Build

TOOLS AND TEMPLATES

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The templates and worksheets are available on the web at PragmaticInstitute.com/alumni.

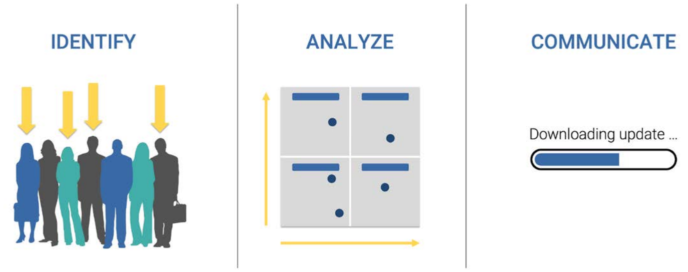
SUPPLEMENTAL DOCUMENTS

21.04.1_OL

Aligning Strategy to Execution

Action Items

- Identify and analyze the stakeholders for your upcoming project.
- Partner with your stakeholders to build a communication plan and choose the right metrics to measure.



Questions to consider

Is your team doing a good job of tying execution back to strategy?

Are you taking the time for each release or at the beginning of a development project to thoughtfully identify stakeholders?

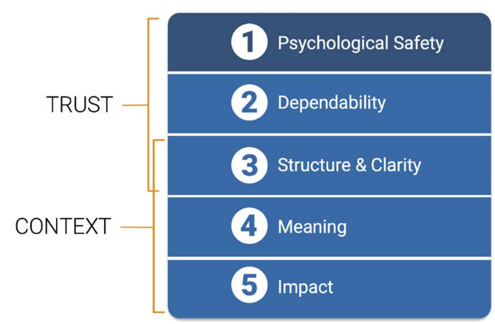
Are you using metrics to communicate with your stakeholders? If so, are you tracking the right metrics?

Add your thoughts here …

Create Effective Teams

Action Items

- Create a working agreement with your team.
- Determine if your team is effective or dependent.



Questions to consider

How will you approach your team about creating a working agreement?

How will you provide trust and context to your team?

Add your thoughts here …

Articulate Problems

Action Items

- Familiarize yourself with your organization's personas (or create one if they don't exist).
- Articulate a few problems from your problem backlog by combining context and persona.

Questions to consider

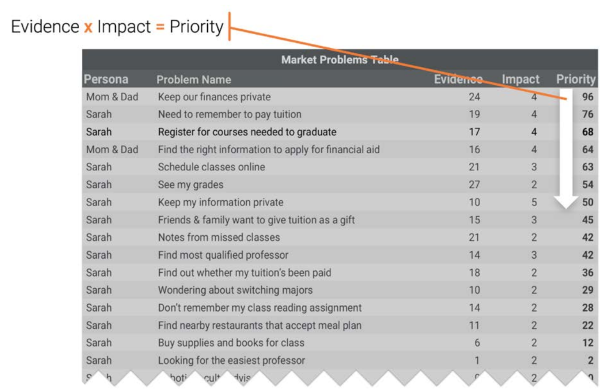
How am I bringing the context of the market to my team today?

Does my team have a connection to the users of my product?

What is driving my product's design today?

Add your thoughts here …

Prioritize Effectively



Evidence x Impact = Priority

Market Problems Table				
Persona	Problem Name	Evidence	Impact	Priority
Mom & Dad	Keep our finances private	24	4	96
Sarah	Need to remember to pay tuition	19	4	76
Sarah	Register for courses needed to graduate	17	4	68
Mom & Dad	Find the right information to apply for financial aid	16	4	64
Sarah	Schedule classes online	21	3	63
Sarah	See my grades	27	2	54
Sarah	Keep my information private	10	5	50
Sarah	Friends & family want to give tuition as a gift	15	3	45
Sarah	Notes from missed classes	21	2	42
Sarah	Find most qualified professor	14	3	42
Sarah	Find out whether my tuition's been paid	18	2	36
Sarah	Wondering about switching majors	10	2	29
Sarah	Don't remember my class reading assignment	14	2	28
Sarah	Find nearby restaurants that accept meal plan	11	2	22
Sarah	Buy supplies and books for class	6	2	12
Sarah	Looking for the easiest professor	1	2	2

Action Items

- Add prioritization criteria to the priority problems you articulated in the previous unit.
- Re-prioritize according to your criteria. Consider how that would affect your stakeholder and customer expectations

Questions to consider

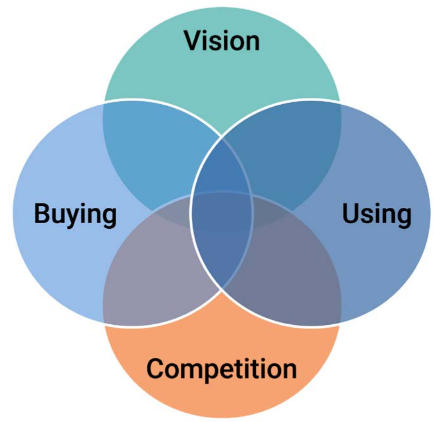
What method am I using today to prioritize work for my team?

Do I feel like I'm balancing the requests of my stakeholders with the needs of the market?

What additional information is important to consider when prioritizing for my organization?

