Get Your Priorities Straight!

A Practical Guide to Smart Roadmap
Prioritization for Product Managers

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Introduction

Creating and maintaining a product roadmap is undoubtedly the product management task most fraught with difficulty and unpleasantness. Since most product managers do not possess psychic abilities, figuring out what to build first (and second, and third) is a truly challenging part of the job as there's no "secret recipe," no scientific formula, no "one size fits all" approach to building a winning product roadmap.

With every feature you slot into the front of the queue you are pushing many other items out. Do you focus on really big, high-impact features or do you prioritize getting a whole bunch of little ones out the door? Do you focus on features aimed at attracting new customers or satisfying the ones you already have? Do you invest in the platform or rack up more technical debt that must eventually be

addressed? The list of questions goes on and on, but rest assured that you are not the first person facing these seemingly unanswerable questions, nor will you be the last.

This eBook aims to provide some practical guidance and advice for product managers who've arrived at the intersection of product management as a dark art and product management as a science and have found themselves facing some tough decisions as they map out the next leg of their product's journey on their product roadmap.

What to Expect

This eBook provides **INTRODUCTORY-LEVEL** information for product managers who are looking for help prioritizing initiatives on their product roadmap, or who simply need a refresher course on the subject. In this eBook, we'll address:

- Important prerequisites for roadmapping such as defining a clear product vision, understanding the metrics that matter most to your product, and gaining a good understanding of your customers.

- Basic prioritization strategies you can apply to get your roadmap on the right track while keeping your team in the loop.

- How to maintain a healthy roadmap (and product!) over time by avoiding common pitfalls like technical debt and feature bloat.

01

Before You Begin

Understanding the Major Influencers

Behind Every Roadmap Decision

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Understanding the Major Influencers Behind Every Roadmap Decision

Your product roadmap should define your product's journey over time and highlight important milestones throughout that journey. A good product roadmap tells a story about where your product came from and where it's headed in a way that helps your team, stakeholders, and in some cases, your customers, understand what you're up to. As is a prerequisite for most adventures, you'll need to have a destination in mind, a means of traveling to that destination, and a compelling reason to embark on your journey before you can hit the road.

Where Are You Going?
The Importance of Product Vision

Do you know where you're going with your product? If you don't have a destination in mind, you're sure going to have a hard time building a map that will take you there. There's not much point in trying to prioritize items on your roadmap if you don't have a clear product vision. Your vision is the guiding force behind every decision you make in your product's lifecycle; and your product roadmap is the navigation tool you'll use to find your way; it dictates the direction your team will be going to reach that vision.

> *"If you don't have your product vision, don't bother with roadmapping. Stop right there, go back to the beginning and make sure that you understand what you guys are building towards, why you're in this. If you don't have your product vision, you're either as far as you're going to get already or you're going to end up somewhere else completely unexpected, and you don't want that."*
>
> **JANNA BASTOW** ProdPad

Don't Have a Vision?

Here's some inspiration from successful companies and products you're probably familiar with:

"To build the simplest and most powerful social media tool, and to set the bar for great customer support..."

buffer

"Uber is evolving the way the world moves. By seamlessly connecting riders to drivers through our apps, we make cities more accessible, opening up more possibilities for riders and more business for drivers."

UBER

"For business email users who want to better manage the increasing number of messages they receive when out of the office, BlackBerry is a mobile email solution that provides a real-time link to their desktop e-mail..."

BlackBerry

"To capture and share the world's moments"

Instagram

"To connect the world's professionals to make them more productive and successful."

Linked in

Don't Forget: Product Vision Should Align with Business Strategy

Before you break out those dry erase markers and start roadmapping: remember that your vision must align with your organization's strategic goals and business strategy in order to be effective and ensure you have buy-in from everyone involved with making your product successful inclusing sales, marketing, support, development, and all the relevant stakeholders.

"You can come up with the most beautiful vision for your product. But it's useless if the people involved in making the product a success don't buy into it. To leverage the vision as the product's true north, to create alignment, and to facilitate effective collaboration, the product vision must be shared – everyone must have the same vision. Without a shared vision, people follow their own goals making it much harder to achieve product success."

