

Deciding What's Next

Product Prioritization With Confidence

A Product Handbook by

ADK

A projekt202 Company



Deciding What's Next

A product prioritization handbook



“Action expresses priorities.”

MAHATMA GANDHI

Before you can make anything, you must first decide where to start. If you're on a team that's building products, evidence suggests this is your single biggest challenge. It's the thing that keeps most of you up at night.

Deciding which feature, function, element, or improvement to tackle next can often make or break project momentum. Unfortunately, these decisions are difficult at the best of times and impossible without clear direction.

Connecting decisions like these to the bigger picture requires a roadmap of some kind. Not the traditional list of customer requests and executive wishes, but something that deliberately focuses choices and action.

This handbook explores the practical ways that product creators can align their daily choices with the product vision and strategy. We'll provide an actionable guide to managing the process of prioritization, managing the people involved, and dealing with their expectations.



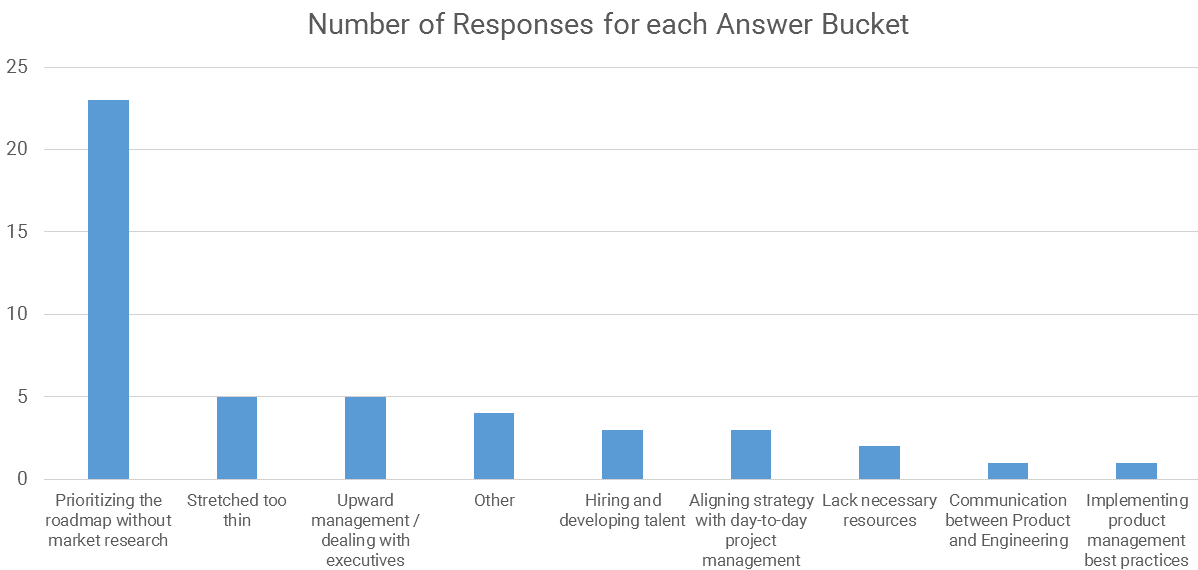
Prologue - The Pain of Prioritization

Respondents to the **2017 Product Management Insights** survey ranked a clearer product roadmap/strategy as their biggest wish behind more resources and a salary increase.

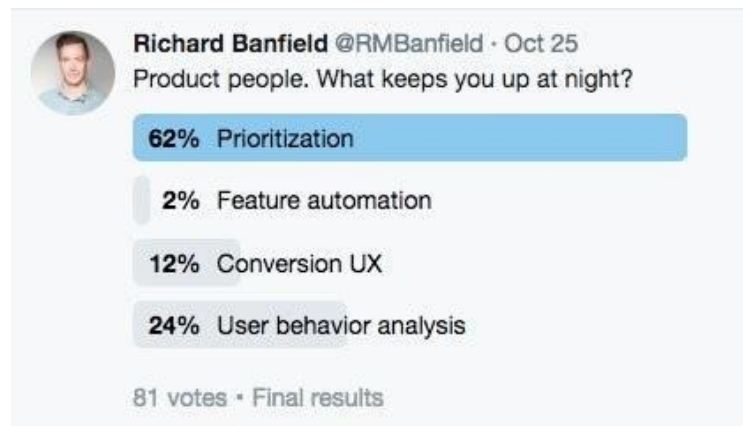
Mind the Product, the world's largest product community, asked their members one, simple question: What's your #1 single biggest product management challenge right now?

Almost half, 49%, of respondents cited their primary challenge as the product roadmap. Add the responses from enterprise software product managers, and this figure jumps up to 62%.

From this it appears that fully two thirds of product leaders are currently struggling with how to prioritize which projects, features, and functionality.



We also turned to the almighty Twitter Poll:



Prioritization is clearly a pain, but it's a downstream problem. You can't solve the prioritization problem by prioritizing. That's like putting out an oil fire by throwing oil on it. To solve prioritization issues, you have to go upstream to the source of the problem.