Add your thoughts here …

Optimize Delivery



Action Items

- Consider the problems you have articulated and prioritized. Is there a clear release theme that customers will embrace?
  - If so, articulate that theme
  - If not, articulate and prioritize other problems to build a release

Questions to consider

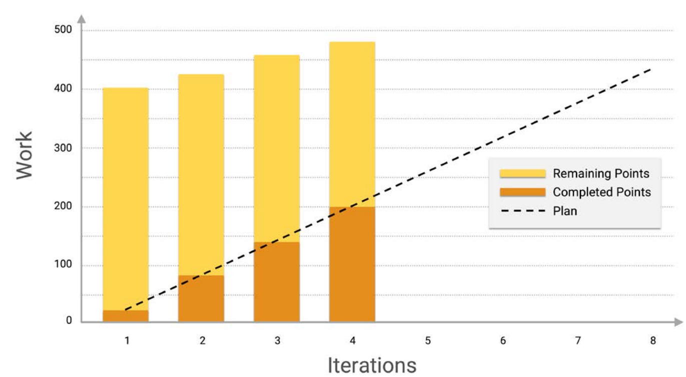
Do the releases my team currently do tell a story that customers embrace?

Am I delivering 100% of something, or 70% of everything?

How am I considering the market when I determine my release schedule?

Add your thoughts here ...

Plan for Change



Action Items

- Create a plan to prepare for changes to the release you themed in the last unit. How will you handle changes to scope, time, or resources?
- Gather feedback and data throughout the project to be discussed at the post-release retrospective.

Questions to consider

Are my releases most often derailed by time, scope or resources?

How often have I promised delivery of something that does not make it to the release?

What changes have been proposed in previous retrospectives that have been successfully implemented? Which haven't stuck?

Add your thoughts here ...

Roles for Effective Product Teams

Pragmatic Marketing Role	Who does it in your company?	**Notes** (Gaps in responsibilities / Comments / Actions)
Product Manager		
Product Owner		
Interaction Designer		
Systems Architect		
Development Manager		
Quality Assurance Lead		
Project Manager		

Example User Persona

Sarah Gordon

2^{nd} year university student

Paying for college with financial aid and part-time job

"I want to make smart choices about my courses, so I can graduate on time and still get the most out of my college experience."

Problems

- Navigating the university bureaucracy can be confusing and time-consuming
- She can't explore as many areas of study as she'd like, while still graduating on time
- Staying on top of tuition payments and financial aid form deadlines
- Making sure she masters her required courses, while still leaving time for social life, job, and interests
- Getting into the classes with the best professors can be difficult

Goals

- Choose a career path in which she can support herself and be happy
- Develop the skills she needs for her chosen career
- Graduate in four years
- Better communicate with her parents about what's happening financially and academically with the university
- Enjoy her learning experience

Background story

Sarah started university expecting to study medicine, but after her first year of school, she decided that wasn't the right path for her. She's considering concentrating in either psychology or business, and she wants to choose the right courses to leave her options open. While her parents are willing to support Sarah in her educational journey, she wants to graduate in four years, so that she doesn't place any additional financial burdens on them.

Behaviors

- Looks for morning classes so she can pick up afternoon hours at work
- Spends a lot of time researching her decisions, to make sure that she's making the right choices
- Not having a clear plan makes her a bit anxious
- Finds the aging systems for course selection bewildering, adding to her stress about staying on track

User Persona Worksheet

Name:

Click to add text

Relevant Information:

Click to add text

Quote:

Click to add text

Problems

Roadblocks that keep them from achieving their goals

Background story

Enough story to explain how they got to their current situation and outlook

Goals

Who the persona wants to be … What the persona wants to do …
How the persona wants to feel …

Behaviors

Specific behaviors that will impact the way they approach their goals

Capturing the Problem Worksheet

PERSONA ____________________ **PROBLEM NAME** ____

USE SCENARIO (detailed description of the problem, including frequency)

MARKET EVIDENCE (# of inputs) ________

IMPACT (objective scale) ________

PERSONA ____________________ **PROBLEM NAME** ____

USE SCENARIO (detailed description of the problem, including frequency)

MARKET EVIDENCE (# of inputs) ________

IMPACT (objective scale) ________

PERSONA ____________________ **PROBLEM NAME** ____

USE SCENARIO (detailed description of the problem, including frequency)

MARKET EVIDENCE (# of inputs) ________

IMPACT (objective scale) ________

PERSONA ____________________ **PROBLEM NAME** ____

USE SCENARIO (detailed description of the problem, including frequency)

MARKET EVIDENCE (# of inputs) ________

IMPACT (objective scale) ________

Working Agreement

TEAM INFORMATION

Team Name:

Team Mission:

Team Motto:

Roles and Responsibilities:

Metrics:

AGREEMENTS

Positive Observable Behaviors:

Strategy Matrix

20XX	Existing Products	New Options	New Products	New Technology
Existing Customers				
Competitors' Customers				
New Customers				
New Segments				

1. Discuss the Pragmatic Institute impact scale example.

Impact	Definition	Considerations
99999	Contractual obligation	Are you accepting one-time contracts outside your target market? Is this a symptom of being sales-driven or are you accepting contracts to accelerate what you would have done anyway? Are you implementing the contracts to the customer's specifications or for the market? What market opportunities are missed because resources are working on contract work?
5	Minimum purchase criteria (evaluator)	Do you have win/loss data to support this or is it anecdotal? Will meeting these requirements improve your ability to close more business?
4	Potentials lose time or money due to problem	Have you uncovered an unmet need? Is there a willingness to pay to solve it? By satisfying these needs, can you gain a competitive edge?
3	Difficult for customers to achieve primary goal	How will you determine primary goals?
2	Customers have difficulty with non-primary goal	How will you determine non-primary goals?
1	Not in target market segment	Are the target market segments well-defined? What will you do to review these for possible future development?

