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Product-led Certification Course

Workbook and Study Guide

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WORKBOOK INTRODUCTION

Since true product-led transformation happens when you take action on what you learn, we put together six exercises that correspond with lessons in the Product-led Certification Course. We recommend completing each exercise when they are prompted by the instructor, but you can always come back to this workbook at any time.

All of the exercises can be done alone, and some can be done in a group setting. Either way, we hope they get you thinking about ways to start implementing product-led strategies at your own organization, and how you can share your learnings with the rest of your team and company.

MODULE 2 EXERCISE

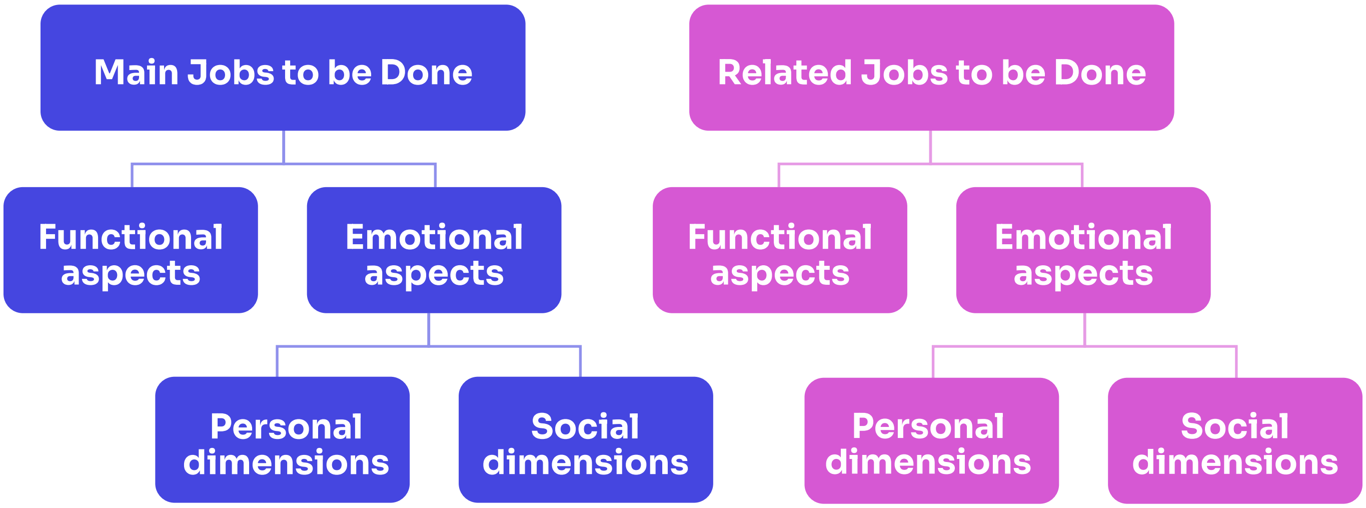
Identify your Jobs to be Done

Total time: 30 - 45 minutes

Introduction

Product-led organizations have a clear understanding of why people use their product and they design a digital experience that helps users get those core “jobs” done. Use this exercise to identify the Jobs to Be Done of your product, so you can create an experience that best delivers on your users’ and customers’ needs—even as they evolve. You can do this exercise alone or with members of your team.

You might use this exercise as a jumping off point for product roadmap planning, or to begin a discussion of what product-led activities might help your customers do their “jobs” more effectively and efficiently. It’s also important to revisit your Jobs to Be Done periodically, as they might shift as customers’ needs change over time.



Instructions

PART 1

Start by considering the question: What is our product's main Job to be Done (JTBD)? Use the space below to brainstorm and write out your ideas, and then decide on a top choice. If you're doing this exercise with a team, discuss as a group and make sure you all agree on the top choice.

MODULE 2 **EXERCISE**

PART 2

For the main Job to be Done you've identified, identify 2-4 **functional aspects** and 2-4 **emotional aspects** – use the space below to capture your ideas.

