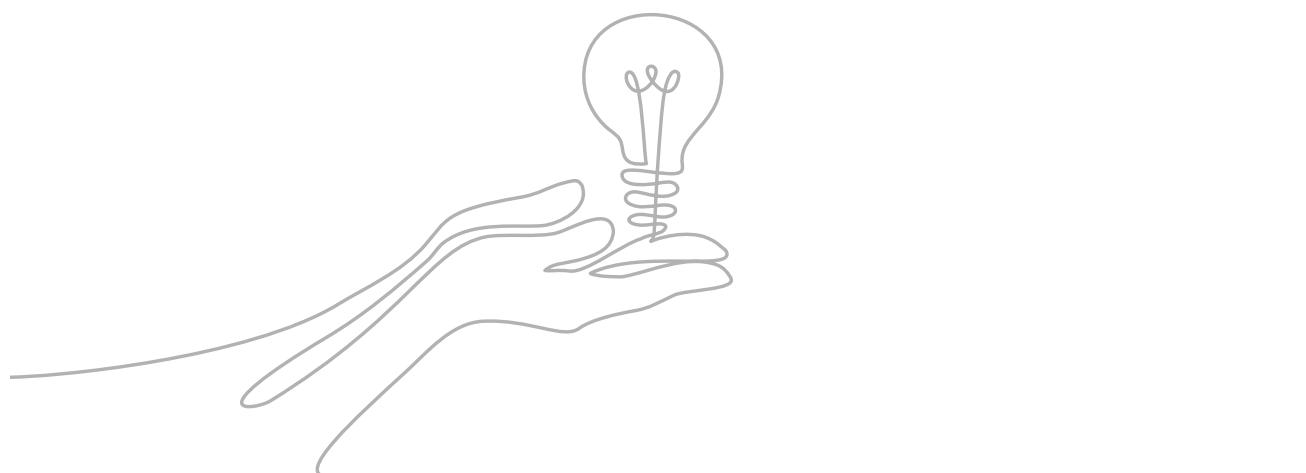


Another big implication of the faster pace of change brought to us by the digital age is how rapidly customer insights expire. In other words, your insights have a shelf-life that's generally shorter today than it was yesterday.

**"Today, in the digital age, you can iterate multiple times a day. Your competitor's product could change overnight, and customer preferences and expectations are changing at the same speed. They expect the products to get better in real time. You need to be testing everyday because something that was true yesterday may not be true tomorrow. And it has nothing to do with your brand, it may not even have anything to do with your industry. It could be an iOS update that could change everyone's perception of retirement, insurance, whatever overnight, right? And so you need to be continuously learning. These changes just happen in real time and they're totally unexpected."**

— **Nis Frome** | Co-Founder and Head of Experimentation at Alpha

While the need to learn, experiment, and innovate continuously is clearer today than ever before, operationalizing those critical activities can prove challenging. In this chapter we'll explore a few of those challenges, and share ways you can navigate around them.



## Defeat Your Doubts

One obstacle along the road to a culture of experimentation we were surprised to see was doubt. More specifically, we learned that many product leaders have to campaign to get a thumbs up to test and experiment from executive stakeholders.

How can you make room for the learning and experimentation that leads to innovation if you're getting pushback from executive leadership?

Rich Mironov, author and longtime product management executive, has been working with product organizations for more than 30 years, and has some tricks up his sleeve for defeating doubts about experimentation.

One mentality that commonly hinders the product team's ability to get buy-in on allocating resources to experimentation and learning is the fallacy of perfection. If stakeholders believe that every feature shipped to date has been perfect, they may not see how necessary testing and iterative development are.

Mironov has a solution to this: show executives that not all bets have panned out positively.

"I like to have a list of the features we've built that were beautifully built, designed, and delivered on time, but that nobody wanted and nobody used." recounts Mironov, "When every executive in the company tells me everything we build is a hit, I have five or six handy counter-examples written down, I can bring up that list and say 'That's not the full story. How about feature X and product Y and platform Z that we shipped on time but didn't engage users or make us money?' I'm trying to embarrass them a little bit—in a closed room, where nobody else can hear—to get them to admit that not everything we build is successful." says Mironov, "And it shouldn't be if we're really experimenting."

A good starting point for getting the thumbs-up on experimentation is getting the team to understand that 'build it and they will come' often fails.

You'll want to put on your storytelling hat for the next step: share your team's experimentation wins.

According to Mironov, it's wise to start with experiments that are as lightweight as possible — what can you learn with half-day or half-week experiments? Once those are done, you can share both ideas that worked, and ideas that didn't work with the executive team.

