

# **SHIP IT:**

# **An enterprise**

# **product manager's**

# **handbook**

From layout to launch: A handbook to enterprise product management



**ManageEngine** 

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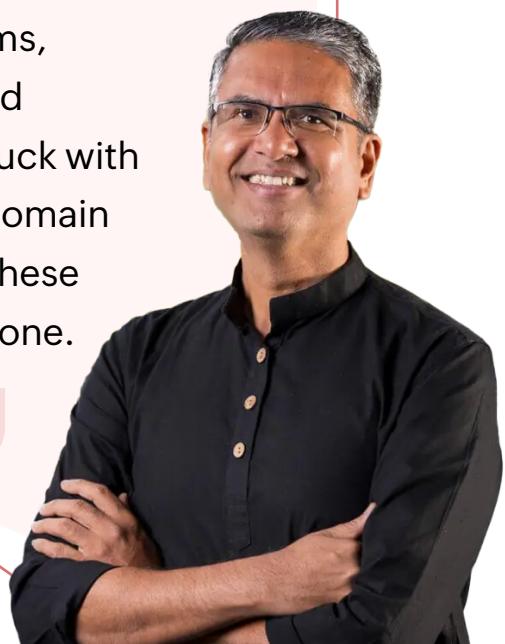
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Product management is highly influential as opposed to authoritative. It is cross-functional, and the primary responsibility of a product manager is to set the vision. There are some innate chops that one must have to thrive as a product manager. For example, the ability to understand and visualise abstract problems, identifying the most practical solution, and listening to problems rather than being stuck with preconceived ideas. While having some domain exposure does help, it is not mandatory. These skills are far more critical than exposure alone.

**- Rajesh Ganesan**

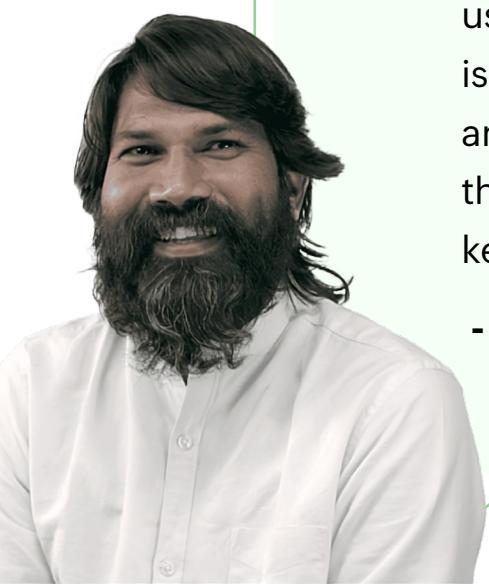
President, ManageEngine



We sell musical instruments, not music. How many people buy an instrument only to leave it unused and forgotten in the corner? It's either because the instrument is too complex for us to pick up or we've lost interest in learning music. The same applies to software. As we build products, we have to look at usage as the value of what we have built is based on how deep the usage is. There are great musicians that emerge, and it is those successes that still keep the demand for music and the instruments. Our own successful customers are the champions for our products, and it is their usage that keeps us going.

**- Manikandan Vembu**

COO, Zoho Corp.



# Chapter 1:

## Introduction

Here's a challenge: Build a house without an architect. Can you do it? Perhaps. Can you do it as efficiently as an architect would? Unlikely. Why is that?

Architects bring experience, knowledge, and most importantly, unique skills to the table—elements that are critical to the success of a construction project. They are responsible for designing the blueprint, overseeing construction activities, and ensuring compliance with regulations. You see where we're going with this. Architects (product managers) collaborate with the construction team (developers), the interiors team (designers), and real estate agents (marketers) to bring their vision to life. Product management is an integral part of software development, just as architecture is to building a house.



“ Ultimately, the art of product management is the art of having a conviction, having a view point. We get paid to act on those convictions. If our convictions prove right, the market rewards us. If they are wrong and if we are smart about it, we will change our conviction.

Ordinary companies ship products with no conviction. Extraordinary companies have deep convictions that come through in their work.

**- Sridhar Vembu**

Founder and CEO, Zoho Corp.

”

The modern world is held together by the fabric of software. From global industry leaders to up-and-comers to the ones that are yet to tap into their full potential, all products have one thing in common—they all went through a rigorous product management cycle. Take a domain like analytics, for instance. The core principles behind the products are predominantly the same. Yet, we see variations in performance, popularity, and usability across competitors. So, what is the differentiator between an under-performer and a world-class suite with millions of users? It's years of dedicated work, combined with creating and fine-tuning an impeccable framework for product management that leaves no room for oversight. And all this is made possible by product managers—leaders who are visionaries, strategists, and collaborators, all rolled into one.

## What's ahead?

Product management is a lucrative, well-sought-after role, especially in software development. It is also one of the hardest jobs to land. Product managers are expected to have a diverse skill set, futuristic vision, strong adaptability, and domain knowledge. Combined with these capabilities, it also calls for a robust internal organizational structure to streamline the product development process. In this e-book, we'll reveal our product management framework and what it takes to build a successful product.

We'll delve into:

- **The fundamentals:** How SaaS product management varies from its non-SaaS counterpart, the roles and responsibilities in a product team, and how the product management role adapts to an organization's ever-evolving requirements. We will also briefly take a look at the tools a product manager can utilize to get the job done, including some homegrown favorites used by our very own product managers.

- **The inside scoop:** ManageEngine's product development practices, covering the various stages of a product lifecycle where product managers play a key role. We also share a product strategy framework that can uphold an organization's vision, along with key technical and domain-related capabilities that are indispensable for product managers.
- **The leadership:** Manikandan Vembu, COO of Zoho Corp., shares the product management challenges we faced in our transformation from a network management company to a SaaS enterprise. We uncover the various setbacks encountered at each stage of our growth over the last 25 years.
- **The stories:** Product managers from Zoho and ManageEngine give us their take on product management, how they tackle roadblocks, and what their journey with the company looks like. We explore the top challenges a product manager faces in the current tech landscape and some key strategies to resolve them.

## SaaS vs non-SaaS product management

The primary differences between SaaS product management and non-SaaS product management lie in the nature of the deliverables and the corresponding challenges. Here's a quick breakdown.



### Development

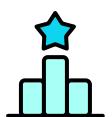
- **SaaS product management:** SaaS solutions typically follow Agile methodologies with frequent releases and iterative development cycles. Product managers prioritize features based on user feedback and business objectives and coordinate closely with engineering and design teams to deliver incremental improvements.

- **Non-SaaS product management:** Non-SaaS products may have longer development cycles and fewer incremental updates, especially for physical goods or products with extensive regulatory requirements. Product managers focus more on long-term planning and coordinating major product releases.



## Customer support

- **SaaS product management:** Support in SaaS product management tends to be more proactive and integrated with the overall product experience. Since they typically involve ongoing subscriptions or usage-based pricing models, continuous customer engagement becomes a necessity.
- **Non-SaaS product management:** Non-SaaS products often involve one-time purchases or limited interactions with customers. As a result, support is often more reactive, transactional, and focused on resolving immediate issues.



## Competition

- **SaaS product management:** In the SaaS subscription model, the competition extends beyond initial product sales to ongoing renewals. Customers will always look for the value for money option. This means SaaS product managers must deliver consistent value to retain customers against competitors who may offer similar solutions.
- **Non-SaaS product management:** Non-SaaS products often compete based on unique features and performance specifications. Product managers must identify and capitalize on advantages to stand out in a competitive market.

# Roles and responsibilities

Roles	Responsibilities
<b>Product manager (PM)</b>	<ul style="list-style-type: none"><li>Define the product vision, strategy, and roadmap.</li><li>Gather and prioritize customer requirements through market research, user feedback, and competitive analysis.</li><li>Work closely with cross-functional teams to ensure alignment and execution of the product vision.</li><li>Monitor key performance indicators (KPIs) and metrics to measure product success.</li></ul>
<b>Associate product manager (APM)</b>	<ul style="list-style-type: none"><li>Support gathering and prioritizing customer requirements through market research, user feedback, and competitive analysis.</li><li>Collaborate with cross-functional teams to ensure alignment and execution of the product vision.</li></ul>
<b>Product analyst</b>	<ul style="list-style-type: none"><li>Conduct market research to understand industry trends, competitive landscape, and customer needs.</li><li>Analyze user behavior and usage patterns to identify opportunities for improvement.</li><li>Gather data and insights to inform product strategy and decision-making.</li><li>Monitor product metrics to evaluate performance and identify areas for optimization.</li></ul>

Roles	Responsibilities
<b>UI/UX designer</b>	<ul style="list-style-type: none"><li>• Create wireframes, mockups, and prototypes to visualize and iterate on design concepts.</li><li>• Collaborate with product managers, developers, and other stakeholders to translate user requirements into design solutions.</li><li>• Ensure consistency and coherence across all aspects of the product's design.</li></ul>
<b>UI/UX developer</b>	<ul style="list-style-type: none"><li>• Implement user interface designs using HTML, CSS, JavaScript, and other front-end technologies.</li><li>• Ensure that user interfaces are responsive, accessible, and optimized for performance.</li><li>• Collaborate with designers and back-end developers to integrate front-end components with the overall product architecture.</li><li>• Conduct code reviews and testing to maintain product quality.</li></ul>
<b>Technical writer</b>	<ul style="list-style-type: none"><li>• Create and maintain product documentation, including user guides, API documentation, release notes, and help articles.</li><li>• Ensure that documentation is clear, concise, and easy to understand for the target audience.</li></ul>

Roles	Responsibilities
<b>Technical writer</b>	<ul style="list-style-type: none"><li>Collaborate with product managers, developers, and other stakeholders to gather information and updates for documentation.</li><li>Manage documentation processes and tools, such as version control systems and content management systems.</li></ul>
<b>Trainee</b>	<ul style="list-style-type: none"><li>Learn about product management principles, processes, and tools through on-the-job training.</li><li>Understand how the product works and its features, including its purpose, target users, and functionalities.</li><li>Support data collection, analysis, and reporting activities.</li><li>Contribute insights to team discussions and brainstorming sessions.</li></ul>

PM RACI matrix	Product manager	Product analyst	UI/UX designer	UI/UX developer	Technical writer
Roadmap and strategy creation	R	C	C	C	I
Market research	A	R	I	I	I
User feedback collection	A	C	I	I	I
Wireframe design	R	I	R	C	I
Prototype design	A	I	C	R	I
Release planning	R	I	C	C	I
Documentation	A	C	I	I	R
Product launch	R	I	I	I	I
Monitor metrics	A	R	I	I	I

R Responsible  
 A Accountable  
 C Consulted  
 I Informed

## RACI Matrix for product management

# Types of product managers in SaaS

Product managers have been a part of the corporate structure for decades, but it was mostly considered a singular role. It was focused on understanding a domain, identifying target users, and getting the product out. The diversification of the product manager role was propelled by the fast-growing tech scene. With the advancement of technologies like mobile apps, the cloud, artificial intelligence, and IoT, software products became more complex. This necessitated roles with distinct skill sets. Moreover, the focus shifted from product delivery alone to customer-centricity. Having specialized PM roles allowed organizations to tailor their approach to meet user expectations. Just as software engineers branched out to form roles—like front-end, back-end, full-stack developers, and so on—the PM role also began to diversify rapidly. To set the context further, each type of product management can be described as a combination of core PM skills with a specialized layer, which we'll explore in this section.

