Product Excellence

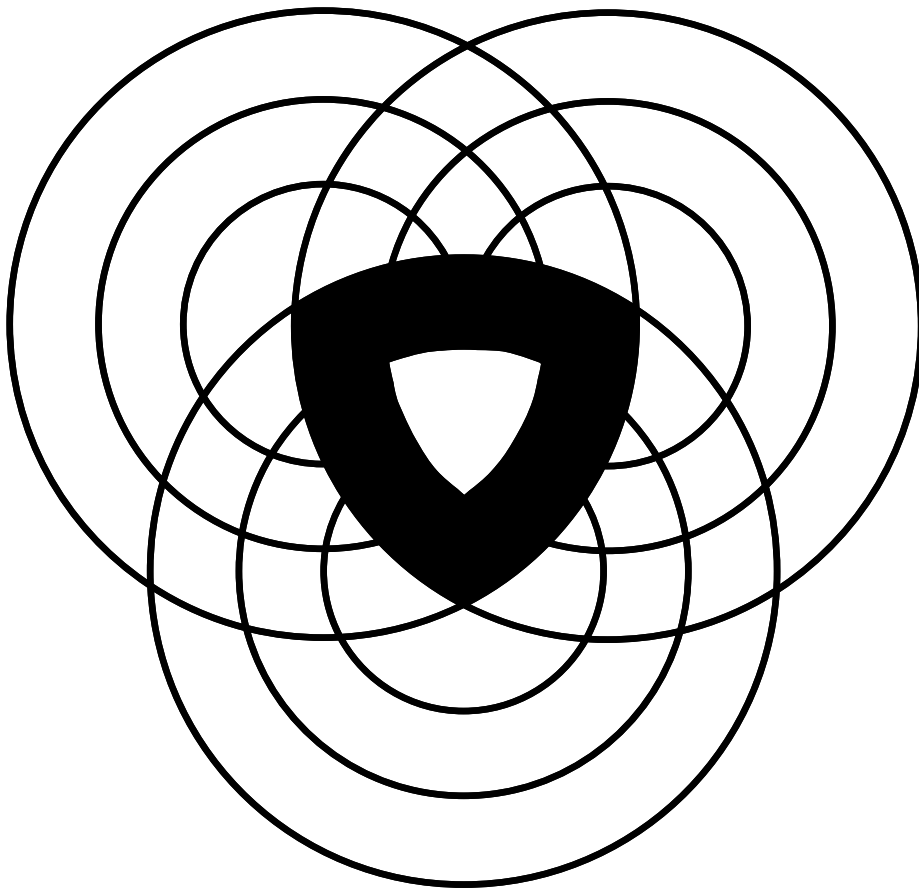**How to build products like today's top product teams**

productboard

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Defining Product Excellence

Product Excellence is the name of an approach to product management that emphasizes getting the right products to market, faster through deep user insight, a clear product strategy, and an inspiring roadmap. We call these the pillars of Product Excellence, and companies that master all three are well on their way to building truly excellent products — products that make a difference in each user's work and life.

Product Excellence places special emphasis on building the right features in the right way. It aims to deliver features that directly target user needs, and do so in less time. This means less effort is wasted working on features users don't really need, and users get more value in less time. You'll know you're on the right track when users are downright delighted by your product – what it can do for them and how it makes them feel along the way.

Product Excellence | ˈprɒdʌkt ˈɛks(ə)l(ə)ns |
noun

1   **An approach to product management** that emphasizes getting the right products to market, faster through deep user insight, a clear product strategy, and an inspiring roadmap.

Deep user insights (Vision)

The entire product team has a shared understanding of what users really need.

The best product teams develop systems for funneling a steady stream of user feedback back to the product team. Whether generated from sales calls, support tickets, or formal user research, they store these insights in a central repository, accessible to all.

Product managers, designers, or dedicated researchers interview users about their needs before feature prioritization even takes place. Solution ideas are prototyped and tested along the way to validate feature ideas while minimizing the risk of wasted effort. Feature usage is monitored after launch, and qualitative insights are collected to inform future enhancements.