2. Discuss how to get market evidence (number of times reported or % of customers with problem).

3. Adapt the impact scale to reflect your strategy.

Impact	Definition	Notes

4. Discuss a formula or multipliers to use to derive priority. *Example: Market Evidence * Impact = Priority*

5. Advanced: Discuss using the 4 criteria as multipliers. B=buying, U=using, C=competitive, V=vision.
*Example: Market Evidence * Impact * (B+U+C+V)*

Market Problems Table

Persona	Name	Market Evidence	Impact	Priority (Market Evidence * Impact)	Group	Group Order

Stakeholder Management Matrix

INFLUENCE
Informal Authority

Keep Satisfied

- Stakeholder Names

- Stakeholder Names

Manage Closely

- Stakeholder Names

- Stakeholder Names

Monitor

- Stakeholder Names

- Stakeholder Names

Keep Informed

- Stakeholder Names

- Stakeholder Names

IMPORTANCE
Formal Authority

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Stakeholder Communication Template

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Stakeholder	Category	Communicator	Channel	Artifact	Frequency	Metric Category	Specific Metrics
Who is the individual or group being communicated with?	*Is this stakeholder one to Monitor, Keep Informed, Keep Satisfied or Monitor Closely?*	*Who is the indiviual tasked with providing the communication?*	*What is the venue or method used to communicate with this stakeholder?*	*How is the communication being delivered for consumption?*	*How often is the communication taking place?*	*What category of metric will be most meaningful to this stakholder?*	*What is the specific metric or metics you are communicating with this stakeholder?*
e.g. Angela (SVP of Sales)	Manage Closely	Jeff (Product Manager)	Weekly meeting (w/ email)	Initiative status template	weekly on Thursday	Value	LTV
e.g. Tech Support	Keep Informed	Deborah (ScrumMaster)	invited to biweekly sprint review	Burndown chart, sprint review deck	biweekly on Friday	Progress	Ticket closures

Status Update Template: Initiative-based

Initiative	Description	Delivery	Status	Path to Green	Update	What's next?
what is the name or version of this project, release increment, or initiative?	*What is the goal of this body of work?*	*When does this launch for our customer? Use date, quarter, or other increment*	*Green - On track Yellow - Elevated risk Red - High risk Blue - Completed Grey - Not started Black - On hold"*	*For any status other than green, provide a description of the steps necessary to bring back on track*	*What is the latest status of this initiative since it was last reported on? What key milestones have been met, risks added, or changes to scope, time or cost?*	*Between now and the next update, what is the planned work to move the initiative forward?*

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Status Update Template: Metric-based

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Business objective	Metric Category	Metric to move	Goal state	Current State	Initiative	Measurement	Outcome
What is the objective or goal the business is trying to meet?	*Is this change a measure of Value, Quality, Progress, or Satisfaction?*	*What is the metric being moved to meet the objective?*	*What is the desired movement of the metric?*	*What is the current state of the metric?*	*What initiative or project was released to affect this metric?*	*How are you measuring the effectiveness of the initiative to affect the metric?*	*"Measuring- Data being gathered to gague effect Positive- This initiative affected the metric in the desired direction Negative- This initiative affected the metric in an opposing direction Uncertain- It is unclear that this initiative had an affect on the metric "*
Turn one time shoppers into lifelong customers	Satisfaction	NPS	Raise to 80 by end of Q2	57	Consolidated shopping cart process from 5 screens to 3	Use existing followup email request with NPS request	Measuring

<Product Name>

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Author(s) and Contact Information

Name	Location	Email	Telephone

Date last updated:

For full information on changes, see change table at end of document.

OVERVIEW OF TARGET RELEASE

What is the goal for this release? What market forces are driving this project? What other artifacts have been created? For instance, has the business plan been approved? Where are we in the overall development process? Are we being driven primarily by content or target release date?

REQUIREMENTS

GROUP # 1 - < GROUP NAME >

Include groups in ascending order – group #1 listed first, etc. Include a short description of the group name, if it's not self-evident.

Requirement #1 - < problem >
Include requirements for each group, by descending priority order.
[Persona] has [use scenario] with [frequency].
Just list the persona's name or title; full personas come later in the document.

Priority
List number of pieces of market evidence found. If possible, provide links to the actual market evidence. Also include the impact and priority. For example:

Market evidence * impact = priority
25 (inputs) * 4 (impact) = 100 (priority)

Requirement #2 - < problem >
Priority

Requirement #3 - < problem >
Priority

GROUP # 2 - < GROUP NAME >

Requirement #1 - < problem >
Priority

Requirement #2 - < problem >
Priority

Requirement #3 - < problem >
Priority

GROUP #3

Etc.

PERSONA DETAILS

Include the full personas; insert a page for each one, or include a link to the full document.

REQUIREMENTS SUMMARY

Include the full requirements summary. Sort by group order ascending, then by priority descending.

Name	Market Evidence	Impact	Priority (Market Evidence * Impact)	Group Name	Group Order
(title of requirement)	Count	Scale	Calculated	i.e., persona goal	#

APPROVALS

Name	Title	Date	Signature
	Systems Architect		
	Interaction Designer		
	Product Manager		
	Development Manager		
	Quality Assurance Lead		
	Project Manager		

CHANGE TRACKING

Version	Date	Changes	Reason
1			
2			

SellMore 2.0

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Author(s) and Contact Information

Name	Location	Email	Telephone
Robin Prodman	Headquarters	rprodman@wemakestuff.com	555.555.5555

Date last updated: 26 April 20XX

For full information on changes, see change-tracking table at end of document.