As a **team** that has over 700 digital projects under our belts, we help our clients tackle these tough prioritization decisions every day. Three of our team members, C.Todd Lombardo, Evan Ryan¹ and Michael Connors, along with industry expert, Bruce McCarthy, **wrote a book** about product roadmapping: **Product Roadmaps Relunched: How to Set Direction while Embracing Uncertainty.**

We've combined the best of the book with our 13 years of experience to create a short guidebook on product roadmapping. With guidance on building, maintaining, and defending your roadmap, along with the best strategies to stay away from of the most common pitfalls.



¹ Since publication of Product Roadmaps Relunched, C.Todd Lombardo is now Head of Product & Experience at WorkBar, and Evan Ryan is now Director of Product at Wayfair.

01



Tame The Chaos - Preparing For the Roadmap

When you're looking at the finished work of a well-executed product it can appear almost perfect. You see the beautiful presentation and experience all the benefits it has to offer.

What you don't see is all the hard work that went into the creation of this sensory masterpiece. You don't see the challenges the people face or the processes that go into making that product.

Behind every great product is a great team doing work in a way that guarantees results. They are following some sort of roadmap.

Here is just a sampling of the people and elements involved in any great product: product leader and/or manager, product team (designers, engineers, etc.), components, roadmap, tools, UI Kit, marketing team, salespeople, and of course, customers.

Remove any one of these elements and the outcome will be different. Like baking a cake, change any of the ingredients or change the bakers and it's possible you'll get a completely different cake.

Sometimes this will be good, but many times it will be an outcome you didn't plan for, or worse, your customers don't want. If you're selling chocolate cake and suddenly the cakes start coming out strawberry flavored you'll have confused or unhappy customers.

It's also true that if you stick to the recipe and process too closely, you'll never experience any opportunities for improvements or moments of delight. This is why the best chefs run a rigorous and disciplined kitchen but also make space for experimentation and improvement.

The trick is in getting the guiding framework right and allowing for flexibility inside that framework. This framework is your roadmap. It's not a replacement for a rigorous process or a smart team. It focuses the people and process on the best outcome for the customer.

Why do I even need a roadmap?

Let's be clear, you don't need a roadmap. But you need a framework to filter out what's immediately important from the things that can wait. Call it a roadmap or whatever you want. The name doesn't matter. The value is in the emphasis it creates on the things that make a difference.

Here's what a prioritization framework provides for your team:

- 1. Focus:** The first thing a roadmap does is it puts a lens around the work ahead and focuses everyone on delivering value. Humans don't just want focus, they require it to do their best work. If we stick to our cake baking metaphor we would say, "We're making the best chocolate cake. We're not making cookies, or brownies. Just chocolate cake."
- 2. Alignment:** The roadmap also helps create alignment. It gets the entire team working toward the same goals. Once the roadmap has

been discussed, the team will have clarity on what their roles are and what their efforts will create. In our kitchen, we'd hear, "We're all on board with our jobs, the baking process, cake flavor, styling, and time it'll take to get it from start to finish".

- 3. Timing:** Knowing what to do is one side of the coin, knowing when to do those things is the other side. A lack of time is a lack of priorities. Another way to look at it is to substitute the statement, "We won't have time for that" for the clarification "That isn't a priority for us to be successful in the foreseeable future."

When to mix the flour and eggs, bake the cake, and add the frosting need to be timed perfectly to get the best cake. A change in order will give the bakery a very different result.

- 4. Visibility:** Seeing the way the team works together and what each person will be doing makes everything easier. Identifying potential pitfalls and opportunities can be done by visually mapping out the work in terms of priority and importance.

If it's 3pm and the goal is to have our chocolate cake on the shelves by 8am the next morning, then working backwards, what do we need to be doing between now and then, and what potentially stands in our way?

- 5. Coordination:** Overlapping efforts or misaligned work that cancels out our progress causes stress and waste. Getting our team working in a coordinated rhythm is going to be a big part of creating and maintaining momentum.

The old saying, "too many cooks in the kitchen" is too perfect not to add here. It's not the number of resources, but the clarity of their

contributions that's important to delivering predictable outcomes.

- 6. Vision:** The best companies and products have a clear vision. A great vision should paint a picture of a brighter future for your customers, while making today's work effort super easy to understand. A famous customer-centric vision was Disney's original "Make People Happy". A simple and clear lens for what needs to be done each day.

So you've delivered a tasty and beautiful cake to your hungry customer, what's next for your relationship with your customer? A roadmap should paint a picture of what comes next to achieve a long-lasting relationship with your customers.

What a Roadmap is not

We've covered why you should have a roadmap, but before we go any further and discuss how to create a roadmap, let's quickly talk about what a roadmap is not.

- A roadmap is not a release plan. Leave out the specific dates and timelines.
- It is not a list of features and/or components.
- The roadmap should not include job stories, user stories, or "jobs to be done."
- A roadmap is not a commitment. It is a fluid guide that reacts to new information and adjusts accordingly.
- A successful roadmap is not a Gantt Chart. Dependencies and waterfall connections won't work for this planning.
- Roadmaps are not experience or user journeys. They don't illustrate the customer journey, even if they include some of those ideas.