In top organizations, colleagues from across the organization are equipped with a better understanding of user needs, helping them excel in their work – whether that's prioritizing, designing, developing, promoting, supporting, or selling.

Clear product strategy (Strategy)

The entire organization is aligned around key strategic objectives.

With so many competing priorities and different stakeholders to please, it's easy to get stuck in a reactive mindset – putting out one fire after the next, impulsively adopting the hottest tech trends, or going tit for tat with competitors.

That's why the most effective product organizations prioritize around clear business objectives. Rather than haphazardly swinging from one feature to the next, they work on initiatives that unify the entire team's efforts around achieving measurable objectives before moving on to another.

These objectives may relate to solving the needs of specific types of users and market segments. Or, they may relate to driving growth, competitive differentiation, regulatory compliance, security, or any number of other goals that would help the business succeed in the mid-to-long-term. In the latter case, they may even directly support organization-wide OKRs or priorities set by leadership that direct every team's efforts.

Whether the goal is to drive user acquisition or improve platform reliability, everyone working on the product knows why their work is important – why it matters.

Inspiring roadmap (Execution)

Everyone understands and rallies around where the product is headed and why.

True product leaders ensure that product management is not a black box. They know that everyone across the organization works to support the product, and they're all invested in its success. They cherish the responsibility not just to share the plan, but rally everyone around a common vision for where the product is headed and why.

For them, product roadmaps are not static documents of what features will be delivered when. They're dynamic visualizations (closely linked to their product plans) that help communicate the outcomes the product team is working towards and how they support the organization's overarching goals.

If some roadmap decisions are hard for certain stakeholders to swallow, they understand the rationale behind tough trade-offs product managers had to make. The business context and user insights behind each decision are always on hand, so everyone can buy-in on a decision, even if they don't personally agree with it.

Five levels of Product Excellence maturity

Simply knowing what the three pillars of Product Excellence isn't enough. There must be a culture and processes in place that give product teams the room to put the framework into practice. And Product Excellence isn't a one-and-done achievement, it is an ongoing process—one that organizations must persist in to continuously deliver great products that customers need.

The Product Excellence Maturity Model codifies effective product management processes, helping to identify where an organization falls along the three pillars of Product Excellence along with the next steps for improvement.

There are five levels of Product Excellence maturity.

Level 1 represents inexperienced product organizations, and Level 5, the mastery of Product Excellence. As teams progress through each level, their products become more sophisticated and increasingly align with the underlying needs of users.

The 5 levels of maturity are independent of the age or size of the organization. Though it's unlikely a startup could achieve the highest stages, it's not impossible. And there are more than a few enterprises that may find themselves performing at the lowest stages.

**Intuition
driven**

- Product makers rely on gut rather than customer feedback & data
- Emphasis on shipping features whether or not they drive real outcomes
- Lack of understanding around the product roadmap leads others to question it

**Introducing
process**

- User requests are taken at face value & feedback is interpreted with bias
- Basic product strategy in place but prioritization methods are overly simplistic
- Roadmap lacks clear objectives, long-term goals are private and undocumented

**Listening to
customers**

- Product makers begin really listening to customers
- Product strategy includes clear and achievable KPIs to measure progress
- Lack of understanding around the product roadmap leads others to question it

**Aligned on
user needs**

- Product makers systematically uncover underlying user needs
- Product strategy and objectives are fully aligned with broader business goals
- Product roadmaps clearly communicate why some ideas are prioritized over others

**A thriving
product
culture**

- The entire organization understands customer needs
- Cross-functional teams understand how they contribute to product success
- Everyone rallies around both the product strategy and roadmap

Use the Product Excellence Maturity Model to assess where your organization falls today and identify strengths and areas for improvement.

In the rest of our ebook, we outline best practices and offer step-by-step guides for mastering deep user insights, clear product strategy, and inspiring roadmaps.