OVERVIEW OF TARGET RELEASE

EXECUTIVE SUMMARY

The Burger release of SellMore™ has three primary areas of focus.

1) Increase the effectiveness of Sales Representatives through enhanced access to various tools.
2) Support the Sales Representative and Sales Director in managing upward in the organization.
3) Provide enhanced insight to the Sales Director, allowing him or her to manage more effectively.

These areas of focus will bring sales and marketing into closer alignment, and move SellMore™ into a competing position as leader in targeted sales processes in small- to medium-sized technology companies.

Requirements for the release are based on evidence gathered from the market. The Requirements Summary in this document shows how priorities were calculated. Persona details are available on the product intranet page.

The business case for this project was approved by the Executive Steering Committee on March 15. It is available through the product dashboard, and includes positioning and market analysis.

A cross-functional team has been reviewing the requirements for understanding. This document is now finalized, and the team is ready to move into initial design.

This release is being driven primarily by content needs. Generally, our users are ready to implement an update around the end of first quarter, so it would be convenient to release in that timeframe. However, we may choose to release later in order to include more of the requirements. Release date will be decided after the initial design has been completed.

MARKET OPPORTUNITY

In small- to medium-sized technology companies:

- 20% are looking to replace their system in the next 2 years.
- 60% of small technology companies don't have a system they can grow with. They aren't "looking," but with a compelling message, we anticipate accelerating the conversion of these "potentials" into "evaluators."

Requirements Summary

REQ ID	Persona	Problem	Evidence	Impact	Priority	Group	Group Order
A1	Jon, sales rep	Can't find sales tools	75	4	300	Better tools for higher sales	1
A2	Jon, sales rep	Multiple trips to same locale	49	4	196	Better tools for higher sales	1
A3	Jon, sales rep	New product education	63	3	189	Better tools for higher sales	1
B1	Jon, sales rep	Missing appointments	43	4	172	We've got your back!	2
B2	Jon, sales rep	Unaware of sev 1 incidents	56	3	168	We've got your back!	2
B3	Cheryl, sales director	Unreliable forecasting	39	2	78	We've got your back!	2
B4	Cheryl, sales director	Unaware of high-impact issues	35	2	70	We've got your back!	2
C1	Cheryl, sales director	Territory realignment	26	4	104	Insights for effective management	3
C2	Cheryl, sales director	Quota status	23	4	92	Insights for effective management	3

REQ ID	Persona	Full Description
A1	Jon, sales rep	Marketing produces an overwhelming amount of information to support the sales cycle. Several times a month, when Jon is away from the office preparing for the next day's sales presentation, he doesn't have the time or patience to review all of the presentations. He just wants to know which are relevant so he can choose the best one to use tomorrow.
A2	Jon, sales rep	Several times a month, Jon visits customers and prospects in different locations. While he is making an appointment, he needs to be alerted to other appointments that are in the same geographic region so he can consolidate his visits to save on travel costs.
A3	Jon, sales rep	Several times a year when a new product is rolled out, the Sales Toolbox is updated with new information. Jon is unaware of what is new or what has changed since the last time he reviewed the materials. He doesn't know where to begin to look in the Sales Toolbox to answer his buyer's questions.
B1	Jon, sales rep	Several times a week, Jon enters an appointment in Outlook with a meeting reminder. A sales assistant enters the same appointment into the sales force automation system. When the two systems are synchronized, the meeting reminder is incorrectly set to "none" in both systems. This causes Jon to occasionally miss customer appointments because he didn't know there was a problem.
B2	Jon, sales rep	Once or twice each year, key customers call tech support with a major problem. Jon needs to know about these problems before the company president starts screaming at him.
B3	Cheryl, sales director	Weekly, Cheryl updates a spreadsheet with forecast information by sales rep. Each rep manually submits the deals they are working on, the potential value of the deal, the step in the sales process, the target close date, and the % likelihood the deal will close. Since the process is so manual, by the time it is updated into the sales force automation system, the information is usually out of date, which leads to unreliable forecasts being presented to the Senior VP of Sales.
B4	Cheryl, sales director	At least once a week, Cheryl has to attend a meeting with her Executive peers. Occasionally, someone will broadside her with information about a problem occurring in an account in her territory. She tried to get Sales Reps to report these to her, but it turns out they usually aren't aware of them either. Cheryl wishes she had this information at her fingertips, so she could proactively address the topic with her peers.
C1	Cheryl, sales director	At least once a month, sales reps leave the company. Whenever there is turnover in Cheryl's territory, she has to realign the territory among the remaining reps until a new rep is hired and productive. She wants to fairly distribute the deals based on what is in the pipeline and the number of prospects not yet in the pipeline. If the rep that covers the SF Bay Area leaves, the highest priority is to parse out the pipeline to her other sales reps. She extracts pipeline data for all of her sales reps into Excel. With 2 windows opened on her computer (the SellMore Quota View of each sales rep's current pipeline, % of quota achieved, and days left to end of quarter) and Excel, she starts realigning territories. Within Excel, she sorts the opportunities by estimated revenue and expected close date and manually assigns each to the remaining reps. She graphs the estimated revenue by sales rep in xcel as she makes changes, to see if the territory is fairly distributed.

