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# Roadmap Relaunch Kit

Essential Tools from the Book

# PRODUCT ROADMAPS

RELAUNCHED

How to Set Direction while Embracing Uncertainty

“It’s about time someone brought product roadmapping out of the dark ages of waterfall development and made it into the strategic communications tool it should be. McCarthy and team have cracked the code.”

—Steve Blank, author of *The Startup Owner’s Manual*



# In the kit



If you've read our book, *Product Roadmaps Relaunched* (O'Reilly 2017), you know that product roadmaps done right can be a powerful way to get everyone on board with your product strategy. You also know that done wrong they can lead to broken promises and unhappy stakeholders. We've assembled these essential tools to give you everything you need to relaunch the practice of product roadmapping in your organization. May all your roadmap visions come true!

This kit gives you everything you need to start a roadmap relaunch in your organization:

- A roadmap relaunch manifesto
- A summary of the 8 steps required in world-class roadmapping
- The 2 different launchpads
- Our 14-question assessment checklist in an easy-to-use printable format
- Our 6-step process for your roadmap relaunch
- Gillian Daniel's story of roadmap change

# A Roadmap Relaunch Manifesto

A traditional product roadmap is not flexible enough for the Lean and Agile methods many organizations have adopted. Worse, it is often light on the strategic context necessary for teams to internalize the overall vision. Many have abandoned roadmaps altogether, but retain this nagging sense that they are missing the strategic big picture.

## **Product people want a document that:**

- Puts the organization's plans in a strategic context
- Focuses on delivering value to customers and the organization
- Embraces learning as part of the product development process
- Rallies the organization around a single set of priorities
- Gets customers excited about their product direction

## **At the same time, a product roadmap should not:**

- Make promises product teams can't keep
- Require a wasteful process of up-front design and estimation
- Be conflated with a project plan or a release plan

Fortunately, there is a new generation of product people developing a new breed of product roadmap. We've assembled these best practices into a flexible framework that provides a powerful toolset focused on results rather than features and dates.

All of this is described in detail in our book *"Roadmapping Relunched: Setting Product Direction While Embracing Uncertainty"* (O'Reilly Nov 2017), but we've provided this kit to help you get started with your own relaunch.

# The 8 Steps of World-Class Roadmapping

Product roadmapping isn't a destination; rather, it's a journey. These are the key steps we've found are crucial to a successful product roadmap. Each company, product, and set of stakeholders is different, though, so you should mix and match based on your needs and the readiness of your organization.

## Gather inputs

Make sure you have all of the relevant information and context you need to make good product decisions. Discuss with your stakeholders, or you'll risk making too many assumptions that cause you to backtrack. (Review Chapter 3.)

## Establish the product vision

A product vision should be about having an impact on the lives of the people your product serves, as well as on your organization. (Review Chapter 4.)

## Uncover customer needs

This is the most important aspect of your roadmapping process. Most items on your roadmap will derive from a job the customer needs to accomplish or a problem the customer must solve. (Review Chapter 5.)

## Dive deeper into needs and solutions

A little context helps you spend less time explaining the roadmap and more time executing it. And it forces critical thinking. (Review Chapter 6.)

## Master the art and science of prioritization

Leveraging an objective and collaborative prioritization method will help stakeholders focus on what's important and come to alignment. (Review Chapter 7.)

## Achieve buy-in and alignment

You can create the best plan ever conceived, but it will work only if the people who fund it, execute it, and receive its output believe in it. (Review Chapter 8.)

## Present and share

One of the chief functions of a product roadmap is to get everyone excited about the future. To accomplish that, you have to tell the story. (Review Chapter 9.)

## Keep it fresh

When conditions in the environment change, your roadmap—like any living thing—must change as well in order to survive. (Review Chapter 10.)

# The 2 different launchpads

## Launchpad A: Course Corrections

If you have a pretty good process and you feel it could be enhanced, you're in a good position. Use the preceding questions to identify the most promising opportunities for improvement, prioritize those using one of the methods we describe in Chapter 7 (critical path would be good here), and focus on improving one part of the process at a time.

If your process is really not working for you but you think it is salvageable with some work, the approach is the same. Don't try to fix everything at once. Use the preceding questions to identify the missing or most-broken parts of your process, prioritize these, and focus on one at a time. It's tempting to change many things at once, but if you've got something that's basically functional, you'll make quicker progress with a single focus.

## Launchpad B: The Full Relaunch

If you don't currently have a process you can salvage and improve upon, it's time to establish one. In this situation, we recommend beginning at the beginning and following the 8 roadmap steps.

