CAREER GUIDE

FOR

PRODUCT MANAGERS

ProductPlan

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Why we wrote this book

At ProductPlan, we've had the opportunity to work with innovative product managers from some of the world's most interesting and successful companies. Some of these product managers are veteran product owners with decades of industry experience. Others are brand new to the field. All of these product managers have had something important to teach us about navigating a career in product management. We've been fortunate to learn from these experts through webinars, guest blog posts, and interviews, and we're excited to pass those learnings on to you, wherever you might be in your own career.

In this book, we set out to produce a reference guide for product managers at all levels. The book begins with Chapter 1, a look at the hiring process from the perspective of both the candidate and the hiring manager. It covers interviewing and hiring tips, including questions to ask when you interview, what to look for in a stellar product manager, and also gives some context on the field as a whole, how people end up in product, which types of personalities you might find in product managers, and how you might put together the perfect product team.

Chapters 2 and 3 present concrete strategies for effectively communicating with colleagues and customers. Chapter 2 focuses on interfacing with product stakeholders, giving product managers tactical advice for building shared understanding in their organization, resolving conflicts and disagreements about priorities, resources, and more, and outlines the importance of empathy. Similarly, Chapter 3 offers guidance on communicating with customers, covering everything from effectively managing customer feature requests to developing graceful ways of saying "no" to your customers.

Chapter 4 focuses on strategies for optimizing and supporting your product and your role as product manager, discussing ways to become a thought leader and

advocate for your product within and outside of your organization. Chapter 4 also asks whether it's possible to ever stop improving your product, whether the work of the product manager is ever done, and humorously (but pointedly) highlights some "lies" or myths product managers should avoid telling themselves.

Chapter 5 offers suggestions for making the most of your time, whether your product team is remote or on-site, small or large, located within the same time zone or spread across the world. Like the "lies product managers tell themselves" in Chapter 4, this chapter offers advice to avoid common time-traps, areas where product managers are likely to fall into distraction and decreased productivity. It's an important chapter for all product managers, whether they're brand new to the field or seasoned product experts; there's always room for optimization.

The final chapter includes several different collections of resources for product managers hoping to augment their product knowledge. Product managers are often lifelong learners with insatiable curiosity and Chapter 6 aims to point them in the direction of some great learning resources: Product-oriented podcasts, books, software, conferences, and training resources.

With this book, we hope to pass on some of the great tips we've received from product managers over the years we've been developing our roadmapping software. We've had the opportunity to chat with hundreds of product managers about their roles and their personal professional experiences. The goal of this book is to condense all of those conversations and tips into a single career guide for product managers. We'll keep updating it, so please send us any other career advice you've picked up along the way.

We hope you enjoy it.

Jim Semick
ProductPlan Co-Founder and Chief Strategist

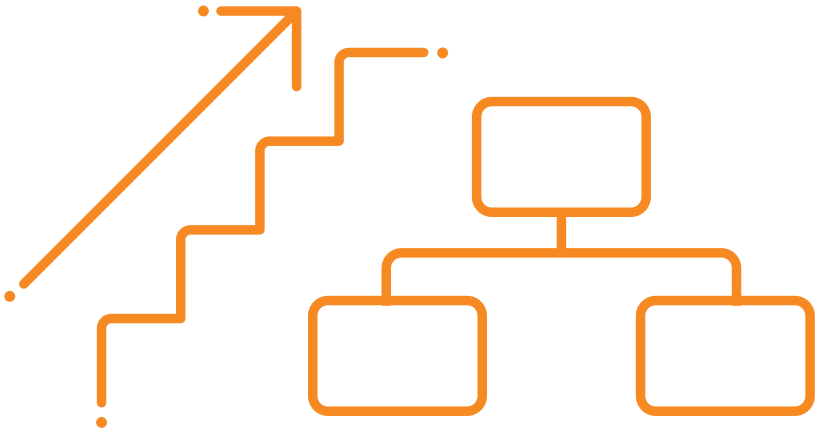
CHAPTER : 1

GETTING STARTED IN PRODUCT MANAGEMENT

This chapter introduces the product management profession, both from the perspective of prospective product managers and veteran product leaders. It covers interviewing and hiring tips, including questions to ask during your interview and what to look for in a product candidate. It also offers a general map of the product manager career path from associate product manager all the way up to Chief Product Officer and beyond.

CHAPTER : 1

The Product Management Career Path



What is the product manager career path?

The product manager career path is a fascinating one with lots of potential on- and off-ramps. At ProductPlan, we've spoken to many product leaders about their career trajectories and past professional experience, and have found there is significant variation in titles, responsibilities, and hiring and promotion criteria. Some product organizations have associate and senior product managers, while others have only a single role with varying levels of responsibility. Factors like company size, budget, business goals, and more will have an impact on how the product team is structured. Despite the different company-specific permutations, it's valuable to establish a general product manager career path.

Associate Product Manager

For this entry-level product role, hiring managers are looking for you to demonstrate both that you have an understanding of what product management is and that you have a clear interest in and passion for the customer. Your first product management job is not like school. It's not about knowing the most, working the hardest, or beating the competition. It's more of an art. It's about demonstrating your empathy for the user, highlighting your ability to identify issues and opportunities, and collaborating with others. It's important to show you can hear all sides of a story, synthesize and assess the different perspectives, and arrive at a clear decision.

Since much of product management involves formulating and asking the right kinds of questions, you'll also be expected to demonstrate your curiosity. Annie Dunham, ProductPlan's Director of Product, says she always asks candidates to tell her about something they've recently learned. This kind of question can reveal a lot about a person's natural curiosity and passion for learning. You can also demonstrate these qualities by thinking carefully about the types of questions you should ask during a product interview.

In terms of the day-to-day work, associate product managers can expect to be involved with everything a product manager typically does, just on a smaller scale. In other words, you may not set the product strategy or own the product roadmap, but you will set priorities for your own projects. You may not be presenting product plans across the company, but you'll be responsible for keeping your peers and your manager updated.

Associate product managers will be responsible for prioritizing tasks with a defined set of constraints, not necessarily defining which tasks they're performing, but making scoping and prioritization decisions around the tasks or projects they're assigned. Associate product managers will work and collaborate daily with other members of the product team, as well as other adjacent teams like UX and

engineering. During this work, they'll regularly communicate the status of their product to all relevant stakeholders. Your job is to balance business objectives and customer needs, reconciling the goals of the business with benefits to the customer. You'll need to ask yourself if a feature is needed, and if so, why? How is it solving a customer problem and moving the needle for the business? This last point introduces the importance of measurement. As an associate product manager, you'll need to continually speak to the "this is what we're doing and why we're doing it" question, and you'll rely on metrics to let you know if you're successful.

So, when are you ready to move from an associate role into a full product manager role? You'll be completely on top of the above activities. You'll have established yourself as the "go to" person for your product set and will have developed an excellent working relationship with engineering, UX, marketing, and other teams. You should be comfortable delegating some of your tasks to someone else and trusting in the process you've helped establish, and you should be prepared to speak to what is needed in the associate role in order to mentor your replacement.

Product Manager

To land a full-fledged product manager role, you'll likely need to come in with some experience. You don't necessarily need direct product management experience, but you'll need to have had some professional experience that clearly demonstrates your communication, collaboration, and prioritization skills. Though you might not need hands-on product experience, you'll definitely need to be able to speak to basic product concepts and walk in with a hit-the-ground-running attitude.

This mid-level product role is similar to the associate level product manager position, except that in addition to being your product's "go to" resource for other teams, you'll be the point person for the product team itself related to your product. You'll be consulted for advice on process, relationships, tactical moves, etc., and will need to be confident and well-informed by data.

In order to move into a senior product manager position, management will need to be confident you're doing your job well and are driven to help the team accomplish its broader goals. You should have a demonstrable understanding of the customer benefit your product provides, be able to articulate the specific customer problems it's solving, and be able to tie product metrics to business goals in a compelling way. In other words, everything should be running and running smoothly; internal and external customers should feel informed and engineering, UX, and marketing should trust and respect you. You'll also know it's time to move on because you're hungry for more.

Senior Product Manager

Typically, at this point on the product manager career path, you'll need to have had some direct product management experience. At minimum, a successful senior product manager will come in with professional experience that demonstrates her ability to think on her feet, be accountable for decisions, lead by example, and make data-driven decisions based on a multitude of complex, interdependent factors. This role will also require deep product and market knowledge.

In terms of day-to-day responsibilities, senior product managers perform most of the same duties as described under the associate and mid-level product manager sections, just with higher-impact, higher-visibility products. They are in a position to lead other, more junior product managers and work closely with product leaders in the organization to contribute to and execute on product strategy. While other product managers might be heads down in the data or more involved with customer interviews and feedback, senior product managers begin to look more at the broader product process and start to become more of a voice for the product team to leadership.

Senior product managers that become a critical source of advice for other product managers and that successfully advocate for the product team to senior leadership are well-positioned to move on to a director-level role. This is especially true for

senior product managers that are consistently exhibiting curiosity and passion not just for their product and customers, but also for the product process itself.

Director of Product

A director-level role in product will require leadership experience, and the ability to build and trust a team to do the work you previously did as a sole contributor. The Director of Product role will further focus on building better processes and honing existing ones, improving overall team performance, and building consensus across the entire organization.

You'll regularly meet with your peers throughout the company—this is what's happening and why, what do you need from product, this is what product needs from you, etc. This role relies heavily on data. You have a team focused on individual KPIs but you're responsible for connecting those small-scale numbers to the broader success metrics of the business as a whole.

Directors of Product spend a significant amount of time researching the market landscape their product lives in. What's the latest info on competition? What are new product best practices? How can we improve our product development process, relationship between teams, and executive buy-in?

Product directors are also a resource and mentor for the rest of the product management team. Product teams will have a variety of strengths and part of a director's job is to put those strengths to work for the benefit of the company while helping individual product managers improve in other areas. You'll advocate for the team and for your product strategy, and you'll own and present the product roadmap to the rest of the organization, and make sure your team understands everything happening at the higher levels of the business and the market. You'll participate in strategic projects as needed, but will spend the majority of your time crafting high-level strategy and ensuring your team's activities are advancing that strategy in the most effective way possible.

VP of Product

At this level, you are significantly less involved with the hands-on activities related to the product development process. In a large organization, there might be more than one VP of Product, depending on the number of product lines. Whether there's one VP or several, this role is a high-level support resource for the product organization, responsible for the entire product set and how it fits into the rest of the organization.

Activities and responsibilities include budgeting for the product organization, ensuring that strategic product decisions align with business objectives, and protecting the product team from infighting and internal politics. The VP role is both there to enable the product organization at the high level and to act as a check on activities from the perspective of the business, C-level stakeholders, and, if applicable, the board of directors. VPs of Product might also participate in speaking engagements, and look at how the product contributes to thought leadership. A lot of a VP's time is spent thinking about what needs to happen with the team today to be ready for what's coming a year from now, i.e. futureproofing your product and team. In this role, your product team is tactical, while you are primarily strategic.

Chief Product Officer and beyond

If your organization has a CPO, that might be the next logical step for an experienced VP of Product. Chief Product Officer is either an expanded variation of the VP of Product role, or one that oversees multiple VPs of product rolling up to one product leader. At this level, you're looking at a product portfolio, and making sure staffing resources, budget, and research are being invested in the areas that will provide the combined best benefit. You're tracking numbers 3-6 months out, but you're making strategic decisions for the 3-5 year timeframe. You're setting the aspirational product goals to inspire and push your team, i.e. "Here's what we can be, here's what we will be, here's what success looks like this quarter, year, and so on."

At this point on the product manager career path, your product really becomes the product organization itself.

Apart from CPO, there are lots of other options for veteran product folks: General Manager, COO, CEO, and more. Product folks tend to make great GMs and COOs because they're used to working across the entire company to move business objectives forward. The same methodologies they've been practicing their entire career—understanding an issue, strategizing, prioritizing work, testing, validating, etc.—come into play at this level as well, although they look a little different.

You'll make budgeting decisions not just across one department, but across the entire organization, relying as you always have on data and KPIs. At this level, you'll be developing, measuring, and constantly improving on objective criteria for success, and you'll be responsible for mentoring and energizing people doing vastly different types of work across the entire organization. In other words, at this point on the product manager career path, your product really becomes the product organization itself.

Tips for Hiring a Great Product Manager

In our many discussions with product leaders from around the world, we've gleaned some insights regarding the traits they look for in prospective product managers. Whether you're on the hiring side yourself or interviewing for a product role, we thought you would benefit from some advice on how to identify and hire a great product manager.

1. Problem-solving ability

Many of the product leaders we've worked with have told us that problem-solving ability is the trait they value most in a product manager.

These CPOs and Directors of Product understand that product management is a tricky role—one in which there are always a lot of moving parts—and that driving a product successfully to the market will require plenty of creative solutions to unexpected challenges. So, when they're looking for a new product manager, sharp product leaders look for natural problem-solving aptitude, which often presents itself as creative thinking, flexibility, and ingenuity.

LOOK FOR:

1. **Problem-solving ability**
2. **Great communication skills**
3. **Empathy**
4. **Leadership**
5. **Insatiable curiosity**
6. **Passion**
7. **Comfortable with failure**

2. Great communication skills

Virtually every product executive we've ever spoken to on the subject of hiring has listed communication as one of the top skills they demand in a product manager.

Even if a candidate checks all of the other boxes—solid product management background, experience in your company's industry, strong technical knowledge—that product manager is far less likely to prove effective if he or she can't communicate clearly and effectively with various product stakeholders. Product managers regularly interface with engineers, executives, sales teams, marketing teams, as well as customers and prospective customers. They need to effectively solicit and communicate valuable product-related information on a daily basis.

3. Empathy

Another attribute that product leaders look for in product managers is empathy—in this context, the ability for a product manager to truly see things from her customer's point of view. Product managers need to be able to put themselves in their customers' shoes and build products to solve their customers' problems, meet their needs, understand their jobs, motivations, and desires. The worst mistake a product manager can make is to ignore their customers, build their product in a vacuum and release something no one wants to use or buy.

4. Leadership

Product managers have the difficult role of coordinating and leading a large, cross-functional team, often without any formal authority over anyone on that team. In fact, some of the team's members, such as the VP of Engineering, might be well above the product manager in the organization's hierarchy.

How, then, can a product manager successfully drive such a complex initiative, when they don't have any organizational power over the people executing the details? With natural leadership skills.

Many product leaders have told us that a great product manager will have the ability to build chemistry and generate enthusiasm among the various teams and departments responsible for developing his or her product. This is no small task, considering that often the same product manager will have to say no to requests from these teams, or push them to work more quickly or with fewer resources.

You want a product manager who will be internally motivated to keep asking and looking for novel solutions.

To succeed in the face of all of these inevitable challenges, a product manager will need charisma—to make that cross-functional team feel as invested in the product's success as the product manager, and to want to actively contribute to making that success happen.

5. Insatiable curiosity

Another important trait is curiosity. Product management is a role that requires a great deal of initiative and intrinsic motivation. It's very difficult, after all, for a VP of Product to tell her product managers exactly what they should be doing on a day-to-day basis, and it can be very easy for a product manager to settle for the first idea or first answer they come up with.

This is why smart leaders look for curiosity: product managers don't know what they don't know and because often the best strategic decisions will emerge only after serious research and investigation, you want a product manager who will be internally motivated to keep asking and looking for novel solutions.

6. Passion

When evaluating a product manager candidate, many product leaders look for passion. Product development can be a long process—often months and sometimes even years—and that process is often punctuated along the way with setbacks and disappointments.

Don't overlook natural passion as a key trait in the product managers you bring onto your team.

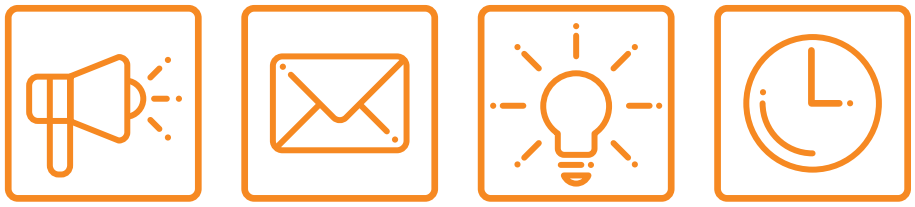
If the product manager responsible for driving that long, setback-ridden development isn't passionate about seeing her product through to a successful market launch, then the whole effort can slide off the rails at any point.

7. Comfortable with failure

Smart, visionary product managers take the long view. They know that any single product in a line, or any specific market launch, might fall flat for any number of reasons.

That's why product executives have told us repeatedly they would like to know that any product manager they hire won't fall to pieces at their first product disappointment. Instead, they want a product manager who will be able to react appropriately, take a moment to grieve, and then start gathering useful learnings that can propel the next launch to success.

Key Responsibilities of Outstanding Product Managers



The role each product manager plays depends on many dynamics—company size, industry, the type of product, the stage of the product, and company culture all influence the exact form the product manager role will take.

Case in point: The three statements below come from three very different (and real) product management job descriptions:

- *Has responsibilities to manage the product from concept to design, sample production, testing, forecast, cost, mass production, promotion, support, and finally product end of life.*
- *Delivers the operating plan: achievement of growth objectives including market share, revenue, profit, and return on investment for all the channels/categories of business and/or key customers.*
- *Responsible for managing and implementing marketing activities through research, strategic planning, and implementation.*

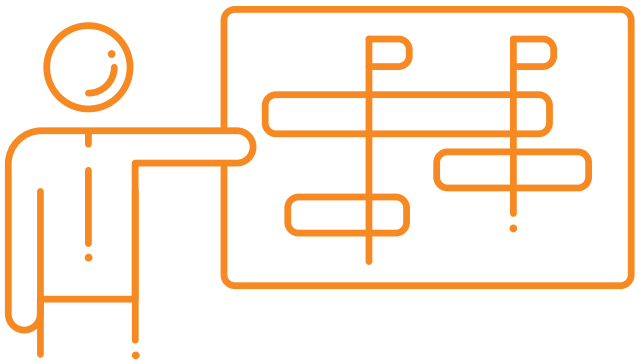
Quite different, aren't they? Whether we look at 3 or 100 job descriptions, you can see that each product management role is varied and unique. What this underscores is that many businesses have vastly different views about what a product manager does, and where her ultimate responsibility begins and ends.

So, what are the key responsibilities of a product manager? And how can you use the role most effectively to usher successful products into the world?

The Key Role of Product Managers: A Working Definition

In most cases, your core role as a product manager will be two-fold:

- *To set the long-term vision and strategy for your company's products.*
- *To communicate this strategy to all of the relevant participants and stakeholders.*



Typically, the primary tool you will use to accomplish your key roles—product strategist and communicator—will be a product roadmap, which is a strategic, high-level document that conveys the "why" behind the products you're building.

As a product manager, it is important to understand that you are a central hub within your company for a lot of critical information about your products, market, competitors, customers, prospects, key industry analysts, and many other constituencies.

To succeed, you will need to continually gather and analyze data and business intelligence from all of these sources (as well as internal sources like your sales

and customer success teams)—and use this data to inform the evolution of your product roadmaps.