Ready to start on your path towards Product Excellence?
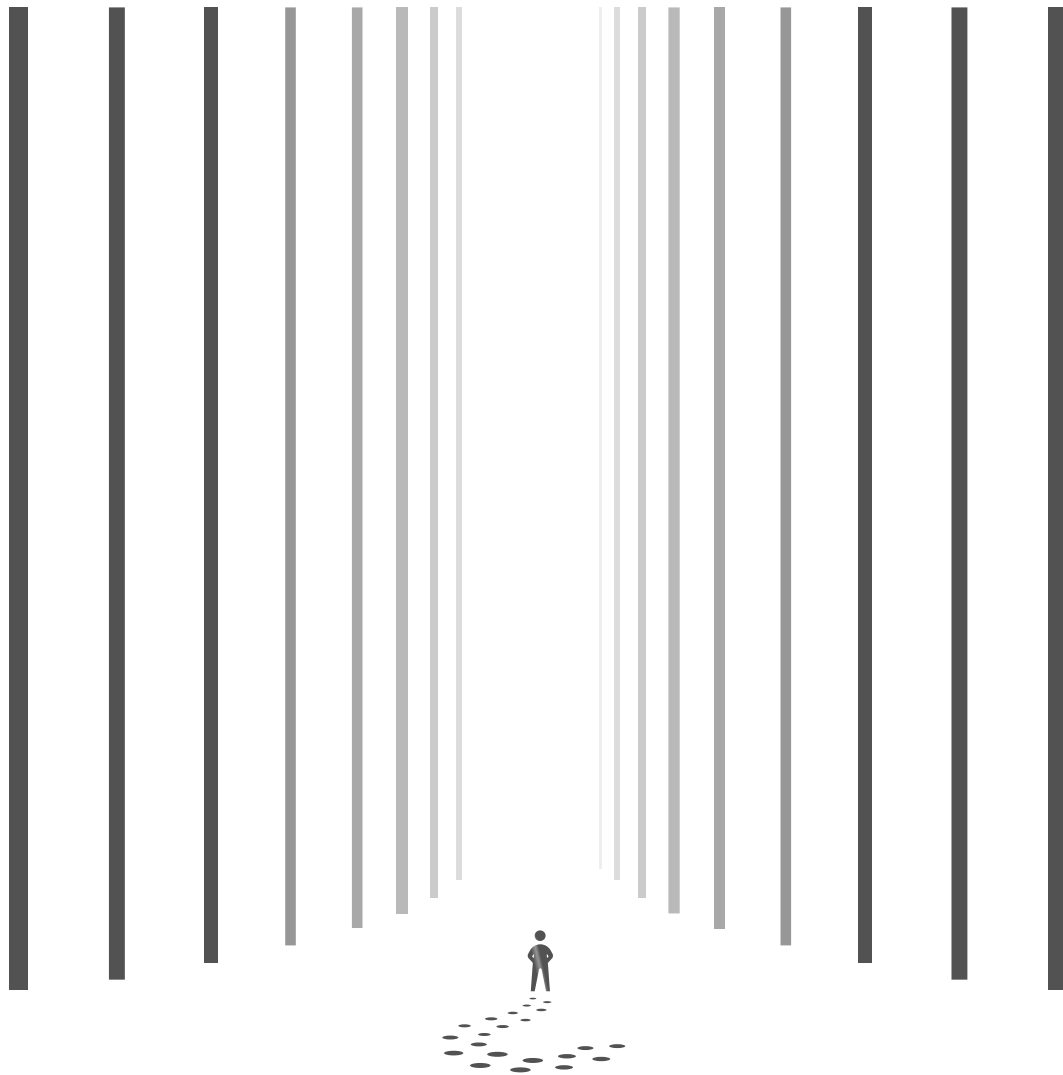
Gathering and leveraging deep user insights

The entire product team has a shared understanding of what users really need

Follow the steps in this chapter to start transforming fragmented product inputs into deep user insights. Then start acting on them.

A step-by-step guide to gathering and leveraging deep user insights

Do an audit of your existing user and product inputs

The first step is to understand all the places where you currently gather insights. Consider the different touchpoints that people at your company have with end-users. These can include:

- Existing user research
- Feature requests
- Conversations between the sales team and prospects
- Customer support tickets
- Email exchanges between your customer support team and customers
- Win/loss analyses
- Qualitative inputs from NPS results
- Exit surveys (conducted by customer success when important customers churn)

As you complete this audit, note which tools or platforms are used to collect information. You'll likely find a smorgasbord of emails, Google Docs, internal communication tools, note-taking apps, and department-specific tools like Salesforce and Intercom.