-ROMAN PICHLER *Pichler Consulting*

How Are You Getting There?
Minding Your Metrics

Once your company is moving full speed ahead toward your grand plan, you'll discover that certain actions have a greater impact on your progress than others; some initiatives will drive your product toward where you want it to be at a faster pace than others, while some initiatives will appear to have no observable effect. Having a grasp on what these levers or metrics are should be a prerequisite to any prioritization activity.

The key metrics you monitor will vary throughout your product's life-cycle as business needs change and priorities evolve. For example, if

your product or company is in a growth stage, metrics that measure things like Acquisition, Retention, and Referrals may be at the top of your list; and as your product matures, your priorities will likely shift to also include moving the dial on Sales and Revenue metrics and monitoring Churn (and diagnosing its cause).

You'll want to monitor metrics every step of the way as they'll help you identify and solve problems and make more informed roadmap decisions. Meanwhile, a keen awareness of the metrics your organization is most focused on at any given time can help you prioritize initiatives that will help move your KPIs in the right direction.

"...Every business is different and if you don't define and agree your priorities up front you risk optimising for the wrong thing, or nothing at all. Pick the 3-5 levers that you can affect and that will have an impact on your business, and then pick measures of these levers that are trackable, actionable and distinct."

– MARTIN ERIKSSON Chief Product Officer, Covester

Why Are You Going?
Customers Are Your #1 Priority

Customer retention is the holy grail of business, and don't you ever forget it! Without customers, you don't have a product or business, so if you want to keep them (happy), it's in your best interest to serve their needs.

Your customers should be the "why" behind your product vision and at the end of the day there shouldn't be anything that goes on your roadmap that doesn't help soothe customer pain and solve their problems. Maintaining customer focus within your roadmap also means not wasting your team's valuable time and resources on

features that will have no impact. Investing time into meticulously prioritizing your customer's needs and coming up with real solutions to real problems is the best possible way to keep your product in tip top shape.

Getting to know your customers and their problems before you start trying to solve them is a wise move. So if it's been a little while since you last connected with your customers, or since you last looked at their feedback, now might be a good time to reconnect.
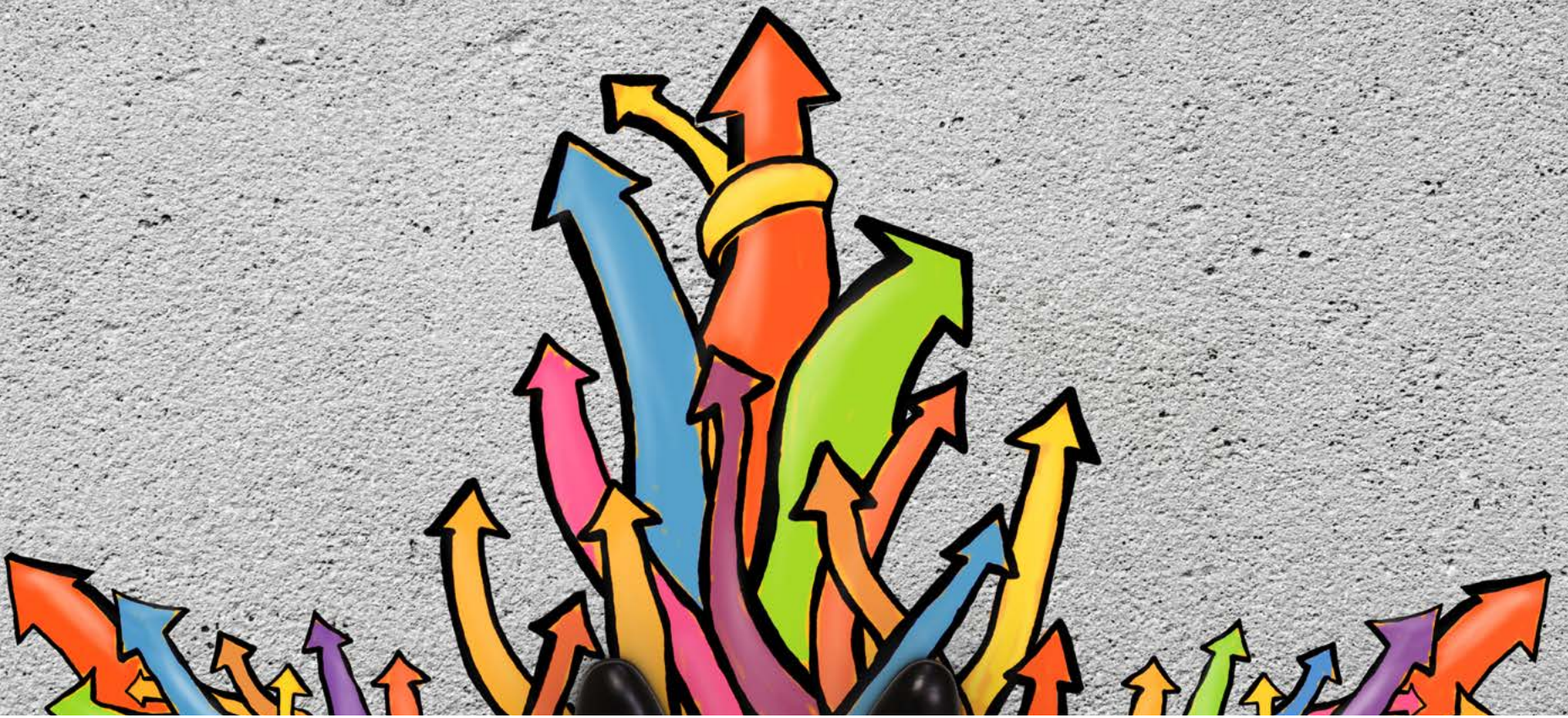
02