Given that you will need to interact with a broad range of stakeholders and teams to ensure your product's success, and that you will also need to translate the input and data you gather to build a case for many decisions you present in your roadmap, there are four critical skills you'll want to bring to your role as a product manager:

1. Be transparent about your prioritization and roadmap process.

Remember, much of your role as a product manager will be explaining "why" to various stakeholders and constituents—why you are prioritizing one feature or theme over another in a release; why you've chosen to focus more on one particular goal for the next two quarters versus another goal, etc.

The best way to get the relevant constituencies—sales, marketing, engineering, your executives—on board with your strategic thinking is to be clear and open with them about why and how you are making decisions.

2. Be able to say "No," but explain why in terms that stakeholders understand.

There will be plenty of times when an executive will ask for a new feature his gut tells him will be great, or when an engineer will suggest tabling the development of a feature set to save time on the next sprint, or when a sales rep will ask (even beg) you to add a specific tool to the next release because a prospect has promised to buy if it's included.

But if those requests will undermine your strategic objectives for the product, you will often have to say no. The key will be in your ability to articulate why (that all-important word in a successful product manager's vocabulary) you cannot

4 CRITICAL SKILLS

1. **Be transparent**
2. **Be able to say "No"**
3. **Be a ruthless prioritizer**
4. **Evidence-based decision-making**

accommodate the request. Again, the more strategic and backed by evidence you can make your roadmap, the more likely your constituents are to understand when you need to say no.

3. Be a ruthless prioritizer while balancing the needs of customers and stakeholders.

Regardless of your company's size or budget, you will always face limited resources for your product development. That means you will always need to prioritize, and continually weigh the competing factors of your objectives for your products, your company's limited resources, and demands from various stakeholders.

If you're not sure how to set priorities or how to weigh various factors in developing your roadmap, there are several great models that can help you get started—such as weighted scoring.

For a detailed explanation of these and other proven models you can use to prioritize your roadmap items check out our other book, *Product Roadmaps: Your Guide to Planning and Selling Your Strategy*.

4. Bring evidence-based decision-making to your communication.

As I've stated previously, one key trait of successful product managers is their ability to answer "why" to the many questions they must field from stakeholders throughout their organizations. One of the most effective ways to answer why is with evidence. It's much more compelling than your opinion—or anyone else's.

If you have real-world user data, customer feedback, and metrics on your product then you already have an excellent source of business intelligence to inform how best to build your product roadmap. Let your own analytics help guide and inform your decisions.

If you don't have real-world user data on your products yet, don't worry. There are plenty of other ways to gather useful intelligence about your product, customers,

and market. Ask your customers directly. Study your competitors' products. Read online communities or comments on your company's blog where your prospects or customers are discussing your products or your competitors' products. Study research reports from the analysts who cover your industry.

When an executive or sales rep asks why you've selected one direction over another for the next iteration of your product, your ability to present a compelling explanation backed by real data will go a long way toward earning their buy-in.

Because you play a central role in your organization—always gathering valuable intelligence from various stakeholders, customers, and your market—you are in a unique position to define the success of your product. Your role as the product's strategist and evangelist will be central to your success and the success of your products.

Strategies for Creating an All-Star Product Team

What's the best way to put together an all-star product team? While there's no five-minute recipe to whipping up a successful product team, a little strategic planning can go a long way. There are several things you can focus on when assembling your product team to ensure you end up with a cohesive and successful group.

1. What makes a good leader?

Generally speaking, leadership is about guiding a team towards a unified goal. More specifically, however, it's good leadership that's so critical to the health of a team and the success of reaching that goal.

What makes a good leader? Is it the inherent qualities in a person? The chemistry of a team? A little of both, or something else? Actually, it's all of the above. Experts have identified general characteristics that all leaders share, but good leadership also depends on the unique individual and the team he or she leads.

In 1939, Kurt Lewin, a psychologist, and his team of researchers first identified three primary leadership styles: autocratic, democratic, and laissez-faire. Perhaps the most intriguing finding from the team's research is that leadership can be taught and learned. Other experts have continued to research this topic, adding

additional traits to the list and perspectives to the mix.

Undeniably, all leaders are not created equal. And while that might not always result in an ideal outcome, that uniqueness is ultimately a good thing. When you think of a quintessential leader, who comes to mind? Steve Jobs, venerable founder of Apple, is considered by many to be a one-of-a-kind visionary leader. His unique flavor of leadership and dedication to innovation helped create a tech empire. We can't all be Steve Jobs, but we can take a few pages from his playbook.

While there's no one particular leadership style that makes product teams successful, product managers who are willing to take the time to figure out what works best for their teams will set the course for successfully reaching a unified goal.

2. Start with the right people.

Obviously, leaders don't go it alone. A leader needs a team, and you don't have to look very far to find people. It's finding the right people that's so challenging (and really, this is what keeps leaders awake at night). What should you be looking for as you build your all-star product team?

Lea Hickman, former VP of Product Management at InVision (an award-winning SaaS-based product design collaboration platform) and Adobe, looks for these three traits in product managers, but they could be applied to just about any role:

- **Communication skills:** Product managers need to be exceptional communicators.
- **Conviction:** "The more subtle, harder thing to interview for is conviction. A great product manager believes in what they're creating, and has conviction around their ideas. And by that, I don't mean falling in love with your idea. I mean having a defensible conviction about your idea and being able to stand behind it, and answer the 'why.' I talk a lot about the why. We often fall short in explaining the why to other people,

and that's part of the conviction. If you can explain why you want to do something, you have conviction."

- **Humility:** "The final trait is something that's important for me when I'm hiring and in product managers I like to work with—a sense of humility. Understanding it's not about you. It's about getting an opportunity to work on behalf of the product and get it into the hands of users—letting users decide."

3. Harness the power of product squads.

If your company were a restaurant, would it be staffed with a bunch of short-order cooks who can replicate standard fare or expert chefs, each responsible for a specific aspect of a unique culinary experience?

Staying focused on a particular goal—or even a specific task—almost feels like a luxury today. And that's precisely what product squads get to do. They don't work across entire products or on ad hoc projects assigned by management. Squads focus entirely on a single functional area, enabling the company to develop expertise and depth of knowledge.

Since 2012, Spotify has followed a product squad approach. Each squad is made up of eight people—developers and a product manager—and has real autonomy. Spotify has discovered that it can "develop significant expertise and intellectual capital across each functional area of its offering. In other words, it can build teams of true industry experts, rather than a single large team of coding generalists." Spotify thinks of its squads as independent startups.

4. Where there are passionate people, there will be conflict.

Now that you've brought together the right people, everyone is going to get along swimmingly, right? Wrong. When people work together, there's bound to be conflict. While conflict can feel counterproductive, it's not necessarily a bad thing. At the heart of most conflict is passion and conviction.

Passion in your work is a beautiful thing. It fuels productivity, commitment, innovation and so much more. And it often leads to conflict. If developers are going head to head over the best solution to a problem or team members are at odds because of differing goals and perspectives, take heart: Conflict can be constructive. In fact, many argue that conflict is critical to making meaningful progress towards a unified goal.

Unfortunately, many of us aren't as well-equipped as we might like to be at navigating professional conflict, and might be lacking the requisite skills to use conflict constructively and resolve it when necessary. So how in the world do you work through conflict as a team and use it constructively? Joel Peterson, Chairman of JetBlue Airways and consulting professor at Stanford Graduate School of Business, believes that conflict can, in fact, be quite good for business and that "the key is to convert discord into opportunities for learning and growth." Peterson offers three strategies for turning conflict into opportunities.

Of course, not all conflict is necessary or productive. This type of conflict is usually born of poor communication or lack of transparency, and it's dangerous because it puts teams on a fast track to losing trust, focus, and time. The easiest way to avoid it is to improve communication. Make sure everyone stays on the same page by using tools that make it easy to instantly access and collaborate with the most up-to-date information.

5. Your roadmap is your friend.

One of the best ways to keep everyone on the same page and avoid miscommunication is to rely on your product roadmap. Even the smartest people on the planet who can skillfully resolve any conflict aren't going to get anywhere fast if they aren't on the same page.

Dedicated product roadmap software helps product managers communicate a product's strategy to multiple constituencies across the company. Your

product roadmap aligns people, vision, and strategy by giving you the ability to communicate and share your product's high-level, strategic view.

Giving everyone access to your roadmap keeps everyone on the same page and promotes knowledge-sharing and transparency, two things that help reduce workplace conflict and inefficiencies. With a tool like ProductPlan, you can create and share live roadmaps with just a few clicks, quickly update your roadmap in real time as decisions are made, easily share your roadmap to build consensus across your organization, introduce a consistent roadmap process across teams and use it to guide your all-star product team to victory.

Things Every Product Manager Should Do In Their First 30 Days at a New Company

We've talked a lot about what the product manager career path looks like, how to get hired, and more, but what should you do once you've accepted your offer. This might be your first product manager role or the most recent position in an established product-oriented career. Regardless of whether you're new to the product team or a seasoned product manager, your first few weeks at a new company are exciting—and often super hectic!

Product management is relationship management.

This section offers some concrete advice on how to make the most of these early weeks and set yourself (and your new product) up for success.

Get to know your team and process.

1. Meet everyone.

Product management is about relationships. It's a great idea to schedule meetings with everyone to figure out who does what and ensure you get a bird's eye view of the current dynamic. Chatting with your team and your peers gives you an opportunity to ask questions, listen to gripes and suggestions, and assess what's working and what's not.

Your list of meetings should also include your boss, stakeholders, and anyone else who has time to chat. Remember, this is the fun part! It can make for a lot of meetings, but it's great to take advantage of coffee breaks, lunches, or walks around the block, to get to know everyone.

2. Learn the process.

When workflows don't make sense, ask more questions! Product development can be an extremely complex process, especially for teams with special considerations—think globally distributed development teams, multiple feature teams, etc.—and every organization has its own distinct process. Sure, you've been brought in to hone that process, but it's unlikely you'll be successful if you fail to understand how things have been operating prior to your start date. Think of this as your first product. What are "customers" saying about it? Why do they need it? Where can you prioritize some big wins?

3. Reserve judgement.

Some things may seem odd at first. You might have immediate suggestions. You might want to point out how you solved X issue at your last company, or recommend a new tool for the product stack. But. Hold off for now. There's probably a history here. There are probably some interesting reasons why things haven't progressed on a certain feature. Or, why no one has implemented the obvious solution on the tip of your tongue. Give yourself a chance to get the lay of the land (and for your new co-workers to provide some context) before you rush to solve every issue right away.

4. Take notes!

This will help you review later and may also be of use to others in the future. When one of our product managers started at ProductPlan, she spent a significant amount of time walking through all the configurations for user permissions for roadmap viewers and editors with one of our engineers. That in-depth Q&A session—where she really took a deep dive into how permissions are supposed to work—will be extremely helpful for her as she works to define how they'll work in the next feature set.

You'll never be in a better position to take the perspective of a new customer than you are in your first 30 days on the job.

Get to know your customer and product.

5. Take advantage of your fresh eyes.

You'll never be in a better position to take the perspective of a new customer than you are in your first 30 days on the job. You haven't yet built up a list of assumptions about or biases toward your product and you should use that to your advantage in these early days. Keep this in mind as you dive into your product and interact with your customers.

6. Audit customer calls.

Sit in on sales calls, support calls, customer success calls, or any scheduled call with your end users. Get to know how your fellow teammates speak to customers, speak about the product, its features, benefits, and value proposition. Prospects are likely to quickly highlight what's currently missing in your product. Current customers give you a perspective on how the product is being used, what new features they'd like to see, and what other problems they want to solve. Empathy for your customer base is essential and should start early.

7. Talk to the customer yourself!

Once you've got a fairly high-level sense of the product, talk to some customers on your own. Do a few customer interviews. Ask them when they bought your product and why? How are things different now in terms of their needs than when they first bought? Your coworkers likely have some assumptions about these topics by now, and the fresh perspective we mentioned in tip #5 might help you uncover some novel insights.

You need to figure out how your organization views your job, and how much room you have to expand or contract your duties as needed.

8. Survey the landscape.

Both in terms of your role and your new product. First, you need to identify how you're going to fit into your new organizational landscape. At some companies, the product team wields a huge amount of influence. Product managers essentially own their product and dictate resource allocation, marketing efforts, and more. For other companies, they have a much more constrained role. You need to figure out how your organization views your job, and how much room you have to expand or contract your duties as needed.

Second, you need to check out your competition and the rest of the market space. You might get excited out of the gate and want to completely rebuild your product, or add tons of new functionality. But that might not be aligned with the company's goals, your customers' needs, or the rest of your team. Often, who you are not is as important as who you are, and clarifying that early on will be helpful.

9. Measure twice. Build once (but keep iterating).

Find out what's being measured and why. This starts with the business. What are the strategic goals this year? How are they measured? How are product KPIs tied to those goals? The company might be tracking experts covering all the critical success metrics you'll need. Or, they might not be tracking anything. Or, they might be tracking EVERYTHING and have no idea how to filter, exclude irrelevant info, or build this data back into future development cycles, design sessions, and prioritization efforts.

You need to assess the instrumentation and take note of what's working and what's missing. I've yet to meet an engineer who wouldn't like to know how a new feature was being utilized, or a CEO that didn't like to use data to validate assumptions. Understanding the current lay of the (data) land will also help you meaningfully demonstrate product and feature performance in the future.

Set some goals and share what you've learned.

10. Set some personal goals.

The first month will be a fire hose of information. To be successful in your new role, you need to know a lot about your product, the processes surrounding its development and launch, the company, and the customers. If you're following tip #1 you're going to be talking to a lot of people and receiving a lot of information. Setting and completing some personal goals is an important way to make sure you feel like you're accomplishing something out of the gate.

Example goals might include: Scheduling three one-on-one meetings with your teammates every week, building your own user persona, delivering a demo to a peer, or creating an overview of why you think customers use your product. These are great ways to track your progress while you build up some momentum.

11. Join all the things!

Find out where your customers hang out, how they hear about new products, what podcasts they listen to, newsletters they read, which dry cleaners they use (just kidding). But seriously, join the communities and networking groups they hang out in and spend some time there. It's a great way to learn about the problems your product solves, what your customers are like in general, and it also helps you keep your finger on the pulse of your market space.

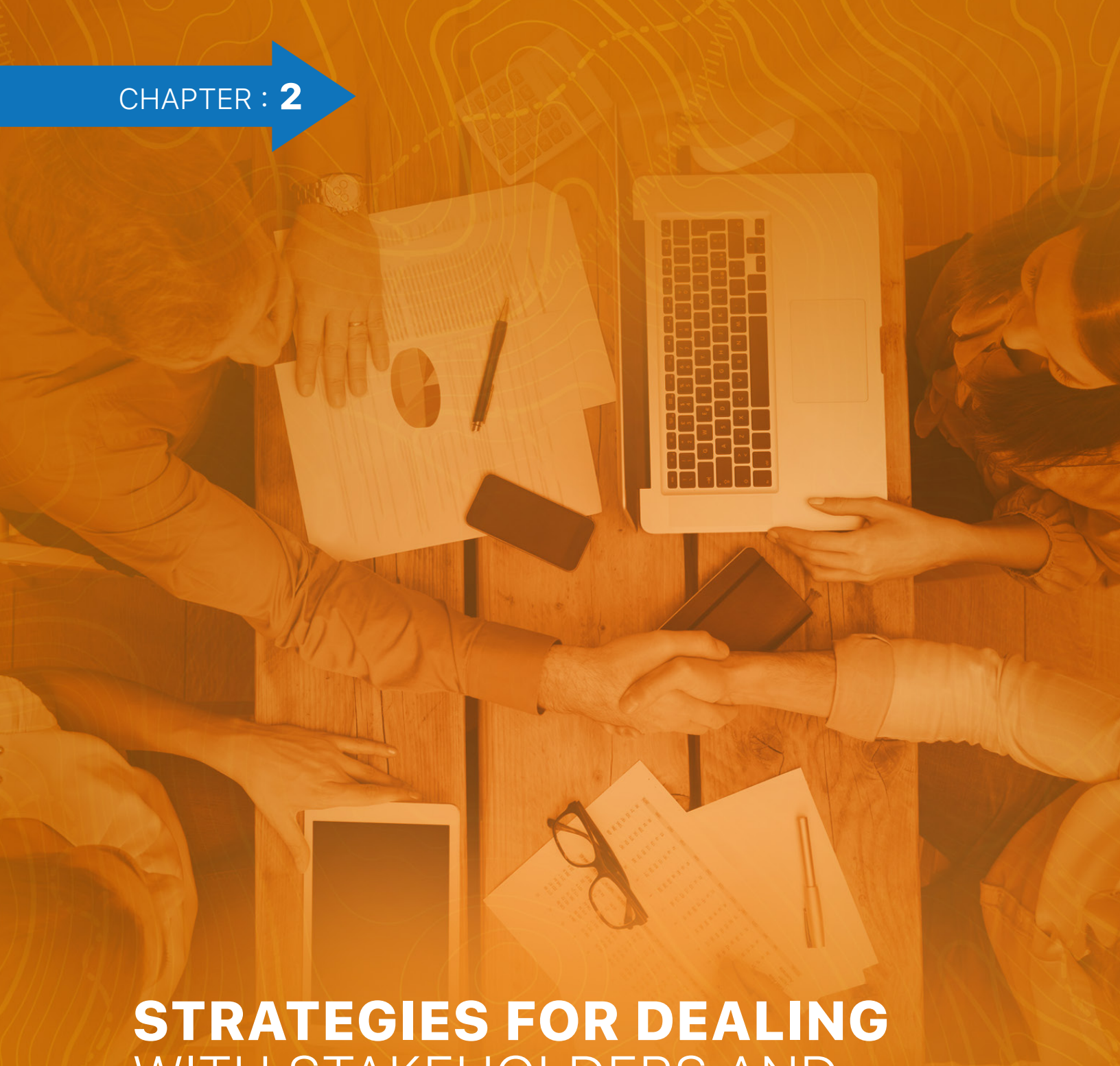
12. Finally, share what you've learned.

If you follow the steps above, you're going to end up with a lot of useful insights for the rest of your team. You've spent the month chatting with everyone, interacting

with the product with fresh eyes, and surveying the landscape your product lives in. Now is a great time to aggregate all your observations and present them to the rest of your team.

Once you go through the above steps, you should have a better sense of what kinds of people you're going to be working with, where the product fits into the landscape, who your customers are, and how work gets done.