APPROVALS

Name	Title	Date	Signature
Joe Architect	Systems Architect	4/11/13	*Joe Architect*
Alan Interaction	Interaction Designer	4/15/13	*Alan Interaction*
Robin Prodman	Product Manager	4/10/13	*Robin Prodman*
Doug Teamlead	Development Manager	4/20/13	*Doug Teamlead*
Sheila Perfection	Quality Assurance Lead	4/24/13	*Sheila Perfection*
Bill Schdulemone	Project Manager	4/12/13	*Bill Schdulemone*
Renee Marketmaster	Product Marketing Manager	4/13/13	*Renee Marketmaster*
Jerry Techsupport	Tech Support – Manager	4/23/13	*Jerry Techsupport*
Mary Doe	Technical Publications	4/11/13	*Mary Doc*

CHANGE TRACKING

Version	Date	Changes	Reason
1	2/15/15	Initial publication	Submitted for review
2	2/21/15	Tracked within document; primarily product contract	Based on early requirement reviews with full cross-functional team
3	4/10/15	Final clarifications based on discussions of requirements version 2	Submitted for approval

Release Charter—Template

PRODUCT

VERSION

PROJECT NAME

RELEASE THEME

TARGET LAUNCH DATE

DELIVERABLES

In this section, list what has been agreed upon. Include group names. Reference the final requirements document version. Also include major milestones – whether those are group deliveries or more traditional milestones (code complete, beta release, final QA, release to production, general availability, etc.).

SIGNATURES

This document lists what we have agreed to deliver. By signing below, I acknowledge that this is the current plan and that I will inform product management and project management if the plan changes.

Name	Title	Date	Signature
	Systems Architect		
	Interaction Designer		
	Product Manager		
	Development Manager		
	Quality Assurance Lead		
	Project Manager		

Agile Development
An approach to planning development and engineering projects that relies on frequent delivery of products using quick teams and brief artifacts.

Artifacts
Written documents describing a project or product to be built. Typical artifacts include personas, requirements, design, and specifications.

Buyer Persona
A biographical description of a typical buyer of the product.

Deliverable
An element required for the completion of a product including documentation, technical support, or a launch plan.

Descriptor
A short description of the requirement, used in tables and documents to quickly reference the full requirement.

Design
The art of creating technology that solves problems in a manner that's pleasing to the user.

Development Manager
The leader of a team of developers or engineers.

Distinctive Competencies
Your company's unique ability to deliver value to its market.

Economic Buyer
A persona with final authority to make a purchase decision. This persona often relies on a committee recommendation but is the final decision maker.

Functional Specifications
The detailed description of how a feature should be built.

Group
In requirements, a group is two or more requirements that make sense to solve together. Grouping is a way to help teams focus on areas of improvement, rather than on the overall project goal.

Group Order
Rank of the designated group. This, combined with Priority, describes sequential work order to development.

Impact Scale
A rating method for assessing the importance of solving a market problem.

Interactive Design
Planning or defining the interaction between product and persona. Involves studying users to build intuitive products.

Iteration
A single planning and execution cycle of development.

Iterative Development
A development process that breaks the finished product into smaller projects (called iterations). The lessons from each iteration are applied in the next and subsequent iterations.

Market Evidence
Each occurrence of the problem, observed in the market and documented in any type of input artifact (such as call report, win/loss report, competitive analysis, enhancement request, analyst report, survey), is a piece of evidence. The total number of pieces of evidence is used in prioritizing, and is referred to as "Market Evidence."

Market Problems Table
A list of problems found in the market. This is a tool used to organize market evidence. When a trend is identified and we decide to solve a problem, it becomes a requirement and is shown in the Requirements Summary.

Market Segment
An identifiable group of individuals or businesses that share a set of problems.

Persona
An archetype of a typical buyer or user of the product.

Priority
Ranking that shows overall importance of a requirement. Calculated as Market Evidence * Impact.

Problem
A discrete pain or issue that has been observed within the target market segment.

Product Backlog
A prioritized list of things to be delivered. Usually listed at the feature level. (Also see Requirements Summary, Market Problems Table)

Product Designer
One who designs solutions to problems. Internal design may be handled by a Systems Architect. External design is the job of Interaction Designers.

Product Manager
One who identifies and quantifies market segments and the problems within them.

Product Owner
In Scrum, the product owner represents the voice of the customer to ensure the team works with the right things from a business perspective. Personas help ensure that this role is filled consistently, without constant interaction from Product Management.

Product Roadmap
A planning tool to help product management focus beyond the current project and ensure that investments support company-level strategy. Also, graphical depictions of that plan.

Project Manager
Person who manages the detailed scheduling of technology projects. Also monitors the schedule and informs team of deviations.

Prototype
A non-production model of a potential product. Often used by designers to test concepts with the target persona.

Quality Assurance (QA) Lead
The primary professional in charge of quality assurance on a product team.

Release Plan
A document that shows what the product team has agreed to deliver in a specific project. The team signs it and agrees to inform Product Management if the plan changes.

Release Theme
A unifying message for a product release such as persona goals, major capability, or set of problems solved.

Requirement
The articulation of a market problem. Requirements that Work use the format of [persona] has [problem, described in a use scenario] with [frequency].

Requirements Summary
A summary table showing key information about the requirements, as well as their grouping and priority.This is a collection of information about problems we are going to ask the team to solve.