- **UX product manager (UXPM = PM + UX and UI design):** Ever tried out a new tool and thought “wow, this is so easy to use”? That’s the end goal for a UXPM. They focus on the user experience and design aspects of the product. They ensure that the product is intuitive, user-friendly, and that it still meets business objectives. A UXPM’s knowledge of user pain points and behavior is crucial for product interface development.
- **Technical product manager (TPM = PM + APIs and DBs):** As the name indicates, a TPM works closely with engineering teams to ensure the technical feasibility of features and enhancements, relying heavily on APIs and databases. Their technical background also helps relay information to non-technical teams and establish realistic project timelines.

- **Platform product manager (PPM = Code reusability + DB modelling):** PPMs focus on building capabilities and supporting the underlying platform that power multiple products or services. Their role is critical in ensuring that the platform is scalable, reliable, and can support the organization's product ecosystem.
- **Data product manager (DPM = PM + Data intelligence):** Every organization needs a member to help align data with strategy and treat the data itself as a product, which is what a DPM does. They work on products that involve significant data components, such as analytics platforms and AI/ML-based features. Essentially, they help determine the flow of data, the purpose it serves, and how to make it more accessible to the people who can obtain value from it.
- **Strategic product manager (SPM = PM + Strategic-level directions with CXOs + Prioritizing + Timing the releases):** The long-term success of a product depends on three things: the product vision, roadmap, and strategy. Where is this product headed? What is its differentiation factor? A strategic PM is responsible for setting tangible goals and ensuring the rest of the team has clarity on the big picture and is working towards a common goal.
- **Growth product manager (GPM = PM + Marketing):** Centered around product-led growth, GPMs focus on key concepts such as customer acquisition, retention, engagement, and monetization. They are data-driven and look for opportunities for upselling and cross-selling. Examples of this type of product management include referral programs, early access for customers, and A/B testing new features.

- **AI product manager (AI PM = PM + AI/ML):** A relatively new role in product management, AI PMs help design AI-powered products or enhance the features of an existing product using its capabilities. This means they have to understand and develop use cases where AI/ML can solve real-world problems, build data models, and have clear understanding of privacy, compliance, and ethics.
- **Product marketing manager (PMM = PM + Delivery management + GTM planning):** So you've got a great product on your hands, what's next? Getting it out there, of course. The responsibilities of a PMM are vast and includes designing a go-to-market (GTM) strategy, market research, and tracking actionable insights like sign-ups and link clicks. A product manager is not to be confused with a product marketing manager. A PMM is responsible for the positioning of a product to customers or users, whereas a PM creates conviction for a product internally.
- **Integration product manager (IPM = PM + APIs + Internal data operability):** This role is operations-heavy and involves identifying opportunities, collaborating with internal and external stakeholders, building integration use cases, and monitoring the performance of each integration. [ManageEngine Marketplace](#) is one example of IPMs coordinating with third-party solutions to build ready-to-use extensions for ManageEngine products.

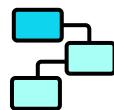
The roles involved in product management are constantly evolving with market changes and are becoming more specific in their responsibilities. Apart from the ones discussed, some organizations may opt for roles—like enterprise PM, consumer PM, mobile PM, API PM, core PM, global PM, innovation PM, etc.—based on their requirements.

# Tools we use for product management



## User insights:

Gathering data or direct feedback from users is the best way to understand consumer mindsets. This can be facilitated with the help of tools that are designed to customize and simplify interactions with the target audience. Zoho Corp. also uses an in-house product analytics tool that provides visibility into product usage.



## Product roadmapping:

These tools help product teams create a visual representation of the plan. Roadmaps often face changes based on the market, new feedback, or opportunities. Managing these changes in one place provides clarity and helps communicate the strategy to all stakeholders.



## Project management:

Undoubtedly, a project management tool is a necessity to keep track of all project-related tasks and ensure nothing falls through the cracks. Day-to-day operations, cross-functional collaboration, and overall progress can be monitored through tools like ServiceDesk Plus. It also helps streamline workflows and manage resources.



## Prototyping:

Product teams require dynamic prototypes that can be tested early and refined multiple times before they move to development, which is what low-code tools like [AppCreator](#) do. It helps establish a user-friendly product design and meet usability standards. Designers are skilled at visual thinking, and prototyping tools allow them to translate their thoughts in an interactive manner with the other stakeholders. Zoho Corp. also utilizes an in-house product design platform that allows product managers to collaborate with designers and other stakeholders to bring the product to life.



## Analytics:

Product managers can use analytics tools to monitor KPIs to gauge how effective a tool is at meeting strategic goals. Additionally, they can monitor project-related expenses and other operational metrics like app utilization and license usage. Analytics Plus is one example of tools that can be used to identify patterns, create reports, and support data-driven decision-making.



## Communication:

For seamless coordination and transparency between stakeholders, product management teams can use collaborative tools. It is crucial for members to be on the same page throughout the process, especially when working with remote, hybrid, or distributed teams.



ManageEngine's product management teams use in-house tools like Zoho Cliq and Zoho Connect for communication and collaboration. The wireframes and prototypes are shared in the respective product groups for feedback and iterations. Teams also use [Vani](#), an all-in-one platform where users can plan roadmaps, create workflows, and more in a unified space.



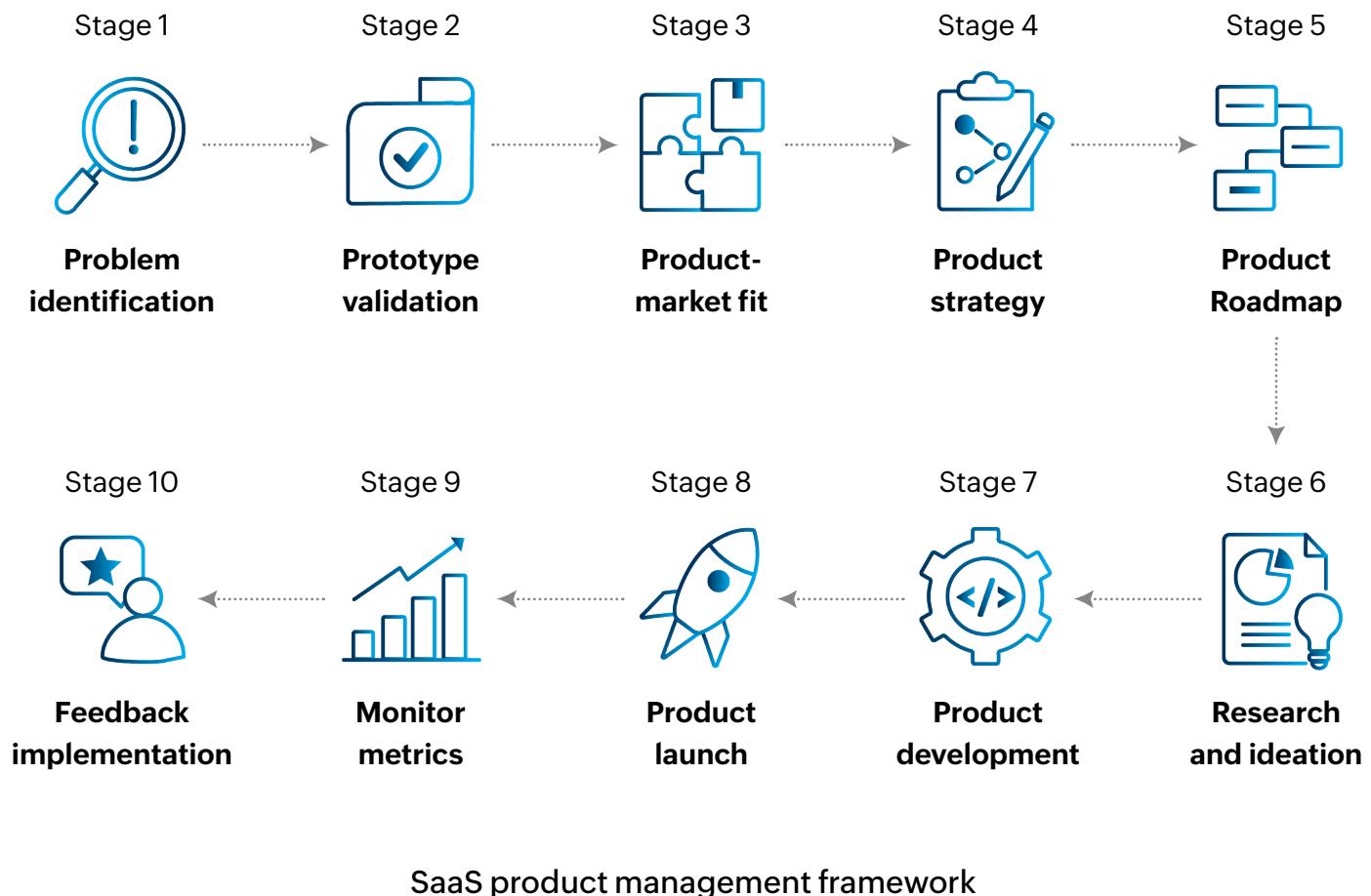
## Knowledge management:

Product-related documentation must be stored in a structured manner, ensuring that stakeholders have access to up-to-date information. A centralized repository like Zoho WorkDrive encourages continuous learning and knowledge sharing within teams.