This can be overwhelming, however, and even experienced teams can take months to arrive at a product roadmap and an update process they are happy with. One way we've found very effective to relaunch your roadmapping process is to hold a roadmap workshop. Very much like a Design Sprint, a roadmap workshop brings together the key stakeholders from around your organization in a collaborative effort to define a product vision, objectives, customer needs, and other aspects of a roadmap. We can highly recommend *Design Sprint* from O'Reilly, co-authored by our very own C. Todd Lombardo! They do this in a focused period of time, usually over a few days, to create an initial version of the product roadmap and agree on next steps such as customer validation and a cadence for revision.

An expert facilitator can be very useful in a cross-functional effort such as this because they are completely unbiased toward any particular department or function. They should also bring an established framework, and experience from a variety of previous engagements. If you've read this book, however, you may be the best expert in your organization!

# Get started in 6 steps

We suggest a **six-step process** for getting started in your organization:

1. Assess your situation and choose an approach.
2. Get buy-in for change from your key stakeholders.
3. Train your stakeholders how to contribute.
4. Start small and work incrementally.
5. Evaluate your results and align on next steps.
6. Keep relaunching.

## Step 1. Assess your situation

Before you can propose a solution, you need to define the problem. (Sound familiar?) It's the same with organizational change. Before you can decide where to begin with a roadmap relaunch, you need to assess your current process (or decide if there even is one).

We suggest you begin by answering the 14 questions in the Health Assessment Checklist (next page). If you are unsure of the criteria, refer to the chapter indicated.

The maximum possible score is 22. If your score is 18 or higher, congratulations, you have a great roadmapping process. Use Approach A described on the previous page to tweak and enhance your already stellar process. If you score a 12 or higher, you're still in reasonably good shape. You should also take Approach A, but recognize that you have a lot of improvements to make and it will take some time to achieve a world-class process. If you've scored 11 or lower, you either have no process or things are so broken currently that you need to set an entirely new baseline. If that's your situation, jump to Approach B.

# Roadmap Health Assessment Checklist

0–2 scale

0 = entirely or mostly no

1 = sort of maybe, not sure

2 = definitely yes

Answering and scoring these questions will help you determine how to begin your roadmap relaunch

		Score
Strategic context	Do you have a clear product vision that most stakeholders can explain? (Chapter 4)	+
	Do you have measurable business objectives that most stakeholders are aware of? (Chapter 4)	+
Focus on value	Does your roadmap focus on customer needs? (Chapter 5)	+
	Are all of the things on the roadmap clearly tied to customer needs and/or business objectives? (Chapter 2)	+
Embrace learning	Do you update your roadmap regularly, leveraging an evolving process? (Chapter 10)	+
	Do you allow time in the roadmap to learn whether solutions are working before committing to solving a customer need? (Chapter 2)	+
Rally the organization around priorities	Do you use an objective and accepted method of prioritization? (Chapter 7)	+
	Do you have an established process for achieving alignment with stakeholders? (Chapter 8)	+
	Do you regularly present and share your roadmap with key stakeholders? (Chapter 9)	+
Get customers excited	Do you regularly present and share your roadmap with customers? (Chapter 9)	+
	Do you seek customer feedback on the roadmap and incorporate it in your process? (Chapter 8)	+
Avoid overpromising*	Do you have specific features, solutions, fixes, or other deliverables on your roadmap? (Chapter 6)	+
	Do you have precise or “best-case” dates for things on your roadmap? (Chapter 9)	-
Avoid overdesigning and overplanning*	Do you thoroughly design a solution before putting a customer need or problem on the roadmap? (Chapter 5)	-
	Do you have project info like resources, milestones, and dependencies embedded in the roadmap? (Chapter 9)	-

\*Subtract from score

Total:

## Step 2. Get buy-in for change from from your key stakeholders

Whether you decide to improve an existing process or start fresh, you will be making change. Like a good roadmap, change requires alignment among the people involved. You can't just change the process by fiat and expect people who work in other departments to go along without question. Review Chapter 8 on buy-in and alignment for techniques like shuttle diplomacy and co-creation workshops to identify and then fold your stakeholders into the process of change.

Then feel free to share the results of your Roadmap Health Assessment from the preceding checklist—even better, involve your stakeholders in the assessment by asking everyone to go through the questions on their own and then comparing answers.

Remember that you are seeking alignment, not necessarily consensus. They may not all agree on how broken the process is or which areas need the most focus. That's OK. If you can get them to agree on the necessity for change, it will be easier to get them to give you some leeway on how to approach it.