CHAPTER : **2**

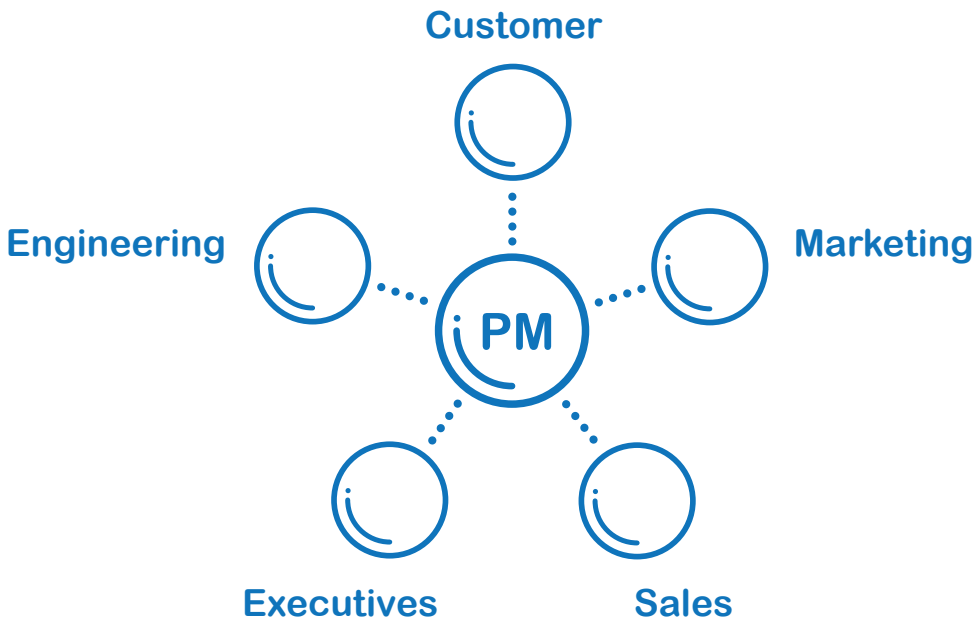


STRATEGIES FOR DEALING WITH STAKEHOLDERS AND TEAM MEMBERS

This chapter presents some concrete strategies for effectively interfacing with your colleagues, including other product managers, executives, and members of teams like UX, Sales, Engineering, Marketing, and more.

CHAPTER : 2

How Do I Build Shared Understanding?



One of the central roles of a product manager is to drive shared understanding. With shared understanding, a team is more effective, resilient, and creative. Alignment without shared understanding is temporary and short-lived. The best teams find a way to break down complexity and speak the same language.

The problem: context is always changing

We all know that one of the big challenges of product management is sharing context. You don't only have to share it with your team, or across your team, but you also have to share it across the entire organization. You're basically sharing context all the time. And the challenge is that the context is always changing. The context of yesterday is not the context of today.

We're going to frame that problem, and give you some strategies to make sure that the context you share is the most current context, and is deep enough for your teams to be able to take action.

Direction vs. destination

Think about some of the words that we use, and think about how we communicate strategy as product managers. Let's say you've got a horizon, and you're in a boat. Now, for a lot of knowledge work, you're just generally sailing west, like an explorer. You're sailing to a point on the horizon. You're going somewhere. That's a direction.

Now think about how people frequently state goals. They state a series of unique points along a line, that you need to be able to hit in order to get to a specific endpoint. And that's what we call a destination. Think about those two words: One is direction, and that's a lot more applicable to knowledge work, and the other is a very linear, deterministic goal that you're trying to hit. Direction versus destination.

Let's take a real-life situation: You have a friend and they say, "I want to lose five pounds." You have another friend who says, "I want to eat healthy." Those are two different perspectives. One is a destination-based perspective ("I want to lose five pounds"). And the other one is a more systems-based perspective ("I want to eat healthy").

Now, we all know there are many unhealthy ways that you could lose five pounds. The idea is by eating healthy, one of the things we might notice is losing weight. But we might also live longer, we might be happier, and we might be less stressed. So that's more of a systems approach.

Now, the third example is this idea of cascading goals. Dividing one goal into a sub-goal, into many sub-sub-goals, into many sub-sub-sub-goals, into sub-sub-sub-sub-sub-goals. We see this in practices like OKRs, or management by objectives.

The idea is that everything cascades up and connects with a higher level goal. Teams are told to focus on their individual goal. Now, that might be good in some

situations. But in a lot of the environments that we're working in, the teams that are on the front lines actually need to be able to see the big picture. They need to do this so that they can make course corrections as they're moving along. Think about a person who's working right there [points at lower level goal]. If they know that's the goal and they see the context changing, what if they could circumvent all these steps and just achieve that goal in another way? What if the context changes for this goal, or if they could take a shortcut?

We tried to lay these out here as we're understanding the problem. You have destinations versus directions. You have goals versus systems. And then you have the need for teams to be able to see the big picture in knowledge work to make sure that they can course correct when necessary to keep moving in the right direction.

The reality: context is a moving target

But the reality in product management is, we'll do a kickoff, and at that point, shared understanding is at an all-time high. Or we think it's at a high. But over time, we're always fighting the downward pressure on shared understanding.

The context is changing. And at the same time, we're learning, and we're improving our shared understanding. We might be iterating and getting more shared understanding. It's always this push and pull on what we're learning and the degree to which our learning is depreciating that really dictates the situation.

That's one problem. We're always losing shared understanding and gaining shared understanding. And even when we have a new, better, shared understanding, we still have trouble communicating that.

A second reality is that different people on your team have different needs. You might have someone who is more junior, who's new at this, who may just not care all that much about the big picture, and they're looking down here [draws line downward]. They're looking for things right in front of them: "Can you tell me what needs to be done next, please, so that I can do my job?"

Meanwhile, you have the people who are asking "why?" all the time, the people who need to understand the big picture, and these are sometimes your most valuable employees. They want to understand the big picture, how things are fitting together, and how things relate to each other. You've got both of these personalities on your teams.

And the third part of the reality is, the problem-solution dichotomy that everyone talks about, where we'll specify the problem and you specify the solution, is a lot more intricate than that. Because every problem has a solution to some higher-level problem. Even something like hitting quarterly goals, or a new round of funding, that's a solution towards maybe reaching a higher-level goal for your company. When people are talking about problems and solutions, it's a lot more complicated than that.

Talk to an engineer for example, even the slightest interface change is a problem to solve. You have nested problems and solutions and people with different needs. And you have the fact that shared understanding is always in a dynamic state, and you're always having to communicate it.

Resist prescriptive goals

First we talked about the difference between a destination and a direction, or systems and goals. And next we talked about the challenges of shared understanding. That we're always trying to grow shared understanding, but it's always degrading, too. There's always that dynamic happening.

When you think about it from a product manager's point of view, it is always tempting to have prescriptive goals. If you take a step back, that is too fragile for most knowledge work. If you just create those destinations that people must hit, then the context changes, they're not going to be able to change course. You're going to lose that shared understanding very quickly.

Think about direction instead of destination as you're putting together your roadmaps. Make sure that you're communicating the why, the data that you have behind that, the boundaries that you've created around your particular goal, and also encourage people to try new things.

Maybe the first plan won't work out, but if they can understand your broader rationale, then they might creatively come up with other solutions that might achieve that goal even faster.

Conflict Management Recommendations for Product Managers

Although they probably weren't written into your job description, as a product manager your role includes such key responsibilities as relationship building and conflict resolution. After all, to bring successful products to market you will need ongoing support and dedication from a wide range of constituents—executives, developers, sales and marketing teams, customers, etc. And these stakeholders will often have conflicting priorities relating to your product roadmap, and sometimes even problems with each other or with you:

"Does your company even bother to test its products for bugs?"

— One of your customers

"How are we ever supposed to make money with that?"

— One of your executives

"You guys never give us enough time to do our work!"

— One of your developers

So how can you deal with these inevitable conflicts, without allowing your products or your company's strategic objectives to suffer as a result?

Below is a product manager's blueprint for conflict management. But before we delve into the details, let us give away the punchline. The following principle informs most of the tips and suggestions below. If you take only one concept from this section, let it be this: The most valuable tool in your conflict management arsenal will be your ability to always remain calm. Keep reading to learn why this is so vital for effective conflict management—and, indeed, for a successful career as a product manager.

The product manager's five-step blueprint for conflict management

1. No matter how heated the situation gets, stay calm.

Product management is a marathon, not a sprint. For your products' sake, you can't afford to win the battle and lose the war. What do these clichés mean in terms of staying calm under tense circumstances? They mean that as your product's primary champion, when it comes to product-related conflicts, you can't afford to respond to negative emotion with your own negative emotion.

Your success as a product manager depends on maintaining strong relationships and credibility for the long haul. Yes, if a developer aggressively pushes back on your timeline in a way you think is unreasonable, you can become even more aggressive in return, and win that argument. And yes, if a customer posts a nasty comment about your product on social media, you can respond with

FIVE-STEP BLUEPRINT

1. **No matter how heated the situation gets, stay calm**
2. **When disagreement turns to argument, your first job is to remove the emotion**
3. **If someone is angry or has a complaint, first acknowledge their pain**
4. **Get to the core of the problem—"chunk down" or "chunk up"**
5. **When you can compromise without undermining the product, compromise**

an equally hostile message stating your case, and you might even feel vindicated afterward. But in these instances, what have you actually won? And at what cost?

If your developer begins working under a timeframe he feels he was beaten into, he's not likely to be as invested in the project, or in future projects. You're better off diffusing the tension in the timeline disagreement, instead of escalating it.

Likewise, no matter how good it felt in the moment to sting back at that customer's nasty message, in the long run you've probably created an even angrier customer—one who is far less likely to continue being a customer and also less likely to recommend your product to colleagues and friends.

Another reason you always want to remain calm is that it's simply the best way to get to the crux of the conflict, and resolve it. Keeping a heated conversation at the same level of tension, or even boosting the tension in the room by adding your own, only makes it more difficult for anybody to clearly identify the problem, and begin discussing rational ways to resolve it. Which leads to the next suggestion.

2. When disagreement turns to argument, your first job is to remove the emotion.

We're not talking here about a rational, calm disagreement relating to your product. Such discussions are usually nothing to worry about. In some cases, in fact, they can serve as healthy exercises in which several parties all dedicated to your product—and all with unique vantage points—are advocating for what they believe is in the product's best interest. Conversations like these can lead to better products.

It's when disagreement turns into argument, when emotion comes into the discussion, that you need to step in and try to diffuse or remove that emotion. This is a vital step for a couple reasons.

First, consider again your long-term objective: to build and maintain the teams you'll need to deliver successful products to market. The sooner you can steer a personal, heated argument back on track—to a rational discussion about what's best for the product—the less long-term damage your teams and company will suffer. Remember, think marathon, not sprint.

The second reason it's so important to remove the negative emotion from a product-related argument is that when people are emotional, they are usually not thinking as clearly as they do when they're calm and rational. This makes it more difficult for you to zero in on what's really troubling them or what they truly want. They might even lose sight of it themselves, if they become angry enough and get lost in the fight.

So, how do you remove the emotion from a heated debate or even a yelling match about your product? The following few tips offer specific ideas.

3. If someone is angry or has a complaint, first acknowledge their pain.

This might seem counterintuitive. If a sales rep launches into an angry tirade about features not included on your product roadmap, for example, your first reaction might be to defend your roadmap and the reasoning behind it. You are your product's champion, after all.

But when you react this way, immediately pushing back with your own argument, you deprive the other person of feeling heard and understood—which in many cases is the cause of much of that person's pain. Often, simply giving someone an opportunity to vent their frustration will diffuse the majority of that frustration.

Now imagine that instead of getting defensive after hearing a sales rep's tirade—and shooting back, "We already discussed this, and the executive team insisted we focus on A and B for the next release; we don't have resources to include C"—you simply listen. Really listen to them.

And when they've stated their case, you calmly respond, "Everything you're saying is completely logical and reasonable. Those features were going to be an important part of your pitch, and it must be difficult to know you're still going to have to take the product out on sales calls without them for a while."

What you've done here is invaluable in conflict resolution: You've validated the other party and acknowledged their frustration. You haven't said yes—and indeed you won't, because you can't. But you have shown them that you heard their issues with the roadmap, agree that they have a legitimate issue, and wish you could help.

> **Related Tip:** *In the above example, part of showing your sales rep you truly heard their issue was that you restated it. Restating the other party's points or complaints is an important way to ensure they know you were really listening.*

Now, because you've acknowledged their pain, from this point forward your discussion will go a lot more smoothly.

Indeed, this sales rep is now more likely to really listen to you as you state your case—because you've set that tone for the conversation, by first listening to them. Also, because you remained calm as they argued, and you didn't argue back, your rep is more likely to trust you. They're more likely to understand your reasons for turning down their requests, and not assume they're based on anger or defensiveness or other personal reasons.

Finally, by acknowledging this rep's pain, and giving them a safe forum of vent their frustration at the situation, you've probably helped to preserve and maybe even strengthen your relationship for the long haul.

4. Get to the core of the problem—"chunk down" or "chunk up."

What happens when, even after calmly listening to a stakeholder's angry argument or complaint, you're not sure how you could possibly address the issue because it feels too broad or general?

Whenever you're engaged in a disagreement and you hear words like "always" or "never" or "impossible," your conflict management antennae should be up.

This often happens when people become emotional—they lose sight of the specific issue and "chunk up" the problem. So the fact that two sprints back your developers had to speed their timeline by a couple of days turns into "You never give us enough time to do our work!"

When this happens, your job is to zero in on the specific problem. Dig a level deeper—"chunk down" the problem. Bring the focus back to the issue at hand. Calmly ask your developer, "Okay, looking at this timeline we're proposing, how many more days do you think you'll need? Maybe we're not as far apart as you think."

Now you've taken the discussion from an emotion-based, impossible-to-fix, "you never give us enough time" problem, to a more rational conversation about the number of development days needed for a specific set of tasks. What follows should be a much more collaborative conversation.

Whenever you're engaged in a disagreement and you hear words like "always" or "never" or "impossible," your conflict management antennae should be up. Chances are the person has veered from a legitimate topic of discussion to a more emotional, general complaint. That's when it's time to employ this tactic—to calmly ask focused questions to get to the root of the conflict.

Similarly, you may find that a constituent who has a product-related argument or complaint has "chunked down," meaning they have fixated on a single, small issue and can't see beyond it.

The telltale signs of this will be a person in a product meeting who repeatedly returns to a single, highly specific point—a marketing VP, for example, who keeps insisting that "we really need a new shopping cart on our site."

To uncover the core of this person's issue, you need to move away from a detailed technical discussion about shopping cart vendors or an argument about what plug-ins work with your product's backend. Your job here is to "chunk up" the problem, to find out exactly why this marketing VP is so set on swapping out shopping carts.

Maybe you'll discover that his team has been doing research and discovered that your shopping cart abandon rate is higher than the industry standard. Not knowing why this is happening, your marketing VP might simply assume the issue is due to a bad experience with your shopping cart application.

By thanking the VP for the insight, and agreeing to look into why your abandon rate is above average, you can both diffuse a possibly negative situation and uncover the real source of the problem.

5. When you can compromise without undermining the product, compromise.

Finally, accept the fact that as a product manager you are often going to have to work with limited resources, under less-than-ideal circumstances, and go to market with a product that doesn't have everything you'd hoped for.

So, in those instances when you can make reasonable compromises in terms of what's on your wish list in order to preserve your relationships and strengthen your credibility over time, doing so can be a smart strategy.

This, again, is the "win the war, not the battle" approach to conflict management.

Yes, you can stand your ground and demand every feature on your product roadmap be coded by the next release, or push back on your sales team's demand for more flexibility in pricing, or squeeze the technical writers to complete their documentation a little sooner.

Your generosity in spreading the credit will go a long way in terms of strengthening your relationships, which will in turn naturally smooth out future conflicts among your teams.

But if you can give a little instead, and show these all-important constituencies you understand their needs and limitations, it might be worth it for the long-term strategic benefit of deepening those relationships.

Proactive bonus tip for conflict management: share praise with your teams

This is a great approach generally for a successful career, but it can also serve as a valuable proactive step in conflict management—because it can help minimize or even prevent conflicts among your teams.

As a product manager, you will often be the one praised for your product's successes—when it reaches customer or revenue milestones, when it wins industry awards, when it's written up favorably by the trade press or analysts, when a big customer signs on, etc.

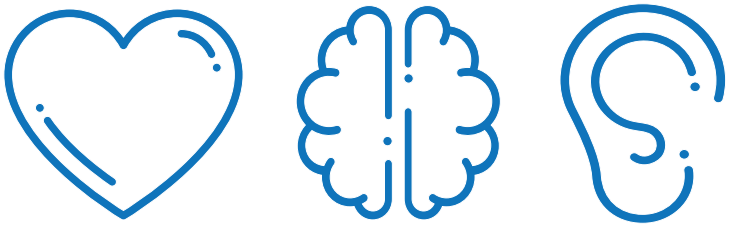
Your generosity in spreading the credit will go a long way in terms of strengthening your relationships, which will in turn naturally smooth out future conflicts among your teams. Everyone will feel more invested and connected together around a shared goal. Conflict is more common, and tension higher, among groups that don't feel connected or appreciated.

Publicly share praise whenever and wherever you can. Thank your sales team when

your product breaks a revenue record. Give kudos to your marketing department for their great campaigns, and to your developers for the product's positive user feedback.

The more these constituents feel appreciated for their contributions, the more your product will be built around closely-knit teams rather than disparate silos separately completing their own tasks. Which means that when it's time to bring everyone together to discuss the project, you'll face fewer conflicts that require the steps above.

The Empathetic Product Manager



Empathy. You've heard it's an important skill for product managers, marketing managers, and UX teams. But how can you put empathy into practice when engaging with customers and prospects?

Empathy is a way of understanding your customers' underlying needs and motivations. We believe that empathy can lead you to build a better product and then explain to the world why you're building it.

At ProductPlan, we like to think of empathy as listening closely, but also as a way of asking better questions that matter. Here are a few tips and examples you can use during your customer interviews to arrive at unique insights you wouldn't have otherwise—and ultimately build great products.

Understand how customers define success

A good place to start is by asking questions to help understand a customer's motivation to solve a problem. If your product is B2B, you want to understand what they want to achieve with their business and the metrics they use to measure the success. In B2B, it's important to remember that "customers" are not businesses, but people who work for those businesses.

When talking with prospects, ask for examples of how they are solving their problems today.

For example, when ProductPlan's co-founder Jim Semick was helping to validate the product that eventually became AppFolio, he scheduled several long conversations and in-person visits with their target business customers. Jim wanted to learn about the products they used, but also to understand what they wanted to achieve with their business.

At first, the assumption was that they wanted to make more money. That often was true, but frequently he heard something different. Many simply wanted to maintain the business but run it more efficiently so they could have more free time (he heard about golfing on Fridays more than once). Others wanted to build a sustainable business they could pass on to their son or daughter.

By understanding these motivations through empathetic questioning Jim was able to build a product and compelling value proposition that resonated with AppFolio's target customer.

For your customers, ask the basic questions that illuminate success metrics—for example:

- *"Why did you start this business?"*
- *"How did you get into this job?"*
- *"How do you know you have had a successful year?"*

Understand how they are solving problems today

When talking with prospects, ask for examples of how they are solving their problems today. If they are currently your customer, it's possible they are

supplementing your solution with other solutions—this is essential to understand. You can discover great product opportunities when customers are cobbling together multiple solutions (including spreadsheets and paper) to solve the problem.

For B2B products, there is no better option than being in their office to see the systems, workflow (and problems) first-hand. You can also see nonverbal cues. Phone interviews are fine, but seeing stacks of paper, wall charts, sticky notes, and other workarounds can give your team inspiration for innovative ways to solve the problem.

Uncover the true motivators

As a product manager, you already know it's important to uncover pain. But sometimes customers and prospects tell you what you want to hear, or tell you something is important when it's actually not very high on their priority list. Asking the right questions can help you get to the true motivators.

Here's an example: When we were researching the concept that became ProductPlan, we interviewed dozens of product managers to understand their product roadmapping process. We uncovered a lot of pain and motivation to change an ineffective process dominated by spreadsheets and presentation tools.

But we learned that the challenge for them wasn't only about saving time and getting out from under the burden of Excel and PowerPoint. By asking the right questions and listening closely, we were able to understand that it was also about creating a compelling vision and looking good in front of stakeholders and executives. As a result, our product roadmap software delivers on speed and ease of use and looks beautiful in presentations.