The best roadmap is a strategic communication artifact that is focused on the big picture and conveys the path you'll take to fulfill your product vision.

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“More often than not, the lack of a roadmap encourages you to do too many things not as well.”

ANTHONY ACCARDI, CTO RUE LA LA

Who will use the roadmap once it's complete? Well, everybody. Product managers, designers, developers, engineers, sales and marketing, executives, customers, external partners, and customer support.

If you've followed the guidance in the previous section you'll have a strong foundation for the work ahead. You've got the *why* behind the roadmap, now let's talk about *how* to make a roadmap.



02



Putting it all together - How to build a roadmap

As we suggested, prioritization is a downstream problem. This means the roadmap is a big part of the solution but it's often the final step in the strategic planning process. By the time you get to the roadmap you should have already prepared the strategic assets that give it context.

To ensure we don't leave anyone behind, we'll assume you haven't done the preceding work and outline those steps here. The required inputs of the roadmap planning process are as follows:

- 1. Clearly defined problem and solution.** Why do you need this product? You have to know whether the problem you're solving is a real customer pain and if it's valuable enough for them pay for a solution². Even if they say they like your solution, if they don't want to pay for it, it's going to be more of a hobby than a business.
- 2. A vision for the future.** Why do you need a product vision? Both your team and the customers you serve need to be able to visualize a better future that's not currently available to them. This vision aligns your product with their imagined future state.

² Customers can *pay* for a problem to be solved by exchanging time, money or energy (or a combination of these things). If they don't think it's worth exchanging any of these things for your solution, it's probably not worth building a business or product around it.

- 3. User journey for the current customer experience.** Why map the current experience? You need to clearly map how they are solving their problem in order to understand how it will be improved or replaced by your offering. If your solution isn't compatible with their lives then you're going to experience friction and low adoption.

To organize these three pieces of the strategic puzzle you should have the following assets to draw insight from:

- Product Vision³
- Business Goals
- User Goals
- Product Goals
- Prioritization
- Visualization - aka Roadmap

It's possible that your product vision and goals haven't been articulated yet, so if you haven't done so, prepare these now. There are no shortcuts to preparing these assets but we've included exercises below to get the clarity you'll need to get started.

We highly recommend doing this in as much detail as possible and including the relevant research. Even if you don't have all the background research, it's in your interest to do the work. As with all planning exercises, it's the thinking that goes into planning that's more valuable than the plan.

You can always come back to the exercises and tweak your answers. In any business, updating the product vision and goals is a sign of a healthy understanding of the market-product landscape.

³ We think that a product vision is more important than a company vision. A product solution needs to have a product vision that resonates with the customer and with the team, while a *company vision* (or mission) really only needs to provide an internal guide for the company and could be the umbrella mission for several products.

Exercise 1: Product Vision Statement

Complete the exercise below, keeping in mind that a good product vision is not about you, it's about the customer's experience. It should also describe the change you'd like to see as a result of your product being introduced to the market.

Vision Exercise⁴

- A. Today, when [describe the current customer segment]...
- B. ...wants to [describe the desired outcome], ...
- C. they have to [describe the current solution].
- D. This is unacceptable, because [describe shortcomings of current solutions].
- E. We envision a world where [describe how the shortcomings are resolved].
- F. We're bringing about this world about through [describe the solution and approach that you intend on delivering]

So when it's complete the vision statement will look something like this:

A) Today, when **families are busy**, **B)** **yet still desire to celebrate special occasions with healthy cakes** there are **very few cake specific bakeries in Boston**, and **C)** they have to **put up with poor quality** that don't offer **healthy ingredients, simple in-app ordering and free delivery**. **D)** This is unacceptable for **budget and health conscious families living in the Boston metro area**. **E)** We envision a world where **a family can delight each other and their friends, whilst eating healthy and saving their time and money**. **F)** We're bringing about this world through providing **healthy and attractive cake options that you can easily order from either a smartphone or connected device**.

⁴ Source: **Radical Product Toolkit**: A VisionDriven Guide for Products.

User Goals:

Knowing your customers lets you get closer to knowing the value you need to deliver. Every customer experience can be mapped to tell the story of how they interact with products and services. It's important to list the goals of the customer as it relates to the journey they experience.

- Goal #1: "Find a healthy, great tasting cake at a location near to me,..."
- Goal #2: "...and make sure it's affordable."
- Goal #3: "It would be great if they deliver too."

Notice, that this is often expressed by the customer as a stream of consciousness or a series of choices that are connected to each other.

Product Goals:

The product goals are the solutions your product provides. It's critical to remember that the customer doesn't necessarily know what the solution will look like, but they are generally very clear on the problem that needs to be solved.

“

“Go to your customers for a better understanding of the problem, never for a detailed description of the solution.”

RICHARD BANFIELD

In other words, the desires, needs or pains the customer describes in their goals are also the indicators of what the solutions will be. Each goal might combine a collection of solutions that result in a satisfactory outcome.