# Chapter 2: **ManageEngine's product management framework**

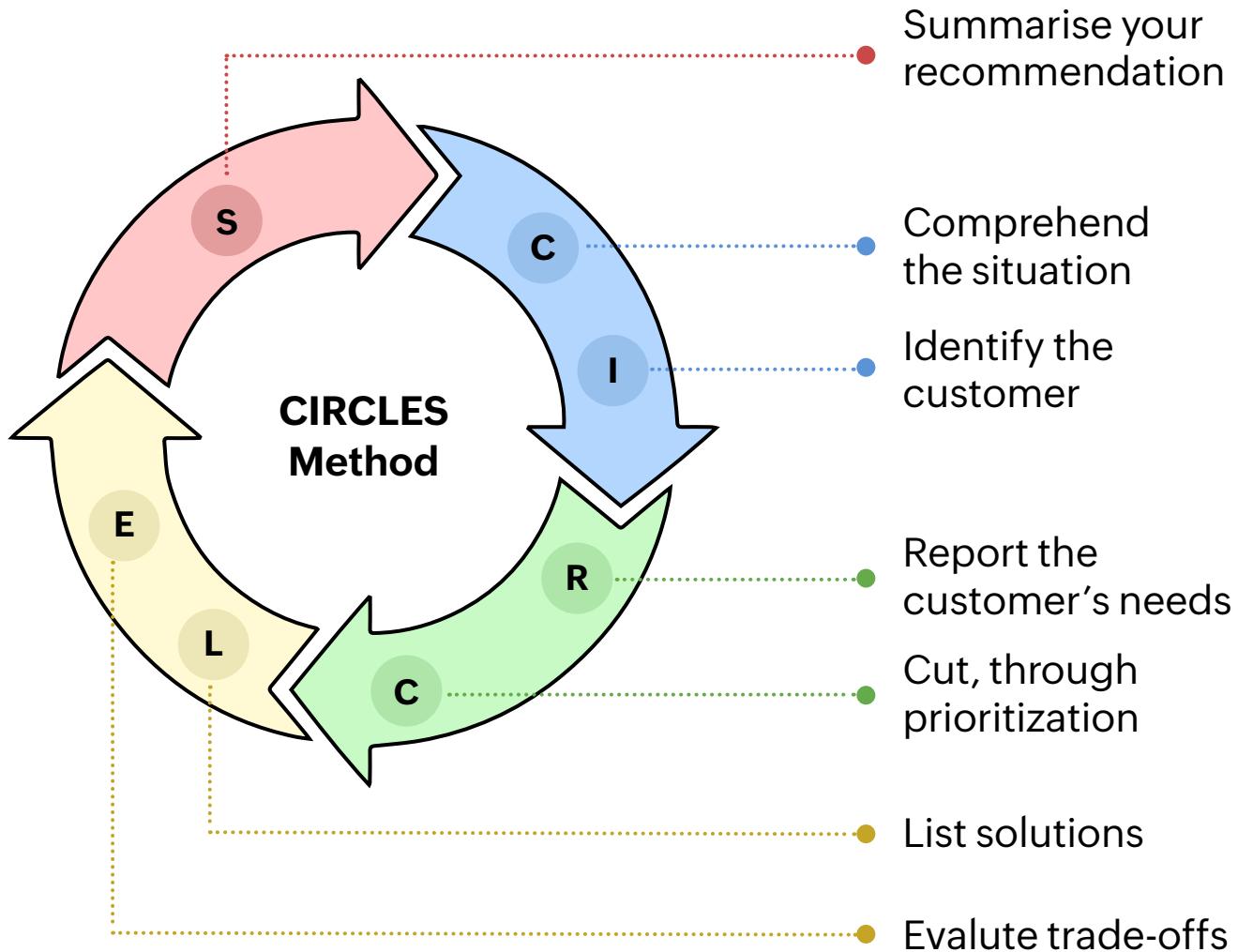
A framework is the foundation upon which teams must collaborate and build their strategy. While each product team follows its own process, this framework gives an overall view of what a successful product release calls for. For those who don't know where to begin, having a SaaS product management framework in place helps cover all the bases.

However, like any framework, it must be flexible enough to reflect changes in the market, user feedback, and other variables.



# Stage 1: Problem identification

This phase begins with a problem statement, a concise description of an issue that needs to be addressed or a condition that can be improved. It helps identify the gap between the current state and the desired state and explain the significance of addressing this gap. Product managers must craft a problem statement that includes four main components: the description of the problem (or a hypothesis), its impact on users, the scope and objectives of the solution, and how the product's success is measured.



Problem-solving frameworks—like root cause analysis (RCA), The Phoenix Checklist, and CIRCLES—can be used to narrow down the problem, analyze every aspect of it, and communicate the results with stakeholders. If it works for Google and the CIA, it will work for you too.

# Stage 2: Prototype validation

In this stage, PMs work on creating a minimum viable product (MVP)—a lean version of a product. While it isn't complete, it includes the core features necessary to address the primary problem and provide immediate value to users. An MVP is focused on rapid iteration, designed for early adopters to improve the product to the next level.

## Minimum Viable Product (MVP)



## When does a product team need an MVP?

- When testing a new idea
- When entering a new market
- When seeking external investment or internal buy-in
- When reinventing existing products
- When the team is working with limited resources
- When the product concept involves high risk or uncertainty

Once an MVP is built and introduced to real users, product teams must validate that the prototype works as intended. This can be done by monitoring metrics like user retention, session duration, and feature usage. Additionally, gathering qualitative feedback through focus groups, beta testing, and A/B testing can help PMs gain insights into their experiences and determine which user flow works best. Lastly, iteration. Look out for recurring themes and patterns in user feedback and prioritize those issues.

When all this is complete, you may find yourself working with a completely different version of the product than what was envisioned. Evaluate the MVP's performance against the validation criteria and objectives set initially. There are three ways to move forward. One, move in the current direction. Two, pivot to a different approach. Or three, in some cases, shelve the idea if the results are not promising. If the performance meets expectations, the product can move to the next stage.

## Stage 3: Product-market fit

When the solution you've built successfully meets the needs and demands of a specific market segment, you've hit the jackpot. Achieving product-market fit (PMF), as rare as it can be, is a crucial milestone for long-term growth. Take ManageEngine for example. Before we established ourselves in the cloud space, we had WebNMS (a subsidiary of AdventNet) to meet the IT needs of telecom customers. WebNMS was doing fairly well for over five years, but the market disappeared—forcing us to change our approach and focus on different markets with new products. In other words, having the right product in the wrong market and having the wrong product in the right market are both ways to set yourself up for failure.

Steps to achieve product-market fit:

1. Understand your target users' needs
2. Identify and validate value proposition
3. Build a lean version of the product
4. Iterate based on feedback
5. Measure key metrics
6. Refine product positioning
7. Scale and market the product
8. Maintain alignment

## How do you know you've made it?

By tracking KPIs and actively seeking customer feedback, product managers can assess how well their product meets market needs and identify areas for improvement. This involves metrics like trial-to-paid conversion rate, churn rate, retention rate, and revenue growth. A good example of PMF measurement is the Sean Ellis test:



### Question:

"How would you feel if you could no longer use this product?"



### Responses:

- A. Very disappointed
- B. Somewhat disappointed
- C. Not disappointed

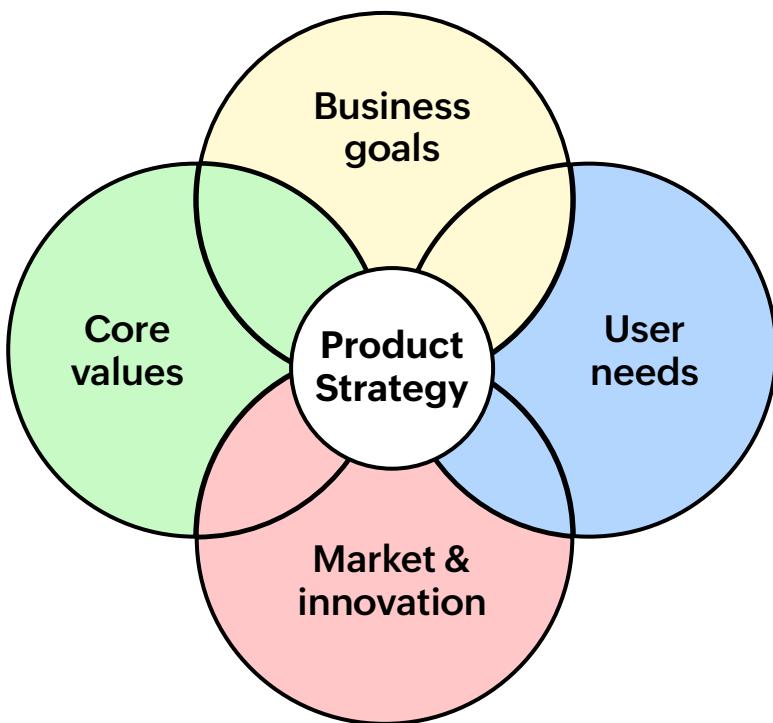


### Analysis:

If 40% or more respondents say they would be "very disappointed," it's a strong indicator of product-market fit.

# Stage 4: Product strategy

For a product to succeed at serving its purpose, product teams must have clarity in their product vision and objectives. A product strategy framework is a great way to establish a strong foundation for product development and keep the focus customer-centric.



This means having answers to questions like:

- What is the purpose of this product?
- How will it impact users?
- What are its functions?
- What is our differentiation factor or unique selling proposition (USP)?

Say you're cooking a gourmet meal. What's the first thing you need? A recipe. It lists the ingredients, specifications, and steps to create the dish. It ensures that you measure the right quantities, combine them in the right order, and serve up a restaurant-worthy dish. When you're creating a product, the strategy ensures that the right resources are used effectively, tasks are completed in a suitable sequence, and the final product meets customer expectations. Your product strategy is the recipe for the success of your product.

 <b>User</b>	 <b>Product</b>	 <b>Company</b>	 <b>Competitor</b>
<b>Product goals and solvability</b> What user problem are you trying to address?	<b>Differentiator</b> What is the product's USP?	<b>Feasibility</b> Do you have the resources to build this product?	<b>Competitor analysis</b> Who are the competitors and what is their USP?
<b>Sustainable usage</b> How often would customers use this product?	<b>Adoption</b> How effective would the product be in reaching users?	<b>GTM viability</b> Can you market the product effectively?	<b>Barriers to entry</b> What stops a new competitor from entering and succeeding in this space?
<b>Target audience</b> Who are the desired users for this product?	<b>Constraints and trade-offs</b> Where can you make compromises to offset development challenges?	<b>Business goals</b> Does the product align with the organization's vision, mission, and objectives?	<b>Brand power</b> How strong is your brand awareness?
<b>Market research</b> What are the current trends? What is the capturable market size?	<b>Success criteria</b> What are the metrics and KPIs that define the product's success?	<b>Pricing</b> What is the best model to make the product profitable in the long run?	<b>Threat of substitution</b> Why would customers consider a switch and can it be done easily?

## Product strategy matrix

Once these details have been ironed out, determine the pricing model that suits the USP, target market, and competitor offerings. Common pricing models for SaaS solutions include subscription-based pricing, usage-based pricing, freemium models, and tiered pricing. At ManageEngine, we offer a combination of free, subscription-based, and tiered pricing, depending on the organization's size and requirements.



### Flat-rate

Offers one product with a set of features for a fixed monthly or annual fee. A one-size-fits-all strategy with easy and focused marketing.



### Tiered

Offers versions of a product at varying packages, depending on the customers' requirements. Most convenient for upselling.