Once you have a holistic overview of your insights landscape, assess them against the problems you are trying to solve for customers. Can you identify trends and patterns in all the collected inputs that help you better understand what's working for users, and what isn't? Are you able to identify the needs of a certain type of customer? Are you now able to quickly find all insights related to a specific feature idea or user need?

These are all important questions you should aim to answer.

Regularly interface with customer-facing teams

As a product maker, you're probably a couple of degrees of separation away from your end-users. That's why it's crucial to interface with sales, support, and customer success — your customer-facing teams—to access a treasure trove of insights from the frontlines.

Running interviews with customer-facing teams to share, rank, and elaborate on user needs can yield many gold nuggets of actionable information. Customer-facing teams speak with so many people that they've probably already begun to identify patterns. And since they understand your business and product, they can interpret these insights within a relevant context

Of course, you won't always do precisely what customer-facing teams suggest. As a product maker, you'll have to synthesize incoming information and weigh it against your objectives and capabilities. Still, getting these inputs are a critical step that will deepen your understanding of user needs.

Make it a habit to talk to customers

Taking the time to talk to a wide range of users often takes a backseat in the high-pressure environment of the tech world. But, as product thought leader Rich Mironov puts it, "You've got to invest time into figuring out who your product is for, what job it will do, and why users will pay you for it. This means actually talking to people who use your product, those who have churned off, and anyone in-between."

We have a few recommendations for how to put this into practice:

- **Build a customer community**

  The way you choose to go about this is your choice. At Productboard, we have a #productleaders Slack channel where we announce new features, share key announcements, and generally keep an open line of communication with customers. Our #beta-testing channel, for example, fosters dialogue about specific feature sets and areas of the product. The great thing about this channel is that it helps us identify who our power users are and allows us to talk to our customers at scale. Even better, customers are riffing off of each other's ideas.

- **Set aside time to regularly talk to customers**

  Go visit your customers once a month to observe them in their work environment. Or, plug an hour a week into your calendar for customer interviews over Zoom.

- **Let colleagues know you're always interested in talking to customers**

  There will always be prospects and customers who are eager to give product feedback. It's your job as a product manager to let your customer-facing teams know to send these folk your way.

- **Join meetings with prospects and customers**

  This is both an opportunity to sell them on the roadmap and gather useful feedback on your vision. Keep a shortlist of target customers that you can reach out to. Identify enthusiastic users of your product who are open to speaking with you and check in with them regularly.

Set up a system to consolidate product inputs from all sources

In a typical organization, teams use many tools — like Salesforce, Zendesk, and Intercom, to name a few — to manage their interactions with prospects and customers. Each of these platforms is home to a goldmine of feedback: unmet needs, problems, reasons for churn, why a prospect opted for your competitor, and more.

However, unless you have access to these platforms and regularly check in on them, many of these insights end up slipping through the cracks.

That's why it's essential to have a system like Productboard that syncs with your existing tech stack and automatically funnels in all incoming inputs. This central repository allows product teams (and everyone else) to have continuous access to fresh insights and easily track and make sense of different feedback types.

Furthermore, this system can act as a self-serve way for colleagues to submit ideas and relay feedback.

> *"You've got to invest time into figuring out who your product is for, what job it will do, and why users will pay you for it. This means actually talking to people who use your product, those who have churned off, and anyone in-between."*

Rich Mironov
Product thought leader

In the next section, we're going to look more closely at how you can begin to act on the insights you've gathered.

For now, remember: It's not enough to take feedback at face value. As a product maker, you must be willing to put your detective hat on to dig deeper into more significant problems or unmet needs lurking beneath what customers say. You need to be strategic about product decisions and make sure they align with broader business goals. And you must incorporate user research and continuous product discovery into the product prioritization process.