— If you're doing this exercise with a team, you can split into two gropus and have one group identify the functional aspects and one group identify the emotional aspects.

FUNCTIONAL ASPECTS	EMOTIONAL ASPECTS

Next, think through the **personal and social dimensions of the emotional aspects** of the main Job to be Done – use the space below to capture your ideas.

— If you're doing this exercise with a team, you can have one group identify the personal dimensions and one group identify the social dimensions.

PERSONAL DIMENSIONS	SOCIAL DIMENSIONS

PART 3

Take a look at what you've come up with – if you're doing this exercise with a team, discuss it as a group. If the number of aspects and dimensions feels unweildly, you can narrow them down even further.

OPTIONAL

- Come up with a list of 5-10 related Jobs to be Done.
- Choose your top related Job to be Done and go through the exercise above again.

PART 4

Once you've completed the exercise, reflect on (or bring the group together to discuss) what you've learned. How does the completed diagram map with the solution you offer today? Are there changes you need to make to better meet customer needs? Feel free to fill out the chart on the next page with your final Jobs to be Done information.

MAIN JOB TO BE DONE

FUNCTIONAL ASPECTS

EMOTIONAL ASPECTS

PERSONAL DIMENSIONS

SOCIAL DIMENSIONS

RELATED JOB TO BE DONE

FUNCTIONAL ASPECTS

EMOTIONAL ASPECTS

PERSONAL DIMENSIONS

SOCIAL DIMENSIONS

MODULE 3 | EXERCISE

Define your data stack

Total time: 30 minutes

Introduction

Product-led organizations are data-driven organizations. Data offers a common language for teams to measure progress toward the goals you set for your product—and also helps you know when to pivot. This exercise will help you identify available data sources, then narrow in on the most relevant business, operational, and qualitative metrics to enable your team to make better decisions.

This exercise works best when you start with a specific goal—like to improve user retention or reduce support tickets—or a specific Job to be Done. Your team can then narrow in on the data sources and metrics that will inform the decision-making required to achieve that goal or meet the customer need.

Instructions

PART 1

Decide which goal or Job to be Done you'd like to focus on for the exercise. On the next page, write down your team's existing data sources – these can be tools or platforms like Salesforce, or even people like executives and customers.

PART 2

Consider what metrics (both quantitative and qualitative) these sources enable your team to track (e.g. NPS, feature adoption, revenue, and monthly active users). Write down each metric under its corresponding data source (for example, revenue would go under Salesforce).

PART 3

Rank the metrics you've identified based on how they help you and your team measure progress toward the goal you've set. Identify the highest-ranking metrics and settle on the set you'll use to make decisions and measure progress toward your goal. Write down your list of final metrics in the accompanying box.

MODULE 3 EXERCISE

DATA SOURCES AND METRICS

FINAL METRICS

MODULE 4 EXERCISE

Design a launch plan that accelerates adoption

Total time: 45 minutes

Introduction

In a perfect world, every feature is immediately and enthusiastically adopted by every customer. In reality, that's rarely the case. As we add users and personas and our products become more feature rich, launch communications have to evolve—which means rethinking the way we educate and enable users.

In this exercise, you'll design a process to ensure a successful feature launch every time. You will come away with a tactical plan that covers how to communicate feature launches and product updates, measure success using product analytics and sentiment, and capture and incorporate customer feedback.

You can do this exercise individually or with a team. If you're doing the exercise with a team, decide in advance if you want the group to work together on one feature launch or in smaller groups based on features they plan to launch.

Instructions

PART 1 What does a successful launch look like?

Alone or with your team, **brainstorm goals you might set for a feature launch** (we recommend doing this in 30-60-90 day increments). Write these down in the chart below.

- For example, you could set goals around the number of users who interact with the new feature or the time spent using the new feature.