Get Your Priorities Straight!

Basic Prioritization Strategies
to Get you on the Right Path

Get Your Priorities Straight!

Basic Prioritization Strategies to Get you on the Right Path

Now that you know where you're going, why you're going there, and how you'll track your progress along the way, you can finally get to the fun part: beginning your journey. Before you start sprinting toward your destination, you'll want to carefully plan the first leg of your adventure.

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TWEET THIS

Your product shouldn't try to do everything and neither should you.

There are only so many hours in a day and only so many resources at your disposal, and for the last time: you simply can't do it all. Much like managing your own time and prioritizing items in your day-to-day to-do list will ultimately help you be more productive; prioritizing the features you roll out, the UI tweaks you make, and other roadmap initiatives will help you better distribute the resources you have available for the maximum impact.

Every product team will have its own unique strategy for prioritizing roadmap initiatives, and that strategy will be influenced by multiple things beyond product vision and key metrics such as company and product culture, development cycles, and beyond. That being said, there's a few techniques you can consider working into your team's process that will help you make better roadmap decisions, including considering the impact they'll have on customers, facillitating collaborative roadmapping sessions with your team, plotting initiatives on a matrix, and building a "minimum viable feature" in instances where you're unsure about an initiative.

The Doctor is In
Start by Diagnosing & Curing Customer Pain

Empathy is one of the most important skills in product management. As a product manager you're responsible for not just knowing your customer, but also understanding their pain, and solving it. This means knowing the problems they face and providing solutions that cure the most pressing pain first.

Feedback and complaints are excellent sources of information about customer pain, if you use them to properly diagnose the pain. In some cases, the prescribed fix is obvious; there's a bug and they'd like to see it fixed. In other cases it's a little more difficult to pinpoint

customer pain; "feature X isn't living up to expectations," or "I want these new color and display settings added to my control panel." In the latter example your job is to dig deeper to unveil the root problem causing the pain. What is your customer trying to solve?

Once you've discovered the pain point at play, you can look at how much pain it's causing your customers and use that as an indicator of what customer request your team should solve first.

How it Works

Let's say your customers say they want extra display settings added to the control panel and you determine that they want those extra settings because they're are having a hard time reading items in the control panel. You've identified a pain point and diagnosed the problem causing the pain, so your next step would be to determine where the solution to the pain should be on your roadmap. In many cases, you'll want to run some more tests to determine how severe the pain is and how frequently it occurs before you prescribe treatment.

You'd want to first gauge the severity of the problem: Is it the vast majority of customers or just a small percentage of customers being affected? For those affected, how hard is it to use the control panel? You'd then want to determine the frequency of the pain: do customers use the control panel every day? Or just periodically?