For example:

- Product Solution #1: a) Find the cake shop by searching the web, b) finding directions on the website and mobile app, c) adding visible signage on the storefront.
- Product Solution #2: a) Adding high quality photos and pricing next to each cake and b) describe the ingredients and care that goes into the cake making process so the customer can understand the value of what they are buying.
- Product Solution #3: a) Add delivery information to the website, app and storefront.

Important note on the order of work: *While some product planning frameworks suggest starting with the business goals and only then moving onto the product and customer goals, our experience shows that understanding the customer's goals first, and then crafting a product and business solution around those goals will be significantly more successful.*

Starting with the business goals can be an obstacle to finding the best solutions because you'll always be fitting a solution to what the business wants, instead of elevating what the customer wants and is willing to pay for. Your job is not to justify your product or business, but to deliver real value.

Business Goals:

An ideal list of business goals will be shorter, rather than longer. The more goals you try satisfy the harder it will be to remain focused and prioritized.

Using our cake bakery example, let's list a few possible business goals:

- Reach the largest possible customer base in neighborhoods surrounding our current location, without a reduction in quality.

- Provide a selection of cakes for special occasions (e.g. birthday parties) that are also consistently healthier than competitors cakes to differentiate our business and develop long-term brand loyalty.
- Build partnerships with local restaurants and coffee shops to extend our out-of-store sales to provide sources for more reliable orders.

Prioritization:

Once you have your goals identified, and verified with customer interviews, you can start the initial prioritization. We say initial, because you'll need to come back and tweak these once you gather actual user data.

Let's start with how not to prioritize your strategic goals and activities. As with anything, knowing what filters not to use is as important as knowing what filters you should use.

- Executive opinions. Your CEO's gut reaction to a feature is not a good place to start. It's not that your executives aren't smart or that they don't have great insights but all subjective opinions are influenced by personal bias. Data, whether it's qualitative or quantitative, rules!
- Sales and Marketing. Similarly, requests from sales teams, marketing teams or even support teams reacting to one or two customer requests need to be checked for consistency and relevancy to the broader customer base. Prioritizing a feature because one customer says they need it will set a precedent for this kind of interruption to the workflow.
- Broad market analysis. We also recommend not relying too heavily on market analyst opinions either. Industry pundits are basing their suggestions on historical and aggregate sector data so beware of using them to forecast the future of your specific or narrow market.

Of course all of the above sources are valid, just not in isolation and never at face-value. Gather data, then do it again. Make it a habit.

Feasibility, Desirability and Profitability

Prioritization is best done through the lens of the following three criteria:

- 1. Feasibility:** "We have the capabilities to create the thing we've imagined". Feasibility is a technical consideration and will need the inputs of the technical team members. Product leaders are not looking for opinions here, rather they want to know what is technically possible versus impossible or highly improbable.

In our bakery, this might be something like, "Our customers like espresso coffee with their cake, but we don't have an espresso machine and we don't have the budget or the baristas to actually make the coffee".

- 2. Desirability:** "Somebody wants this thing we created". Desirability is the customer focused part of the analysis. It takes into consideration the needs of the end user, the interaction elements, affordances, and how these are to be created, marketed or sold.

At the bakery this might sound like this, "We have the oven capabilities to bake really large cakes but our customers don't want to buy these big cakes as they don't have the necessary refrigeration space to store them".

- 3. Viability/Profitability:** "Those people will actually exchange money for this thing". The viability of the product needs to be considered as a

function of the overall business. This insight is provided by the product manager(s) and relevant executives.

In the bakery it's essential to know which cakes make money and which are a waste of flour. While some cakes might be fun to make, the viability of the business rests on the fact that a cake must also be profitable.

Applying this to the real world

By mapping these criteria against the experiences you plan to ship, you can develop a matrix. Each experience is then scored from 1 to 5 in terms of its feasibility, desirability, and viability.

Try not to be too granular when making your list of experiences. If you find you're listing individual features you might be too focused on outputs and not enough on delivering outcomes.

The final column, representing the total scores, ranks your priorities. Ultimately, the matrix aims to objectively focus on the most important theme and the order that they would be sequenced.

Here's an example of how this might look for our bakery⁵:

	Desirability	Feasibility	Viability	Total
Exterior neon signage	5	5	3	13
All organic ingredients	2	4	3	9
Same-day delivery	5	1	2	8
In-app custom cake design	4	1	1	6

⁵ The scoring values are up to you. If you'd prefer a scale out of 10, then use that. Ultimately, simple and understandable is the goal here.



“The key is not to prioritize what's on your schedule, but to schedule your priorities.”

STEPHEN R. COVEY

Visualization - The Roadmap!

A strong roadmap is a strategic communication artifact that is focused on the big picture and conveys the path you'll take to fulfill your product vision. Over time, roadmaps have been presented in many visual formats.

We're fans of simple and visually attractive but beyond that we don't have a preference for presentation formats. What we do have a preference for is what the roadmap should include.

Some roadmaps include specific features but we recommend keeping these confined to near-term periods. Alternatively you can leave them out completely and use the anticipated user experience outcome in its place.