### Usage

A pay-as-you-go model that charges customers based on their usage. An affordable and customizable plan.



### Freemium

Users have access to a limited version of the product for free and must pay to upgrade and access all available features.



### Feature

Customers are charged based on the number of features they choose. A straightforward plan that encourages upsell.

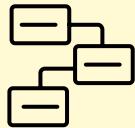
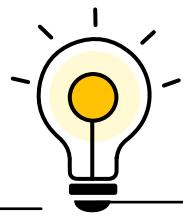


### Per user

Offers a fixed fee based on the number of users per month. A simple plan that increases revenue as an organization grows.

## Popular pricing models used by SaaS companies

## PRO TIP



Map out the user flow before creating an MVP



Hold off on scaling effort until you find the PMF



Communicate the product strategy with all stakeholders

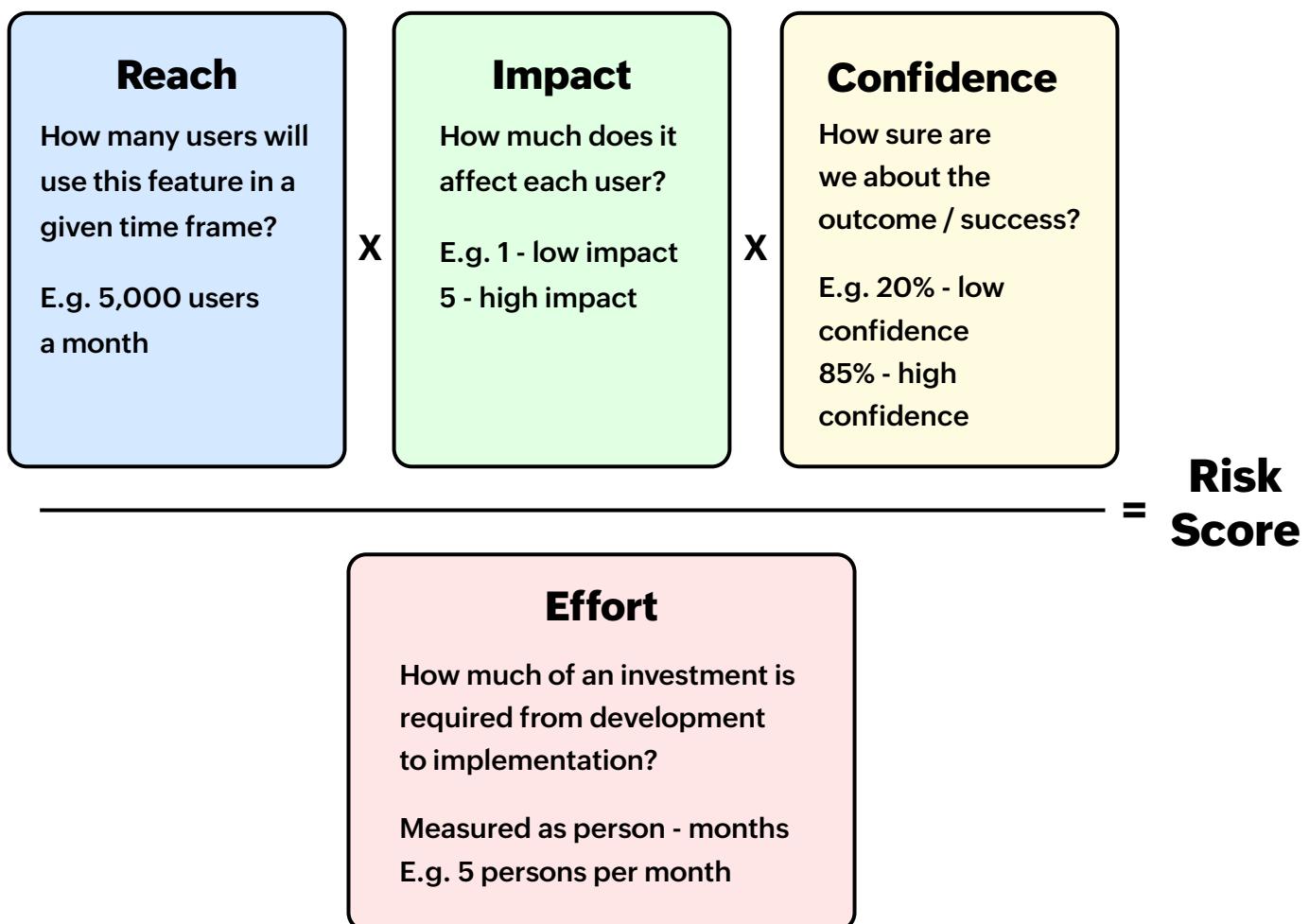
## Stage 5: Product roadmap

A product roadmap is a visual guide that provides a high-level overview of the direction, priorities, short-term, and long-term goals of the product. This includes planning the release, managing dependencies, and providing stakeholders with clarity in responsibilities and estimated timeframes. Roadmaps can be depicted through Gantt charts, Kanban boards, or timeline diagrams to convey complex information and facilitate understanding among stakeholders.



## Feature prioritization

Product requirements are never-ending lists. There's always a feature that needs enhancements and new ones in the pipeline. How can product managers prioritize their work? Features are typically prioritized based on the organization's business objectives, user feedback, and market demand. Select features that have the highest strategic value and impact on achieving key goals. If it's a new product that currently does not have customer input, prioritization frameworks like RICE, the Kano model, and the MoSCoW method can help teams streamline work.



### RICE prioritization framework for product management

<b>M</b>	<b>Must have</b>	Non-negotiable features without which the release cannot move forward. These can affect the project's visibility, security, and /or legality. Must-have features are critical to the delivery timeline
<b>S</b>	<b>Should have</b>	Features that may not be as vital as must-haves but are important requirements nonetheless. The product can still function without it but must be in the product's long-term vision or a part of the next major release.
<b>C</b>	<b>Could have</b>	"Nice to have" features that can be included in future releases. Their impact is minimal. However, they can be implemented at little cost to improve user experience.
<b>W</b>	<b>Will not have</b>	Features that aren't feasible or offer little to no value to the product. They will not be a part of upcoming releases but can be considered in the future if circumstances change.

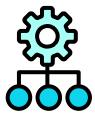
### MoSCoW prioritization method

At ManageEngine, support agents monitor tickets on the in-house help desk for feedback that may help the product management team. These are marked for review and pushed to a repository handled by the product managers. In most cases, there are multiple scenarios or problems that can be solved by one feature or module. So, the tickets are sorted according to the module and stored in the repository for continuous monitoring. A dashboard reports the number of requests for each feature. This helps our product management teams prioritize features.



## Release planning

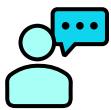
Product or feature releases require a definitive timeline. Managers can break down the product roadmap into manageable release cycles, such as quarterly or monthly increments, with milestones set for each release. Milestones are determined based on key deliverables. These can include stages like design completion, development sprints, testing phases, and beta launches. Releases also require extensive collaboration with cross-functional teams, so it's crucial to sequence tasks, address dependencies, and minimize potential bottlenecks before development begins.



## Resource allocation

Following release planning, we focus on the classic SaaS trio—people, process, and technology.

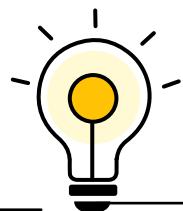
- **People:** Assess the capacity of the product team, including developers, designers, QA testers, and other roles. Take into account any ongoing projects, internal requirements, and overlapping roadmaps.
- **Process:** Allocate a budget for various phases of product development, marketing, and support activities. Expenses for marketing activities, in particular, can add up quickly, so product managers must collaborate with the marketing team to optimize their budget.
- **Technology:** Identify and secure the tools required for development, testing, and deployment. Work with sysadmins to ensure there are no hiccups in acquiring tools and the licenses required are up-to-date.



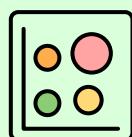
## Communication plan

The fundamental quality of a roadmap is its accessibility. Presentations are a reliable way to keep stakeholders informed about the roadmap, highlighting key features, timelines, and expected outcomes. Progress updates can be provided through meetings, reports, and dashboards. Ensure that these changes are also updated in the presentation, making it a single source of truth for all active members in the project. To further establish a two-way channel of communication, product teams can hold feedback sessions to gather input and make necessary adjustments to the roadmap.

### PRO TIP



Ensure personal bias does not influence prioritization



Use a resource heat map to gauge utilization



Establish clear criteria for completion of release

# Stage 6: Research and ideation

At the heart of product management is a relentless focus on the customer. Before we work on a product, we must understand the why of it all. Why should we offer this solution?

## Key components for answering the why

To identify the problem we wish to solve, product management teams should take into account two key components: market analysis and user input. All the data collected at this stage is consolidated to give product managers the big picture.



### Market analysis

- **Industry trends:** Product managers require a clear understanding of emerging trends and technologies, identify patterns in market growth, and assess evolving customer preferences. For instance, the post-pandemic SaaS market saw an uptick in AI-based solutions and features, especially with the launch of OpenAI's ChatGPT.

- **Competitive analysis:** Evaluate competitors to gain insights into their product offerings, pricing strategies, and advantages. A SWOT (strengths, weaknesses, opportunities, and threats) analysis can help identify gaps and potential avenues.
- **Market segmentation:** Divide the target consumers based on factors such as company size, industry vertical, and geographic location. Ideally, the product positioning should be tailored to address the specific needs and pain points of each segment.



## User input

- **Surveys and feedback:** There are multiple avenues for sourcing customer input like support tickets, community forums, and focus groups. Additionally, interacting with existing customers through surveys or interviews can give product managers a sense of direction at this stage.
- **Usability testing:** Beta testing programs can help product managers evaluate the user experience (UX) of the feature or product. Observe how users interact with the tool, identify usability issues, and gather feedback on design improvements.
- **Persona development:** Create user personas or journeys based on common characteristics and user goals. Personas here are fictional characters that embody the target demographic, their preferences, and pain points. Developing a storyline can help teams empathize with users and design solutions tailored to their needs.

## User Personas

Let's break down the types of users we want to target.  
Who are they? What are they interested in?