"I can say, 'Look, we did this really light, quick, dirty experiment, it took two-and-a-half days, cost less than \$1,000, and we learned that if we show delivery dates before we show prices, people buy more,'" says Mironov, "And then I also get to say, 'Here was a really good idea that came from Larry across the table, who is SVP of something important. We ran the experiment, and we may not have gotten it exactly right, but we weren't able to find any leverage in doing that. So let's go offline and talk about it because maybe they have other ideas that we can experiment with.'"

Telling stories about experiments your team conducts is an extremely useful way to evangelize the idea of learning experiments, says Mironov. "Nobody does this naturally. Nobody wants to invest in it because everybody is sure they have the answers."

**"If I can repeat 30 or 40, or even 90 stories where we've either learned something that helped us move the product ahead faster, or helped us avoid spending a lot of money on a bad bet, people start to see the pattern."**

— Rich Mironov | Author and Product Executive

Finally, don't forget to attach the word 'savings' to your stories, suggests Mironov, "You can say 'Instead of spending \$6 million building this, we spent three days and a couple of thousand dollars. We figured out half of the plan is right and half the plan is wrong. In doing that, I think we just saved \$3 million.' Now my CFO wants us to experiment more."

## Make Space for Learning

**"As we become more mature as a product organization, the cost of maintaining the product and optimizing the product sort of takes up all our capacity which makes it hard to truly innovate within a team."**

— Aloka Penmetcha | Director of Product Management at Pivotal Software

For early-stage organizations operating in startup mode, experimentation-driven learning is usually a part of day-to-day operations. Pre-product-market fit organizations simply don't have enough information about their markets, customers, and problems to make decisions in a silo. However, as organizations mature, experimentation can easily be sidelined.

**"When there is a startup culture and you're just doing all the things to hurry up and grow and get capital and clients, that's one thing. Once you've got that, you need to be able to have what I call, 'the next quantum leap of growth.' The way you do that isn't the way you did it the first time. There has to be an embrace of innovation outside maintenance and support mode. Because maintenance and support doesn't ultimately trigger massive growth."**

— Oliver Giles | Product Planning Leader at MINDBODY

According to Giles, outside of maintenance and support, product teams need to have space to work on both obvious high-value projects and “think outside the box entirely projects.”

“Think outside the box projects belong in an incubator that you cordon off. You let that incubator and those projects explode in flames if they fail, and if they become the next

quantum leap, you then begin asking whether you can free up resources to continue the project.” explains Giles, “Regarding this, you need to accept that it might not always work. But you also need to accept that if you don’t try things and experiment, you might never get to the growth you once had. If you do nothing, you need to understand that the growth you will have is more limited over time as you begin to tap out the market.”

So how can you make space for these big bets? How can you make experimentation a fact of life for your growing organization?

## Operationalize experimentation

For Nis Frome, Co-Founder and Head of Experimentation at Alpha, making space for innovation meant establishing a dedicated experimentation team.

**“The organization knows how to grow something that exists, and the organization is really good at growing things that exist. My team figures out if something is worth existing in the first place.”**

— **Nis Frome** | Co-Founder and Head of Experimentation at Alpha

“Innovation won’t happen on its own. If everyone is on an incumbent team with a product in the market or a defined niche that’s going to market, nobody is going to explore these other areas. Nobody has the incentive, the expertise, or the ability to switch context to do that,” explains Frome, “so we set up a separate team.”

Frome is quick to add that his team operates much differently from a typical innovation lab. For one, rather than prioritizing so-called ‘innovation’ Frome’s team puts value on the process of iteration.

**"An innovation lab says that the outcome is innovation, but you can't optimize for innovation, because If you knew what it took to innovate, it wouldn't be innovation. It already would have existed. That's kind of a challenge—you can optimize for learning and you can believe that learning will lead to innovation, but you can't optimize for innovation. So, instead, we optimize for learning and iteration."**

— **Nis Frome** | Co-Founder and Head of Experimentation at Alpha

In addition, the experimentation team does not select which initiatives they work on, nor do they determine the criteria for validating them.

"An existing team within Alpha has to sponsor a problem to be solved or an opportunity they see. They set clear success criteria at what point they would take that on as validated," explains Frome, adding that the experimentation team focuses on validating ideas for initiatives all across the organization, not just product initiatives. Once they've validated an idea or opportunity, Frome's team hands projects back over to their sponsors to scale.

Today, the team at Alpha has a completely different challenge than they did before the inception of the experimentation team, "Initially we thought this team would not be able to get to all the things that we wanted to get to. What we're actually finding is it's getting to too many things. If we validate too many things, the whole organization can't handle it. They can't make a team around something fast enough to actually operationalize what we validate," says Frome, "So it does actually work both ways. You could over-index on innovation."