The best way to uncover true motivators is with open ended questions. Using "why" and "how" are great tools and should be used often. Couple that with listening closely and you are on the right track.

Empathetic questioning and listening can help uncover true motivations and provide a path to better products. It's also a great way to let customers know that we care enough to truly understand them.

A few more tips for empathy

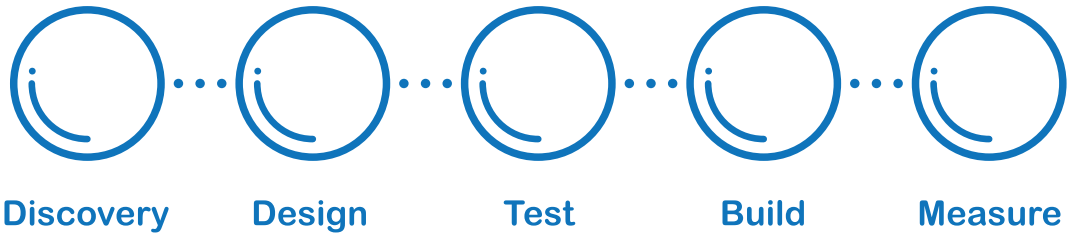
- Listen to their language. Listen closely to the way that customers phrase their problems and their domain space. Use that language when talking with them. These descriptions and words can not only provide you with a way of discussing issues in a common language, but you can later use this language as a way to describe your product and build out value propositions that resonate.

- Debrief after each interview. If you can, interview in pairs or as part of a team. Take notes and have a follow-up discussion to document what each of you heard. We guarantee that you heard things differently.

- Let customers answer questions themselves. Don't prompt them with suggested answers. Give them time to answer the question. Sometimes uncomfortable silence is good and will yield responses you might not have gotten otherwise.

Empathetic questioning and listening can help uncover true motivations and provide a path to better products. It's also a great way to let customers know that we care enough to truly understand them.

How Product and UX Teams Collaborate to Build Great Products



In many ways, product management is process management. Product managers shepherd products through a development process that involves multiple stages, each with unique deliverables, goals, and stakeholders. When they work together effectively, Product, User Experience, and Engineering teams can build and deliver exceptional products and experiences.

It's helpful to define the product development process and think carefully about when exactly each team is involved. At the highest level, the process can be broken down into five discrete stages: Discovery, Design, Test, Build, and Measure.

Discovery phase

The discovery phase is largely owned and directed by the product team, to the extent that they're determining which customers will be interviewed and when and what type of information they will want to gather and document. The goal of the discovery phase is to understand the customer problem (or potential benefit) and produce the types of touchstone materials that will be referenced throughout the

rest of the stages. The product team will outline the business objective, answer the "why are we doing this?" question, and generate a hypothesis for how development will solve the customer's problem. In the discovery phase, product managers are seeking to understand the customer's problem and form the value proposition for upcoming development work.

During the discovery phase, it can be extremely helpful to involve the UX team. UX designers are typically going to want to talk to many of the same customers during the design phase. Involving them early on in the discovery phase can be helpful and save time down the road. The more UX understands the thinking behind the product team's hypothesis, the business case, value proposition, etc., the more context they have in mind during the design phase.

It's useful to note that this same reasoning can apply to arguments over how early to bring engineering into the conversation. Often, it's more a question of what resources are available, and the most effective way to use those resources.

Design phase

If they're not already involved in the discovery phase, UX will almost certainly be brought in at the start of the design phase. This stage of the product development process is typically led by the UX team itself, with the goal of developing a wireframe or prototype. The design phase is where the documentation from the discovery phase comes into play, with the UX team producing a visual wireframe on top of the conceptual framework developed during discovery.

Test phase

During the test phase, product and UX teams are trying to gather data on whether or not the solutions proposed during the discovery and design phases are actually generating the benefits they hoped they would. For example, did it take the customer less time to perform X action than before?

The test phase introduces a check on the opinions and assumptions of the product and UX teams. UX and product might not always agree on the initial solution and the testing phase helps them settle on a direction. What if the data suggests both teams are right? Ask the customer! Don't literally ask them to break your tie. But, ask customers to look at a few prototypes, and figure out which option helps them better solve their problem. Which one is quicker and easier? That's your answer. The more UX (and engineering) are involved in the test phase, the smoother the build phase will be.

Build phase

Ideally, the goal of the build phase is to end up with the feature that solves your customer's problem. If product, UX, and engineering have been involved in a good, open dialog with lots of transparency and knowledge sharing, the feature should work pretty well at the conclusion of the build phase. If product ensures UX understands the value proposition and conceptual model of the feature, and UX and product both ensure engineering understands which interactions are critical and why, then engineering is more likely to build something that solves the customer's problem without too many compromises. Since they've been given context throughout the process, engineering knows which items are okay to leave out if time is an issue, and which items or features are must-haves.

Measure phase

Remember, you've moved through the first four phases for a reason. You're trying to solve your customer's problem and move the needle for your business. It's hard to launch a product that doesn't succeed, but it's worse to have it released and just sit there and make things worse. This is why you need to benchmark before, during, and after the development process, ideally with a dedicated tool like Pendo. Product managers need to ensure they have an accurate understanding of where their product was before launch, and carefully track what happens post-launch to determine if the project has been successful, neutral, or harmful.

Ideally, UX and engineering should be brought in as early as possible in the product development process. At least from the design phase onward.

Their work impacts deliverables in almost every other stage of development and the open exchange of ideas between product and UX (and engineering!) will ensure the best outcome.

CHAPTER : 3

STRATEGIES FOR INTERFACING WITH CUSTOMERS

Product managers are primarily concerned with solving problems for their customers. This chapter offers suggestions for communicating with customers, with guidance on everything from managing customer feature requests to developing graceful ways to politely tell your customers "no."

CHAPTER : 3

When Should Recurring Feature Requests Lead to Re-Evaluating Your Product Strategy?

One of the most challenging aspects of being a product manager is reconciling recurring customer feature requests with your overall product strategy. At what point do recurring feature requests signal market demand and a need to re-evaluate your product strategy?

This is a slippery (yet extremely common) way to frame the question because it suggests there's a point where you reach a "critical mass" of feature requests. Something like, "If you receive X requests for the same feature, then you should just build the feature and update your strategy."

From one perspective, this seems fairly reasonable. There's obviously a demand for a feature if you're getting a ton of requests, right? But, this is a very reactive (and not particularly strategic) way to respond.

As a rule, your product strategy should be flexible, but pretty consistent over a given period of time. Ideally, when you developed your product and business strategies, you went through a solid market validation process, considering a number of factors to determine the right product-market fit.

Your product shouldn't have to pivot every three months based on customer feedback. So, if it's not a magic number of requests, how do you know when you should adjust strategy based on feature requests?

Here are six questions you can use to guide your thinking:

1. What are your customers really asking for?

This question becomes much simpler to approach when you think of the feature request less as a request for a "new button," "app integration," or "configuration option" and more as a request for a solution to a specific problem. When a number of feature requests come in, your customers are signaling that they have a shared challenge.

Identifying the problem your customers are trying to solve is critical because it lets you perform a quick litmus test: Is this problem something our product is supposed to solve? Is this problem one that we want our product to solve?

Remembering that your customers are requesting things because they have a job to do is an important step. They're not asking you to add a button because they love buttons—well, most of them aren't; they're asking for a button because it will make their jobs and workflows easier, faster, more efficient, or enjoyable. It might help them build more widgets or ship more software. Understanding their real intentions and motivations is an important part of this process.

6 QUESTIONS TO GUIDE YOUR THINKING

1. **What are your customers really asking for?**
2. **Does this problem align with your broader strategy?**
3. **What are the positive and negative impacts on business metrics if we add or ignore this feature?**
4. **How big is the project?**
5. **What's the opportunity cost?**
6. **Does it require further investigation or research?**

With your strategy in mind, it might not matter to you if you get 1,000 requests for a feature that isn't aligned with your product's primary goals. On the other hand, you might get one great request that would really propel your product forward.

2. Does this problem align with your broader strategy?

Once you have a lock on the underlying challenge behind the feature request(s), you can better determine whether that problem is something you want your product to solve. Would building this new feature or capability align with your overall strategy or deviate from it? If it aligns with it, is it worth prioritizing over other features in your backlog? Is this something you initially considered when you first developed your strategy, or is it a wild departure from your product's mission? It might be that your market and customer have evolved, but it could also be a waste of time.

With your strategy in mind, it might not matter to you if you get 1,000 requests for a feature that isn't aligned with your product's primary goals. On the other hand, you might get one great request that would really propel your product forward.

3. What are the positive and negative impacts on business metrics if we add or ignore this feature?

If you build this feature, are you likely to see an increase in revenue? A decrease? Are you gaining entry into a new market, one that you had been planning to enter? Would it increase customer retention rates and slow down churn? It's much easier to make a strategic decision when you can back it up with data and projections.

Whether requests come from customers or internal stakeholders, a product manager is responsible for allocating her development resources in a way that advances her strategy without wasting the team's time and energy.

If you're re-evaluating your product strategy just to meet a handful of customer requests, you might be setting yourself up for failure.

4. How big is the project?

What's the required investment and overall level of effort involved? This can be a gut-based kind of calculus, but as a product manager you should have a quick, instinctual sense of the scope of a given request. Would this request involve a quick UI update, or a major code refactor? Is there a huge potential for scope creep, i.e. if you start development on feature X are there a bunch of dependencies involved that would require development on features Y, Z, etc.?

5. What's the opportunity cost?

Now that you have a sense of the scope of the feature, what resources would be required? Would it be worth pulling your team off of other projects to work on this one? There's a lot of cost-benefit analysis that happens when weighing feature requests against your overall strategy.

Whether requests come from customers or internal stakeholders, a product manager is responsible for allocating her development resources in a way that advances her strategy without wasting the team's time and energy.

6. Does it require further investigation or research?

Maybe, after moving through steps 1-5, you're starting to sense it might be worthwhile to further explore adding the feature. That doesn't mean you should start development immediately. It just means the feature gets added to your backlog, or to your Parking Lot or Planning Board. Do some more research. Interview your customers to further understand the problems this new feature would solve. Treat it like any other new component or feature.

At the end of the day, there's no formula for determining when it's time to take development action on a given request. Maybe the request is great and would really move the right needles for your organization. Maybe the environment you developed your original product strategy in has evolved significantly and your customer persona has evolved with it. Maybe not. Maybe it would be a distraction or push you into a customer segment you're not interested in targeting.

You need to use your instincts as a product manager, supplemented by business success metrics, and conversations with your customers and product team, to determine if a feature request warrants a re-evaluation of your product strategy or if it's an opportunity to say "no" to your customer.

That's for you to feel out and investigate using the questions above.

Dealing With an Unreasonable Customer

There's a great scene in Seinfeld where Jerry goes to a rental car counter to pick up the midsized car he reserved. When she checks the computer, the agent at the counter tells Jerry there are no midsized cars left. "But the reservation keeps the car here," Jerry says. "That's why you have the reservation." And when the agent says, "I know why we have reservations," Jerry responds, "I don't think you do."

Then Jerry explains where he thinks the rental car company's process broke down: "You know how to take the reservation—you just don't know how to hold the reservation. And that's really the most important part of the reservation: the holding. Anybody can just take them."

As a product manager, the temptation to take an approach similar to this fictitious rental car company—to say yes to everyone, whether or not you can fulfill your promises to them, and whether or not doing so is even a smart decision—can be overwhelming. After all, you will have more requests and demands for your product than you can ever possibly meet. The easy answer—easy in the moment, at least, but much more difficult later—is to try to fulfill them all.

But before you agree to any customer request to add to or change your product, you always want to ask yourself at least two questions first:

1. *Will fulfilling this request represent a strategically advantageous (and defensible) decision for the product and our company?*
2. *Is meeting this request even feasible, given the company's resources?*

Only after you are able to answer both of these questions with a "yes" can you then step back and make an informed decision about how to address the customer's request or demand. And more often than not, when you ask yourself these questions, you will find that your customer is asking for something that is—even if they have the best of intentions in asking—unreasonable.

Dealing with unreasonable customers is an inevitable part of a product manager's job. But there are ways to make these moments easier and more productive for both your customer and your company.

1. Don't create the unreasonable customer in the first place.

In that scene in Seinfeld, the rental car company itself was completely responsible for creating an unsatisfied, angry customer. The company could have easily avoided the problem altogether, simply by being more careful about the promises it made.

The scene is exaggerated for humor, of course, but many product managers take a similarly shortsighted approach—and try to please everyone—when they are feeling overwhelmed with requests or demands on their product.

The easiest thing in the world, at least in the moment, is to respond positively when a customer asks you to add a feature to your product, or to prioritize something now that is slated well into the future on your product roadmap, or to make any number of other changes to satisfy their specific needs, as opposed to the needs of your company and your user base as a whole.

It can also feel tempting to make grand promises in a roadmap you're sharing with the public. After all, a roadmap can serve as an important strategic marketing and sales document, and the more groundbreaking you can make your new product or the next release of an existing product, the more attention and enthusiasm you can generate.

You won't be able to please everyone —certainly not those customers who ask you for the world.

But you need to temper your drive to satisfy and delight your customers with the real-world constraints on your product's development—a limited budget, limited resources, and the limited patience of your executives or investors, for example.

You won't be able to please everyone—certainly not those customers who ask you for the world. Sometimes your best strategy will be to set expectations at a reasonable level as early in your development as you can.

2. Be clear and candid about what your product will and won't do.

One of the best examples of this approach is Southwest Airlines, arguably the most successful low-cost commercial airline ever.

From its earliest days, Southwest created a very clear mission, which it shared with the public: We are going to be a low-cost airline firmly committed to delivering the best possible service while keeping our overhead—and prices to our customers—as low as possible by avoiding any frills.

In practice, this meant being candid about saying no—no inflight meals (light snacks and beverages only), no tiered seating classes, etc.

Indeed, Southwest was so open and enthusiastic about the services they didn't offer that they turned them from negatives to positives with their customers. And today, only a completely uninformed traveler or an outright lunatic would demand Southwest give them a first-class seat or serve them a steak dinner inflight.

You can do something similar—be extremely clear and candid about what your product does and doesn't do. If you take the Southwest approach, and explain proactively that you have intentionally stripped your product of all but the essential functionality needed to solve your customer's problem while still offering the lowest-cost product available, then your customers will walk away satisfied.

3. When speaking to a demanding customer, do not commit on the spot.

The first two suggestions were to help you avoid as many confrontations with unreasonable customers as possible in the first place. We believe that you do have control over some of these confrontations, and by taking those steps above, you can minimize them.

You will take your customer's demand into consideration, but you can't promise anything until you have spoken with your colleagues or conducted your own research on the question.

But what happens when you are actually faced with an unreasonable customer, someone who contacts you to demand that you make concessions with your product to meet their needs?

There are a few things you'll want to know when you find yourself in this uncomfortable moment, and we'll discuss them in the next few tips. Our first suggestion, though, and perhaps the most important, is not to commit to any demand on the spot.

The reason it's so important to start with this tip is that in these moments, the conversation can get emotional—both for you and for your customer. They might be very adamant about what they want or what they believe your product should

do for them. And you might really want to please that customer—or just end the conversation and do so on a positive note.

So before you can even take such a call, you want to be pre-armed with a standard policy that you can easily and automatically fall back on: You will take your customer's demand into consideration, but you can't promise anything until you have spoken with your colleagues or conducted your own research on the question.

You can even create a standard, go-to phrase for these conversations: "That's something worth investigating, and I will look into it, but I never commit to any product changes without first discussing it with my team." Something like that.

Find a statement that feels natural to you, and practice it so you're ready to answer even the most passionate, aggressive customer demand on the spot—without being caught off-guard and committing to something you'll regret.

4. When speaking to a demanding customer, take the time to truly listen, and make sure the person feels heard.

This is one of the most common strategies employed by human resources professionals, the people in business who deal most frequently with interpersonal conflict.

What many HR professionals will tell you is that often, when an employee comes in to file a grievance, what they really want is simply to be heard and to feel as though someone understands their issue. And often, after the employee has had a chance to air his grievance in front of HR, without interruption and without feeling judged, he is satisfied and no longer feels the need to officially pursue the matter.

When a customer contacts you to tell you that your product really needs to add a feature or to move some functionality to a more convenient location in the application, sometimes the best answer you can give that person is, "You're right. We really should have done it that way." Or, "I completely understand your point. It must be frustrating not to be able to do it the way you'd prefer."

If you truly listen to your customer, and perhaps ask some probing questions to guide them to the crux of their issue with your product, you might find that the functionality they're missing is actually available elsewhere in your product.

And as powerful as this simple approach is for HR, when it comes to product management, there are additional benefits to truly listening to your customer and making them feel understood. For example...

You might learn something valuable from that customer.

If your first instinct when confronted with an upset customer is to shut that person down, you risk missing out on some valuable user feedback.

Perhaps listening to your customer will uncover a truth about your product that you've overlooked—something that might be able to help not only this customer but your product and other customers as well.

You might get a chance to teach your customer something valuable.

If you truly listen to your customer, and perhaps ask some probing questions to guide them to the crux of their issue with your product, you might find that the functionality they're missing is actually available elsewhere in your product. In other words, by fully hearing your customer out, you might find you're able to solve their problem after all.

And—here's a bonus—you might find that the way you've been positioning your product has been incorrect or incomplete, because perhaps other customers wish

they had the same functionality and don't realize that they already do!

5. Don't engage a customer complaint via email. Pick up the phone.

Resorting to email is a common approach taken by product managers and any professionals who have to have difficult conversations. Why? Because it's easier than actually hearing the other party and having to respond in real time. But a lot of context and subtext—indeed, a lot of truth—doesn't come through in an email message.

The same principles that apply in your personal life apply to your role as a product manager—get on the phone, hear each other out, get to the bottom of the problem, and work to find a mutually beneficial solution.

So when it's time to have that difficult conversation with a customer, don't take the easy way out and confine the discussion to reading and typing. Get on the phone and talk to them.

There are several benefits to this approach for you and for your product.

First, when you get on the phone with your customer, if you can keep a level head, listen more than you talk and respond calmly and respectfully, you'll often find you can defuse an otherwise tense or even hostile situation. It will be a lot more difficult for your customer to remain angry with you if you calmly and rationally explain to them that, while you understand their wishes, you have your own constraints and limitations to contend with.

Second, when you truly listen to your customer—which is much easier when they're

speaking directly to you than when you're simply reading their words in an email—you'll often uncover a lot of useful feedback about your product.

The same principles that apply in your personal life apply to your role as a product manager—get on the phone, hear each other out, get to the bottom of the problem, and work to find a mutually beneficial solution.

How Product Managers Can Say No (and Still Get Invited to Lunch)

Product management can often feel like a zero-sum game. You have finite resources to develop your product, and if someone wants you to add X to the roadmap, doing so will have to come at the expense of Y.

Effective product management often comes down to making the best choices possible with the limited resources you have. To be successful, a product manager will often have to say no—to ideas, to suggestions, and to requests or even urgent demands from both internal stakeholders and external customers.

But this doesn't mean that as a product manager you have to be confrontational or adversarial with the many interested parties who will come to you with requests that you simply don't have the resources to fulfill. (And for those of you who are new to product management, trust me, you'll be fielding these requests often.)