Here is our list of elements that should be included in all roadmaps:

- Broad time frames (e.g. Now, Next, Later)
- Themes by time frame
- High-level product goals (as covered above)
- Metrics for measuring each stages progress
- Risks and considerations
- Status of each stage
- Sales and marketing impacts

In the case of our favorite local cake bakery:

	Q1 2018	Q2 2018	Q3 2018	Q4 2018
Theme	signage	ingredients	delivery	delivery
Possible Features	New sign and/or menu board	100% organic	Inner ring Boston	north shore
Stage	sourcing & installation	discovery	completion	completion
Metrics	completion	customer survey, 2 vendors	20 customers	20 customers
Risks & Considerations	sizing, permitting	pricing, customer loss	additional vehicle?	on-time issues
Sales & Marketing	keep color on-brand	menus, website, app updated	materials updated	materials updated

Customer facing roadmaps, assuming you need to share these with customers, will be different from internal roadmaps. There will be less information to share and a focus on themes over commitments to features.

Current	Planned	Considering
Increased signage	Expanded delivery	Improved ordering system

The overall takeaway from the product roadmapping exercise is to get your activities planned into time periods. Start thinking broadly and then narrow down your efforts to the shortest time frames. Implicit in this idea is that the roadmap is dynamic and requires continual updating.



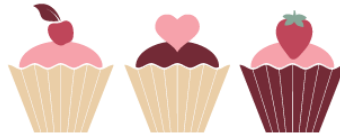
**“Dream in years; Plan in months;
Evaluate in weeks; Ship daily.”**

DJ PATEL, PREVIOUSLY THE U.S. CHIEF DATA SCIENTIST

Like all tools and artifacts at the product leader's disposal, these roadmaps are only as good as the information that goes into them and the ongoing attention they receive. Failing to communicate this roadmap clearly and frequently to your team will make it less effective. Make time to share and discuss the roadmap.



03



The Struggle Is Real - Top Product Roadmap Pitfalls

Now that you know the *why* and *how* behind product roadmapping, it's time to get our hands dirty. Product roadmapping is not all cupcakes and sprinkles - it's messy, complicated, and relentless work.

There will be mistakes, possibly even hurt feelings, and some frustration. This chapter is dedicated to highlighting some of the top roadmapping pitfalls and how to avoid or triage them.

Pitfall #1: We don't collect or include enough customer feedback

NIHITO: Nothing important happens inside the office.

It's a bit of a long acronym, but the oft-repeated Pragmatic Marketing mantra is never more appropriate than with understanding the value of your product. You won't find the answers to important questions about your product inside your office without "getting out" to talk to customers or users.

These days it's easier to collect feedback, often without even actually leaving your office (though we realize that runs afoul of the acronym). Online survey tools make it easier for product teams to collect customer feedback on the cheap and in higher numbers. Click-tracking tools can help you

observe how and where users click and scroll through your website or application.

There's the also the all-important customer interview that never fails to reveal important information about how customers use and think about your products and solutions.

Even the most well-constructed survey will miss important details that your customers may reveal as part of a live conversation.

If you really want to go deep (and get it right), you should think of this as more than "just" interviewing your customers. You should think of it as **Continuous Discovery**, described so well by Nate Walkingshaw.

Ultimately, you need to collect and combine both quantitative and qualitative feedback from your customers.

Pitfall #2: Our roadmap is a broken record

Broken record roadmapping refers to a situation where the same themes, features, fixes, and solutions keep cropping up on your roadmap time and time again. These items never seem to make their way into the sprint or release despite their longstanding appearance on the roadmap. "The backlog we have is never retired."

A key question for product teams to consider is, if these items keep getting deprioritized and never make their way into a release, is it possible they are not (or are no longer) important to your users (internal or external)?

Or perhaps enough time has passed that you need to at least revisit the original reason the item appeared in the first place. Did the request come from a single or very few stakeholders? Has the need changed? Has the

product and/or use case changed such that you can declutter your roadmap and remove these items from consideration? Perhaps take the time to run the feature through your Desirability/Viability/Feasibility chart to reveal its score, chances are pretty good it's low.

Pitfall #3: Our roadmap is too often used as a sales tool

How often have you heard the members of your sales team say, "I can't sell this"? Balancing the need for individual customer's requests (via the sales team) and delivering broad value to the entire user base is difficult.

Previously we said that requests from sales teams reacting to one or two customer requests need to be checked for consistency and relevance across the broader customer base. This remains true, but the sales teams are, and should remain, an important stakeholder in the product roadmapping process.

They are, after all, often the ones closest to the customer. In terms of gathering anecdotal data, they are well positioned to gather the customer's needs. These are leading indicators but need to be backed up with empirical evidence. The sales team can help you with this.

As you think about how to involve the sales organization in the roadmapping process, you need to consider how to collect product feedback, competitive market information, and customer needs from the lens of a sales rep. Customers will often open up to sales in a way that's different from how they will provide similar information to the product team.

You also need to think about how you will communicate the roadmap to the sales organization and the format this information should take. Take care not to over-promise or present features and releases as firm dates. If given the chance to sell on "futures," sales reps will take that ball and run with it, setting

you up for potential customer satisfaction or expectation challenges in the long run. Or worse, create revenue recognition challenges for your finance department.