How to turn deep user insights into excellent products

Create a culture around gathering insights that can scale

Product makers represent a small percentage of employees within an organization, especially in comparison to sales, marketing, customer success, and support—customer-facing teams that are on the frontlines with users each day.

That's why, instead of taking sole responsibility for the heavy lifting, product makers must build a culture around gathering insights. To achieve this, folks across the organization must develop a "product mindset" and understand the specific role they play in the product development process. They must be trained to recognize good feedback and learn to tease out important patterns.

Here's what this culture looks like in practice:

◆ **Sales and marketing teams** aren't just selling anymore—now they have an ear to the market. What's happening in the industry? What are competitors doing? What is your product's main differentiator (and what isn't)?

◆ **The customer success team** is no longer just preventing customers from churning or encouraging them to renew; they are actively trying to understand the gap between customer needs and the product's capabilities, clarifying where the product falls short for the product team.

◆ **The support team** is no longer being reactive to customer issues. Instead, they are listening for usability pains to share with the product team.

The dos and don'ts of submitting user insights

Want to get your entire company involved in sharing user insights? Create clear guidelines! Here is how Productboard's product team encourages diverse stakeholders to participate in the insight collection process.

◆ **Do** take the initiative to share feedback rather than relying on product makers to do it based on casual conversations or topics that came up in meetings.

◆ **Do** provide feedback with context to make it actionable.

◆ **Don't** simply pass on a feature request like "We need a Salesforce integration." Instead, provide details around the problem and the people it is affecting.

◆ **Don't** create your own tags to categorize feedback. Only use tags approved by the team

◆ **Do** be ready to participate in follow-up conversations with product team members.

This won't happen overnight, but you can teach your customer-facing teams how to ask the right questions and participate in mature conversations around user insights. And, once you build this culture, everyone becomes an extension of the product team.

Get to the bottom of what users really need.

Customers are often opinionated about your product and the direction you should take it in. Unfortunately, they're usually wrong.

Why? When customers ask for a feature, they envision the ideal solution for their own needs.

Perhaps because we humans assume our own needs represent objective, universal problems, we overestimate others' ability to understand them. Why else would so many customers be willing to take the time to compose a message, but leave out key details surrounding why they need the solution they're requesting?

You can't rely on customers to explain their needs to you. You need to sleuth them out yourself.

There are several frameworks to do this. Product thought leader Rich Mironov, for example, frequently uses jobs-to-be-done. This helps him get to the heart of customer needs by reframing their relationship to their problems.

5 Whys is another, and the one we like to use at Productboard. Here's how:

To identify customer needs, always ask why, then ask why again, sometimes ask a third time, and on occasion once or twice more after that. Uncovering customer needs is a multi-step process, and the trick is asking why in the right way.

Each follow-up question you ask should serve to dig one level deeper towards uncovering the core user need at play. See the following example of a conversation between one of our product managers and a customer. Notice how he keeps asking for more context and information to dig into the customer's underlying need.

Do you guys have feature voting on your roadmap?

Hi there, thanks for reaching out! We've heard something similar from some other users. Can you help me understand how you'd expect feature voting to work?

Well, we really want a community forum where users can submit feature ideas and vote on others' ideas.

OK, it sounds like this is mainly about sourcing new ideas, but also beginning to validate which user-generated ideas resonate the most across all users. Is that right?

Yep, that's it. We have 10,000 customers and there are just five PMs on our team so we feel a bit out-numbered. We have no chance of being able to log everyone's ideas one-by-one.

So you primarily see this a matter of efficiency? Collecting more ideas faster?

Yeah, but this also needs to feel like an authentic community. Our goal is to engage our entire user base, help them see how others are using the product, and make them feel like they have a say in the direction the product is heading.

Makes sense! I think I've got all the context we need for now. Mind if we follow up for more input once we begin designing this feature?

For sure. Always happy to help.