GOALS

30 DAYS	60 DAYS	90 DAYS

MODULE 4 EXERCISE

PART 2 How will you communicate the launch?

Write down ideas for **communicating a new feature release** to customers and internal teams, and the level of details for each audience.

- **Think about which communication methods** are appropriate based on the size and importance of the feature launch (e.g. in-app messages, email, digital campaigns, etc.).
- **Consider how these actions will drive adoption** over the 30-60-90 day period and how you will partner with your marketing team on customer launch communications.

COMMUNICATION METHODS

PART 3 How will you engage customers around the launch?

Consider the most appropriate method for **collecting customer feedback** on the new feature (ideas may include interviews, surveys, or an in-app feedback tool). Think about and document **how you will use data and feedback** to make improvements post-launch.

If you're doing the exercise as a team, come together and have each group give a high level read-out of their plan. Discuss what each group can learn from the other and have each team assign a person to make the necessary updates to ensure you have an agreed upon launch process going forward.

CUSTOMER FEEDBACK

MODULE 4 **EXERCISE**

Create a customer feedback policy

Total time: 30 - 45 minutes

Introduction

Customer feedback is vital to any successful software product—product teams should always strive to understand and incorporate the voice of the customer in everything they build. But this is especially important for product-led organizations, where everything the company does revolves around the customer.

By creating a product feedback policy, your team will have a standard process to follow to gather and manage feedback from customers, ensuring customers have a voice as you evolve your product. In this exercise, you'll document the five components of your feedback policy.

Instructions

PART 1

In the template on the next page, find the section for **your approach to product feedback.** Write a statement that explains the importance of feedback to your organization and what you will do with that feedback (also consider what customers gain by providing feedback).

PART 2

Find the section in the template for **how customers can provide their feedback.** Write down the step-by-step process for submitting feedback, as well as who reviews it.

PART 3

Find the section in the template for **what happens to feedback after it is submitted.** Write a statement that answers questions like, "How can customers track the status of their feedback?" and "Will customers be notified when the feature they requested is released?"

PART 4

Find the section in the template for **frequently asked questions.** Anticipate questions that you might be asked about your customer feedback policy and consider how you would respond.

PART 5

Find the section in the template for **sharing your policy.** Document how your customer feedback policy will be shared, considering the various communication channels available to your team.

CUSTOMER FEEDBACK POLICY

YOUR APPROACH TO PRODUCT FEEDBACK

HOW CUSTOMERS CAN PROVIDE FEEDBACK

WHAT HAPPENS TO FEEDBACK

MODULE 4 **EXERCISE**

FAQS

SHARING YOUR POLICY

Create a customer health scoring model

Total time: 45 - 60 minutes

Introduction

This exercise is inspired by the team at Rapid7, who discovered as they added hundreds and then thousands of customers that it was increasingly difficult to identify the most successful users, as well as those who are struggling. By assigning customers a score based on product usage and other key indicators, they could begin to predict success and struggles, and intervene more quickly.

A key point from their case study is that your customer health scoring model will evolve over time as you observe customer outcomes. This exercise will get you thinking about the components of your health score and the action plans you'll put in place to retain unhealthy customers and leverage healthy ones.

MODULE 6 **EXERCISE**

Instructions

PART 1

In the space below, write down every metric you can think of that might provide a signal to a customer's health.

PART 2

Think about how you might group your metrics. These groupings will be the components of your score.

- For example, a group of metrics might indicate successful product adoption, another grouping might relate to the support experience, another to sentiment, and another to purchasing behavior.

GROUP 1:	GROUP 2:
GROUP 3:	GROUP 4:
GROUP 5:	GROUP 6:
GROUP 7:	GROUP 8:

PART 3

Prioritize the components by **time frame.** Choose 3-4 components that you might incorporate into your score quickly and add those to the box below labeled “**initial**” – these could represent data that is accessible today .