In chapter two, we covered the customer facing roadmap. You may want to consider a similar version for your sales team. On this version, there is less finite detail and a focus on themes over hard commitments. Again this version of the roadmap might look something like this:

Current	Planned	Considering
Increased signage	Expanded delivery	Improved ordering system

Pitfall #4: Out of nowhere requests

The reality is that stakeholders asserting roadmap decisions without evidence can derail even the most well thought-out plans. Nobody likes it when high-level ideas are added to the roadmap as must-haves, especially when they are not backed up with validation.

“The team just experienced another executive swoop and poop,” says Jared Spool, Founder of UIE and CoFounder of CenterCentre, likening these executive decisions to a seagull attack.

“The executive swoops into the project and poops all over the team's design, flying away as fast as they came, they leave carnage and rubble in their wake.”

As humorous as this sounds, it's also Spool's hyperbole. Teams and their leaders are more often working toward common goals and have no desire for anything ending in the aforementioned carnage and rubble. The absence of evidence is addressable without drama.

To many product professionals, having their roadmap hijacked from time to time by other pressing issues is an unavoidable situation that must be tolerated. Tom Greever, author of *Articulating Design Decisions*, calls these hijacking decisions the CEO Button.

“An unusual or otherwise unexpected request from an executive to add a feature that completely destroys the balance of a project and undermines the very purpose of a designer’s existence.” We acknowledge that these situations can be often be harmless but if these interruptions continue unchecked they will ultimately derail the product. Fortunately there is a solution, but it is not a quick fix.

One way to avoid future disappointment is to create a testable prototype of the idea, feature or interaction that is being planned. This can be done for most design features and interactions. Currently, the easiest way to do this is with **Design Sprint** or **Directed Discovery**.

Both these approaches are based on the scientific method of developing a testable hypothesis and then running the appropriate testing cycles to generate results, providing evidence either for or against the hypothesis. “When the team invites real users to try a prototype, they’re collecting data about the users’ needs, which provides a solid footing for the design” says Jared Spool.

“When the executive shows up, the team can present the data along with the design that emerged from it. Demonstrating the data behind the design decisions reduces the potential for negative influence the executive can assert, and smart executives will embrace the approach.”

Pitfall #5: Hurt feelings

Prioritization can be polarizing because it’s often perceived as choosing one

person's ideas over another's. When people have something personal invested in an idea or feature that's on the chopping block, emotions can run high.

The solution is collaborating at several levels. It is the product leader's job to connect with all the stakeholders and communicate to each of them why certain choices have to be made.

Shared vision

It starts with developing a shared vision and purpose for the product. If the team doesn't agree on the big picture, then they certainly won't agree on a single feature. Getting buy in to the company vision and the 'why' driving that vision are essential. Agreement and understanding of both the company and product vision give the team a North Star. What it doesn't do is give them a method for prioritizing each task and feature.

Collaboration, not consensus

The key to breaking the potential stalemate is to not set consensus as the goal. Collaborating toward a solution doesn't require consensus. This concept is not new to leaders but might be new to the realm of product leadership.

Herminia Ibarra and Morten Hansen suggest in their article **"Are You A Collaborative Leader?"** (Harvard Business Review, July 2011) that collaborative leadership is the "capacity to engage people and groups outside one's formal control and inspire them to work toward common goals—despite difference in convictions, cultural values and operating norms."

In collaborative teams, leaders still retain the authority to direct their teams if and when resolutions can't be found. As necessary as it is to treat everyone in the team as equal human beings, there is a tendency to conflate this with equality in ability to understand the context. The UI designer on a team might

have a strong understanding of their domain but will probably lack the industry experience and scope of knowledge that a seasoned product leader has.

It's easy for team members to get hyper-focused on their interests and domains. After all, we hire people for their specialities and focus. The job of the product leader is to help the team rise above thinking of only their individual contributions and consider higher goals.

Hannah Chaplin, CEO at Receptive, says, "The best way for Product Managers to prioritize stakeholder feature requests is not to do it at all." In her eye-opening **article** Chaplin suggests that Product Managers rise above the feverish chatter of feature requests by requiring stakeholders (sales, customers, leadership, engineering) to collect, filter, and bubble up only the most critical requests to the Product Manager at an established interval. This delegation of prioritization leaves the Product Manager, "freed up to make strategic and data-driven product decisions" without all the distractions.

04



The Finished Product

As mentioned earlier, every company, product and visualization tool is different, so every roadmap will look different. There is no right way to visualize a roadmap. You have a lot of flexibility with how you *show your work*, but clarity is your goal.