Nothing helps product managers uncover new customer needs quite like a genuine fascination with the problems they're solving for. And that's something that gets built up one question at a time, over months or years of becoming an expert in a given space
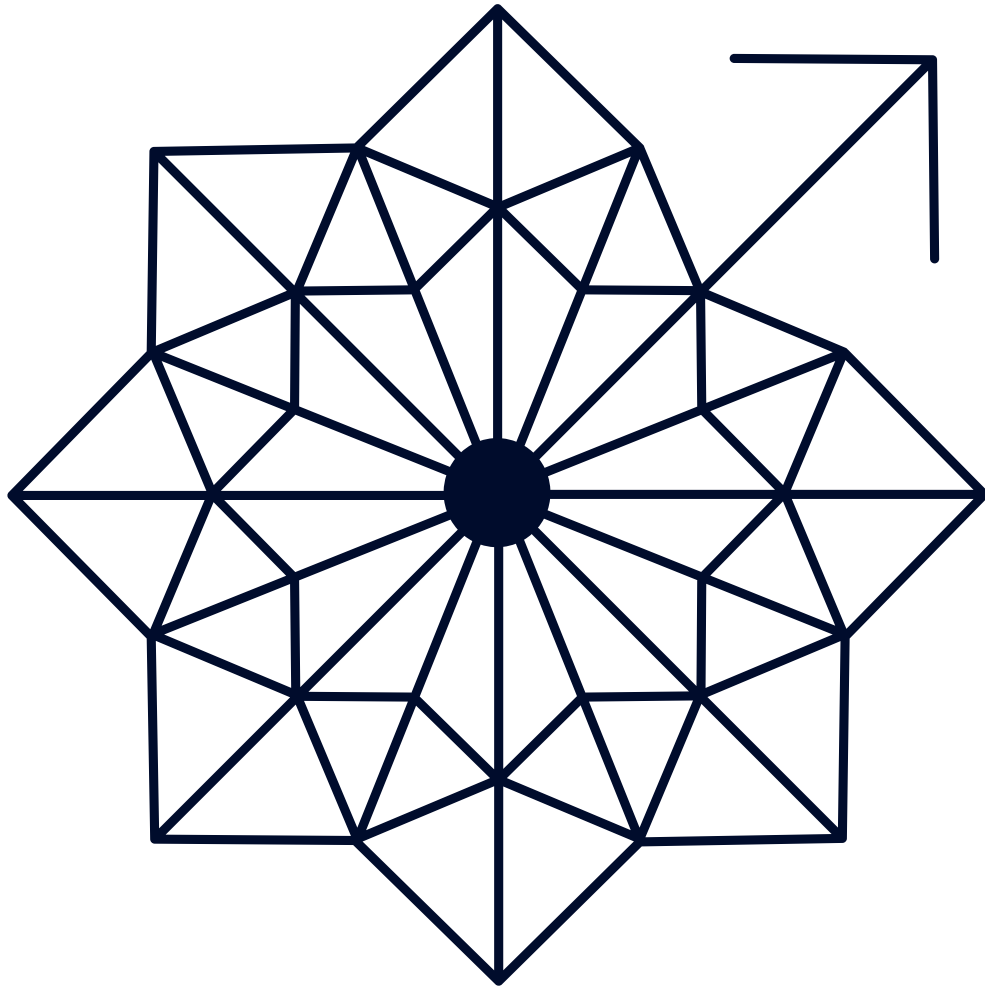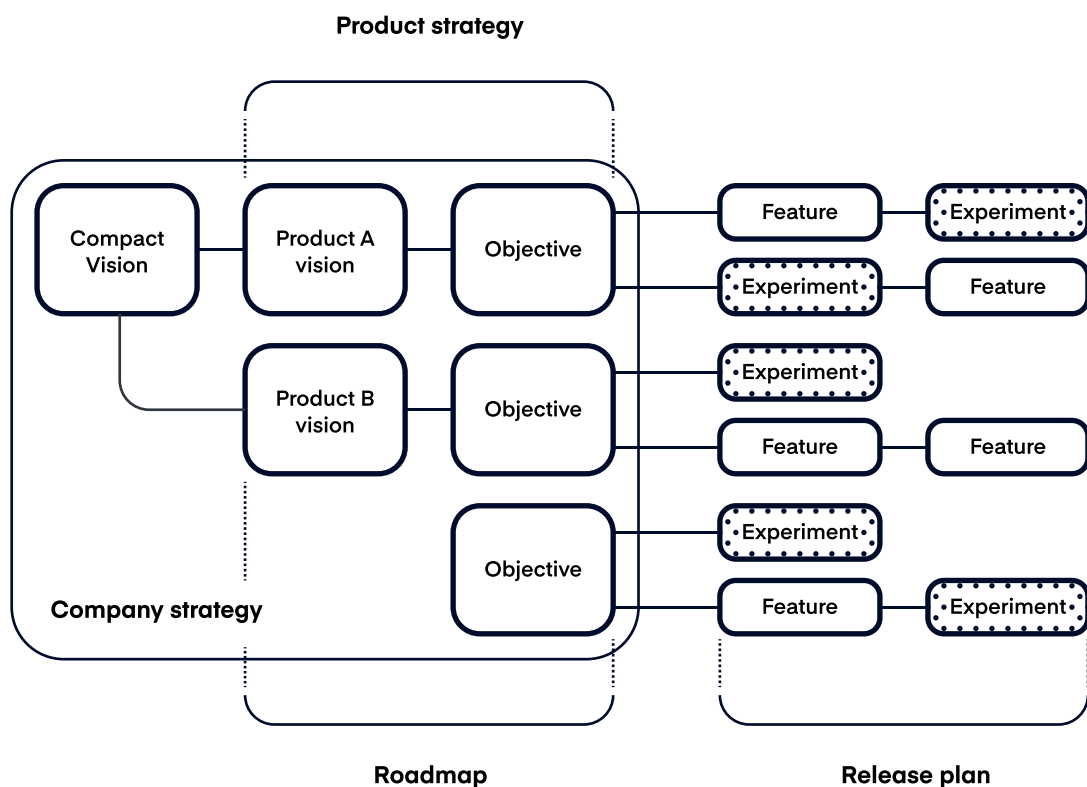
Creating a clear, unifying product strategy