Requirements Document
The collection of information needed to describe requirements for one project. Includes an overview of the release, requirements (in order by group and priority), and personas.

Retrospective
A meeting, after technology is released, to review the project. The meeting is intended to uncover systemic issues and enable continuous improvement.

Specification
The detailed description of what will be built to satisfy requirements. This document is produced by the development team, often by the designer.

Systems Architect
The person in Development who is in charge of internal design of the technology. Often implements development standards, as well.

Technical Reviewer
One who neither pays for nor uses a product yet determines which product will be selected based on capabilities. These capabilities are often technical or regulation compliance.

Use Case
Use cases define every possible interaction between the user and the product. They are focused on usage of defined features, and found in functional specifications. Use cases are used to ensure that all possible paths have been coded and tested.

Use Scenario
The description of a market problem. Includes a detailed description of the typical situation that causes this problem to occur, including the current results. Each use scenario references a persona, as well.

User Persona
An archetype of a person who uses the product.

Waterfall
A sequential software development methodology where each phase is completed before moving to the next phase: requirements, software design, software development, system test, integration, and maintenance.

about us

Pragmatic Institute

For over 25 years, Pragmatic Institute has been delivering targeted training courses to technology companies around the world. Our training is based on a fundamental belief that a company's strategy should be driven by the market and data and that teams must have a common foundation from which to work.

We also believe that our job is not just to tell you what you should do, but to provide the tools, templates and action plans needed to get it done. All of which means you can start making an impact on your business and your products immediately.

PRAGMATIC
INSTITUTE

So what makes Pragmatic Institute different?

The De Facto Global Standard

With over 200,000 individuals trained in over 25 countries, we are the industry standard used by successful product management, product marketing and data science organizations. We have created a growing international community of strategic product and data professionals that is changing the way companies do business.

Real-World Experience

Our courses are developed and taught by individuals who have led the product management and marketing groups at many of today's leading technology companies. Our instructors have all implemented The Pragmatic Framework™ in their own careers. They don't teach from theory. They teach from experience and with a clear passion for the material.

Ongoing Support

At Pragmatic Institute, our goal isn't just to train you; it's to make a lasting change in your company, culture and career. That's why we offer a variety of post-training support—from our online Pragmatic Alumni Community to our quarterly magazine, *The Pragmatic*—that provides tools, tips and best practices to help you implement the concepts you learned. We also provide access to our instructor community and to your fellow alumni so you can continue to share experiences and foster new ideas.

Satisfied Customers

More than 90 percent of attendees rate the courses as *essential* or *very useful* to their careers, leaving the training with unbridled enthusiasm about their jobs and the impact they can have on their companies. Their enthusiasm and success is why 80 percent of our new business is word-of-mouth referrals from satisfied customers.

Trusted Name

Pragmatic Institute is sought the world over for our thought leadership in the product management, product marketing and data science spaces. We've presented at industry events, written articles and even published our own books. We've been honored eight times by *Inc. Magazine* as one of the fastest-growing private companies in America (2000, 2007, 2008, 2009, 2011, 2012, 2013, 2016 and 2017).

Cindy Cruzado

ccruzado@pragmaticinstitute.com

Cindy has more than 25 years of go-to-market experience in the high tech software industry with a proven track record of strategic and operational leadership in startup and enterprise environments. She has worked with groundbreaking solutions in U.S. and international markets and across multiple industries, including higher education, meteorology, finance, CRM and marketing automation. As a result, Cindy brings deep and broad experience to her role as a Pragmatic Institute instructor. Cindy specializes in helping teams identify and build market influence and deliver delightful customer experiences that drive brand preference.

Prior to joining Pragmatic Institute, Cindy held a variety of executive roles, including vice president of product marketing at WeatherBug and Blackboard, and most recently as chief product officer at a stealth-stage startup.

Steve Gaylor

sgaylor@pragmaticinstitute.com

Steve has been developing product management and marketing teams and growing organizations for more than 25 years. He has demonstrated success in both strategic-leadership and tactical-execution roles, while providing solutions to a broad variety of industries.

Prior to joining Pragmatic Institute, Steve's career included positions with Texas Instruments, Harbinger, Peregrine Systems and Inovis—with his most recent role being as vice president of program deployment for PrimeRevenue.

Amy Graham

agraham@pragmaticinstitute.com

Amy has more than a decade of experience in product management, development and operations. She is known for her ability to bridge the gap between IT solutions and the business. During her career, Amy has launched and managed a variety of products including multi-million dollar software projects and mobile apps.

She also has experience creating the product management function from the ground up, leading a team responsible for multiple product lines and expanding it into a global product management function.

Prior to joining Pragmatic Institute, Amy was vice president, client services and product development at TalenTrust. She previously served as director of technology solutions at Bright Horizons Family Solutions and on the leadership team at Work Options Group.

Todd Middlebrook

tmiddlebrook@pragmaticinstitute.com

Todd has a wide breadth of knowledge and experience in both product management and marketing, having spent more than 15 years as a leader at some of today's biggest technology companies.

Prior to Pragmatic Institute, Todd was director of worldwide enterprise competitive sales for desktop and devices at Microsoft, where he led and supported one of Microsoft's most effective sales forces. He has also served as vice president of product management at Virtual Bridges, product line manager at Torchquest Inc. (formerly 2ndWave Inc.) and as product manager at IBM Tivoli Software. He is known for providing executive leadership with strategic recommendations gained from competitive engagements and market understanding.