In fact, if you learn a few techniques for turning down these requests effectively, you might even find that your audiences completely understand and even support your decision.

Six tips product managers can use to say no—without making enemies

1. Spend time acknowledging and discussing each request.

In customer service training at virtually all of the world's most successful

companies, new reps are taught to listen attentively to a customer's request or complaint, and then to speak with the customer in a way that demonstrates the rep understands and empathizes with their issue. The reasoning is simple: People want to be heard.

When an internal stakeholder or a customer comes to you with a request to add a feature—a request you can't support, at least not right away—how you frame the conversation can be just as important as the answer itself.

You wouldn't want to say something like, "That doesn't sound like a priority for this product" or, "We don't have that on the roadmap." Why? Two reasons.

First, when you jump to a rejection without giving legitimacy to your stakeholder's request, you deprive that person of feeling heard.

Instead, you want to spend time acknowledging the request, explaining to the person that you understand why they would want or need it, and showing empathy for their situation.

You might say, for example, "That's a strong idea for a new feature, one we've actually considered [or that we're currently weighing] as a possible addition to the product." Only after you've acknowledged and demonstrated an understanding of the request can you explain why it's not something you can support at the present time.

A second reason you wouldn't want to dismiss a feature request without any context—"That isn't a priority for us"—is that without providing your reasoning, you leave your stakeholder feeling as though your "no" was arbitrary. Having a request turned down can be disappointing, but having it turned down without a reason feels far worse.

Which brings me to the next tip: When you have to turn someone down, be able to demonstrate that you know your stuff and have good reasons for doing so.

2. Know your stuff—so you have sound reasoning ready.

This is a broader tip, a suggestion to spend as much time as it takes to become the unrivaled expert in all details relating to your product. This includes a deep understanding of your market, your company's internal resources and capabilities, the competitive landscape, and any other factors that would affect your decision to include (or not include) a new feature or other request relating to your product.

If you know these details inside out, then when it comes time to turn down a request, you'll be much better equipped to provide your requestor with good, sound reasoning.

You can think of this as the second part in a two-part strategy that begins with tip number one. When someone comes to you with a request for your product, and you have to turn down the request, you'll first want to spend time discussing it with your requestor. Show that you understand their needs and appreciate them offering up the suggestion. Then, when you explain why you cannot accommodate the request at the moment, you can provide the larger context—which might include issues like competing projects or preserving your product's simplicity and usability—that your requestor likely didn't consider.

A common example of a request you won't be able to accommodate is one that is in conflict (or at least does not align directly) with your company's larger strategic objectives. For example, your company's primary aim for the next year might be to grow the number of users for your software product. With that organizational directive in mind, you might have prioritized initiatives like streamlining the sign-up process and creating a scaled-down, free-trial version of your product.

Now, when an executive or other internal stakeholder asks you for a request that doesn't support the primary company objective—for example, if they ask for an overhaul to a major epic in the product that only your power users would benefit from—you can explain to them why you can't add that epic to the roadmap, at least

not right away. You need to focus all available resources on meeting the company's main strategic objectives of bringing in new users.

Knowing your stuff also means having relevant data—user feedback, usage reports, competitive information, sales details—always at the ready to explain why a stakeholder's request might not be as urgent or impactful as they might think. Let's say an executive asks you to prioritize a bug fix he found in a feature deep in the application. If you're able to show this stakeholder that fewer than 1% of your user base ever access that feature, that data and reasoning will go a long way to explaining why the fix can wait.

Although being turned down can be disappointing, being provided a clear, logical reason can help soften the blow.

When you apply this technique correctly, you'll first demonstrate to your stakeholder that you've heard his request and see its value. This will then provide a nice transition to your explanation that you are also operating in a larger context, weighing all requests, even valid ones like his, in light of this bigger picture.

Although being turned down can be disappointing, being provided a clear, logical reason can help soften the blow.

3. Wherever possible, show the requestor that it's not no forever, just for now.

Let's say you have to turn down a request from the sales or marketing team that is, indeed, valid. Or one that you simply hadn't encountered before, and which might be worthy of inclusion in your product but first needs vetting. Your answer might not be "no" at all—but instead, "not right now."

Here's where an "idea parking lot" can prove invaluable—not only because it's a place to keep ideas that might prove useful down the road, but also because it's a great way to show your stakeholders that you are not rejecting their requests, just parking them for review later.

At ProductPlan, for example, our Parking Lot feature helps product managers in the prioritization stage by allowing those features or requests that don't meet their criteria for inclusion on the roadmap to be captured for later consideration.

A second idea for showing stakeholders that you plan to evaluate their requests, and that you're not merely rejecting them, is by placing these requests in a community forum, ideally one that is accessible to both your internal teams as well as external customers and even prospects, where any interested party can view and vote or comment on new ideas.

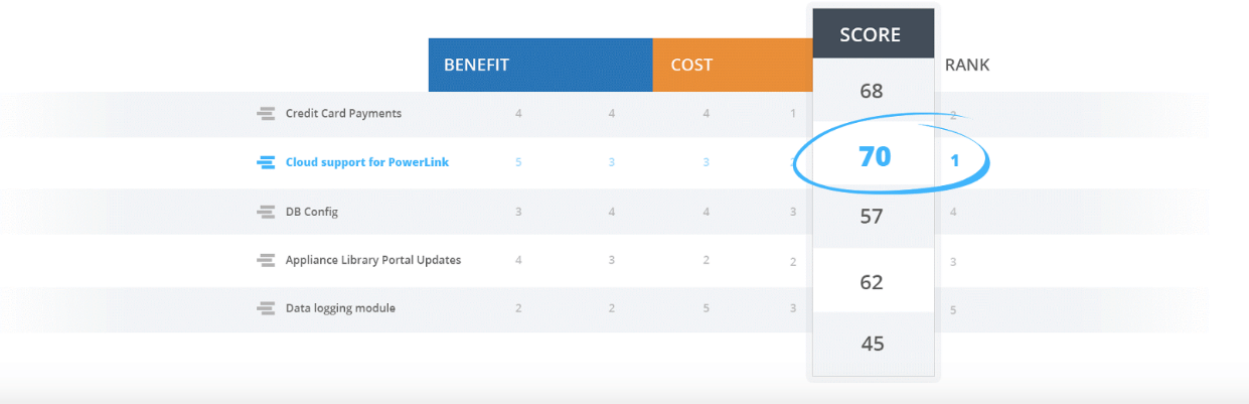
> **BONUS IDEA:** *If you aren't already operating such an open forum, create one. It could be a community Slack channel, a blog on your company's website, or built on a third-party platform. The idea is, you'll be encouraging your user base to contribute their ideas for your products—and then allowing other users to give their feedback on these ideas. Who knows? You might discover features or ideas for your product that you'd never considered, that your competitors haven't thought of, and that your customers are telling you they want.*
>
> *Placing a product request that you can't immediately fulfill into an idea parking lot, or onto an open forum where others can vet it for you, is another way to show everyone with a stake in your product that you're taking their requests seriously.*
>
> *Tools such as forums, chat rooms, and idea parking lots are useful in their own right, but they can also be extremely valuable in helping product managers protect the integrity of their roadmaps and products—by giving them a place to put unproven or lower-priority feature ideas besides directly into the product.*

4. Be transparent about how you prioritize.

One of the best ways to say no, particularly to an internal stakeholder like an executive or a sales director, is to simply lift the veil on your product roadmap and walk your colleague through your methodology for prioritizing epics, themes, and features for upcoming releases.

If you can clearly demonstrate through a presentation of your roadmap that the next sprint or longer-term development cycle is focused on X, with solid reasoning behind that decision, then your stakeholder should find it more logical that you cannot accommodate her request to include Y.

This is where a visual product roadmap application can be so helpful. For example, the Planning Board (seen below) built directly into ProductPlan's roadmap software, lets you create a list of initiatives so you can work with stakeholders to score their priority levels according to various factors before you begin building your roadmap. When your strategic discussions and scoring are complete, you will have a logical, supported list of priorities for your roadmap.



By using a tool such as the Planning Board in your product strategy's early stages, you'll have the ability, at any stage of your product's development, to show the reasoning behind your prioritization decisions—complete with numbered scores—to a stakeholder who wants something included on the roadmap that's not a high priority.

This helps demonstrate to your colleague that you are being fully transparent, and at the same time puts your "no" into the larger product development context.

5. Try not to say "I" when you say no.

Yes, as the product manager, you're the person a stakeholder will come to with an idea or request for your product. But no, that doesn't mean you're making a personal decision when you turn down that request. In fact, if you're spearheading your product's development intelligently, the decisions you make will be based not on your personal feelings but rather on your expert understanding of your product, customer and market.

One powerful way to underscore this fact, and to give your internal and external stakeholders a better understanding of why you need to say no, is not to refer to yourself in the conversation at all.

In the end, the decision to grant a request for your product or to turn it down is not about you.

Instead of saying things like, "I don't think we should focus on that epic now," you can refer to the data: "Our research has told us that…." You can also refer to the agreed-upon strategy: "The stakeholders have decided they want the next release to emphasize…." Or you can refer to the roadmap policy you've established: "For tough calls like this one, we've established a set of guidelines…."

In the end, the decision to grant a request for your product or to turn it down is not about you. The decision will be based on what's best for the product and what will support your company's strategic objectives. When you have to say no, the more you can keep the conversation focused at this strategic level, and not on yourself or your thoughts or ideas, the more likely that your requestor will leave that conversation understanding your position—even if they are disappointed.

6. Try not to say "No" when you say no.

Who says you have to say no at all? You now have several legitimate answers—other than no—to a product request that you can't fulfill right away. You can place such requests into an idea parking lot, where you can revisit them at a later time. You can also place them into an open forum, where you can publish an idea and allow qualified sources (your customers) to help determine its merit.

Which means you don't actually have to say no.

Say a customer comes to you with a feature request, and you know immediately that you can't include it on the roadmap for some time. Your answer can go something like this:

> *"Thanks for the idea. We really appreciate hearing from our users. Requests like these let us know that you're using and getting value from our app. Our product roadmap and development schedule are pretty well locked in place for the immediate future... but let me put that idea out to our community [or let me place that into our idea parking lot, or let me revisit that as soon as we complete our next release and our dev cycle loosens up a bit]."*

You haven't committed to anything. But you haven't said no, or anything close to it. Your customer feels heard and appreciated, that their idea has merit, and that you have a legitimate reason for not being able to execute on it right away.

This customer might walk away a little disappointed. But because you used these techniques, and showed you heard and understood their request, they're much less likely to walk away angry or frustrated.

CHAPTER : **4**

OPTIMIZING & SUPPORTING YOUR PRODUCTS

This chapter focuses on the role of product manager as product advocate. It offers guidance on ways to improve and optimize your product, even when it seems like you've created the "perfect" product. The chapter also highlights some common pitfalls for product managers to avoid.

CHAPTER : 4

Becoming a Better Product Advocate Within Your Company

How do you win executive buy-in to work on an innovative idea that risks cannibalizing some of your existing product line? The answer to this question rests on a product manager's ability to be an effective internal product advocate.

Despite frequent discussions about the many important roles of product managers—learning about customers, knowing the competitive landscape, communicating with stakeholders and developers, championing their products publicly—it's often easy to forget just how vital it is to champion our products internally as well, across the entire company.

As a product manager, you are your product's internal champion—whether you realize it or not.

As a product manager, the responsibility will likely fall to you to be your product's internal champion. Which means if you don't advocate regularly and persuasively for your products across your organization, your products will likely have no internal champion. Here's why that can be detrimental for your products and your company.

Why your products need an internal advocate

Ultimately, being an internal advocate for your products will help you build better products.

As a product manager, you are often facing competing agendas within your company, budgetary and resource constraints of your own, and general inertia across your company during the long process of bringing a product to market.

By being an ongoing advocate of your product with executives, developers, the marketing and sales departments, the customer success team, your investors, and other relevant groups within your organization, you will create a much better chance that your product will receive the benefit of everyone's A-game throughout its development.

It's easy for everyone to feel enthusiastic and optimistic during an initial strategy meeting. But that early-stage excitement will inevitably wane, and it will then fall to someone—that means you, the internal product advocate—to maintain the advocacy and cheerleading throughout the development process that keeps everyone pumped for the product's eventual release.

Another reason an internal product advocate is so vital to the product's success is to help ensure everyone involved stays focused on the big-picture strategic goals—and teams don't get lost in the tactical details and minutiae. Because you can't oversee every aspect of your product's development, you will need to trust your various teams to make some strategic decisions in real time—and the more you are there to advocate internally for your product's vision and strategic objectives, the more likely those other teams' decisions will reflect those bigger-picture goals.

How to be an effective internal product advocate

So how do you pull it off? How can you become an effective product advocate within your company? Here are some suggestions.

1. Share your product's high-level strategic vision with your entire company.

When you speak with colleagues across your organization about your product in terms of features, you'll have a hard time generating and maintaining enthusiasm—

particularly among those groups who don't understand all of the details of those features, or your market's need for them.

So instead, try to keep your communications across your organization higher-level—talk about the market problems your products will solve, the value added to your customers, and how the product will earn your company market share, revenue, and a leadership role in the industry.

Also, if the teams working on your products push back on your objectives or requests, and you can tie those requests back to the product's larger-picture strategic vision, you'll have a better chance of bringing those teams over to your side.

2. Tailor your product advocacy specifically to the people and teams you're talking with.

In our conversations with product managers about roadmapping, we often find that executive stakeholders don't want to hear about a product's technical details. That's just one of many examples of why it's so important to tailor your conversations about your products to the groups you're speaking with. You'll be a much more effective advocate for your products if you advocate for them in a language that resonates with each separate audience.

When you're talking with sales or marketing, for example, you'll want to emphasize how your product will help solve problems for the personas they'll be selling and marketing to. For your executives, on the other hand, your product advocacy should emphasize the product's eventual revenue to the company, or its ability to bring your company into new markets.

This is we're obviously big advocates of visual roadmap software with view filters. When you're speaking with several different audiences—developers, executives, customer success, etc.—you don't want to have only one view of your roadmap.

You want to be able to quickly change the focus and the level of detail based on the specific audience you're addressing.

3. Make a habit of weaving product advocacy into everything you do.

Becoming an effective internal product advocate means you're always an internal product advocate—not only when you're called on to speak about something specific. You have to make it a part of your job to be on the lookout for opportunities to champion your product across your company.

And you can find these opportunities everywhere.

Let's say you find a blog post or industry research report about the fact that your customer persona is on the rise, or that a problem that your product will ultimately solve is growing in popularity. Copy people across your company—your development team, your sales team, your leadership team. Let them know, "Hey, looks like we're onto something here!"

Don't expect your teams to stay internally motivated from day to day. Life and daily responsibilities get in the way of that. So use these pieces of market data wherever you can to help keep your teams enthusiastic, and give them the day-to-day reminder they'll need to keep doing their best work, during the long period between that exciting kickoff meeting and release day.

4. Spread good product news across your company every chance you get.

Another great way to keep your internal teams motivated and enthused about your products is to share good news about those products as often as you can. If your sales team closes a big deal, send that news out to the company. If your product gets an honorable mention in the trade or business media, share that across the company.

And if you find a positive comment or quote about your product from an actual

user? For goodness sake, jump up on your desk and shout it to everyone within earshot. (Or just Slack or email it to everyone.)

Hearing that your product is succeeding in the marketplace, solving real problems for your market, and winning favor among your ideal customers, puts a human touch on what otherwise might often feel like abstract work for your teams. Let them know that the work they're doing is making a positive difference in people's lives.

5. Hold regular product meetings to keep everyone informed.

Often the simple act of bringing everyone together to discuss your product's progress and to remind them about its big-picture goals can provide a tremendous boost in enthusiasm for the product.

One of the things we encourage product managers to do is to hold regular meetings with the various stakeholder groups, such as marketing, sales, customer support, engineering, etc. These get-togethers are also a great chance to give both progress updates and much-needed context to the work everyone is doing. It's in these meetings, for example, that you can discuss what you've learned from your trips out to talk with customers—what your users like about your product, for example, and what they'd really like to see added to it.

Again, what you're doing here is taking what might otherwise feel like a series of abstract and disconnected tasks—adding this feature, changing this screen, fixing these bugs—and turning them into important projects that will be improving the way real customers, real people, will be able to work (or play or do whatever your product lets them).

I also recommend that product managers record their sessions with customers. This gives them something to show their internal teams back home, and those videos can really help teams put a human face to the problem they're being asked

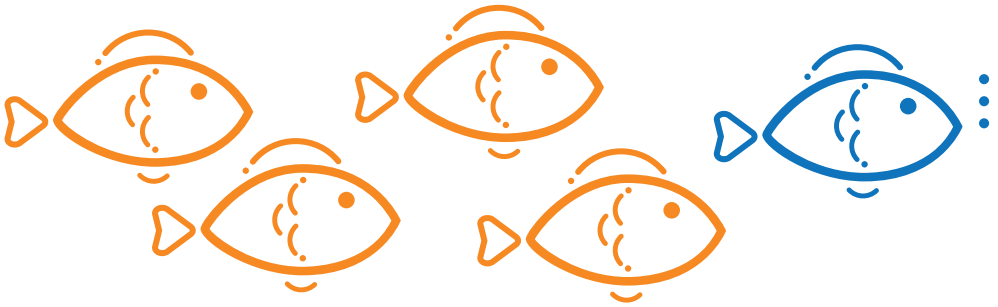
to solve with their product development work. The more real-world information you can share with your internal teams, the more they'll have a chance to see the big picture—and the more enthusiasm they'll be able to bring to their work.

Always be advocating

Bringing a product to market successfully is an incredibly challenging balancing act—weighing priorities, limited resources, and pressures against other priorities, limited resources, and pressures. The more support you can elicit from across your company, the more your disparate teams are aligned in their mission to bring your strategic goals to reality, and the better your chances of releasing or maintaining a successful product.

But this takes internal product advocacy—ongoing championing of your products every chance you get. In summary: *Always Be Advocating*.

Product Managers: Are You a Thought Leader or a Follower?



Thought leadership encompasses both internal leadership in your company and external leadership in your market. As a product manager, it's your job to drive the product vision and to be a subject matter expert in your domain.

You can be a thought leader within your company by producing a strategic product roadmap, advocating for your product vision, and focusing on innovation. Likewise, you can be a thought leader in your market by writing, speaking at conferences, and growing a social media following. Here are some tips for getting started.

What tips can you share on getting invitations to speak or finding people who need speakers?

Start small by speaking at local meetups, and then work your way up to getting invited to speak at larger conferences. Through this "scaffolding," you can establish your reputation and hone your speaking skills.

When larger conferences are evaluating speakers, they're often looking for a track record—they're looking for people who have done it before and who have a certain amount of credibility in the product space. Of course, it also helps to have done some writing and to propose an interesting topic. But you really need to have done your homework ahead of time in terms of practicing your public speaking skills and having some smaller events under your belt.

For those of you who are a little bit wary of public speaking: Thought leadership doesn't mandate that you speak publicly. There are lots of outlets to get your message out, including writing and social media, that can help you establish yourself as a thought leader without necessarily speaking at conferences.

As a thought leader, do you believe you need to have a firm opinion and not just parrot research? If so, how do you balance that against a corporate mandate to be non-controversial?