The entire organization is aligned around key strategic objectives.

Product Strategy is a deliberate plan including steps from where you are today to where you want to be in the future.

A sound product strategy outlines how you are going to approach your customers, their needs, and the products you will build. It specifies the sequence of steps, defines high-level objectives, and provides a framework that guides the allocation of resources and steers your organization towards a set of shared priorities.

A well-crafted product strategy brings focus and alignment to your organization. If you don't choose your objectives wisely, you'll use up scarce resources building incomplete or non-competitive products that people won't use, slowing you down and giving your competition the chance to eclipse you. Likewise, unless you're building your entire product yourself, you'll need to collaborate with others and achieve alignment around what you'll build next. Speed is crucial for survival of a new product and you can't afford to waste time arguing about priorities.

Product strategy

Compact Vision — Product A vision — Objective — Feature — Experiment

Objective — Experiment — Feature

Product B vision — Objective — Experiment

Objective — Feature — Feature

Objective — Experiment

Feature — Experiment

Company strategy

Roadmap   **Release plan**

Depending on the nature of your market and the maturity of your company, the time horizon for your product strategy can vary:

◆ It might be as short as 1 year for an early-stage startup.

◆ It's typically around 3 years for companies that already found a product-market fit.

◆ It might be as long as 10 years for companies in slow-moving industries, or for companies with long product development cycles (for example, aerospace).

Your product strategy should be a fairly stable document to assure continuity and allow for the execution of longer-term initiatives. You will want to revisit it regularly, but don't expect to make major changes unless there are significant new market developments or discoveries. Saying that, you must stay vigilant and be ready to make changes quickly if market conditions change.

STEP 1

Define your product vision

> *"Your product vision is the "why" your product exists—your product strategy is your plan for how you'll get there."*

Before creating your product strategy, you need to define a clear vision for your product — a mission statement for your product. It's a long-term goal that answers the question: In X years, what do you want your product to be?

There's no set length for product vision statements. They can be short, like this one from Wildbit:

We make it easy to reliably deliver time-sensitive messages to our customers' users.

It's very clear. Even if you don't have a clue what Wildbit actually does, you can still figure out the point of their product just from that statement. You might expect to find "easy" and "reliable" in reviews of Wildbit.