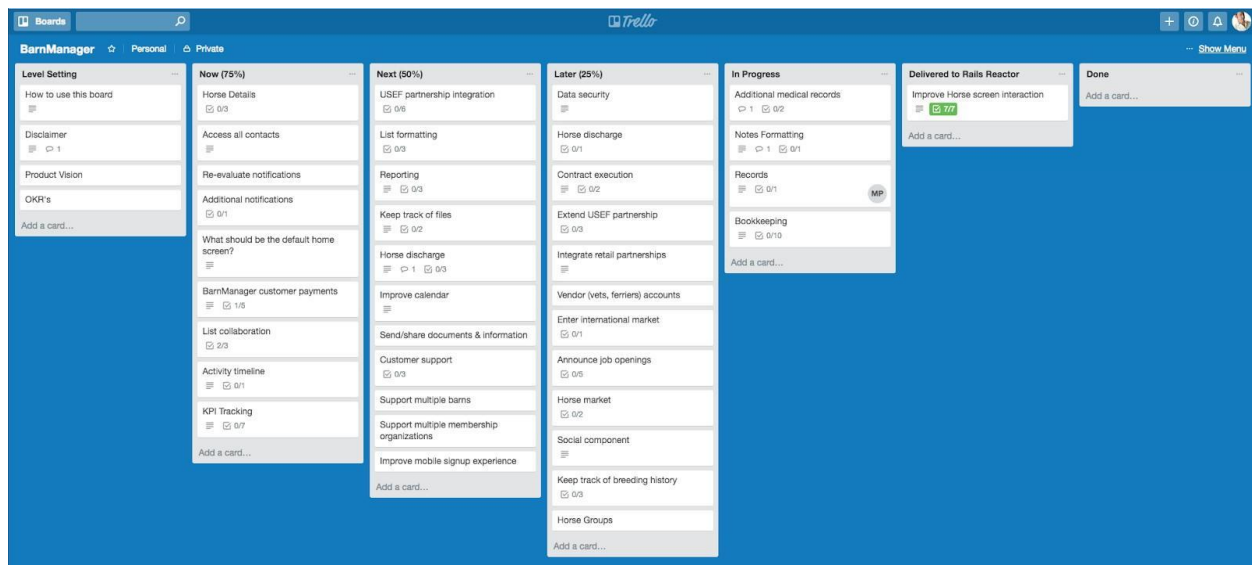
Remember, your goal is not to list out individual features or elements, but describe the highest priority experiences in a sequence that your team will understand. It's also not necessary to get 100% consensus from the team on the roadmap components. It's not democratic, it must be data driven.

In many cases, you may have a few people on the team that are not in complete agreement with the roadmap. That's okay, as long as you have customer-driven data to justify something in the roadmap, it can stay. Opinions don't count.

Let's take a look at an example of how roadmaps have been visualized by our team and our client's teams.

Example: BarnManager

BarnManager is a SaaS product, and as the name suggests, it is used by barn managers at equestrian facilities. The roadmap is used by the entire product team, which includes both internal and external domain experts. Product Manager, UX designers, visual designers, developers, engineers and marketing people are all using this roadmap.



Full view of the BarnManager roadmap, showing all cards.

Their roadmap has seven categories or lists. The first group of cards is just an explanation of the roadmap and includes instructions on how to use the board, the Product Vision, and a list of OKRs (Objectives and Key Results).

The rest of the card groupings are broken into two broad areas: The temporal categories describing what to work on and when (Now, Next, and Later), and the status-of-work areas (In Progress, Delivered⁶, and Done). Let's zoom in and look at each element of the roadmap.

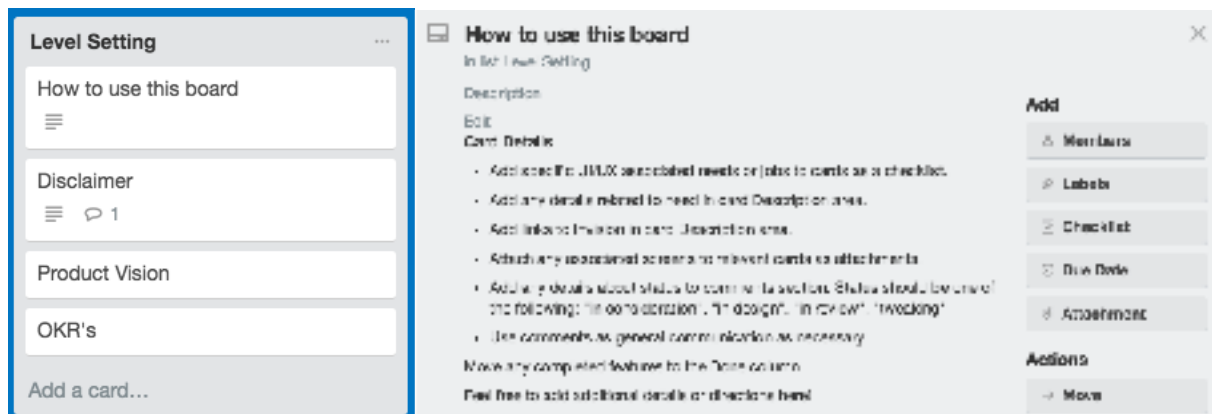
⁶ In this example, Delivered means those items that have been created by the UX team and passed onto an external dev and engineering team. Not all product teams do such a definitive handoff. In highly integrated, crossfunctional teams these might be elements that are worked on by multiple people and a 'soft' handoff is more likely.

Card Group #1: Level Setting

This card group acts as a catch-all for the things that help make the roadmap more useful. It provides guidelines for how to use the roadmap, a reminder of what the overall Product Vision is, and links to prototypes.