After you've done a triage of your customers' pain, you'll have a better idea of what product areas could use work most and can use this as a preliminary prioritization tool. If the pain is both severe and frequent, the solution is both urgent and important, so put it first.

TWEET THIS

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The Matrix Approach
Prioritizing by Impact & Effort

Time is money, and when you decide to tackle a project, you're essentially budgeting your available assets, and in doing so, (hopefully) preventing yourself from overpromising on what your team can deliver in any given time period. That being said: Not all features are created equal (nor are bugs or "platform enhancements"). As a product manager it is NOT your job to scope out how many man-hours everything will take (unless you work for a type of company where it somehow IS your job, in which case you have our sympathies).

TWEET THIS

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However, when you're creating your roadmap and prioritizing items for specific releases, you'll need to have at least some idea of how big each item is. Here lies one of those tricky fuzzy lines that are a regular occurrence in the life of a product manager.

On one hand, you could ask your project manager, scrum master, engineering head, or tech lead how long they think something might take and depending on your team dynamics they might give you a ballpark idea using fun Agile metrics, or they could drag you into hours of meetings that net you a result with so many qualifications that the answer is next to useless.

On the other hand, you could just guess, which for some roadmap items might not be the worst move in the world, though for most large or complex items it's not a great idea.

A popular exercise for categorizing potential features based on resources is a matrix system. This is best done in a group setting as it can help you and your team quickly decide which features are "worth it" and which features aren't without getting into the nitty gritty of man-hours or story points.

Collaborative roadmapping exercises give participants insight into "how the sausage is made," which will come in handy down the line when people are looking at the finished product and wondering why their pet feature ended up in Q4 instead of Q3.

How it Works

Gather your team and any other relevant parties and go through the features you're trying to make sense of one-by-one, working together to determine how much effort each will require to implement and gauge how much impact each will have (more power to you if you can use customer data to help estimate impact). Once you've made these estimates, you'll plot the initiatives on a matrix and use it as a visual tool to help you identify the best opportunities for your team to pursue.

Impact & Effort Matrix
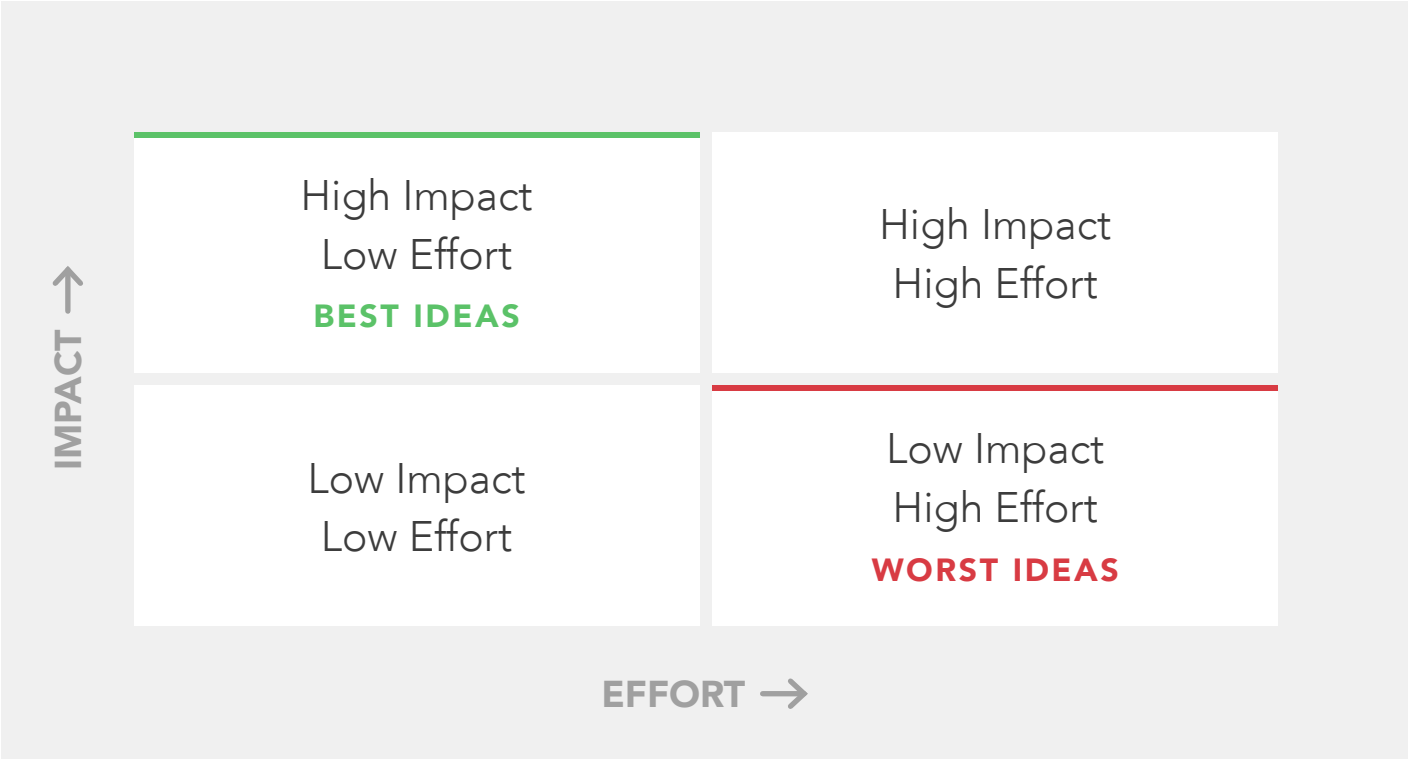
High Impact, Low Effort