PART 4

Add components to the **medium-** and **long-term** categories based on when you feel you’ll be ready to incorporate those metrics into your model. Think of these as wish list data sets that you know will help make your model even more exact.

INITIAL	MEDIUM-TERM	LONG-TERM

PART 5

Think about values you might assign to each of the initial components.

— For example, if you think product adoption is the biggest indicator of a successful customer, you might assign 40% of the total score to that and smaller percentages to the other 2-3 categories.

PART 6

Brainstorm what plans of action you could put in place to address each type of customer. For example:

- A healthy customer might receive outreach to speak at an event or to provide a referral.
- An unhealthy customer might be offered a coaching session or targeted with content to help them be more successful.

Document your ideas and share them with your team for feedback and further discussion.

HEALTHY CUSTOMERS

NEUTRAL CUSTOMERS

UNHEALTHY CUSTOMERS

Product-led Certification Course Exam

Study Guide

STUDY GUIDE

Product-led Certification Course Exam Study Guide

Introduction

We're excited you're interested in becoming a Product-led Certified! The Product-led Certification Course is designed to introduce you to the fundamentals of being a product-led product manager at your organization and prepares you to apply product-led strategies to your business. And by getting certified, you'll show the world that you have the fundamentals mastered for what it takes to be a product-led product manager.

This study guide provides an overview of the Product-led Certification Course and how to best prepare for the exam. The guide covers:

- Details about the exam
- Topics covered
- Sample questions
- Tips to prepare for the exam

DETAILS ABOUT THE EXAM

Format: 30 multiple choice questions

Time alloted: 90 minutes

Passing score: 75%

Cost: $149 (USD), includes the course as well as the exam

Delivery method: Online, not proctored

Language: English

Prerequisites: None, though we highly recommend that you take the Product-led Certification Course to prepare for the exam.

TOPICS COVERED

The questions on the test align to the material covered in the Product-led Certification Course. The topics and percentage of questions per topic on the exam are outlined below.

TOPIC	% OF TOTAL EXAM
The fundamentals of being product led	20%
Leveraging data to build great products	16%
Delivering products differently	12%
Using product-led strategies to drive customer success	16%
Rethinking how you market and sell products to drive growth	20%
Implementing product-led strategies at your organization	16%

SAMPLE QUESTIONS

The questions below serve as an example of the type you'll be asked on the exam.

1. How do "aha" moments lead to feature and product adoption?

A. They guide users to high-value features because research shows a correlation between these features, adoption, and high NPS.

B. They help users understand their own product in ways they've never seen before so that they can perform their jobs optimally.

C. They allow users to hone in on the area(s) of the product that best match their use case. Research shows that when they find this within minutes, there's a 10x likelihood they'll use the product again.

D. They show users exactly what it is they want to do in the fastest, simplest way possible. And when users know the areas of the product where they'll find value, they'll likely stick around.

Answer: D

2. What are 2 strategies to drive upsell from within the product? (select all that apply)

A. Create pressure and notify users that their trial ends in [X] days

B. Highlight Paid/Premium in the navigation

C. Share in-app about the full version of the software, explaining that it offers even more features

D. Create in-app prompts with cost to sign up and the steps to do so

Answers: B and C

3. A Product Feedback Policy is a key component to collecting, managing, and weighing customer feedback. A Product Feedback Policy is a document that outlines the following for customers: (select all that apply)

A. Where to submit feedback

B. How often your company's product team reviews it

C. How they'll communicate back

D. When the company is legally obligated to make updates to its product(s)

Answers: A, B and C

TIPS TO PREPARE FOR THE EXAM

- This is an "open-book" test, so be sure to have any notes you captured while taking the course beside you before beginning.
- The test is timed without the ability to pause, so be sure you have a dedicated 90 minute period available before clicking "Start."
- Make sure you have a quiet space so you can focus while taking the exam, with few distractions.

Lastly, we also ask that you please don't cheat and don't share exam content with others.
Take your time to read exam questions carefully and good luck!

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