Most of the thought leaders that we follow have opinions and have a distinct voice. Often thought leaders are characters—people naturally gravitate towards those who take a stance. This doesn't mean you need to necessarily chose topics that are incredibly controversial or that your company is going to object to, but you should try to take a position. You can strike the right balance. It's very possible for you to take interesting positions and not just toe the company line, while also not being too controversial or inappropriate.

At ProductPlan, for example, we took certain positions about product roadmaps in our first book. There are so many different ways of creating product roadmaps, and there are so many different ways of prioritizing, but we have strong beliefs about roadmapping best practices. That's a common thread throughout the book—there is a definite viewpoint. Opinions make for more interesting reading.

How do you measure the ROI of thought leadership and how do you track your impact on sales?

It's hard to do. Ultimately, thought leadership activities benefit the product, but it can be really hard to directly connect them to sales because the leads eventually come in through different channels. It might be extremely difficult to connect speaking engagements, educational events, or awareness-related social campaigns, but that doesn't mean you shouldn't do these types of activities. Ultimately it's a great approach—educating your market is the right thing to do.

How do you execute on a thought leadership role in an industry that is dominated by analysts?

Many analysts take a very conservative and traditional approach to thought leadership—that's through writing papers, speaking at conferences, and so on. There are so many opportunities for you to take advantage of new mediums that analysts aren't utilizing like social media—think answering questions on Quora, writing blog posts on Medium, or participating actively in public product channels on Slack.

Analysts are also often very horizontal—they cover a wide range of your industry. So there's an opportunity for you to specialize in a particular area. Then, you can promote your content through channels that the analysts aren't using. We guarantee that most analysts aren't answering questions on Quora. There are definitely opportunities for you to differentiate yourself, and in a sense, be more cutting-edge than some analysts.

Lies Product Managers Tell Themselves

Product managers, especially the dedicated ones, can sometimes become so consumed with championing their products that they lose sight of the bigger picture. Their perspective on the market, their competitors, their customers, and even on their long-term product strategy can become skewed. Eventually, many of these skewed ideas can turn into false narratives—okay, lies—that product managers tell themselves.

This isn't a criticism of product managers. To the contrary, in most cases these little lies arise not out of dishonesty, but rather out of a product manager's good-faith effort to advocate for her product. When outside forces (executives, investors, customers) inevitably exert pressure on the product's development, the product manager often clings to notions of how to proceed that she hopes will give her product the best chance of success—even if she's seen evidence that these notions are inaccurate.

This list is a word of warning to you to avoid falling victim to these lies as well. In most cases, clinging to such false notions will slow the progress of both your product and your career.

Lie #1: I am the CEO of my product.

As any experienced product manager will tell you, the product management role doesn't send a lot of organizational authority your way. Even if your company occasionally refers to you as its "Product CEO," that doesn't mean, for example, that you can boss around your CTO and Ops VP. It doesn't even mean you can

add Product CEO to your email signature. It just means that, ultimately, you're responsible for your product's successes and failures.

In some ways, the more seriously you take your role as product manager, the better, because it means you will be a stronger and more convincing advocate.

Just don't take the CEO moniker too seriously.

Lie #2: All product decisions need to go through me.

As we just discussed, many people refer to product managers as CEOs of their products. And with that in mind, it would be understandable to assume this means that you should demand the right to sign off on all product-related decisions. You're the boss, right? The CEO? But keep in mind, CEOs themselves don't make all decisions for their companies. They simply can't. So they delegate responsibility and decision-making authority to the relevant experts across their companies.

You should take a similar approach with your products. Here's why. First, in our modern era of rapid product development and a fickle market, how could your team keep up with customer demand and competitors if all product decisions need to be run through a single person? You would quickly become a bottleneck, the head of a slow-moving, ever-delayed product team.

Second, it's also important to remember that a key ingredient in successful product management is team-building, creating an atmosphere of camaraderie among your colleagues and a common sense of purpose. Your team needs to become invested in your product development, or they won't give you their best work. And you won't generate much team commitment or enthusiasm if you reduce everyone working on your product to mere order-takers.

And third, you're not the expert on everything relating to the development of your product. Let the technical people handle the technical stuff; leave the marketing

ideas to the marketing team. Your key job here will be to keep everyone working toward a common strategic goal, and to keep everything on track. You'll have more success with both if you share decision-making responsibility with your team's experts.

Lie #3: Our survey says we should do this, so we should do it.

There are so many falsehoods in this statement that we'll need to unpack it carefully.

First, just as you are not truly your product's CEO, you are also not your users' order taker. Survey data, requests from specific customers, and other types of feedback can be invaluable. They can give you great insight into your user personas and new opportunities in the market. But these data cannot function, all by themselves, as the final blueprint of your next product release.

You need to blend these learnings with your own market knowledge, not to mention your company's strategic vision for the product. Don't let a set of survey results become elevated to "scientific proof" that everyone then feels compelled to follow. Doing so will sometimes lead you down the wrong path.

Second, whom exactly are you surveying? This is a common pitfall for product teams—they send out many user surveys, and over and over again they receive feedback from the same few, highly engaged (or bored?) users. Again, the insights here can be instructive and helpful, but you can't fall victim to thinking of this subset of your user personas as always representing the truth about your entire user-base or the market in general.

And third, what about your own intuition? What about the fact that users' needs and priorities change over time, often quickly? If you take your team down a development path based on a (self-selected and small) survey response, and the product won't be ready for many months or even longer, how can you be sure that

even the survey respondents who showed the most enthusiasm for your proposed changes will still want them on release day?

Your role as a product manager is to bring together all relevant inputs, including your own knowledge and intuition, to arrive at the right strategic course for your product's future. A set of survey results should be just one of those inputs—never the final word.

Lie #4: I'm not in sales or marketing.

It's an odd phenomenon, but many product managers who are proud to call themselves their products' chief advocate, champion, or evangelist will, at the same time, balk at the notion that they are also part of the company's sales and marketing efforts.

It's common for product managers to begin thinking of their products as ends in themselves—works of art that elegantly address needs, solve problems, or fill voids in the market. In some ways sentiments like these can be positive because they show just how much a product manager cares about her product. But the darker side of this sentiment is that it can lead to a product manager believing that because she is building something so important, she doesn't have the time or the need to focus on selling and marketing.

But what such a product manager is forgetting, of course, is that even if the products are indeed works of art, their ultimate job is to act as vehicles for the company to generate revenue. And to do that, those products need to do more than just be built—no matter elegantly. They also need to be marketed and sold. Crass? Perhaps. But true.

Oh, and here's one more related thought. If you really think you're not in sales, then answer this: How'd you get the green light from your executive stakeholders to move forward with your product in the first place? How'd you convince your

development team to work in the way and on the timetable you needed? And how'd you persuade your key user personas that the product would be just what they wanted? As a product manager, you're selling to various groups all the time. And if you've been a product manager for a while, you must be pretty good at it, too!

So no, dear product manager, you're not simply on the product team. You're also in sales. Marketing too. (More reality: You'll still get just the one paycheck, though.)

If you're developing products and bringing them to market, there are really no circumstances under which you don't need a product roadmap.

Lie #5: I don't need a roadmap because we're an agile team.

So you're an agile development team? That's great. But it has no bearing on whether or not your team needs a product roadmap. In fact, if you're developing products and bringing them to market, there are really no circumstances under which you don't need a product roadmap. Not if you want your products to be successful.

To say that you don't need a product roadmap is to say the following:

- *We don't need a long-term strategic vision for our product.*
- *We don't need to lock in any focus, constraints, or priorities for our product's development.*
- *We don't need any high-level, visual representation of our strategic plan to share with stakeholders and to communicate to them why we're developing the product in a given way.*

- *We don't need a strategic product document that we can refer to at any time throughout development, to gauge whether we are successfully executing on our plan.*

Like the other lies we've discussed, the sentiment behind this one contains at least a kernel of logic. Most product managers have been forced throughout their careers to develop and maintain product roadmaps using the wrong tools—because the right tools simply never existed.

If you have to maintain and frequently update your product roadmap in an Excel spreadsheet or a PowerPoint presentation—neither of which were developed to be roadmap software or are particularly well-suited to the task—then perhaps you'd jump at any reason to skip building a roadmap for your products.

But you would be missing out on one of the most powerful strategic tools available to a product manager. A well-developed product roadmap will do all of the things for your team mentioned above—help you craft and communicate a long-term strategic vision for your product, give you a high-level visual representation of your plans that you can share with stakeholders and other audiences, and serve as an ongoing reference point to ensure you are staying on task.

Can You Ever Stop Improving Your Product?

You'd probably think that something like a cranberry wouldn't have much room for new features or product enhancements. Honestly, what could a product manager at a food company do to improve the cranberry? Despite the humorous nature of the question, the companies behind the cranberry just keep finding new ways to create new value and new markets with this simple and unremarkable product.

The leading company behind cranberry juice, Ocean Spray, has built a diverse and wildly successful portfolio of cranberry-based products: Cran-Pineapple™, Cran-Grape®, Cran-Pomegranate™, and on and on. As those trademark and registered-mark symbols indicate, Ocean Spray is developing real intellectual property around a piece of fruit, even though all they can truly own as a corporation are the products' names.

Those innovations are likely coming from the company's product and marketing teams. This is our way of answering the question posed in this section's title: Can you ever stop improving your product? The short answer is no, but not necessarily for the reasons you might think.

Our experience tells us that the typical product manager's immediate response would also be no. But we believe that the product manager would be answering without giving the question enough thought.

When improving your product gets difficult

If you were confronted with this question—Can you ever stop improving your product?—you'd probably try to envision a scenario where your product reached

a level that all product managers strive for. In such a scenario, your product has all of the functionality needed both to solve your customers' problems and to delight them as well. It has attained a sales status in which it is generating revenue year after year both from existing customers and from new ones. And in terms of features, the product really has everything it needs and nothing it doesn't.

In other words, your hypothetical product in this scenario seems to be a profit-making machine requiring no further improvements and only a minimal amount of maintenance to keep the revenue spigot turned on.

Many product managers likely believe that in a situation like this, in which their product is performing beautifully, delighting customers, and turning a profit, they might be able to stop improving it, at least for a time.

However, we would argue that even in this near-perfect scenario—which few products are ever likely to enjoy anyway—simply sitting back and letting that fixed amount of revenue flow in would still mean leaving money on the table.

Here's why: If the market has an interest in your product, then that product always has room to grow.

Three ways to think about improving your product

If your product seems to be "done" from a feature and enhancement standpoint, there are still several approaches you can—and should—use to look for ways to improve it.

1. Improve your product by connecting it to the larger ecosystem.

This is what the creative product teams at Ocean Spray are doing with cranberry juice. Rather than resting on their revenue-generating laurels—the company was already a giant in the cranberry juice market, with no signs of slowing down—

3 TIPS

1. **Connect to a larger ecosystem**
2. **Improve promotion and branding**
3. **Improve the entire user experience**

they looked for ways to make cranberry juice feel interesting and novel again, by "partnering" the cranberry with other fruits and flavors.

We live, work, and play in a world in which we increasingly demand that our tools integrate seamlessly with other tools. You can use this to your advantage as a product manager, by always seeking out relevant partnerships that make your products a critical part of your personas' toolsets.

For example, take Microsoft Word. From a feature standpoint, that app has matured to the point where we don't expect much new functionality from new versions. Sure, there might be a few additions in the future—perhaps a button that outputs a .doc file to some new file format that competes with Adobe's PDF, for example. But the Word product team probably isn't devoting many resources to brand-new word processing features. And that makes sense: They've more or less solved that problem for their users.

But do you know what the Word team should be working on? Integration partnerships. Making Word work seamlessly with dictation or speech-recognition apps, for example. That would potentially improve a product that itself really doesn't have much need to add more core features.

2. Improve your product by improving its promotion and branding.

Let's look at another example. Oil of Olay was a category-dominating skincare brand for generations. But in recent years, parent company Procter & Gamble saw the product line's sales declining. Today's young people weren't as interested in what they accurately viewed as an old brand, a brand that offered "your mother's secret" for beautiful skin, and similar types of promises. In other words, the challenges facing Oil of Olay's product line weren't necessarily deficiencies in the products themselves.

Actually, you could argue that these skin and beauty products faced the problem

we alluded to earlier when describing that perfect-product scenario. Even if your product has found its feature sweet-spot and is delighting users and bringing in a profit, eventually that product will need improving. This is because no market stands still and demands the exact same product forever.

In Oil of Olay's case, what happened was that a new customer persona emerged—the millennial—who was more scientifically-minded and therefore receptive to a different type of messaging than Oil of Olay had been delivering for decades.

So the company rebranded itself simply as Olay. Then it went to work developing a more science-based message behind the value of its skincare products—skin regeneration, guarding the skin against the damage of surface free radicals, and the scientific process behind maintaining younger-looking skin.

3. Improve your product by improving the entire user experience.

In its earliest days, Amazon typically promised three-to-five-day shipping—and in many cases surprised and delighted its customers by delivering their packages within just a couple of days.

Then Amazon began offering two-day shipping for many of the items sold on its marketplace. More recently, the company began hiring a massive fleet of drivers so it could deliver products the same day.

And of course today Amazon is well into the testing stages of its drone program—Amazon Prime Air—where, if all goes according to plan, you will be able to have a product literally flown to your house within a couple of hours of placing the order.

You could argue that, for Amazon, shipping is a major part of the product itself. And that's true. But the point remains: Even if your product feels complete from a feature standpoint, you can still improve it by improving other aspects of the user experience.

For your software product, for example, you can always be looking for ways to make the download and installation process simpler, or make it easier to get comfortable with your app's workflow by improving your onboarding process. You can even look at your current support process, and find ways to make that part of the experience faster and better for customers who contact you for help.

Your product isn't just a set of features strung together to create a user workflow. It is an entire experience that begins as soon as your customers start researching your company and products, and continues for as long as they use your product.

Make a customer journey map of this entire process. Review every touchpoint your customer persona has with your company and your products. We're sure you will find aspects of that experience you'd like to improve.

CHAPTER : **5**

MAKING THE MOST OF YOUR TIME

This chapter is all about optimization and efficiency, including suggestions for making the most of your time, improving productivity, and avoiding distraction and is a useful section for both new and seasoned product managers.

CHAPTER : 5

Product Managers: Don't Waste Your Time on These Six Things

As a product manager, you are a specialist. You're the professional in your company responsible for making sure that your products have clear strategic objectives, that they make it successfully through development, and that they go on to enjoy success in your market.

Part of your job as a product manager should be to figure out the things you spend your time on that actually help you strategically benefit your products and your company's bottom line—and then take everything else you're currently doing and either delegate it, or just kill it altogether. This section outlines six areas we've identified as common distractors.

1. Admiring your work

Often, in boxing or the other martial arts, you'll hear a coach shout at a fighter, "Stop admiring your work!" What this means is that the fighter has just landed an effective strike, and it did some damage to his opponent, but now the fighter is taking too long to do whatever he should be doing next. Maybe he should get back into his stance, or re-establish his guard, or take a few steps back, or fire off another strike while the opponent is still recovering. Whatever that fighter's next move is, though, it can't be just to stand there, even for an extra second—because then he's vulnerable to a counterattack.

Take your moment to enjoy this victory.

When you have a success in the market, or receive positive feedback from the tastemakers or thought leaders in your industry, that's a great moment. But it should last only a moment.

Take your moment to enjoy this victory. Celebrate it with your team—and be sure to thank them for their effort and praise their great work, because this will also help with team-building. Then, take whatever learnings you can from the success and get back to work.

2. Beating yourself up over a failure

Just as you can fall behind if you drag out the celebration of a success for too long, you can also lose precious time, energy, and focus on strategically moving your product forward if you get caught up in sulking when your product falls short of expectations.

You will certainly find valuable learnings in each product failure, just as you will with any success. But when you do experience a disappointing product launch or other type of failure, your job is to learn what you can from the experience, share those learnings with your team, and start putting that knowledge to work as soon as possible to make your next product effort more successful.

3. Doing tasks that you should be delegating

Because a product manager's role is so varied and covers so much territory across her organization, it's easy for a well-meaning product manager to find themselves spending the majority of their time on the wrong tasks.

You need to think of yourself as a specialist with a core agenda—making your product a success—and offload as many responsibilities as you can that don't directly serve that core agenda.

It happens all the time: A product manager who wants to make sure everything is getting done properly and on time ends up taking on too much responsibility, spreading themselves too thin, and spending so much of their time on the wrong tasks that they don't have time for their core responsibility of strategically moving their product forward.

If you're spending too much of your time on marketing-specific tasks, work with your marketing department to assign the right owner to those responsibilities. If you have access to a project manager, empower that person to handle whatever scheduling and task-tracking responsibilities you are mistakenly managing yourself.

You need to think of yourself as a specialist with a core agenda—making your product a success—and offload as many responsibilities as you can that don't directly serve that core agenda.

4. Operating solely on opinion

A product manager's gut instincts, hunches, and opinions are often valuable. Indeed, these beliefs and insights are often the direct result of that product manager's experience in their industry and the skills—the "sixth sense"—that they've developed for identifying opportunities or threats, or for correctly predicting what will resonate with their customers.

But these opinions should serve as a starting point—not as the ultimate basis for strategic decisions about your product.

Your opinions, while valuable, should be only the beginning of your strategic planning. You and your team should then move on to gathering evidence, user feedback, market data, or other research-backed answers to the questions your opinions have raised.

When you spend too much time operating on opinion, what you'll often find is that you will have to defend your ideas, debate them with skeptical, evidence-minded colleagues, and possibly even apologize for them if they prove inaccurate.

Start with opinion, but then move quickly to evidence.

5. Capturing and rewriting your ideas more than once

Imagine you're in a meeting with your cross-functional team. You're talking product strategy, coming up with feature suggestions, thinking through promotion ideas for your go-to-market plan, etc.

As the ideas fly around the room, you jot them down on the whiteboard, or maybe in a document or empty email message on a laptop. When the meeting is over, guess what has to happen? You have to transfer all of those ideas to some other format for longer-term storage.

Now imagine that the same thing happens with every one of your team's meetings: You gather up a bunch of ideas, you jot them down in the meeting, and then you have to go re-jot them somewhere else.

Instead, use a single idea-capturing tool to create a single place to house, review, and add to your list of ideas. Ideally this will be a cloud-based solution, so you can access it anywhere, even if you hold a product meeting at Starbucks for a change of scenery.

This could be an Evernote notebook. It could be a Google Doc. Or it could be ProductPlan's Parking Lot feature.

6. Creating multiple versions of the same product roadmap

Don't waste hours manually re-creating your roadmap as three distinct versions—one for your stakeholders, another for the development team, and yet another for your sales and marketing departments—as so many product managers do.

You can't really blame yourself for doing this. When you meet with your executive team, you have to present a roadmap that highlights big-picture stuff, like revenue projections and what the product will do for your product's market position. Those execs usually don't want to spend much time reviewing the details. When you meet with your engineers to get development underway, on the other hand, you have to present a roadmap that will allow the assembled group to focus on very different things.

The problem is that when you use the wrong tool to build your roadmap—typically a static document application such as a spreadsheet or presentation tool—you end up having to rebuild the same document, or at least move a lot of the details around, every time you need to present it to a different group.

Instead, it's helpful to use purpose-built product roadmap software that will allow you to input the information for any of the various audiences you'll be sharing the roadmap with, and then—with just a few clicks—show the right roadmap view to the right audience.