These are your best ideas, they're easy to tackle yet have high impact potential, they're quick wins for your product.

High Impact, High Effort

These ideas will move the needle, but are major projects that will require serious time and effort--they'll also require further thought from you and your team about where they belong on your roadmap.

Low Impact, Low Effort

The little things. These ideas aren't tons of work, but aren't particularly important, either. They make good projects for your team to pick up between larger ones or on an "whenever it's convenient" basis.

Low Impact, High Effort

Your worst ideas. These tasks involve a lot of work but barely move you toward your vision and goals--these aren't high priority, if they're priorities at all.

Dealing with Uncertainty
Taking the Minimum Viable Feature Approach

What about when you can't measure or estimate the expected impact of an initiative? Sure you can leverage data, conduct market research, talk to customers, and use this research to make estimates about the impact of a feature, but there will always be a level of uncertainty in your results.

So let's get hypothetical here for a moment: You believe that adding customization features is going to improve usage and adoption of your product, but you're not sure about how much improvement you can expect and don't really have a way to calculate it, there are

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"Planning and forecasting are only accurate when based on a long, stable operating history and a relatively static environment."

- ERIC RIES The Lean Startup

simply too many factors to control for. Through brainstorming sessions and customer roundtables you've netted 17 different settings that should be added to the product, which will require a decent chunk of effort for your team to develop and launch.

With so much uncertainty around whether this big project will actually help your product, it's a tough call how high-priority this feature should be and whether it's a feature worth adding at all--how do you make that call? Well, do you need to implement all 17 of them to see whether this enhancement is going to move the needle? Probably not.