	<b>Jane Doe</b> 33F	<b>ORGANIZATION</b> <ul style="list-style-type: none"> <li>Mid-sized retail company specializing in fashion apparel</li> <li>Approximately 500 employees across various departments, including marketing, design, merchandising, sales, and operations</li> <li>Open to investing in SaaS tools to enhance customer experience and optimize operations</li> </ul>	<b>RESPONSIBILITIES</b> <ul style="list-style-type: none"> <li>Coordinate product launches, seasonal campaigns, and promotional events to generate brand awareness and attract customers</li> <li>Develop and execute marketing strategies to promote the company's fashion products and drive online and physical sales</li> <li>Collaborate with cross-functional teams to ensure alignment and consistency in marketing efforts</li> </ul>	<b>PURCHASING POWER</b> <ul style="list-style-type: none"> <li>Has significant influence over the marketing budget but not the sole authority. She can recommend software, with final approval from the marketing director and finance team</li> <li>Typical purchase range is \$5,000 to \$20,000 for software tools and marketing technology annually</li> </ul>
<b>TRAITS</b> <ul style="list-style-type: none"> <li>• Detail-oriented</li> <li>• Tech savvy</li> <li>• Collaborative</li> <li>• Creative</li> <li>• Data-driven</li> </ul> <b>QUOTES</b> <p>"We spend too much time manually updating multiple platforms. It's crucial for us to have a single source of truth."</p>	<b>NEEDS</b> <ul style="list-style-type: none"> <li>A versatile tool for task management, campaign planning, content creation, and performance tracking tailored to retail</li> <li>Integration with existing marketing platforms and channels to streamline workflows and data sync</li> <li>Robust analytics and customized reporting functionalities to monitor and optimize marketing efforts</li> </ul>	<b>GOALS</b> <ul style="list-style-type: none"> <li>Centralize projects to track progress and collaborate seamlessly</li> <li>Improve campaign planning and execution efficiency</li> <li>Enhance reporting and analytics capabilities and improve marketing performance</li> </ul>	<b>PAIN POINTS</b> <ul style="list-style-type: none"> <li>Difficulty in coordinating tasks and timelines within the team</li> <li>Inefficiencies due to using multiple disjointed tools</li> <li>Limited visibility into project progress and performance metrics</li> </ul>	

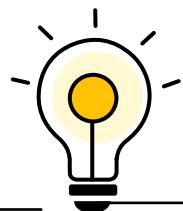
### A sample user persona for a project management tool

## Product requirements document

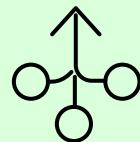
The next step in this stage is creating a product requirements document (PRD), a guide that outlines the specifications for a new product or feature. It serves as a blueprint for development, ensuring that all stakeholders have clarity on what needs to be built, why it needs to be built, and how it should function. PRDs are also a great way to identify and mitigate risks before commencement. Ideally, a PRD should contain:

- **WHAT:** A high-level overview of the product, including its purpose, objectives, and strategic importance.
- **WHY:** The rationale behind the product, including market research, user needs, competitive analysis, and business goals.
- **WHO:** The target users, user personas and use cases, and scenarios that demonstrate how users will interact with the product. It should also list the stakeholders involved in the project and their responsibilities.
- **HOW:** The scope, acceptance criteria, requirements (functional, non-functional, and technical) and external dependencies in relation to the project. Most importantly, a visual representation or mock-up of the product or feature is crucial for a PRD. Any supporting documentation can also be included.
- **WHEN:** A tentative timeline, including key milestones, deadlines, and phases of development to manage expectations.

### PRO TIP



Review existing data engaging with customers



Consolidate data for an overall outlook



Use version control for PRDs to monitor changes

# Stage 7: Product development

Product management's role in this stage is to oversee and coordinate the development process, ensuring that the product is built according to specifications, meets quality and compliance standards, and is delivered on time. They help define the scope of work for each sprint, clarify user stories, and set priorities based on the product roadmap.



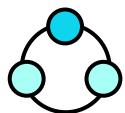
## Proof of concept (POC)

Before developers get to work, they must come up with a POC, a preliminary version or prototype of an idea that is used to demonstrate feasibility. It serves as a validation step to confirm that the concept can be practically implemented before committing resources to development. A POC is integral for product management as it helps secure buy-in from internal stakeholders (including PMs) with factual evidence and identifies potential technical, operational, and financial risks in the early stages.

A detailed PoC should move as follows:

- **Objectives:** An overview of the project, its goals, target users, and key questions that must be addressed.
- **Scope:** Critical functionalities, features, and boundaries, such as user access levels.

- **Hypotheses:** Assumptions related to the product's performance, scalability, user experience, or security.
- **Methodology:** Discussions on the approach, timeline, and resources required and estimated cost.
- **Deliverables:** Tangible outputs expected from the PoC, like performance/feasibility reports, integration proofs, or security assessments.
- **Risks:** List potential risks, such as compliance issues or integration challenges, and outline the strategies to mitigate the risks.
- **Stakeholder involvement:** Elaborate on roles and responsibilities and when each team will be involved.



## What is the difference between a POC, PRD, and an MVP?

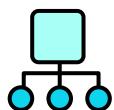
While all three are crucial to the success of a product, each serves a different purpose at various stages of the product development lifecycle. Here's a brief comparison based on key aspects.

<b>Aspect</b>	<b>Product requirements document (PRD)</b>	<b>Proof of concept (POC)</b>	<b>Minimum viable product (MVP)</b>
<b>Purpose</b>	Provide specifications for development	Validate the feasibility of an idea or technology	Test market demand with a functional version of the product
<b>Scope</b>	Comprehensive, high-fidelity	Limited, low-fidelity	Limited but practical
<b>Benefits</b>	Development roadmap, project management	Decision-making, risk reduction	Early user feedback and market validation
<b>Development effort</b>	Low	Minimal	Moderate

<b>Aspect</b>	<b>Product requirements document (PRD)</b>	<b>Proof of concept (POC)</b>	<b>Minimum viable product (MVP)</b>
<b>Audience</b>	Development and product/project teams	Internal stakeholders, decision-makers	Early adopters, customers
<b>Investment and risks</b>	Variable	Low	Variable
<b>Outcome</b>	Detailed guidelines for complete development	Feasibility report or basic prototype	Functional product
<b>Success criteria</b>	Product meets specified requirements	Proof that the concept works	Product meets user needs and gains traction

The development process then begins with the selection of a development methodology. The main factors to evaluate when selecting a framework are:

1. Project scope and requirements
2. Team size and structure
3. Customer involvement
4. Organizational culture
5. Development speed and delivery

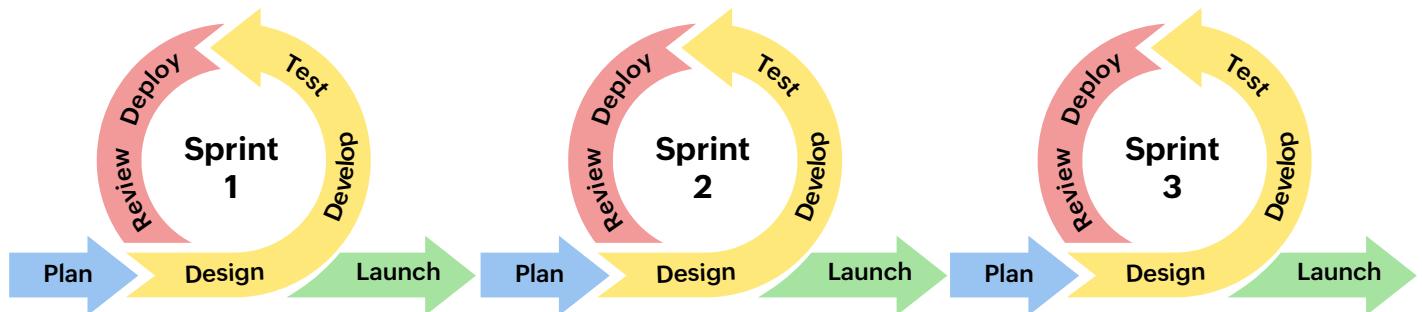


## Common product management frameworks

Let's review the four most commonly used frameworks in product management.

### 1. Agile

Agile is a flexible approach to product development that is designed to handle changing requirements and deliver value incrementally. Products are developed in small cycles called iterations or sprints, typically lasting one to four weeks. Agile methodology involves close collaboration between cross-functional teams and stakeholders, with a priority on the most valuable features.



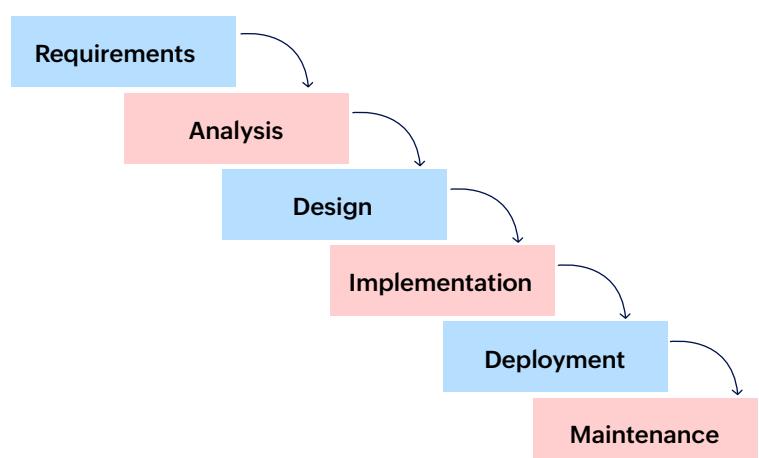
Agile is a suitable approach for teams with:

- Evolving or unclear requirements
- Small/medium strength
- High customer involvement
- Continuous improvement culture
- Demand for quick delivery and regular updates

## 2. Waterfall

Waterfall is a linear and sequential approach to product development where each phase must be completed before the next one begins. It progresses through a series of predefined phases with comprehensive documentation at each step.

Waterfall is a milestone-based approach where progress is measured through the completion of milestones. Each phase serves as a checkpoint.



Waterfall is a suitable approach for teams with:

- Well-defined and unchanging requirements
- Large strength
- Limited customer involvement
- Clearly established hierarchy
- Less urgency for rapid releases

### 3. Kanban

Kanban is a visual workflow management methodology where tasks are initiated based on capacity and demand, rather than being pushed through predetermined schedules. With work in progress (WIP) as the focal point, it limits the number of ongoing tasks at any given time to prevent overload.

Kanban optimizes the flow of tasks for continuous delivery.