This kind of level setting card can also be a repository for some of the other assets and information you've gathered. The more complex your product and team structures, the more detail you can add. However, don't confuse this card for a task list or user story list. Those things should live in their own boards or repositories.

It's obviously not necessary to add this detail to every roadmap but in this case it was helpful. We were the external UX firm working with a client that was not familiar with these types of planning tools. A little extra effort provides the clarity and support the team expects and the client needs.

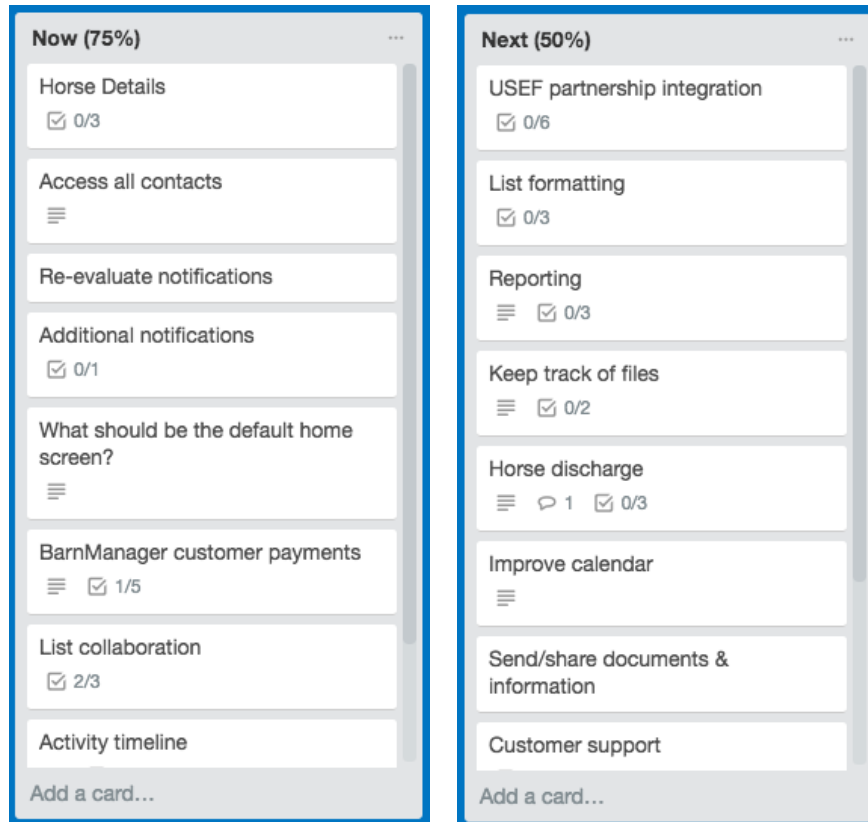


Detail of the first card group and associated card detail pop-up on the roadmap.

Card Groups #2 & #3: Now and Next

The Now and Next card groups in the example are the first of the temporal cards. These are the cards that divide experiences into time related categories. These cards display those experiences that need the most attention. The Now card is what the team needs to focus on, and keep working on, until they are complete. Placement in the appropriate group

suggests their priority. Just like the **Kanban and MoSCoW** prioritization techniques used in Agile methodology, these are the forcing functions behind what to do next.



Detail of the first card group and associated card detail pop-up on the roadmap.

Each card in the group will contain a detailed description or unanswered questions about the experience. We add the unanswered questions because we believe that if there is doubt or concern it demands attention. Why would you make something if there is doubt as to its validity?

Here's an example of a card detail. In this case it's the Activity Timeline card in the **Now** group.

Activity timeline ✕

in list [Now \(75%\)](#)

Description

[Edit](#)

Reconsider activity timeline - do we need it? What is the value? What is the most important information to show?

If someone inputs a lot of stuff at once, the activity feed is much less important, it's not telling you the most important information

If we remove activity timeline from home page, what should we show instead? Calendar? Events?

Add

- Members**
- Labels**
- Checklist**
- Due Date**

Detail of Activity Timeline card.

You'll notice that the unanswered questions are forcing a conversation to happen between team members, and in some cases demanding more information or data. This epitomizes the role of a roadmap - it forces discussion and investigation.

Conclusion

Now that we have guided you through understanding, building, and maintaining a product roadmap to effectively prioritize what's next, we will leave you with one big, fat, potentially overwhelming fact. Prioritization doesn't really ever end.

As soon as you are done, you need to start collecting new data, analyzing changes and reviewing the roadmap again. Anything that has to do with humans is inherently temporary. Plan for ongoing prioritization activities. Set the expectation for a rolling prioritization schedule with your team and you'll find it becomes embedded in the team culture and will help things run just a little smoother in the long run.

Hungry for more?

- **Product Roadmapping book** - C. Todd Lombardo, Bruce McCarthy, Evan Ryan, and Michael Connors
- **Free chapters** from the best selling **Product Leadership** book.
- **Great article** by Hannah Chaplin
- Have more questions? Contact us via our chat or forms on our site **ADK Group**

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From Richard, Emily and Heath.