Instead, you can borrow from the Lean Startup principles Ries outlines in his book and take the minimum viable product approach at the feature level. Start by selecting one or two customization options that your preliminary research shows will be popular and implement those as smaller chunks of work in an upcoming release. Then, use your predefined KPIs to prove (or disprove) your hypothesis that
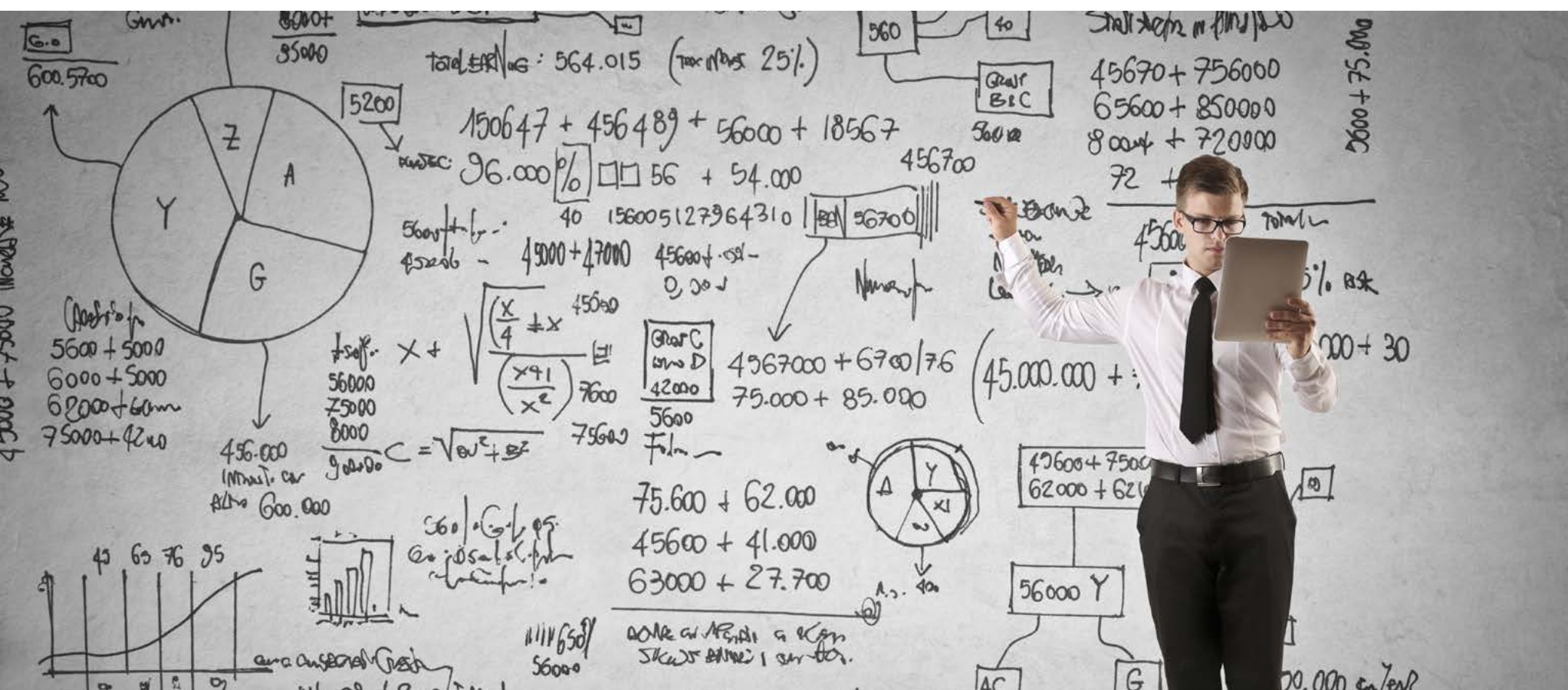
adding new customization options will get you more customers or usage.

This build-measure-learn tactic will help you get more net-new features into a given release while conserving development resources for work that has a proven value. It's a great approach if you have lots of features to sift through and lots of uncertainty (i.e. lack of data) about how well they'll perform. Launching an "MVF" is a great way to validate whether you should continue building the feature out fully or leave it alone because you won't waste precious resources (like your dev team's time) on features that end up being ignored in the end.

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Cleaning up your Backlog

What to do with the features and initiatives
that are always picked last

Once you've been managing the same product for a while you will
likely notice the same feature, or more likely, features, getting left
off your "up next" list time after time. Chances are, these features
are still floating in your backlog for one of two reasons:

1. They require too many resources to implement.
2. They aren't expected to have enough impact to justify building.

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You can probably throw the ones that fall into that second bucket out--you are likely never going to have extra resources and the list of things you want to put on your road-map is only going to get longer. If you can't demonstrate the value of those features now, you most likely won't be able to down the line either--unless, of course they pop up again in the form of customer requests, in which case you'll have an opportunity to revisit and reassess them.

The items that belong to the first category, however, can be some of the most challenging for product managers to prioritize. Sure, they're important, but perhaps they don't seem urgent or don't want to push off everything else on your plate to get them done, so these features often wind up rotting away in your product backlog. Rather than put off a decision, why don't you dig a little deeper and ask yourself this: Is this an item your organization HAS to do or simply WANTS to do?

When it's a resource intensive "want to do," you really need to build out the business case to determine whether it's a worthy cause. If after building out the business case you determine that it is indeed a worthy cause, then your organization may want to reallocate resources on hold to tackle the initiative.