Stories/ Ideas	Analysis	Development		Testing		Deployed		Completed
		In progress	Ready	In progress	Ready	In progress	Ready	
Task 7  Task 8		Task 5		Task 3				Task 1

Task

= Each color denoting a category of tasks

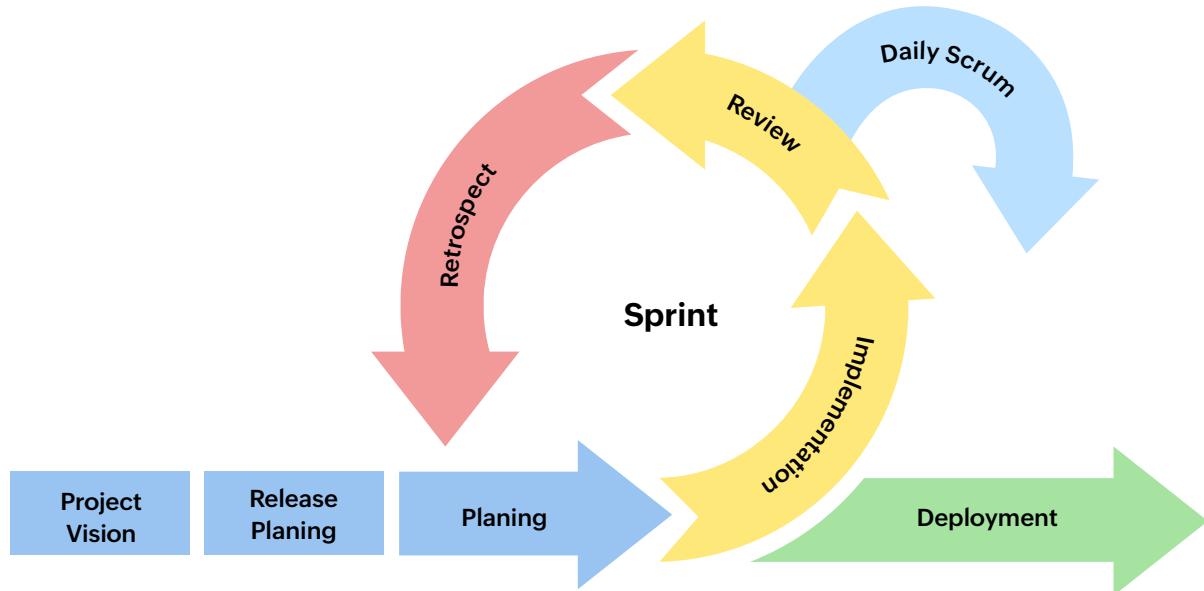
Kanban is a suitable approach for teams with:

- Flexible timeframes
- Small strength
- Moderate customer involvement
- Incremental development culture
- Requirement of identifying bottlenecks in real time

## 4. Scrum

Scrum is a subset of the Agile framework that emphasizes specific roles, ceremonies, and artifacts to manage the development process. It typically involves a product owner, who is responsible for the product backlog, a scrum master to facilitate the process, and developers that handle other tasks. There are four main ceremonies that comprise a sprint.

1. **Sprint planning:** To define sprint goals
2. **Daily stand-ups:** Short daily meetings to discuss progress
3. **Sprint review:** A demo of completed work
4. **Sprint retrospective:** To review and improve the process



Scrum is a suitable approach for teams with:

- Projects that can be broken down into sprints
- Small, cross-functional collaboration
- Heavy customer involvement
- High discipline to adhere to ceremonies
- Demand for rapid delivery

It is worth mentioning at this point that there are multiple other frameworks such as rapid application development (RAD), Lean, Scaled Agile Framework (SAFe), and Crystal Agile Framework. These methodologies may also be combined and implemented in a hybrid system if the team's operations call for it.

Throughout the development process, product managers hold numerous responsibilities, such as:

- Monitoring the completion of tasks using project management tools. They maintain visibility and confirm the team stays on track with timelines and deliverables.
- Participating in sprint planning meetings to align ongoing work with the roadmap.
- Managing the backlog to validate critical features are developed first.
- Coordinating testing and user acceptance testing to escalate critical issues and work towards timely resolution.
- Ensuring that all relevant documentation (e.g., technical specs, user guides, and API docs) is created and maintained throughout the development process. The writers in the product management team can assist with content generation—both technical and marketing content.

## Stage 8: Product launch

The product launch can be split into two phases: pre-launch and post-launch activities.

marketing team to create a detailed GTM plan to generate buzz around the launch. The PM's role here is to provide clarity on the target audience, key messages, and positioning of the product. They must also prioritize launch readiness; i.e., ensure that internal teams—including sales and customer support—are well prepared and all launch preparations are in place, including documentation, training, and marketing materials.

On launch day, the product management team's entire focus is on orchestrating a seamless rollout. This includes coordinating with the development team for deployment, monitoring systems for issues, and ensuring that marketing campaigns go live as planned. They should be prepared to address any issues that arise and engage with customers in real time.

## Stage 9: Monitor metrics

After product rollout, product managers must monitor metrics that can help improve user experience, enhance product performance, and make strategic decisions. These metrics can be broadly categorized as:

1. **User acquisition:** Sign-up rates, conversion rates, and referral rates
2. **User engagement:** Active users, retention rates, churn rates, and session metrics
3. **Product performance:** Feature usage, bug reports, and time-to-value (TTV)
4. **Financial performance:** Monthly/annual recurring revenue, customer lifetime value, and revenue churn rate
5. **Customer feedback:** NPS, CSAT, CES, and support metrics

The North Star Metric (NSM) is another crucial factor in data-driven decision-making. It is a single, measurable representation of a product's success and long-term growth. It is a leading indicator that reflects the core value derived by the user and is directly tied to customer experience. When there's a tangible value assigned, the product is accountable to the outcome of that metric and provides more clarity into the product's future than measures like revenue. The NSM varies across products. In SaaS, it could be the number of daily active users (DAU), number of records created, number of interactions, etc.

It's important for PMs to have a singular focus that aligns with business goals for sustainable success.

## Stage 10: Feedback implementation

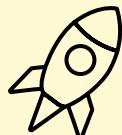
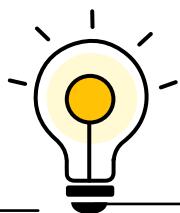
After gathering metrics and feedback from users, product managers are left with a treasure trove of information. Only question now is, how do we maximize its value?

The answer: continuous iteration.

Identify recurring themes and issue in the user feedback. These are key insights that can be categorized as actionable and non-actionable items. Here, we go back to the first stage and use prioritization frameworks like RICE and MoSCoW and focus on changes that would most likely have the highest potential impact with reasonable effort. This feedback then is included in the product roadmap to make enhancements in the next release cycle. Communicate the changes to stakeholders and gather their input as well.

A continuous improvement mindset is a must-have for product managers and the teams. It is the only way to create a more responsive and successful product that meets the needs of its users and thrives in a competitive market. It ensures a higher quality output through incremental improvements and supports sustainable growth.

### PRO TIP



Plan your GTM strategy to begin with a niche and scale



Continuously test unproven assumptions with metrics



Provide updates on how feedback was implemented

## Vital skills for product management

- Strategic thinking
- Continuous learning
- Research and analysis
- User-centricity
- Data-driven decision-making
- Cross-functional collaboration
- Soft skills like communication and empathy
- Prioritization

# Domain-specific understanding for SaaS PMs

1. **Subscription models:** A deep understanding of subscription-based business models is mandatory when offering cloud solutions. As mentioned earlier, product managers also need to work with pricing models, tiered plans, and freemium offerings to identify the best fit for users and maximize customer lifetime value.
2. **Cloud infrastructure:** This includes familiarity with cloud computing concepts and services provided by platforms such as Amazon Web Services (AWS), Microsoft Azure, or Google Cloud Platform (GCP).
3. **Usage analytics and insights:** SaaS product managers should leverage usage analytics to gain insights into user behavior, feature adoption, and product performance. Data-driven insights help identify opportunities for product improvement, prioritize features for development, and optimize user experience.
4. **Data security and compliance:** SaaS product managers must prioritize data security and compliance with regulations such as GDPR, HIPAA, or SOC 2 when working on a new product or feature.
5. **Development and deployment practices:** Collaborating closely with internal teams to automate deployment pipelines requires understanding of practices like continuous deployment, site reliability engineering (SRE), and Agile methodologies.

**6. Marketplace and ecosystem development:** Exploring opportunities like marketplace applications, development portals, and partner ecosystems around an organization's solutions is—once again—an emphasis on customer-centricity. It facilitates integrations that benefit customers, extends the product's reach, and provides long-term value.

## Chapter 3: In conversation with...



**Manikandan Vembu**

COO, Zoho Corp.

**Q.** What can you tell us about the product management challenges the company faced on its journey from AdventNet to Zoho and ManageEngine? What steps did you and others take for sustainable growth? And what's ahead?

Like every business, the product business comes with its own challenges. From our experience, we know that neither market demand nor product success are permanent, and the only way to stay relevant is by evolving the product.



## Initial success

Our first successful product was SNMP API and with that early success, we built Agent Toolkit, WebNMS, and Simulation Toolkit—all targeting the same telecom OEM (like Cisco, Motorola, Nortel, Lucent, Ericsson, and others). After the initial success in the telecom business, with growth peaking at 300% in 1999 to near zero growth in 2003, the peak and bust happened within four years. There is no guarantee of demand for any product. We were a 400-person company back then. The successful products we built didn't have market demand; it dropped due to the telecom slump. From 10 new optical companies starting every month, more companies were shutting shop. We had zero new customers in August 2003, and that was the trigger for moving out of the telecom market to new markets.



## Identifying the new market

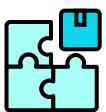
With 400 engineers working on multiple products, moving them to build new products was not easy. The first product that came out of that telecom experience was OpManager—a server and network monitoring tool that targets businesses—which was built on top of WebNMS. It was a small team that built OpManager but the majority were still working on the telecom market, which wasn't growing and was in the decline. Instead of having people on products without market demand, we moved people to build new products in ManageEngine. We already had engineers, so we decided to go after other markets in the enterprise IT space that were already successful—it was proof of market demand. As OpManager was targeting IT, we wanted to build additional products that target IT for cross-sell opportunities.

From ServiceDesk Plus to Endpoint Central to Active Directory, all the early products in ManageEngine grew that way. OpManager helped us revive growth and ServiceDesk Plus' success helped us accelerate growth. When one product's growth is slowed, another pushes the company's growth.



## Future-proofing the business

SaaS was just starting in the early 2000s and with our experience in telecom, we knew that SaaS could threaten the installed software business. With some additional resource from the telecom business, we started the Zoho brand and invested heavily in SaaS to ensure that we have strong presence in the SaaS market.



## Finding product-market fit

While it was easy to build the product, it wasn't easy to find product-market fit. Until the end of 2007, Zoho had decent sign-up but not much in terms of revenue. While ManageEngine was making good revenue and growing, Zoho was a non-starter. One product manager even suggested closing Zoho CRM because we couldn't see traction. We persisted by improving the product, and that helped Zoho hit its 1st million dollars in 2008. While the ManageEngine side did our first \$1 million in revenue in 1998 (just two years after the inception of AdventNet), it took more than four years for Zoho to hit the first million. Even though the first million took longer in Zoho, the business software market had much higher potential than the telecom market, and that potential is what brings more competition in the business software market.

It requires a lot of product focus to get the product-market fit. The majority of products fail here, and some of our own products in successful markets couldn't find the product-market fit. This taught us that even with all the features, the product could fail if it lacks something. Identifying that challenge and getting the initial customer traction is the first big hurdle in the product's success.