Rich Nutinsky

rnutinsky@pragmaticinstitute.com

Rich has more than 20 years of experience in the software industry, with 15 years in product management. He has launched several successful software products using the Pragmatic Framework.

Prior to joining Pragmatic Institute, Rich served in various product management positions for companies including Arasys Technologies. He has also provided consulting services to market leaders such as Microsoft, AT&T, DuPont, NEC, GE and Siemens, working with senior-level executives to improve their product strategy, management and marketing processes.

Diane Pierson

dpierson@pragmaticinstitute.com

Diane has more than 20 years of experience in product management and marketing. In addition to holding multiple vice president and general management roles, she started her own company. As a result, Diane brings a comprehensive business understanding and executive mindset to her role as a Pragmatic Institute instructor.

Prior to joining Pragmatic Institute, Diane delivered more than $100 million in revenue to SaaS, publishing and big data companies including Dun & Bradstreet, LexisNexis, InfoGroup and Copyright Clearance Center. She is the founder of Shelftacular! Wire Shelf Covers.

Clarke Smith

csmith@pragmaticinstitute.com

Clarke Smith has more than 20 years of experience in the product marketing space, having worked for such well known companies as Hallmark and Advanced Auto Parts. He also helped leverage a groundbreaking service model that utilized domestic and offshore resources to plan, execute and track cost-effective local marketing programs for clients including DirecTV, Allstate, Spring, Ameriprise and US Cellular.

Paul Young

pyoung@pragmaticinstitute.com or @ptyoung
Read Paul's Blog: ProductBeautiful.com

Paul has more than a decade of experience in hardware, software and services product management and marketing. During his career, Paul has launched and managed dozens of products, started his own business and successfully implemented the Pragmatic Framework at several companies.

His experiences range from large companies to startups, and across a wide range of technologies and business models. His focus on building market-driven teams gives him a unique ability to relate to product management teams and executives that are transforming their business. In addition to his role as an instructor, Paul serves as vice president of product.

Jim Dibble

jdibble@pragmaticinstitute.com

Jim Dibble has 20+ years' experience in UX design, curriculum development and professional training. As a consultant and director at strategic design firms Cooper and Designit, Jim led product strategy projects for clients in tech, finance and healthcare. He coached client cross-functional teams in UX design, design research, service design and design leadership.

"I'm excited to help cross-functional teams supercharge their collaboration in order to build market-winning products and services."

Shannon McGarity

smgarity@pragmaticinstitute.com

Shannon McGarity has spent 20+ years solving clients' design challenges in roles like head of product and UX director. Prior to Pragmatic, Shannon was a director at strategic design firms Cooper and Designit: leading teams on projects, creating curriculum, coaching innovation teams and teaching service design, design leadership and more.

"I've seen how great design can lead to powerful products and services, and product management and data science are powerful partners!"

Michael Cullan

mcullan@pragmaticinstitute.com

Michael studied mathematics and music as an undergraduate at the University of Arizona before obtaining a master's degree studying computational statistics at Arizona State University. He has developed usable software tools alongside cutting edge statistical theory, putting new ideas in the hands of researchers and practitioners. In his free time, Michael turns this passion for math and science toward art, creating code-based visual art and organizing events for digital art and music.

Don Fox

don@thedataincubator.com

Born and raised in deep South Texas, Don studied chemical engineering at MIT and Cornell where he researched renewable energy systems. Don was attracted to data science because it is an interdisciplinary field that combines math, statistics and computer science to derive insights of processes using data. Don has worked as a model developer for Green-Fire Energy.

He enjoys puns, wearing ties, cardigans and everything fall.

Ana Hocevar

ana@thedataincubator.com

Ana obtained her Ph.D. in Physics before becoming a postdoctoral fellow at the Rockefeller University where she worked on developing and implementing an underwater touchscreen for dolphins. Previously, Ana worked as a doctoral research at Jozef Stefan Institute and a teaching assistant at the University of Ljubljana in Slovenia. Now she combines her love for coding and teaching as a data scientist.

She spends her free time doing pottery, sometimes climbing and every now and then scuba diving.

Russell Martin

russell@thedataincubator.com

Russ was born in TN, grew up in NY, and got his Ph.D. in applied mathematics from Georgia Tech. After that, he lived and worked for seventeen years in the United Kingdom, including Warwick University and the University of Liverpool, where he was a lecturer.

In his spare time, Russ reads all sorts of science-y things he probably doesn't really understand and plays board games.

Richard Ott

rich@thedataincubator.com

Rich moved from particle physics to data science when he left academia, and is excited to be joining his interests in data and programming with his love of teaching. Previously, he worked as the lead systems consultant for Verizon. He was a postdoctoral researcher at UC Davis, and a research and teaching assistant at MIT.

In his spare time, he's a fan of science, speculative fiction, board games and hiking.

Robert Schroll

robert@thedataincubator.com

Robert studied squishy physics in Chicago, Amherst and Santiago, Chile, before uniting his loves of computers, teaching and making pretty graphs at The Data Incubator and Pragmatic Institute.

In his free time, he plays tuba and right field, usually not simultaneously.

curriculum

Pragmatic Institute's complete set of courses helps you build and market products people want to buy. The entire product-focused curriculum is based around the Pragmatic Framework, the proven, actionable blueprint that companies have built their success on for 25+ years.