Surprisingly, it's the the "have to do" items that are the trickiest because it's inevitable that you'll have to take care of them sooner or later. The worst possible outcome is that the "have to do" project suddenly becomes a "have to do NOW" project and ends up taking up everyone's time at an inopportune moment when you have a closing window of opportunity for something else.

Liken this to your dentist telling you at a checkup that you'll need your wisdom teeth out...eventually. You're left with two options: 1. Put the procedure off until your wisdom teeth start growing in and causing such excruciating pain that you have to reschedule your family vacation to go get them taken out, or 2. Have them removed at your earliest convenience, and despite being out-of-commission for a few days, not missing your family vacation or other important events.

It's best to take care of these "have to do" items at your convenience and on your own terms, rather than leave them looming in the background of your product backlog because it allows you to have a bit more control.

When you uncover a "have to do" item in your backlog you may have an opportunity to take the "minimum viable feature" route before you dedicate lots of resources to it. If you can't make it into a MVF, and it's not yet an "urgent" have to do item you, break the project down into smaller parts to incorporate as part of your next two or three releases. No one wants to be the product manager making their entire dev team spend three months on platform upgrades and database migrations, but if it's a "have to do," sooner is almost always your best bet.

03

Maintaining a Healthy Roadmap

Feeding Your Roadmap a Balanced Diet

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Feeding Your Roadmap a Balanced Diet

It can be tempting to load up your roadmap's near-term releases with projects and features that all aim to do the same thing so you can meet a short-term goal. It can also be difficult to resist the temptation to cram in as many shiny new toys as possible; they're fun to spec out, they get customers and sales teams excited, and they usually have some positive revenue implications.

TWEET THIS

Don't let shiny new toys and short term goals blur your product vision.

But you can't let those short term goals and shiny objects distract you from what's important. The fanciest new feature won't do anyone any good when your site is too slow, your servers are down or your COGS is too high because you haven't done the maintenance work that all companies need to factor into their development plans. Avoiding technical debt, among other common product focus pitfalls means embracing a roadmap that covers all your bases; customer requests, maintenance, updates, bugs, business needs, and so on.

One way to ensure your roadmap has a healthy mix that takes care of all of these needs is to use the "bucket" approach--categorizing your initiatives into several "buckets" and making sure every release has a balance of items from each category. For example, maybe customer requests live in one category, technical and infrastructure needs belong in another, and strategic items go into their own.

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Wealthfront CEO, Adam Nash, says he favors categorizing items into three buckets: Requests, Metrics Movers, and Customer Delight; a mix that ensures his roadmap stays in shape and every sprint or development cycle maintains a healthy balance of initiatives that cover customer needs, product vision, business strategy, and technical needs while also making time for experiments and innovation.

There's another benefit as well; the bucket strategy helps ensure teams are transparent about their reasoning when they choose to add a new feature. If a feature is added to your product roadmap but doesn't serve an important purpose, it will stick out.

"I've found that categorizing features into these buckets forces product teams to be intellectually honest with why they are implementing a certain feature. Is it because customers want it? Or is it because the company wants it (to move metrics)? Or is it just cool?"

ADAM NASH Wealthfront

Validate Feedback Before Building
Just Like Fine Wine, a Customer Request Improves With Age

It can be tempting to prioritize customer requests above everything else because, after all, "the customer is always right" and the customer is paying your salary, but when you have to wade through feedback and requests from customers, stakeholders, support, and sales, you have to use discretion and do your due diligence on the actual value add of acting on each request. Just because one customer requests something doesn't mean you have to build it.

"If your product roadmap is dictated by whatever a customer said in the most recent sales call, your product development organization will be constantly jerked around, function very inefficiently, and suffer from poor morale and retention. Plus, a single sales rep will pitch to multiple customers in a quarter, leading to conflicting input; sales reps typically overestimate the probability and speed that their accounts will close, leading to wasted effort on accounts that don't produce revenue; and you probably have multiple sales reps who will be giving conflicting input."

ERIC KROCK LifeMap Solutions

Be sure you don't jump the gun on feedback. When you allow customer requests to simmer for a bit, you give yourself the opportunity to collect feedback from more customers and validate whether the request is worth acting on and whether the customer who first requested the feature still wants it the next time you talk to them.