## **Scaling phase: Maintaining existing customers and keeping the product relevant**

For a new product, finding the product-market fit is a challenge. For successful products, on the other hand, there are two challenges. We have to manage existing customer requirements and also identify new ideas that will help win new customers and keep the product relevant in the market. Most often, we serve existing customer requirements, which is a departure from the new direction that evolves in the market. So it requires a balance between keeping current customers happy and making the product ready for future customers. It's a continuous discovery process, and it is not easy to identify new features or a direction that will help the product stay relevant and extend the customer base.

“

In service-based business, customers ask for what they want, so scaling is about building capacity and processes. Scaling in product-based business is about discovering the right direction for the product. Most companies in the product business fail after initial success because they cannot discover the right direction and keep the product relevant in the market. They often outsource the requirements to customers, which makes the product obsolete.

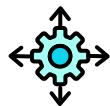
**- Manikandan Vembu**

COO, Zoho Corp.

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Across all our matured products, we are in the scaling phase. Customers are not going to tell us what will help our product grow. It is our challenge to identify what is useful and build that. In any successful market, competition is unavoidable. Competition will always try to find better ways of solving the problem and staying relevant. We should also find better ways to solve the problem. This is where a deep understanding of the problem is important. Otherwise, the product becomes obsolete, and which is why some products stagnate even if the market grows.



## Setting the direction for the market

The next phase in the product business is setting the direction for the market, and if that direction is right, all the competition will follow that direction. From being a follower in the market, the goal is to become leaders in the market, and that can happen only by successfully identifying future direction.

# Product managers from Zoho and ManageEngine



### Srivatsav Balen

Product manager, Zoho CRM

Srivatsav joined Zoho nearly a decade ago and oversees product management activities for Blueprint, a prominent feature of Zoho's CRM solution. Here, he shares his perspective and experiences.

Product management does not utilize a one-size-fits-all approach. In general, there are two types of product managers - problem-seekers and solution-givers. At Zoho, we're inclined to be problem-seekers. Our culture is, and always has been, that way. It boils down to what kind of problem we seek and what we're trying to solve. What problem fascinates us? The solutions may be technically or functionally challenging, but we look forward to these challenges and see it as an opportunity for growth.

## **Q. What does a typical day look like for a product manager at Zoho?**

Here's how my team and I allocate time for all the tasks lined up for the day:

First, we work with anything that impedes the release pipeline and make sure things are addressed and it is not waiting for a PM. This ensures that the direction is set for the progress of the day.

Next, we work with the development team, including other APMs and senior APMs, to answer their queries. This could be to address use cases, challenges, or make changes in line with other features that may have been released that might conflict with the feature currently in the works.

Following this, we work with the design team. Our role here is to draft a wireframe or mock-up and coordinate with designers on the finer details. As a product manager, I must ensure the design meets the current design standards but at the same time doesn't lose ease of use. When the design satisfies our criteria in terms of form and function, we give it the go-ahead and it moves to development.

## **Q. What inspires product managers to seek problems?**

Truthfully, product management is not a job you can check in and check out of. It's a constant state of mind, and like any creative role, inspiration can strike anywhere, anytime. For instance, a friend of mine got married a few years ago, and I was in charge of vendor coordination. We had vendors for the venue, catering, decor, etc. Managing the data supplied by the vendors was arduous, to say the least. Let me give an example. The caterer would present a standard package, which I'd have to go back and share with the bride, groom, and their families. We'd revise the package based on their collated input and send it back. Let's say three desserts instead of two and a change in the main course. Then the vendor would come back with a revised quote. I then had to go back and confer with the families to approve. This back-and-forth was taxing and affecting productivity. I presented the challenges to my team, wondering if there was a logical solution within our product ecosystem. This inspired the creation of the Configure, Price, Quote (CPQ) tool in Zoho CRM. So, problems exist everywhere, and product managers can be inspired by a completely unrelated scenario to build something new.

**Q. For any given product or feature, there's bound to be multiple avenues for feedback, both internal and external. How do you decide what takes priority or what the team should work on next?**

Requirements can be categorized as stated and unstated. Stated requirements are the ones we get from tickets, community, events, internal feedback, and social media channels. They usually know what the problem is and may even have a solution. There's clarity in their input. Unstated requirements are those that aren't from the users but are necessary for the growth of a tool. There's a famous anecdote from Steve Jobs that's often quoted in the product management world: "People don't know what they want until you show it to them." Until you show the customer what is available or make them aware that there is a problem that can be solved, there's no way for them to know what they need. In that case, our focus is on the output. As a product team, we try to balance stated and unstated requests, and resources are split between both kinds of requests.

**Q. What is the role of senior leadership in product management?**

Often, product or feature ideas are shelved due to various reasons like feasibility issues, resource limitations, or difficulty in finding product-market fit, where the market was simply not ready for a launch or users were too niche. When a team comes up with the same suggestion later, it's possible that the current infrastructure is ideal to bring the concept to life. However, leaders hold valuable insights as to why it didn't work the first time. Their input must be factored in when working on it again and ensure it is no longer a roadblock. This approach works for us at Zoho because most of our leaders were engineers and were involved in the initial versions of our products. They know the product inside-out. Their mentorship and foundational knowledge play a key role in the trajectory of the product.

## **Q. What do you think is a challenge for young product managers?**

Finding a balance between design and functionality is always tricky for young PMs, especially when working on a mature product. Take the classic example of deleting an item. A PM may opt for something like a three-dot menu where the user selects “Delete,” followed by a pop-up check-box where they reconfirm their choice. A designer might find that to be cumbersome and suggest an icon instead, to simplify the process. However, in this case, we want the user to be absolutely sure that their action is irreversible and cannot retrieve deleted data. Maybe as a workaround, they can introduce an additional block like admin approval before deletion. So, finding that level of balance is necessary and requires multiple one-on-one conversations between PMs and designers. I always recommend creating a wireframe with pen and paper before working with the design team as it helps me communicate my thoughts with clarity.



### **Aparna TA**

Product manager, ManageEngine

Aparna has been a part of ManageEngine for almost a decade, beginning her journey as an enterprise analyst before pursuing her passion to create new solutions. In this segment, she shares her approach to product management and the challenges that come with it.

## Q. How would you categorize your responsibilities?

To give a general overview, I'd say we categorize our work as:

- **Discovery work:** This is about exploring the different solutions we can build, understanding features, and market trends. We talk to different teams, engage with customers, and gather input. This serves as a base for the next step.
- **Product work:** Our main focus here is to come up with PRDs.
- **Project work:** First, we follow-up with stakeholders on the PRDs, then check their feasibility and alignment. We also prioritize features and conduct stand ups.
- **Program work:** Typically, we oversee projects, see if things are moving on track, align and prioritize items, and collaborate with other teams to iron out the finer details.
- **Ad-hoc work:** Anything that may be beyond the scope of product management responsibilities, we allot some time for that too.

Depending on which stage of the development process we're in, the distribution of work differs.

## Q. What were the challenges you faced when you first stepped into this role?

Product managers, in the early stages of their career, are usually tasked with coming up with very specific PRDs. Use cases are known, and from there, finding out the problem statement and identifying the functionalities required. A lot of newcomers (including me, when I was one) get into solution mode (feature listing) as soon as they get the use case without identifying the core problem. Here it's asking "what does the customer want to achieve, which they are unable to now?" It's not about a feature that is missing, but about a task that needs to be done, usually irrespective of the tool.

Beyond that, collaborating and getting a buy-in from teams is a perennial challenge. Each team views the project from their perspective. Naturally, when there are different contexts and goals, it requires additional effort from a PM's side to understand their vision and functional objectives. From there, we need to pitch our ask or goal such that it aligns with theirs. There's a lot of back-and-forth—a lot of input coming from multiple stakeholders—so getting their buy-in is a slow process.

When we say buy-in, we need to understand that there are layers to this as well. The first level is leadership, where we seek broad alignment to initiate the work. Next, we need to be backed by senior managers to align with the outcome. Following this, we work with other PMs and developers on use cases and specific functionalities. We have to collaborate with every stakeholder at their level and work our way through to deliver what we set out to. Although it is a challenge, it is imperative that everyone gets the bigger picture and understands how they can help deliver the solutions.

## **Q. How can managers stay inspired and come up with new ways to solve problems?**

I have always believed that if you really look for it, you can find your inspiration anywhere. Inspiration is everywhere at Zoho and ManageEngine, with 100+ products, and so many functions, each trying to do so many different things.

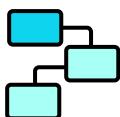
Product managers must take the time talk to every stakeholder in the product to understand why something is designed a certain way; that's when you begin to understand the complex machine every product is. Only when you know the complete picture can you find opportunities to change it. To put it simply, don't wait for the inspiration to be handed to you.

Product managers should talk to their peers and product leads in other teams to see what they are doing and how they are approaching the problems in their domain. Reach out to leadership, ask them about the how far they have come and where they see company going. There are so many moving pieces. When you start taking such small initiatives on your own, you'll have more clarity in your purpose. I say this because I also spend about three to four hours a month doing this. It has been the most rewarding experience and usually a welcome distraction from the daily grind. There's so much happening around us on a daily basis; all we have to do is follow what inspires us and trust that will lead us to what we are searching for.

## Chapter 4:

# Setbacks and strategies in product management

What are the most common challenges faced by product managers in SaaS and how can they overcome them?



## Prioritizing the roadmap

A product roadmap is defined by user feedback, market analysis, and the overall product vision built by the product team. When a product is on v1.0, the product management team usually has a fair idea on what the next few versions may look like, what features they plan to incorporate, and what enhancements users can look forward to. However, users and internal teams may have conflicting priorities, and the roadmap often has to compete with variables like market changes, user requests, and internal feedback. For product managers, the biggest challenge is keeping the roadmap on track while ensuring immediate needs are addressed and the product stays ahead of the competition.

### Strategies:

- Implement prioritization frameworks and set Specific, Measurable, Achievable, Relevant, and Time-bound (SMART) goals.

- Get feedback from power users to identify best-sellers and poor performers. Reach out to churned customers and understand their reasoning to seek an alternative. There may be some critical issues that need to be addressed immediately.
- Maintain open lines of communication with all stakeholders and engage in regular feedback sessions. Transparency builds trust and helps manage expectations.
- Be flexible with the roadmap and include buffer time for unexpected issues and adjustments.



## Driving user adoption

Ensuring new users understand and effectively use the product is crucial for retention. For instance, poor onboarding experiences can lead to high churn. Other factors like resistance to change, lack of ongoing support, and perceived value also play a role in user adoption. Changing user perception and easing the transition to a new product may be a challenge for product managers.