## Step 3. Train your stakeholders how to contribute

Remember also that this is a new approach for many people used to traditional roadmapping. Knowing your audience—that they

will likely come with expectations for feature and date commitments, for example—will help you explain what's different about roadmapping this time, why, and how it will be better.

As we discussed in Chapter 8, product roadmapping is not a solo pursuit. Every stakeholder has a part to play and an obligation to contribute. Often times, they just need to be shown how.

Feel free to borrow from the book, as well as the 8 steps in the roadmapping process outlined here and the 6 steps for a relaunch. And check back at [www.productroadmapping.com](http://www.productroadmapping.com) for new ideas and helpful material.

## Step 4. Start small and work incrementally

Look for every opportunity to start small and demonstrate early success. If you're using approach A to course-correct an existing process, this will be natural. Pick the portion of the process you want to focus on and align with your stakeholders on what an improvement looks like. Set a goal you can achieve in a few weeks, like incorporating one of the prioritization models from Chapter 7 or defining some short-term business objectives. Even a small success will allow you to quickly gather support for further improvements.

Even if you are relaunching your roadmapping process entirely as we describe in approach B, you can limit the scope of the effort in other ways. A roadmapping workshop is comprehensive, but takes only a few days to execute, for example. You can



also limit involvement in your relaunched roadmap until you gain some confidence in the results. You might, for instance, include only the product core described in Chapter 3: the product people, engineers, and designers most closely involved in your product effort. You can then slowly expand the circle of stakeholders you share the roadmap with, evaluating feedback after every encounter.

## Step 5. Evaluate your results and align on next steps

Many product teams have a period of evaluation after they release a product or a feature to market. Sometimes called a *discovery* period, this is when they learn whether the thing they released has had the effect they wanted for customers and for the organization. This is good practice for internal changes like these as well. While you may not need to set formal business objectives for changes you make to the roadmapping process, it's smart to gather your stakeholders periodically, review the changes you've made, and seek feedback on the effects—intended or not—they have had. This will allow you to align on whether to stay the course, change course and try again, or head back to base to try a different direction.

If you have a cross-functional product steering committee, you can use these regular meetings to review your progress and align on next steps. If not, perhaps establishing a regular meeting is a good idea anyway. This same team can be leveraged to

review actual product results and inform roadmap planning. Your needs may vary, but many such teams meet every three to six weeks. More often is seldom productive as there hasn't been enough time for the results of change to be felt. Less often frequently prevents the team from gelling, and shared context is quickly lost.

Make sure your team knows you intend to continue to evolve the process. Your team should help you identify where and how the process can be improved over time. Hitting roadblocks or detouring around dysfunctions is natural and to be expected. The key is to acknowledge that the ecosystem is dynamic, and then have the confidence to roll with it and learn.

## Step 6. Keep Relaunching

It's important to recognize that change is hard for many people—and especially so for organizations. Worse yet, it's hardest when crossing organizational boundaries. You will likely face resistance to change from people within your organization (even your own team) who don't perceive the necessity for change, or who feel threatened by change, or who simply have other priorities. Don't give up. We've seen positive changes at large and small product organizations all over the world.

## Gillian's Story of Roadmap Change

**F**rom 2014 until mid-2016, Gillian Daniel headed product at smartShift Technologies. Her objective was to get the company into a controlled and predictable growth mode, which required redefining their solutions (bundles of technology and services), as well as positioning and messaging. They also created two new add-on products.

To set the stage for this change, Gillian worked with the executive team to define a vision for what the company wanted to be, what problem they wanted to solve in the world, and for whom.

With a clear vision in place, she was able to propose specific business objectives—outcomes the company was looking for from its product development efforts—including revenue per customer, and penetration into new markets. These goals then became the yardstick against which all proposed new products or product enhancements were judged.

To manage this process, Gillian developed a scorecard that ranked each idea against each of the company's business objectives on a simple high-medium-low scale. She then asked Engineering for a quick T-shirt sizing of each idea. The ideas that got the highest rating on multiple goals for the least effort were the ones that were considered for development.

This scorecard wasn't the final approval for projects, however. Gillian feels strongly that gaining alignment among the key stakeholders in management on a plan is far more important than any particular

feature or new product idea. If the team is all pulling together in one direction, they will move faster and be more successful.

So she used this scorecard as a framework to support one-on-one discussions with the executives about priorities, playing out various scenarios, and arriving at a plan through what we call **shuttle diplomacy**.