Getting away from knee-jerk prioritization is key to any successful product strategy. Customers also don't always know what they need; they may know what they think they want, but they rarely know what is actually possible and they have a very limited perspective (their own). You should be looking at the entire market, not just listening to feedback from the vocal minority.

Avoid Feature Bloat

Don't Overpack your Product with Extra Bells and Whistles

On its own, a new feature can seem like a great idea -- "One more thing to make our customers happy!" -- however, most products don't exist in a vacuum, and everything you add into the mix adds weight and has implications on everything else your product already does. Features don't come without a price, and investing in adding a new feature means budgeting for more than just development and implementation. New functions and features come with complexity costs for customers and often require ongoing maintenance to keep

them healthy and ensure that they aren't getting in the way of your product's core function.

It's all about striking the right balance between features and functionality and maintaining focus on your product vision. You should always consider whether something new has the potential to take away from something you already have that's working great, because it can sometimes be hard to remove functionality once people get used to it.

> "It's not about ten features versus seven, it's about the right four versus the wrong eight (or the right eight versus the wrong four). It's also about the right place and the right time to reveal the right features. Every feature, widget, or interface control competes. Loading up the screen with stuff that is used 10% of the time means the stuff that's used 90% of the time has to fight for attention. That's not a good experience. The experience should be light, flowing, and comfortable, not heavy, clunky, and frustrating."

JASON FRIED Basecamp

A Word on Healthy Competition
Don't Let Competition Distract from Vision (or Dictate Roadmap Decisions)

Finally, you certainly can't simply ignore the competition, but don't let them prioritize things for you. If your product has direct competitors, it can be easy to fall into catch-up mode as they churn out new features that make your salespeople anxious, but don't fall into the features arms race with your competitors.

Sure it's important to be competitive, but constantly adding new bells and whistles just to match the competition will ultimately distract you from your long-term goals.

Instead of trying to keep up with your competitors' new releases and functionalities, use them as a source for inspiration - they chose to solve a customer problem with Feature X, but are there other (and better) ways to solve it?

You should also remember that very few competitors are competing for the same exact customers with the same exact value proposition and your product's overall position may not be threatened or jeopardized by the other company's new widget.

Conclusion

When the dust settles, your roadmap should tell a story about your product's journey, or more accurately, you should be able to tell a story that matches up with your roadmap.

When you roadmap you are essentially dividing up your product's journey toward your vision, or long-term goal into chunks, or legs, and each leg of your journey should help you accomplish the interim goals you need to get to that final destination.

A great roadmap is built while keeping a laser focus on achieving your product vision and business goals while monitoring key metrics and serving customer needs. When your team looks at your

roadmap they should see that the most important issues are being addressed and have a better perspective of the scope of the various things involved in the care and keeping of a successful product.

If your vision is clear and your navigation skills are successful, your roadmap's audience will gain a deeper appreciation of what your team is working on; they'll see that both today's work, tomorrow's tasks, and sprints during the weeks and months to come build toward something significant. If you remember to focus on pursuing your vision, solving customer problems, and constantly taking the path with the greatest impact, you'll have an easier time getting where you'd like to be and getting team buy-in to your plans.

Prioritize your Roadmap with Data

Let your customers help you know what to build next with our leading product management platform

+ Leverage customer feedback to discover new opportunities and diagnose customer pain

+ Collect actionable data & easily prioritize feature requests
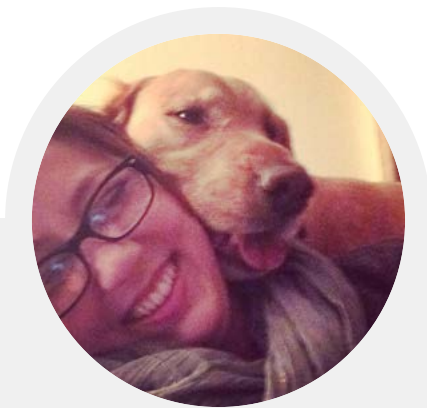
+ Engage your customers to validate your ideas

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Get Your Priorities Straight!

A Practical Guide to Smart Roadmap
Prioritization for Product Managers

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