If you're maintaining more than one file version of your roadmap, you're wasting valuable time.

Tips For Remote Product Teams

We believe strongly that remote product teams can develop successful, game-changing products just as well as teams whose members are all working under the same roof.

As we've already discussed, product managers are a special group of individuals. Given the competition in the market and the specialized skills product managers possess, it makes sense to recruit from as broad a pool of talent as possible. But...

Is there a more controversial topic in business today than whether or not employees should be allowed to work away from the office? Just throw the question out there for discussion. Pretty soon, everyone will be raising their voices—and not because they're in different offices.

Staunch proponents of remote teams will tell you (often with a raised voice) that given today's cloud-based communication and collaboration tools, you'd be a fool to cut yourself off from the majority of the world's talent pool and limit your company only to those employees within driving distance of your office.

Opponents will shout back that it's not possible to develop the chemistry and

team cohesion a company needs to be successful if that "team" is just a bunch of faceless emails and disembodied phone voices scattered all over the world, communicating asynchronously at all hours of the day and night.

So who's right? Indeed, is there really a right answer to the remote-team question?

We admittedly come to the subject with a bias. We believe strongly that remote product teams can develop successful, game-changing products just as well as teams whose members are all working under the same roof.

Our bias comes partly from seeing time and time again how effectively distributed product teams are able to work together to advance a successful product strategy—even if those teams are comprised of people on several continents.

How do we make it work? And how have so many users of ProductPlan made it work?

Based both on our research into remote teams and our firsthand experience as a distributed team ourselves, here are four suggestions for making your remote product team a success.

1. Hire the right people.

One important insight we've gleaned from interviewing hundreds of product executives over the years is that smart leaders know how to prioritize the skills and strengths in the product managers they hire based on the specific needs of their companies.

Some place a premium on curiosity when hiring a new product manager. Others have told us they value passion above all other traits. Still other product execs have said that when they're interviewing product managers, they're looking first and foremost for an entrepreneurial mindset.

But do you know what we haven't heard as a key trait in a product manager—not from a single one of the product leaders we've interviewed? The ability to be at a specific desk, in a specific building, during a specific set of hours each day.

You already know this intuitively, but it's worth underscoring here if you're considering developing a remote product team, or if you're already a part of one and want ideas for how to make it more successful. If you've hired the right people for the right roles, and those people are bringing the characteristics to the team that you value most—passion, problem-solving ability, empathy, etc.—where they work won't really matter so much.

Just start with a small step or two in the remote-team direction.

2. Start slow as you develop your remote product team.

In *The 4-Hour Workweek*, author Tim Ferriss offered a brilliant suggestion to a would-be remote worker who hadn't yet gotten permission from her company to take her job out of the corporate offices and start working at home (or Starbucks).

Because shifting to a remote-work arrangement would represent such a dramatic change in culture for a company that didn't already allow it, Ferriss suggested starting small—very small, perhaps asking for just one day a week to work remotely. (Maybe even a day every other week.)

Then, Ferriss suggested, on this day the remote worker should make darn sure she's highly productive—delivering more than her typical day's amount of work, all while being accessible at all times to the team back at the office.

Ferriss's plan is obviously to offer a proof-of-concept—this remote-work thing

actually works—before asking for more time away from the office. If you reverse-engineer Ferriss's suggestion, you can use the same strategy to learn for yourself if it can work—and, if so, how to make it work—for your remote product team.

Just start with a small step or two in the remote-team direction. Maybe allow part of the team to work from offsite for a couple of days, then gradually build to a point where everyone who wants to can be working from anywhere, as long as productivity doesn't suffer.

Here's another way to dip your toe into the remote-team waters: For your next hire, try a contract-based team member who's out of state (or in another country)—so you can learn whether you can fully bring a remote worker onto your team.

3. Make sure there are no gaps in productivity or support.

In their book *Remote: Office Not Required*, authors Jason Fried and David Hansson explain that the software firm they founded, 37signals, was a remote company from day one. Indeed, the co-founders launched the business with one partner in Chicago and the other in Copenhagen. Two people; two countries. You can't get much more remote than that.

At the time of the book's publication, 37signals had grown to several dozen employees spread all over the world. The authors pointed out that their flagship product—Basecamp—was by then serving millions of customers, including users in just about every country.

In this instance, having a remote team actually helped the company cover its service and support needs across all hours of the day. As long as they had staff somewhere in the world able to cover the Help Desk during business hours, they didn't care where that support staff was located or what their hours were.

At the same time, as long as the Chicago side of the team that had to deal with

their counterparts in Copenhagen was able to be accessible to those team members, did it really matter if they worked odd hours?

One of your tasks when operating a remote product team will be to make sure that the people who need support—whether members of your team or customers—can get it when they need it. Once you've worked that out, the specific hours that people work, and where they are while they're working, shouldn't be an issue.

Or, as the *Remote* co-authors succinctly put it: Thou Shalt Overlap.

When everyone on your team is confined to the same office every day, and long-winded meetings eat into a great deal of a typical day's productivity, your staff will understandably treat new meeting requests with suspicion, even dread.

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4. Communicate, communicate, communicate.

One possible drawback of remote product teams, even ones that run extremely smoothly, is that individual team members can sometimes feel isolated, adrift on their own, cut off from all of the important stuff happening on the Mothership.

And if you run an entirely remote product team, at one point or another everyone might feel this way—because there is no Mothership. The best way to address this, our experience has taught us, is by bringing the team together for regular communication—maybe even more often than you think is necessary. This is what we do, and it truly does help keep the team cohesion, shared sense of purpose, and enthusiasm levels high.

Cover whatever ground you think is worth reviewing as a team, and then set them free again to do their work.

When everyone on your team is confined to the same office every day, and long-winded meetings eat into a great deal of a typical day's productivity, your staff will understandably treat new meeting requests with suspicion, even dread.

But when those same team members are set free to work in the environment and at the times they feel the most productive energy and clarity, then jumping on a video call every few days to chat with the rest of the team won't feel like such a productivity-draining inconvenience.

So, hold virtual meetings with your remote product team. Often. Have robust discussions about product strategy. Review the product roadmap together. Pop open your project management tool to discuss daily progress. Cover whatever ground you think is worth reviewing as a team.

And then set them free again to do their work.

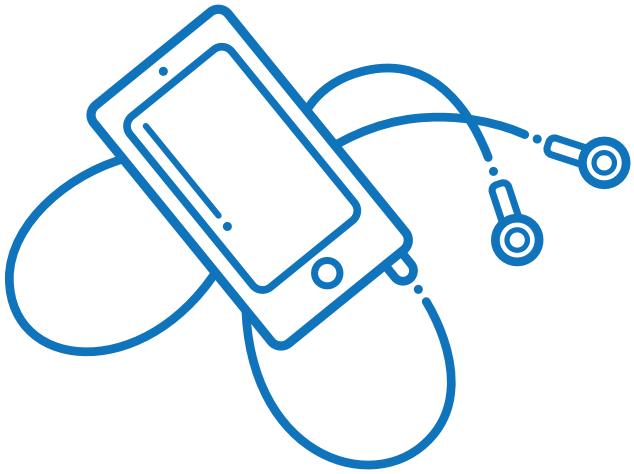
CHAPTER : 6

HELPFUL RESOURCES FOR PRODUCT MANAGERS

This final chapter is a collection of useful product management resources, covering a selection of our favorite product management books, podcasts, conferences, and more. It also offers suggestions for product management software and additional training resources for every point in your career.

CHAPTER : 6

Great Podcasts for Product Managers



Product managers are busy. But you're also a highly creative and resourceful bunch. Whatever new tasks and obligations hit your agenda, you find the time and space to take them on.

So, when you want to set aside some time to learn, to come up with new ideas, and maybe to get inspired—but you don't have hours of free time to read a great book—what can you do?

Our answer: Get creative, as you always do, and find time in the spaces between your daily to-do list.

This is why a great podcast can be among the best learning formats out there. You might not have time to sit down and focus all of your attention on a product management book. The good news is that listening to a podcast doesn't require much time, or sitting down, or all of your attention.

You commute to and from work, right? You exercise, right? You go for short walks around your office to get some fresh air and give your eyes a break from your computer's display. You do the dishes, fold laundry, take out the garbage. All of these activities provide great opportunities to throw on your headset and tune in to an educational or inspirational podcast.

We're going to recommend ten podcasts below, which offer outstanding learning and inspirational content for product managers. We've only included a few podcasts targeted specifically at product managers. Our thinking here at ProductPlan is that the most successful product managers are the most well-rounded—the ones who expose themselves to the greatest number of relevant disciplines. So, we're suggesting podcasts that offer learning and insights in fields such as entrepreneurship, leadership, and marketing, as well as product management.

1. Mixergy

Hosted by entrepreneur Andrew Warner, Mixergy is a long-running podcast focusing on entrepreneurship, running successful businesses, and coming up with winning products.

Although the podcast is not aimed directly at product managers, you will find that many of the goals, challenges, workarounds, priorities, successes, and failures of the startup founders interviewed here overlap with those that you and your product team face.

2. Duct Tape Marketing

What's great about this podcast, hosted by marketing consultant and author John Jantsch, is that it can give a product manager a different perspective on their products and their markets.

Jantsch and the marketing experts he interviews discuss how and why businesses

and brands connect with users (or don't), how they earn customer loyalty, and the role that marketing itself plays in growing a successful company.

It's easy to become narrowly focused on your responsibilities as a product manager. Stepping back and learning how other key players in your company—such as your marketing team—are devoting their resources to helping your product succeed can provide valuable insights and ideas you might not otherwise find.

3. The Advanced Selling Podcast

Speaking of gaining new product management insights by spending time with other members of your product's cross-functional team, here is a great podcast about sales. What's valuable about The Advanced Selling Podcast, in addition to the fact that the show's archive boasts nearly 500 episodes, is that it offers a product manager great learnings from the front lines about how users and decision-makers react to products.

Co-hosts Bill Caskey and Bryan Neale, experienced B2B sales trainers, offer fresh insights on such important topics as how pricing affects sales and buyer perceptions, how to narrow your field of prospects (read: user personas), etc. For a perceptive product manager, there is real gold here.

4. Accelerate

Here's another great sales-themed podcast. Accelerate's host is Andy Paul, a longtime sales trainer, and in the show's more than 500 episodes he interviews lots of heavy-hitters in the sales game. Whereas The Advanced Selling Podcast is useful primarily in that it gives you a window, provided by sales reps, into what your customers might be thinking, the Accelerate podcast is great for other reasons.

First and foremost, this podcast gives you some real insight into the lives of your sales team members—the challenges they face, where they believe other parts of the organization (marketing, product, management) let them down, and what types

of support they value most. In other words, this is a great opportunity to listen to your sales reps and learn how you might be able work with them more effectively.

The podcast also offers great insights—from sales leaders—about how to streamline and otherwise improve a company's sales strategy and processes. You might discover some helpful tactics and resources here to help your own sales effort.

5. This is Product Management

Here's the first pure product management podcast on the list. Host Mike Fishbein (of software maker Alpha) interviews a wide range of relevant experts and thought leaders: venture capitalists, product executives, entrepreneurs, and of course product managers. The result is an always-valuable podcast, any episode of which can give you a new insight or idea about your market, how to manage your sprints, how to lead a team, and how to come up with better products.

6. Leadership and Loyalty Tips for Executives

One of the most highly praised podcasts on leadership, this series, hosted by speaker and coach Dov Baron, addresses successful leadership strategies in both business and social settings. The Leadership and Loyalty podcast delves deeply into such topics as building strong teams by creating loyalty, learning how to focus your team and, of course, what makes a great leader.

This podcast is not aimed specifically at product managers, but the lessons here—one recent episode is titled "The Magnetic Leader"—often provide relevant insights for you and your product team.

7. Beyond the To-Do List

As a product manager, you have to think and act strategically. Because everyone's strategic thinking and processes always have room for improvement, there's the Beyond the To-Do List podcast.

In this often funny series, Erik Fisher, a productivity expert and author, interviews all sorts of productive folks—entrepreneurs, product execs, successful bloggers, bestselling authors, journalists, you name it.

Some of the advice is directly on point for product managers. In one recent episode, for example, Erik interviews AppSumo founder Noah Kagan on product testing and optimization. At other times, the podcast discusses broader topics such as being present, work-life balance, and getting more done. An older episode, for example, finds Erik talking about strategic productivity with bestselling author Charles Duhigg.

If you believe you could benefit from some expert guidance on strategy and productivity, give Beyond the To-Do List a listen.

8. Product People

Here is the second product management podcast on our list. If you listen to Product People—which describes itself as "A podcast focused on great products and the people who make them"—and the This is Product Management podcast we listed above, you'll be off to a great start in terms of finding valuable product management insights on a regular basis.

Product People's episode archive is loaded with wonderful, insight-rich discussions for product managers. Noteworthy topics include how to build habit-forming products, product validation, promoting your product, and productizing your services. In fact, if you had the time to listen to just one podcast on this list, we'd recommend you start here.

9. Happier with Gretchen Rubin

We've discussed a lot of product manager-related topics in this post. Even the non-product-management podcasts we've suggested so far have all been aimed at making you more productive and effective at work. So it's time for some balance.

A successful product manager is a fresh, relaxed, and mentally-focused product manager. With that in mind, we highly recommend the Happier podcast, hosted by Gretchen Rubin, bestselling author of *The Happiness Project*.

How is this related to product management? It isn't, at least not directly. This is just a terrific series offering advice on lightening up, gaining perspective, boosting optimism, and becoming a happier person.

10. 100 Product Managers

Here's one more product management-specific podcast to finish off our list. In 100 Product Managers, host Suzanne Abate is on a mission to interview 100 active product managers from companies of all sizes, from startups to enterprises.

Listen to her conversations with product managers from Expedia, Trunk Club, Sonos, and more.

Must-Read Books for Product Managers

1. Free

What's great about Chris Anderson's *Free* is that the former WIRED editor-in-chief forces us to take a long, objective look at how we are pricing our products. The book asks us to confront whether, in an era when more and more products and services are becoming free, we can afford to stick to the old paradigm of gating our offerings and making them available only to paying customers.

Free also offers one of the earliest explorations of the freemium model—whereby a company would make much of its offerings available for free on the gamble that 1) it could lure in users and then charge them for additional functionality, and 2) even if only, say, 5% of all users ended up becoming paying customers, the product could still turn a profit.

We've offered some suggestions about making smart decisions when pricing your products, but the book *Free* presents you with some pretty radical thinking about how to charge for your offerings, and how giving a lot of them away can at times be the most lucrative strategy of all.

2. Do the Work!

Do the Work! by Steven Pressfield is a fun little book, a fast read at under 100 pages, and it is loaded with great advice for staying on track through any creative undertaking—including driving a new product to a successful market release.

But perhaps the most important aspect of the book for our purposes is its section discussing research. Specifically, Pressfield warns that as valuable as research is, it can also turn into a way of stalling—what the book describes as "The Resistance."

This is a great gut check for product managers. It forces you to ask yourself if you are stuck in research mode, waiting for more data, because you're actually afraid to move ahead with your product development in earnest—building the roadmap, presenting it to stakeholders, committing to timelines, getting your engineering team going, etc.

We have offered product managers plenty of advice about how to more strategically set your priorities and how to boost your productivity. And while *Do the Work!* offers some fantastic strategies for these as well, we believe the book's real value will be in helping you identify The Resistance in all of its sneaky, slithery disguises, and helping you conquer it so you can keep moving forward on your product's path.

3. Crossing the Chasm

Here is a more traditional product management book, focusing on how businesses can develop products that make that rare and difficult leap from cool novelties for a small group of early adopters to full-blown mass-market successes.

We include *Crossing the Chasm* here partly because its principles have stood the test of time. Because it was originally published more than a quarter-century ago, you won't have to worry about any of its examples or data not holding up because they are skewed in favor of some temporary trend.

This is simply a great explanation of how a successful product will make its way through a standard bell curve—from early adopters, to the early majority, to the late majority and finally to the laggards—and how to structure your products to follow this successful path.

4. Presentation Zen

Yep, we've included a book about presentations. And with good reason.

As a product manager, you will no doubt have to present your plans—particularly your product roadmap—to several different audiences. And no matter how brilliant your product's strategic vision, how well you've thought through the details of the execution, you will have a difficult time earning the buy-in and enthusiasm of these audiences if you present it in a flat, boring, or convoluted way.

Presentation Zen offers dozens of great ideas for making your insights and arguments resonate as you present them. Trust us: You'll find gems in this book.

5. Analytics at Work

We stated in our *Do the Work!* recommendation that getting stuck in research and data-analysis mode can be a genuine pitfall for product managers. But we also pointed out that research can be invaluable for compiling both the real-world knowledge you'll need for your own strategic thinking about your product, and the ammunition you'll need to convince stakeholders and others that your thinking is on point.

For this reason, we recommend *Analytics at Work: Smarter Decisions, Better Results*, by Thomas Davenport and Jeanne Harris. This book offers great insights into how to collect the right data, what tools to use for analyzing it properly, and how to learn from the most successful and data-driven companies before setting your own analytics objectives.

One word of caution: *Analytics at Work* explores metrics-driven learning as it relates to the whole company—in terms of how it applies to expanding, hiring, marketing, etc.—and not merely how to gather and analyze user data on your product. We believe you can find great insight for product research in learning how the best companies use data in their hiring and advertising decisions.

6. Complete and Utter Failure

Here's a fun exploration of the many public failures of individuals, institutions, and businesses.

We include it here because we think reading it might remove some of the debilitating fear you have about the possibility your product might fail. It might. In fact, statistically speaking, it probably will. But as you'll read throughout this great little book, many extremely successful corporations have failed, and they bounced right back.

Enjoy this one. It's a fun read.

7. The Art of Product Management

Okay, here is the list's one true product management book: *The Art of Product Management*.

Like *Crossing the Chasm*, we feel comfortable including this one because it has stood the test of time. Even though the book was published way back in technology's Paleolithic era of 2008, its principles and insights still stand up today.

The book offers valuable lessons for product managers about developing an effective product roadmap, adequately equipping your support teams (which few businesses do, even today), properly implementing agile, etc.

Although this book is written primarily for product managers in the technology industry, we believe its principles are broad enough to offer value to a product manager in any field.

8. Read This Before Our Next Meeting

Here's another valuable little title that, like *Do the Work!*, came out of the Seth Godin-produced Domino Project. This short book addresses a single topic, meetings, and offers some new insights about it. Author Al Pittampalli offers a fresh take on office meetings and introduces some very high-threshold criteria that a manager should have to meet before being able to call a meeting at all.

There are some great ideas here for product managers, in terms of finding other ways to communicate updates or other important information without having to assemble a large group of people in a room (or a Google Hangout session) for an extended period of time.

Read this before you call your next meeting.

9. Inspired: How to Create Products Customers Love

Here is another pure product management title, written by one of the most successful product managers in modern times. Marty Cagan, a longtime product executive for companies like eBay and HP, walks the reader through his hard-won insights about how to identify when you've got the right product and when you don't, how to work with technical teams to get your products built the right way, and the basics of how to be a great product manager.

10. The Innovator's Dilemma: When New Technologies Cause Great Firms to Fail

And guess what? Even after you've read all of these books (and a bunch of other must-reads), helped build products with a loyal following, and grown your company into a thriving enterprise, you're still not out of the woods.