### Strategies:

- Demonstrate value with compelling use cases, case studies, and success stories. Elaborate on how the product solves specific problems.
- Simplify onboarding with comprehensive and accessible training materials. Work with marketing teams and technical writers to create tutorials, guides, webinars, and support documentation.
- Facilitate seamless integrations with existing tools and workflows through APIs, connectors, and other integration solutions. Offering tools and support for easy data migration from legacy systems can also drive user adoption.



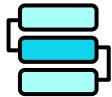
## Aligning with business goals

Business goals can shift due to market conditions, competitive pressure, or internal strategic decisions. Other factors like emerging technologies, varying KPIs amongst teams, and customer feedback may not necessarily align with business requirements. Product managers must ensure that the product roadmap is flexible enough to incorporate changes that meet these goals without causing significant delays or disruptions.

With any product-based organization, there exists a pressure to deliver quick wins and show immediate results, which can sometimes conflict with long-term strategic goals. Deciding where to allocate limited resources to balance short-term projects with strategic, long-term initiatives can also be a challenge for product managers.

### Strategies:

- Compare the product strategy and roadmap with the organization's vision, mission, and objectives. Identify overlapping goals and where differences lie.
- Engage with stakeholders, particularly the C-suite, board members, or investors (if any—[we wouldn't know!](#)) continuously to understand their needs and work their feedback into the product strategy.
- Break down long-term goals into smaller, manageable increments that can be adjusted based on changing priorities.



## Managing internal dependencies

A product or feature rollout requires intense cross-functional collaboration involving multiple teams. This also means the project timeline can quickly be derailed by resource unavailability, communication gaps, and disjointed workflows. If the team is struggling to meet deadlines, there may be a compromise on the quality of work put out. This may be a recurring issue when multiple product teams rely on a single team of engineers or in teams where several projects are ongoing simultaneously.

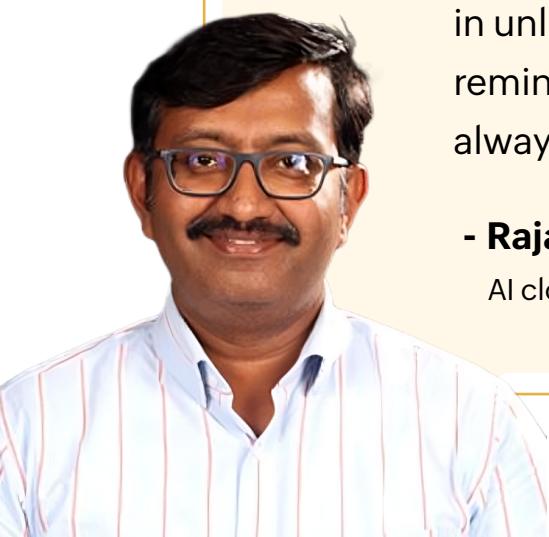
### Strategies:



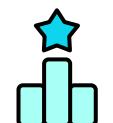
**Mediocre vs Mastery:** It is sometimes forgotten that consistent 'mediocre' practices such as attention to detail, repeated quality checks, writing basic reports, and documentation are crucial to help educate team members, build a framework for learning from mistakes, provide a testing bed for refinement, and reinforce the team's memory. Skipping these foundational steps and jumping directly to complex challenges never leads to true mastery but results in unlimited reworks. Aligning and consistently reminding the team of these essential practices is always a challenge for a manager.

- **Raja Gopal Hari Vijay,**

AI cloud lead for ZLabs at Zoho Corporation Pvt. Ltd



- Set realistic goals by discussing resource availability with the teams involved. All stakeholders must be aware of the product management team's long-term goals to allocate resources accordingly. Avoid making last-minute changes to the plan unless the situation calls for it, for example, in case of a hotfix or security bug.
- Use project management [tools](#) to monitor progress, plan releases, and improve collaboration and visibility across teams.
- Use no-code or low-code tools to create mockups/wireframes and reduce dependency on engineering teams.



## Highly competitive market

The downside to offering subscription-based services is that customers can cancel their subscription and walk away anytime. With hundreds of SaaS companies offering alternatives and switching solutions becoming easier than ever, it takes a game-changing product to keep customers onboard and stay ahead of the game. Reducing customer churn or increasing customer retention in a competitive landscape—especially with constantly evolving technology—can be tricky for product managers.

### Strategies:

- Dig deeper into why customers opt for competitor solutions. ManageEngine's pre-sales teams are encouraged to communicate with lost customers or leads and share their observations on the in-house collaboration platform.
- Focus on clear product positioning. Identify the purpose of the product, who it's meant for, what customers gain by using the product, and what they lose out on by not using the product.

- Conduct thorough competitor analysis before building a new product to identify gaps in the product strategy and gain a deeper understanding of the landscape.



## Security and compliance

Compliance with regulations like GDPR and industry standards like ISO/IEC 27001 is a basic requirement for SaaS providers to protect users' data. Non-compliance can lead to fines, legal action, and loss of customers' trust and opportunities. Ensuring compliance across all products and features may be difficult, particularly because they must stay updated on multiple changes and new regulations applicable worldwide.

There are multiple aspects of security that a product manager must be aware of, such as encryption, application security, and incident response. Vulnerabilities in third-party integrations can also compromise security. Even if PMs are not directly responsible, it is crucial that these factors are taken into account at every stage of the product development process. Internally, monitoring access to restricted data could be another roadblock without the right tools and practices.

### Strategies:

- Safeguard confidential information by limiting user access and permissions to authorized individuals. Implement practices like Zero Trust and MFA and restrict access based on user roles and responsibilities.
- Check in with development teams on periodic security audits and vulnerability assessments. Product managers can go one step further and take part in code reviews to understand the technical details behind the release. ManageEngine's teams use an in-house tool to identify vulnerabilities and prepare reports.

- Opt for approaches like DevSecOps, where security practices are integrated into software development. For product managers, this means early detection of potential vulnerabilities and threats. And early detection of security issues means fewer last-minute fixes and delays, smoother audits, and improved scalability in practices.



## Scalability and performance

Adding new features and functionalities can increase the complexity of the product. Complex systems are harder to scale and optimize, potentially leading to performance bottlenecks. An increase in the number of sign-ups, concurrent users, and the volume of data generated and processed further add to the challenge.

### Strategies:

- Collaborate with UI/UX teams to ensure that performance enhancements don't affect the user experience. During the early stages of prototype development, assess the impact of design choices on load times and responsiveness.
- Identify the scalability and performance risks involved with a project, like potential downtime during an upgrade. Work with the development team to come up with contingency plans to minimize the impact on users.
- Work with senior leadership to balance new feature development with necessary infrastructure investments to support growth.



## Data silos and decision-making

Data collected and stored across different teams or systems can result in data silos. When important data—like customer profiles or metrics and KPIs—are fragmented, product managers cannot fully understand user behavior, preferences, and pain points. Teams may also duplicate efforts, leading to inefficiencies and increased time-to-market. Without a holistic view, any business-critical decisions made would be based on incomplete or outdated information, reducing the accuracy and relevance of the product strategy.

### Strategies:

- Centralize data from various sources through a service desk or CRM solution. This ensures consistency and makes it easier to analyze and visualize data.
- Establish standardized data collection, storage, and sharing practices and encourage cross-functional collaboration to break down silos.
- While data is important, don't fall victim to analysis paralysis, i.e., over-analyzing volumes of data to take decisions. Narrow down on data relevant to the decision to be made. For instance, review adoption rate and performance issues when evaluating a feature's sunset.



## Gathering customer feedback

In-app polls and email surveys provide limited data and don't necessarily reflect the complete user experience. For actionable insights, product managers need in-depth input. This could be a challenge if customers are not willing to engage with the team or if the customer base is vastly bigger than the team itself. Managers may also struggle with getting the right information from their users. Using only generic questions like "What do you like about the tool?" will not cover the broad capabilities a tool offers and where it needs work.

### Strategies:

- Engage in one-on-one conversations with customers, preferably in person. The key is to keep the interaction brief and personalized.
- Ask scenario-specific questions that highlight the challenges customers face in their industry, the solutions they seek, and how they implement features in their day-to-day responsibilities.
- Incentivize feedback, especially from power users. This could be through early access programs, vouchers, merchandise, or free products/services.



## Lack of innovation

A role like product management calls for a constant flow of creativity and the drive to come up with original ideas. Over time, PMs may lose perspective and focus on smaller fragments instead of looking at the big picture. Sridhar Vembu, CEO of Zoho Corp., shares his thoughts on the subject. He says, "It is easy to manage but very difficult to inspire. Many managers, lacking the ability to inspire, become pure 'task masters.' That is an easy crutch."

Becoming pure task masters is a dead end in any creative pursuit like product development.”

Stagnation can lead to boredom and disengagement among the product team, ultimately resulting in a decrease in productivity. The dearth of innovation can also kill a product, the same way it drains team morale. The product loses its competitive edge and quickly becomes outdated compared to competitors who are consistently introducing new features and enhancements. This is especially a challenge in the SaaS industry, owing to its fast-paced growth and constantly evolving market needs.

### **Strategies:**

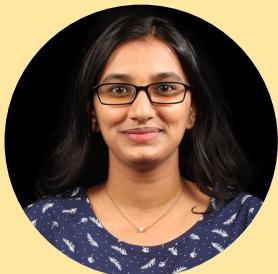
- Engage with different product teams to gain fresh perspectives. Create an environment where team members are encouraged to share ideas and challenge the status quo. PMs can also provide incentives or recognize members to reward their creativity.
- Go back to the source. Observe how customers use the product in real-world scenarios. This can uncover a new angle and may even inspire unconventional solutions.
- Stay updated on industry trends and emerging technologies. Participating in online communities and attending industry conferences and workshops are a great way to gain exposure to ideas.

## **Final takeaways**

At its core, product management is a way of thinking and a commitment to customers and businesses alike. Bridging the gap between technology and the market, it ensures innovative solutions answer real-world challenges. At ManageEngine, we understand that every product decision made has the potential to create lasting value. We hope the insights shared here help fellow product managers build their own framework and create impactful products.

# About ManageEngine

As the IT management division of Zoho Corporation, ManageEngine prioritizes flexible solutions that work for all businesses, regardless of size or budget. ManageEngine crafts comprehensive IT management software with a focus on making your job easier. Our 120+ award-winning products and free tools cover everything your IT needs. From network and device management to security and service desk software, we're bringing IT together for an integrated, overarching approach to optimize your IT.



## About the author

Mahanya is a content writer who specializes in IT stories, documenting the journey of enterprises like ManageEngine - their ups and downs, internal processes, and core principles. She is keenly interested in interacting with IT thought leaders to get their perspective on digital transformation. A true zillennial at heart, she spends her spare time on social media finding homes for rescue dogs.