## Make space on the roadmap

**“Set aside a budget for the product and design teams, and maybe a little from engineering, to actually do experiments. If we don’t budget for it, it never happens, if we don’t assign people, it never gets done, if everybody’s overextended, experimentation and learning is the first thing we give up.”**

— Rich Mironov | Author and Product Executive

While a dedicated experimentation team was exactly what the folks at Alpha needed, that approach will not work for every team. For example, Rich Mironov feels strongly about dedicating a portion of each team’s time to experimentation and avoiding a dedicated innovation team.

“I don’t want to have dedicated teams, because the dedicated teams often aren’t in good touch with what the products really do. They can lose their context because they’re sampling only new ideas, and they get all religious about it. Instead, I want every one of my teams to be spending between 6 and 8 percent on real experiments,” he says.

Alternatively, rather than telling each team to spend a certain percentage of their time experimenting, you can put experiments and so-called innovation on the roadmap on a case-by-case basis as a means of maintaining focus. According to Shivan Bindal, VP of Product Management at RentTrack, it’s important to be selective about which experiments to prioritize.

**"There's two sides of the innovation and experimentation card but really only one matters. There's science for the sake of science, and there's science for the sake of the company. Science for the sake of the company is what matters. Science for the sake of science is literally a research project where you're building a solution and looking for the problem."**

— Shivan Bindal | VP of Product Management at RentTrack

Only after you've determined that the opportunities you want to research are indeed relevant to the product and can potentially move needles should you make space for those explorations on the roadmap. Bindal continues, "If you're doing research and there's direct applicability to the product, create the space in the roadmap. Show how an opportunity from research and experimentation can lead to a product change or implementation of the product. If you do it once, people will take notice. You do it twice, people will notice even more. Creating that opportunity for a step function improvement in your product is the way in which companies continue to innovate. And you have to be supportive of this."



## Accountability

Another challenge product leaders have when trying to establish a culture of experimentation is accountability. As Mironov mentioned earlier in this chapter, innovation and experimentation are often the first things to go when teams get busy, and we all know product teams, by their very nature, are constantly busy. So, how do you keep yourself and your team accountable for actually designing and running experiments on a regular cadence? How do you make sure your team is actively making space in their busy schedules to test and learn?

Aloka Penmetcha, Director of Product Management at Pivotal Software, is considering tackling this challenge by incorporating innovation goals and learning accounting directly into the product roadmap. Therefore, in addition to seeing that they have space to experiment and learn, each product team is held accountable for setting learning goals and experimenting to answer specific questions. Penmetcha explains, “This way, as teams are speaking to what they’re doing and the outcomes they’re driving, they’re also speaking to how they’re innovating and what experiments they’re running.”

Similarly, Mironov holds his teams accountable for their constant learning. He expects his team to learn (and share) something new every week.

**“In my weekly staff meeting, I don’t just ask about what we’re shipping. We go around the room and everybody shares the experiments they’re working on, what they hope to learn, how soon they’ll be done, and people tell me what they learned last week from their experiments. [If you have nothing to share], that’s embarrassing the first couple of times, right? And I encourage my peers running the design and engineering teams to do the very same thing. Because what you inspect is what gets done.”**

— Rich Mironov | Author and Product Executive

## Build a Learning Culture One Step at a Time

Making space for innovation can be a tall order when you and your teams already have full plates. But, committing to learning and experimenting is critical for companies, not just as a means of maintaining a competitive edge, but as a prerequisite for staying in business. The recipe for success in innovation varies for each organization, as will your ability to allocate resources to learning. It's okay if you don't have it all figured out. Every journey has to begin somewhere.

**"There's always a spectrum between doing nothing and, for example, setting up an experimentation team. There's value to being somewhere in the gray area in between. It's not all or nothing. MacGyver your way towards something. Even if you don't get paid or incentivized to validate new sorts of initiatives, that doesn't mean you shouldn't do it."**

— Nis Frome | Co-Founder and Head of Experimentation at Alpha



7

## Conclusion

## Conclusion: Forever a Work in Progress

Cultivate a culture of continuous improvement that extends beyond the product itself.

“It’s about the journey, not the destination,” the old adage says. And for product teams (and their products), those words couldn’t ring more true. Priorities evolve. Environments change. Team members come and go. And with each change, new adventures along the way arise.

Products and the teams that create them are both beautifully imperfect. Part of the beauty of imperfection is found in the opportunity it represents. Product teams spend a substantial amount of time searching for opportunities to optimize their products. Product leaders should help do the same with and for their teams. They should foster a culture of continuous improvement throughout the product development organization.