All of our courses provide real-world insights, actionable best practices and proven tools to maximize results. You can customize your curriculum to focus on the areas with the biggest need and the most impact for your organization—and each course allows you to earn a certificate documenting your new knowledge.

So whether you are responsible for determining what should be on the shelf or helping it fly off the shelf, we have a course (or two or three) for you.

Foundations

This course literally lays the foundation for everything that product professionals do. It is a prerequisite for every other Pragmatic Institute course and a primer for all product professionals. Everyone learns to “speak the same language” and work more effectively using the Pragmatic Framework.

Who should take this course? Everybody who has a stake in the product’s success in the market

Foundations teaches how to:

- Gain a thorough understanding of your market
- Find and prioritize opportunities that minimize risk and optimize results
- Better balance strategic and tactical tasks for greater impact

Key deliverables: positioning and gap analysis

Focus

Learn to find the opportunities in your market’s problems, score them objectively and identify where your company’s strengths intersect with what the market values. Then use this market data to successfully and credibly sell your strategies internally.

Who should take this course? Anyone responsible for product direction and strategy

Focus teaches how to:

- Find opportunities with the biggest impact, urgency and potential
- Build credibility by showing that a sizeable market values the product
- Articulate how individual opportunities fit with the company’s strategy

Key deliverables: business plans and roadmaps

Design

Learn to collaborate effectively with designers throughout the product development life cycle to create products that wow. Build trust with your designers and amplify efforts to create innovative, user-friendly products that resonate with the market.

Who should take this course? Anyone who partners in designing great products

Design teaches you to:

- Understand design capabilities and approaches so you can work effectively with designers
- Align design and product teams around user and business context
- Encourage the creation and exploration of multiple concepts to find the most innovative solution

Key deliverables: Design practices and roles, user personas, feedback models

Build

Learn how to prioritize requirements and plan releases based on market facts. This course teaches a universal approach, regardless of development methodology, to creating products that win in the market.

Who should take this course? Anyone responsible for writing, prioritizing and working with requirements

Build teaches how to:

- Improve the hand-off between departments, focusing the product team on what needs to be built and development on how to build it
- Rank requirements objectively using market data to minimize infighting and maximize impact
- Work together more effectively, regardless of locations or methodologies

Key deliverables: prioritized project lists and requirements

Market

Learn to build buyer expertise and use that knowledge to create marketing programs that get results. This course also teaches how to effectively measure and report the impact of your programs on the bottom line.

Who should take this course? Anyone responsible for setting go-to-market strategies

Market teaches how to:

- Gain a thorough understanding of your buyers and how they like to buy
- Earn approval and funding for your marketing plan
- Measure your marketing plans against the metrics that matter most to your company

Key deliverables: buyer personas and marketing plans

Launch

Elevate product and marketing launches by creating marketing programs that resonate with buyers and providing salespeople with the tools and training they need. Learn to execute successful launches that align your entire organization around the right strategies.

Who should take this course? Anyone with product launch or sales enablement responsibilities

Launch teaches how to:

- Apply buyer expertise to create marketing programs that get results
- Identify key launch strategies and prepare your entire organization
- Deliver sales tools and training that reduce friction and increase close rates

Key deliverables: organizational readiness and sales enablement

Price

Learn how to set the right price for each product in each market. This course teaches how to determine what your market is willing to pay and how to combine that with your corporate strategy to develop pricing that pays off.

Who should take this course? Anyone who makes or influences product pricing decisions

Price teaches how to:

- Determine what your market is willing to pay
- Develop pricing models that support corporate strategies and empower sales
- Use segmentation and portfolios to optimize revenue

Key deliverables: pricing structure and planThe Business of Data Science

The Business of Data Science

Learn to harness the power of data science and artificial intelligence for your organization. This course teaches business leaders the fundamentals of data science, how to use it to make better business decisions and how to implement it in your organization.

Who should take this course? Product professionals and business leaders who want to understand how data impacts their business and anyone who works with data professionals

- The fundamental principles of data science, machine learning and artificial intelligence
- How to identify and define the most profitable data science projects
- Best practices for building data science teams and initiatives, and how to avoid common pitfalls and obstacles

Key deliverables: Data science project structures, best practices and tools

Executive Briefing

This interactive, half-day course teaches executive teams about what it means to be tuned in to the market and the strategic role that product management and marketing play in this effort.

Who should take this course? Executive and leadership teams

Executive Briefing teaches how to:

- Use the Pragmatic Framework to instill market focus throughout the organization
- More clearly define roles and responsibilities to get the entire team on the same page
- Discover opportunities for your company to truly have an impact on the market

Key deliverables: a proven way to create effective product teams

The Pragmatic Framework™

The proven blueprint for creating and marketing products people want to buy.

STRATEGY

EXECUTION

MARKET	FOCUS	BUSINESS	PLANNING	PROGRAMS	ENABLEMENT	SUPPORT
		Business Plan	Positioning	Marketing Plan		
Market Problems	Market Definition	Pricing	Buyer Experience	Revenue Growth		
Win/Loss Analysis	Distribution Strategy	Buy, Build or Partner	Buyer Personas	Revenue Retention		
Distinctive Competencies	Product Portfolio	Product Profitability	User Personas	Launch		
Competitive Landscape	Product Roadmap	Innovation	Requirements	Awareness	Sales Alignment	Programs
Asset Assessment			Use Scenarios	Nurturing	Content	Operations
			Stakeholder Communications	Advocacy	Sales Tools	Events
				Measurement	Channel Training	Channels

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