That's because, as author and Harvard Business School Professor Clayton Christensen explains in *The Innovator's Dilemma*, new technologies, processes, and approaches are hitting the market all the time—and some entrenched leaders

lose to scrappy upstarts because they fail to adapt to these new realities.

Or, just as frustrating, other successful companies employ a culture of remaining nimble and adapting to new technologies to stay competitive—but often make the mistake of adapting the wrong new technologies and losing because of that misstep. This is a must-read because it will force you to acknowledge that your product is never finished, your business (no matter how successful) can never slow down and rest on its laurels—and that true product management is really a process of innovating, continually learning, and continually adapting.

What Should Your Product Stack Include?

When we talk about product management tools, we're usually referring to the standard few that most product managers use every day: a spreadsheet, a project management tool, and purpose-built roadmap software.

But a product manager's job involves a lot more than tracking the backlog, overseeing the progress of her teams, and reviewing her product roadmap. From gathering customer feedback, to analyzing data and trends, to creating demos and tutorial content for their sales teams and customers, most product managers will need a much wider range of tools than the few that we typically associate with the job.

Whether you're a new product manager or a seasoned product manager just wanting to make sure you're not missing a key component of your role because you're lacking the proper tool, we offer the following suggested list of product management tools—organized into the various categories of a product manager's role.

Product management tools: are you missing any of these?

Data tracking and analysis tools

1. User tracking and analysis tools (such as Pendo, Google Analytics, and Notion)

These tools can be invaluable sources of intelligence and insight into how your

software's users or your website's visitors are actually engaging with your product and your content.

Whereas customer surveys or interviews—which are valuable tools in their own right—will tell you only what your customers say and think, applications like Pendo capture and help you analyze what those customers actually do.

If your company sells software or just maintains a lot of content on a website, deploying a service like Pendo or Google Analytics can uncover important realities about what resonates with your users, and what doesn't. Notion is also a great tool for creating dashboards to track the most important metrics for your team.

2. Customer survey tools (like SurveyMonkey or Google Forms)

What's great about web-based survey tools like SurveyMonkey or Google Forms is that they have so many types of pre-formatted questions that, whether you want to offer multiple-choice questions, drop-down lists, or just open comment fields, you can put together a survey in just a few minutes.

You can then send the survey out to your customers and easily track and analyze the results.

For gathering quick answers to important user questions, these tools are extremely helpful. But beware: Like email, online survey tools are so easy, convenient, and inexpensive that it can be tempting to overuse them. Use your "SurveyMonkey" sparingly, so as not to upset your user base.

3. Recording apps for customer chats or formal interviews (such as iTalk)

When you speak on the phone with customers, even if you're just calling to answer a question or help them with an area of your product that's giving them trouble, it's always a great idea to record the call. You never know when a customer will offer a valuable insight, ask a question you realize a lot of other users will have, or

just share a new way they're using your product that you might not have otherwise thought of.

With a recording app like iTalk on your smartphone, you can simply push a button to record the call and then retrieve and share it as an audio file. Note: You should always ask your customer for permission before recording a call.

These recording tools can also be great if you're meeting face-to-face with your customer—because you can just turn the app on and use your phone's built-in microphone to record the audio. (You are meeting face-to-face with your customers, right?)

4. Industry research accounts (like Gartner or Forrester)

Here's a tool you probably wouldn't immediately think of as part of the product management tool stack—but it certainly should be.

Having access to the collective industry research and the latest thinking of the analysts covering your space can be extremely beneficial in terms of guiding your strategic thinking and helping you determine where your market is headed. The statistics and reports these research firms output can give you just the types of data you need to prioritize and earn stakeholder buy-in for specific themes and features on your product roadmap.

Of course, this will be among the most expensive product management tool on this list, so you might need to use your powers of persuasion (which you no doubt have as a product manager) to convince your management team of its value.

Internal communication and project management tools

5. Team messaging tools (such as Slack, Basecamp, or an internal Wiki)

When your product development, or any initiative that consists of many moving pieces and involves teams across the organization, gets underway, you will want an

easy and immediate means of communicating—as well as maintaining an ongoing record of all communications related to the initiative.

Thankfully, there are many simple, cloud-based tools that allow for just this type of easy and centralized team communication. Slack, Basecamp, and Microsoft Teams are a few that come to mind.

6. Presentation software (like PowerPoint or Keynote)

We often point out how inefficient presentation tools are for roadmaps. But that doesn't mean that PowerPoint (or Keynote—choose your poison) shouldn't have a prominent slot in your product management toolkit.

Presentation decks can be invaluable for communicating your high-level strategies, visions, and plans across your organization and to external audiences like customers. Vision decks, for example, can be a powerful way of communicating your product's vision to a group of executive stakeholders and earning their buy-in. Presentations can also be a highly effective way of conducting sales training or educating your industry's analysts about your product.

7. Project management tools (such as JIRA, Pivotal Tracker, or Trello)

Like the team messaging tools we listed above, today's project management applications are much more robust and provide a simplified means of tracking and documenting details.

Using a web app such as Trello, for example, you can track and share various items with relevant team members by grouping these items into easy-to-view Boards—such as "Sales Collateral in Progress"—and then creating individual Cards below, such as "Product Data Sheets" or "Case Studies." These cards can easily be dragged and dropped under different Boards—say, from "In Progress" to "Under Review."

Other popular project management tools include Microsoft Project, which teams typically arrange in Gantt chart format, and JIRA, which is often configured as a less visual issue-tracking tool. And tools like Pivotal Tracker will help you to execute on your roadmap and keep your backlog organized.

External communication tools

8. Email automation tools (such as MailChimp or Constant Contact)

Although web-based email campaign platforms like MailChimp, Campaigner and Constant Contact are most commonly used for email marketing campaigns, they are also great tools for product managers. This is because these apps allow even those with zero HTML skills to quickly generate company-branded, attractive email messages—which product managers can use to send product or feature update notices to users, or even to create newsletters that offer a mix of helpful information and promotions regarding the company's products.

Another major benefit of using these automated email-marketing applications is that, because these vendors track and report back to you highly detailed information on your recipients' engagement with your emails, you can easily track the success of each campaign. You can even learn about each user, so you can continually improve your content to make it more relevant and compelling.

9. Video recording and editing tools (like Camtasia)

Many product managers and marketers create and share videos to both promote their products and to teach customers how to use them. If you are selling a software product, for example, you can add tremendous value to that product for your user base by creating helpful how-to videos that walk a user through specific functions and features of the product.

With tools like Camtasia and Captivate, you can simply walk through your product on your computer, narrating your instructions as you go (using your computer's built-in microphone or an external plug-in mic), and the video capture tool will record the entire experience.

These videos can serve as valuable content that lives in your product as well as on YouTube or other web video channels—and can even serve as a selling tool.

Product planning and creativity tools

10. Flowcharting tools (such as Visio)

Although not all product managers use flowchart and diagram applications, the affordability and ease of use of these tools makes them a great way of performing a step that many product managers overlook but shouldn't—customer journey mapping.

Creating a customer journey map is helpful in giving you and your organization a clearer view of your customer's full experience with your company. When created properly, a journey map will show all of the touchpoints an individual has with your organization from a first visit to your website (or a first call from one of your sales reps) through purchasing and using your product.

Journey maps can also focus specifically on the full experience of using your product—say, from first visit to the site, through completing an online form, through any contacts the user has with your sales reps or other staff, through downloading and logging in to your tool.

Flowcharting and diagramming tools—like Microsoft Visio and OmniGraffle—can be helpful in mapping out any specific aspects of a user's workflow or experience with your product. And because they offer a visual view of that workflow or experience—as opposed to merely a list of steps your customer will take—the flowcharts you output from these tools can then help you uncover insights into how to strategically prioritize your product roadmap.

11. Product strategy tools (such as ProductPlan)

A purpose-built roadmap tool is a must-have item on any list of product management tools.

The reasons for this are too numerous to cover comprehensively in this brief list, but suffice it to say that using any non-native roadmap application to draft and maintain your product roadmap will create far more work, make the resulting roadmaps far less flexible and easy to share, and far more prone to version-control issues that can slow your product's progress.

Productivity tools

12. Idea-capture and collaboration tools (like Evernote and Google Drive)

Finally, don't forget the business productivity tools you'll use every day to capture ideas, review and share notes from meetings, and organize your insights and thoughts into cohesive plans and documents to earn stakeholder support.

Here we're thinking about idea-capturing tools like Evernote, cloud-based collaboration apps like Google Drive, Dropbox—and even paper and pen, because sometimes inspiration strikes when your smartphone is across the room!

Product Management Conferences You Should Attend

Conferences are great opportunities for product managers to learn from their peers, network, and—perhaps most importantly—gain the fresh perspective that comes along with a few days away from the office. In recent years, a handful of great, product-focused conferences have cropped up to fill the growing demand. To help you choose an event that's right for you, we've compiled a list of our five favorite conferences for product managers.

This list would be incomplete if we didn't also mention ProductCamp and other local product management meetups, which are excellent opportunities for product managers to mingle. However, we chose to focus on larger conferences that attract attendees from all over the world, so that product managers can make informed decisions about whether or not to invest in attending these events.

1. Mind the Product

Mind the Product is an annual product management conference that takes place on both sides of the Atlantic, with one event in London and one in San Francisco. A play on the British tube warning "mind the gap," Mind the Product started in England, but has since expanded to become a global community of product managers. In addition to the annual MTP conference, the community also organizes smaller Product Tanks in cities all over the world. (There is most likely one coming up in your city!)

We've attended MTP San Francisco in previous years and found it to be extremely insightful. One of our favorite speakers from a prior MTP was Ken Norton, a former Google product manager and a current partner at Google Ventures, who talked about the importance of making yourself uncomfortable and giving your team space to take risks—because that's how innovation truly takes place. Another great past-speaker was Des Traynor, one of the founders of Intercom, whose presentation focused on outpacing disruption by thinking about products as systems, rather than as isolated applications.

Although it's not necessarily the best place to find concrete product management advice, Mind the Product promises to be a congregation of some of the most forward-thinking, cutting edge voices in product management. Their ideas will leave you feeling inspired—and will certainly break you out of your day-to-day putting out fires/backlog management mindset.

2. Atlassian Summit

Summit is Atlassian's annual user conference that brings together teams from all over the world to share best practices for building products—both in general and with Atlassian software specifically. The conference kicks off with training sessions on Atlassian products and then transitions into a series of keynotes from product leaders and innovators. Company and industry updates from Atlassian executives are also thrown into the mix.

The focus of the conference is on how teams can work together to build great things (which is no surprise since Atlassian makes software for teams, like JIRA, Confluence, and their most recent addition, Trello). Attendees are therefore less homogenous than Mind the Product, which is specifically designed for product managers. At Atlassian Summit, you are likely to encounter a variety of job titles—developers, designers, scrum masters, and the like. There are nevertheless plenty of keynotes that product managers will find valuable, with topics ranging from story mapping and roadmap planning to building a culture of innovation.

Like Mind the Product, Atlassian Summit has two sister events, one in Europe and one in Silicon Valley. Unlike MTP, Summit takes place over three full days and has multiple sessions running in parallel, so attendees can customize their schedules. With lots of speakers and breakout sessions to choose from, product managers of all experience levels are certain to find talks they're interested in. And if the educational and professional development opportunities aren't enough to convince you, the conference also ends with a big party, the "Atlassian Bash."

3. Industry: The Product Conference

Industry is a two-day product conference in Cleveland, Ohio that bills itself as a way for product managers to "get out of execution mode and get inspired." Most attendees are product managers, but the conference also attracts startup founders, CEOs, and "intraprenuers." Industry is organized by The Product Collective, an organization founded in 2014 to bring product managers together and build community—especially outside of Silicon Valley.

The event includes presentations by featured speakers as well as working sessions focused on achieving specific goals. In past years, speakers have come from companies like Uber, Square, and Google. Work session topics include achieving product-market fit, questioning your assumptions, and the jobs-to-be-done framework.

Industry promises to be a gathering of the world's best product managers, and in that regard it bears a lot of resemblance to Mind the Product, including some overlap between speakers. Industry, however, is a longer conference and its organizers are headquartered in Cleveland rather than London, making it more convenient for most product managers in the eastern United States.

4. SiriusDecisions Summit

SiriusDecisions Summit is a conference for B2B professionals in product, marketing, and sales. The conference takes place over four days and features several keynote

speakers as well as track sessions where attendees can seek help implementing the frameworks presented into their own business practices.

Although not specifically tailored to product managers, SiriusDecisions Summit is a unique opportunity for those working at B2B companies. Apart from the educational sessions, it's also a great opportunity for product managers to network and observe market trends.

5. Front: Conference for UX and Product Managers

Front is a conference for UX designers and product managers that takes place annually in Salt Lake City, Utah. It's distinct from the conferences we've mentioned so far in that it's focused on in-depth case studies from peers in product management and UX—case studies that showcase the good and the bad. In fact, there is no call for speakers; instead, presenters are invited based on their body of work.

Front is organized by the Product Design Association, a group that also organizes smaller meetups for the product management community in Utah. The conference promises to offer an in-depth look at how product managers and UX designers at diverse companies solve problems. Front differentiates itself from other conferences by erring on the side of tactical advice rather than inspirational rhetoric. In fact, their website advertises no after-party and no alcohol, just "extraordinary content."

Product Management Training: Five Excellent Resources

If you want to become a software developer, one option is to major in computer science or software engineering in college. You probably won't hit the job market with much experience coding, but that degree gives you a good shot at a first job in software engineering because it signals that you have a technical background.

But what if you want to be a product manager? Or what if you're already a product manager and want to sharpen your skills? What product management training paths are out there for you?

As we mentioned in Chapter 1, there are many roundabout routes to a product management career, but few paths are as straight and clear as the ones leading to, for example, a software developer. Some find their way to product management after first being a designer; others come from an entrepreneurial background; still others fall into product management after stints as marketing professionals or developers. There really isn't one standard or accepted product management training path.

You aren't likely to find a simple way to acquire product management training on the job, either, because product management positions almost always differ based on the industry, the company's culture, and the products you are managing at a given job. Where can you go if you want useful product management training?

1. Take online product management courses at sites like Udemy and LinkedIn Learning.

You can learn a lot about product management without ever leaving your desk by viewing video courses online on platforms like LinkedIn Learning.

A search of their massive library of video courses reveals that LinkedIn Learning offers more than 7,000 instructional video clips on product management. Their product management training content covers topics as diverse as the foundations of product management, agile best practices, and pitching product ideas to your stakeholders.

The online learning site Udemy also offers a sizable library of product management training videos—from the very basics of becoming a product manager to advanced product management principles.

2. Attend live training at a Pragmatic Marketing event.

If you can get away from your desk, and if you can convince your company to pay for it, you should sign up for a live training session with Pragmatic Marketing.

Taught by actual product leaders and experienced product managers, Pragmatic Marketing's training courses are not simply academic exercises in product theory. They teach using hands-on, real-world situations that you are likely to face as a product manager.

Moreover, Pragmatic Marketing teaches a comprehensive approach to product management, and their Pragmatic Marketing Framework teaches you how to gain a 360-degree understanding of your products. You'll learn how to identify market problems, size up your company's assets, and understand the competitive landscape. You won't have to apply the strict Pragmatic Marketing Framework to your products, of course, but learning this proven approach will teach you a lot of valuable lessons that will serve you well in your product management career.

3. Join product management communities, like those on Slack and LinkedIn.

Online product management communities are another great source of product management training, learning, and even direct help with your real-world product management issues.

The Slack product community ProductManagerHQ, for example, offers an enormous library of resources and educational content for new and experienced product managers, interviews with product leaders, and even an introductory course called One Week product manager. Their active online community can also help answer your product management questions.

MindTheProduct is an online product community that hosts regular meetups and product management training sessions all over the world. Like ProductManagerHQ, their site is a rich source of educational resources from real-world, experienced product managers across all industries.

You can also join product management groups through LinkedIn, such as the Product Management Networking Group, where you can network with other product managers, ask questions and learn about trends in your industry. And we also invite you to join our recently launched free product management Slack community, The Product Stack.

4. Learn disciplines that complement your role as a product manager—like development and entrepreneurship.

Because product management affects and is affected by a broad range of other disciplines across the organization, product management training should also include learning tangential disciplines and skills that can improve your ability to deliver successful products to market.

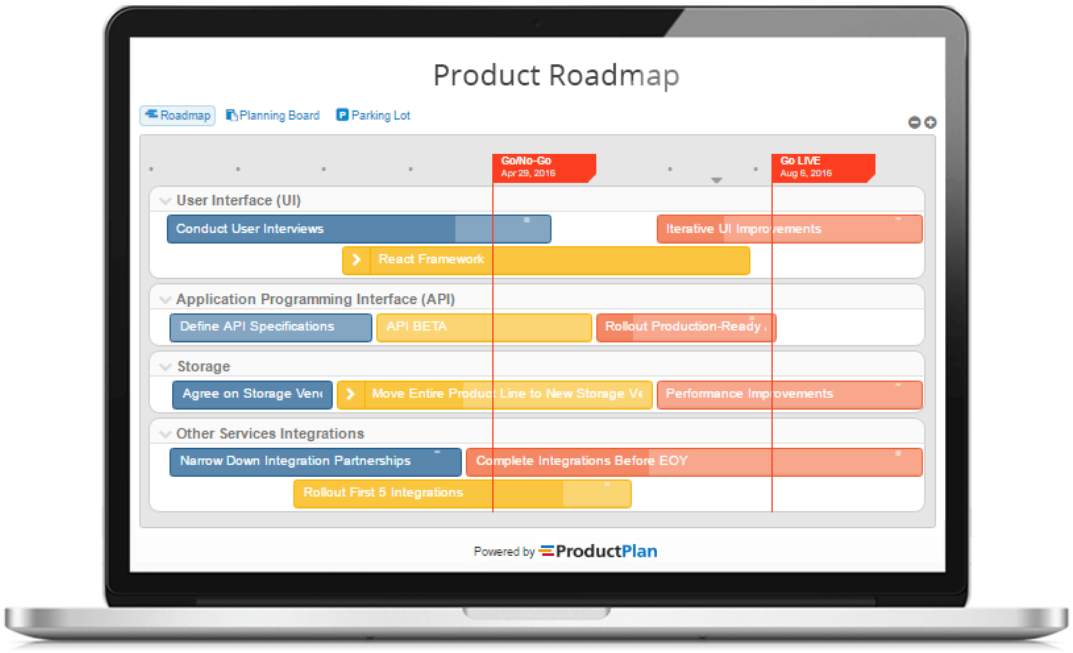
So why not learn about what it takes to be an entrepreneur? Understanding the issues and challenges business leaders face can help you better understand how

your product's priorities fit into the larger company picture. A search of LinkedIn Learning returns hundreds of video courses on entrepreneurship, leadership, and running a business.

5. Read the best product management blogs, newsletters, and websites.

Product management insights are published on the web every day, so it's also a smart idea to regularly visit the best sites delivering this content.

As we've already mentioned, one of the first sites you should check out is the blog and resource page from Ken Norton, a former Google product executive who now works with Google's investment company, where he provides product and engineering support to more than 300 portfolio companies including Uber, Nest, and Slack. Norton's site is an ongoing gift to product managers, a steady stream of valuable new product management training content.



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