Each flaw, point of friction, or hiccup in communication represents an opportunity to improve. It’s often more productive to embrace those imperfections as the beautiful opportunities they are than to view them as ugly inadequacies. If you can help your team view challenges the same way, you’re on the right path to creating a culture of continuous improvement.



**"Always be learning. As we scale, there are lots of things we're going to do that are wrong, there are going to be some things we try that work. The things that work need to be taken and improved upon. Scaling companies cannot become complacent by early stage success, every day is a new opportunity to ask two key questions—how can we better serve our customers, and how can we better improve the way we work?"**

— Tom Barbour | Former Head of Product at Monese<sup>12</sup>

A few pointers to help you find the beginning of that path:

- **Change is healthy.** There is always room for improvement, and the ability to recognize that and accept it is important. But you need to accept that change is part of the game and is not a bad thing.
- **There's no 'I' in team.** It's best to identify and solve problems as a group. Empower your team to communicate openly and often about things that can be improved, and give them the space to share, and everyone wins because they improve together.
- **Make improving part of your process.** If you leave retrospectives and conversations about improving to chance, you'll miss out. It's wise to create a cadence/model for continuously identifying challenges and applying changes so you can have predictability and promote accountability across the team.

With the above in mind, you can continuously revisit some of the ideas we've discussed throughout this book, and iterate on how your team works better together.

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<sup>12</sup><https://medium.com/monese/observations-on-scaling-engineering-and-product-teams-2475f3607efb>

# Editor's Note & Acknowledgements

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**Rich Mironov** is a seasoned tech executive and serial entrepreneur, Rich has been the “product guy” at six startups including as CEO and VP Product Management. To date, Rich has consulted to more than 100 tech companies on product organization, product leadership, and scaling for growth. In 2008, he authored, “*The Art of Product Management*,” a highly regarded work in the product management space.



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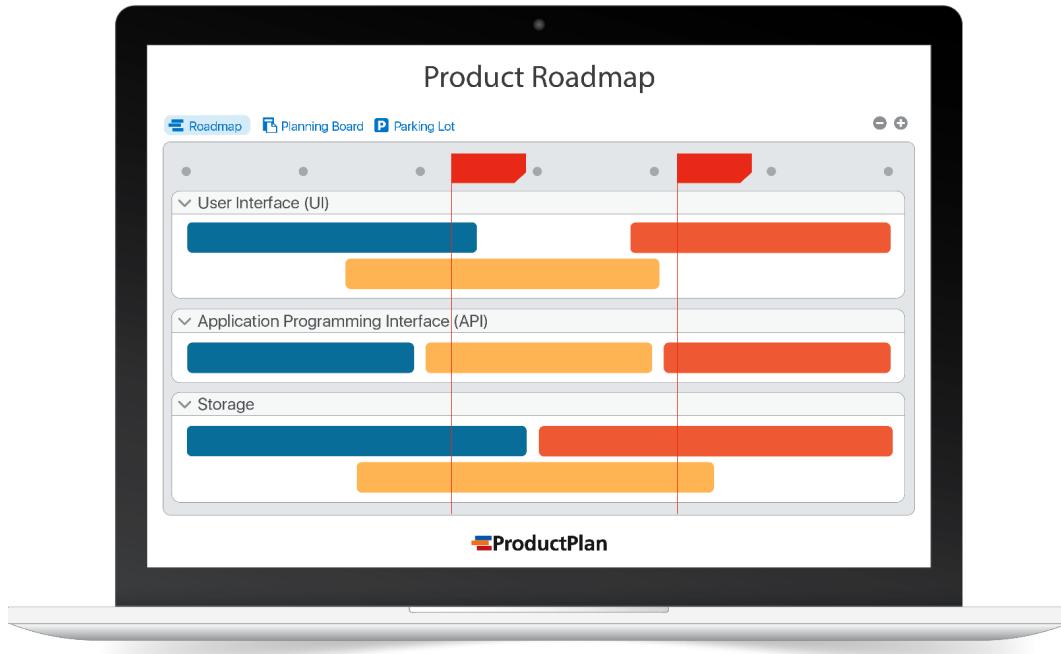
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**Scott Williamson** is VP of Product at GitLab, where he is helping scale the PM team during a time of rapid company growth. Prior to GitLab, Scott was VP of Product for SendGrid over a six year period, where helped lead the company to a successful IPO and \$3B acquisition by Twilio. Scott has been leading large PM teams for the last ten years, including a team of 30+ at SendGrid.

In addition to the folks mentioned above who we consulted when writing this book, we've also quoted pieces of literature written and shared by a few other experts in this book. We would like to properly thank those individuals as well. You can learn more about those individuals in our works cited section on the following pages.

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