Each of Gillian's product managers was responsible for publishing a roadmap for their product or product line. These focused heavily on the strategy—the “why” of what was proposed—much more than the details of the planned features. “That context is necessary,” explains Gillian, “to make sure each team member is armed with the right information to make all of the day-to-day decisions that pop up in their respective jobs. Without that, they deliver the wrong things because the plan—or tactics—to execute on the strategy can never be perfectly thought out.”

After executing on these plans for some months, the company made solid progress on revenue per customer, validating Gillian's approach. However, margins took a hit as the cost to serve customers rose. This caused Gillian and team to reevaluate their goals, adding profit (mostly via seeking ways to lower costs) to the scorecard. The resulting scoring shifted priorities, and the roadmap was adjusted to fit the new direction with little fuss. The company bounced back to profitable growth, significantly increasing its US customer base and revenue to complement the existing European business.

DEAR ROADMAP,

I AM SO EXCITED TO BE  
GOING ON THIS JOURNEY WITH  
YOU!

I HOPE TOGETHER WE CAN!

- 1) FOCUS ON WHAT PEVA DOES WELL
- 2) IMPROVE THE USER EXP WITH REAL USERS IN MIND
- 3) STRENGTHEN OUR OFFERINGS WITH AI

I KNOW TOGETHER WE  
CAN DO GREAT THINGS!

- JAMIE

DEAR ROADMAP, 

I look across the room and my heart fills with glee. Your roadmap gives you a sense of direction and you know where you want to be.

I yearn for what you have, you can give me so much more than I have now.

Give me some of your time, let me feel the emotion of achievement, you can fill the void I have in my life.

DONT IGNORE ME ANYMORE!

x 

YOUR SECRET  
ADMIRER.

=

Dear Roadmap,

I wish I had you in my life. The guidance and direction you provide is something I long for here at Pega. My designs would be so much better if only I knew what I was designing for. My design process would be more efficient if I knew when things were needed ahead of time. I hope I find you someday.

- Chris

Dear Roadmap,

It would be <sup>so</sup> awesome if we had you. We could understand what we needed to do in the short term, and long term, and we could have actual designs ready for team (instead of the giant mess we have today!)

The entire company would understand why we do the things we do, and when we should do them. We'd even be able to understand how much it should all cost.

Wouldn't it be great?

If we only had you, roadmap...

Sincerely,  
Stu

Dear Roadmap...

How do I love thee? Let me count the ways:

- 1) You are an extension ~~of~~ of a visual representation of how we intend to achieve our product vision
- 2) You clearly demonstrate valuable problems to solve
- 3) You inform the organization about what the product team is actively working on
- 4) You enable the launch/readiness planning for ~~external~~ stakeholders and teams.
- 5) You align product/engineering/design around the path forward.



Liftoff.

# Product Roadmaps Relunched

A good product roadmap is one of the most important and influential documents an organization can develop, publish, and continuously update. In fact, this one document can steer an entire organization when it comes delivering on company strategy.

This practical guide teaches you how create an effective product roadmap, and demonstrates how to use the roadmap to align stakeholders and prioritize ideas and requests. With it, you'll learn to communicate how your products will make your customers and organization successful.

Whether you're a product manager, product owner, business analyst, program manager, project manager, scrum master, lead developer, designer, development manager, entrepreneur, business owner, this book will show you how to:

- Articulate an inspiring vision and goals for their product
- Prioritize ruthlessly and scientifically
- Protect against pursuing seemingly good ideas without evaluation and prioritization
- Ensure alignment with stakeholders
- Inspire loyalty and overdelivery from their team
- Get your sales team working with you instead of against you
- Bring a user and buyercentric approach to planning and decision-making
- Anticipate opportunities and stay ahead of the game
- Publish a comprehensive roadmap without overcommitting

## Get the book

The theme-driven roadmap is the only way to operate today. By focusing on value rather than features or dates, this book makes product roadmaps useful again.

—David Cancel  
CEO, Drift

**Product roadmaps matter. You can't build a great company unless you have a great strategy and a product roadmap is a way of clearly articulating that strategy. This book makes it clear how to develop the core components of a roadmap, the problem set, the value propositions, and areas of focus for the customer.**

—Jeffrey Bussgang  
General Partner, Flybridge Capital

**It's critical that you start a dialog with your sales and marketing teams early about what's on your roadmap. The approach described in this book allows you to do that effectively by focusing on what's important—the customer and their problems—and not getting caught up in features and specific dates.**

—Carol Meyers  
CMO, Rapid7

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