They can also be long and specific, like this one from Joel Spolsky:

For a mid-sized company's marketing and sales departments who need basic CRM functionality, the CRM-Innovator is a Web-based service that provides sales tracking, lead generation, and sales representative support features that improve customer relationships at critical touch points. Unlike other services or package software products, our product provides very capable services at a moderate cost.

Joel's example is very realistic. It doesn't say that they're creating the best tool in the world at the lowest cost. It says that CRM-Innovator is going to be an affordable tool for what's needed.

Regardless of which direction you go in, there are four principles that every product vision statement needs to have.

- **Be customer-focused:** Your customers are the whole reason for your product. If you don't reference them in your product vision, you need to rework it.

- **Be a bit of a stretch,** but not unrealistic: Your vision needs to be both attainable and ambitious. If it's too much of a stretch, you'll have a hard time rallying your team around it.

- **Show differentiation:** Something in your vision should explain why your product is different from your competitors.

- **Look X years down the road:** In five years, you want people to say ___ about your product.

Identify your target market

Depending on how broad or targeted your vision is, your target customer base can span from every human being to just a handful of people. You might have an aspiration that your product will be used one day by everybody, but before you get there, you need to find your first group of customers and expand from there.

Customers can be described by a combination of descriptive and behavioral characteristics:

- **Descriptive characteristics** are typically demographics that are available externally. For individuals, they can include title, location, education, years of experience, family status, income, etc. For a company, it can be the number of employees, funding, revenue, industry, technology stack, etc.

- **Behavioral characteristics** are a set of behaviors that specific sets of customers exhibit. For example, knowledge of topics, likes and dislikes of specific products, response to a specific product, service, or a promotion, purchasing behavior, etc.

For example, Salesforce has different types of customer segments that differ along obvious dimensions, like company size, industry, or geography. They also likely differ along a less-easy-to-identify set of behavioral dimensions, like willingness to pay, technology adoption, and security vigilance.

Within each company are different personas that vary slightly for each market Salesforce serves, from individual sales reps and operational staff to CROs and VPs of sales. Each of these personas has a specific set of needs—problems, pain points, desires, use cases, and jobs they're trying to get done.

Begin your product strategy by identifying a narrow customer segment you intend to target, along with 1-3 specific needs your product will address for that segment. Say you were planning to compete with Salesforce—you might consider targeting individual sales reps (persona) at small/medium online retail businesses located in the USA (descriptive characteristics) who are technically savvy but dissatisfied with complex CRM platforms like Salesforce (behavioral characteristics).

That will allow you to stay focused in product development and in the positioning and messaging of your campaigns.

Decide what problems or needs your product will solve for your target market

The better your product solves a burning set of needs for customers, the more value you create. It's critical for your strategy to outline the sequence in which you're going to attack the needs of your prospective customers to ensure that the initial version of your product only includes those that are most important.

The characteristics of your target customers tend to be highly correlated with their needs—but in many cases teams struggle in this effort and cannot agree on what a "need" should be. When creating your product strategy for the first time, you'll likely have to do some detective work—interviews, surveys, or other research—to uncover these data points and understand what people are seeking to achieve in a given circumstance with your product.

As an example, product managers for our Salesforce competitor might consider interviewing current users of Salesforce and other competing tools along with small business owners who might not be using a CRM tool. In these interviews, try to avoid discussing your product—instead, focus on the problems at hand and how prospects are currently solving them. This will give you insight into ways your product might solve these needs more efficiently than current options.

Product needs can be divided into three big buckets:

◆ With **performance needs,** the more the better. Customer satisfaction increases as more needs are fully met here.

◆ **Must-have needs** don't create satisfaction by being met. Instead, the need not being met causes customer dissatisfaction. Must-have features are "table stakes" or "cost of entry" —boxes that must be checked for customers to be satisfied with your product.

◆ **Delighters,** or wow features, provide unexpected benefits that exceed expectations, resulting in high customer satisfaction. The absence of a delighter doesn't cause any dissatisfaction because customers aren't expecting them.

Satisfaction

Atractive

Indifferent

Functionality

Must be

Performance
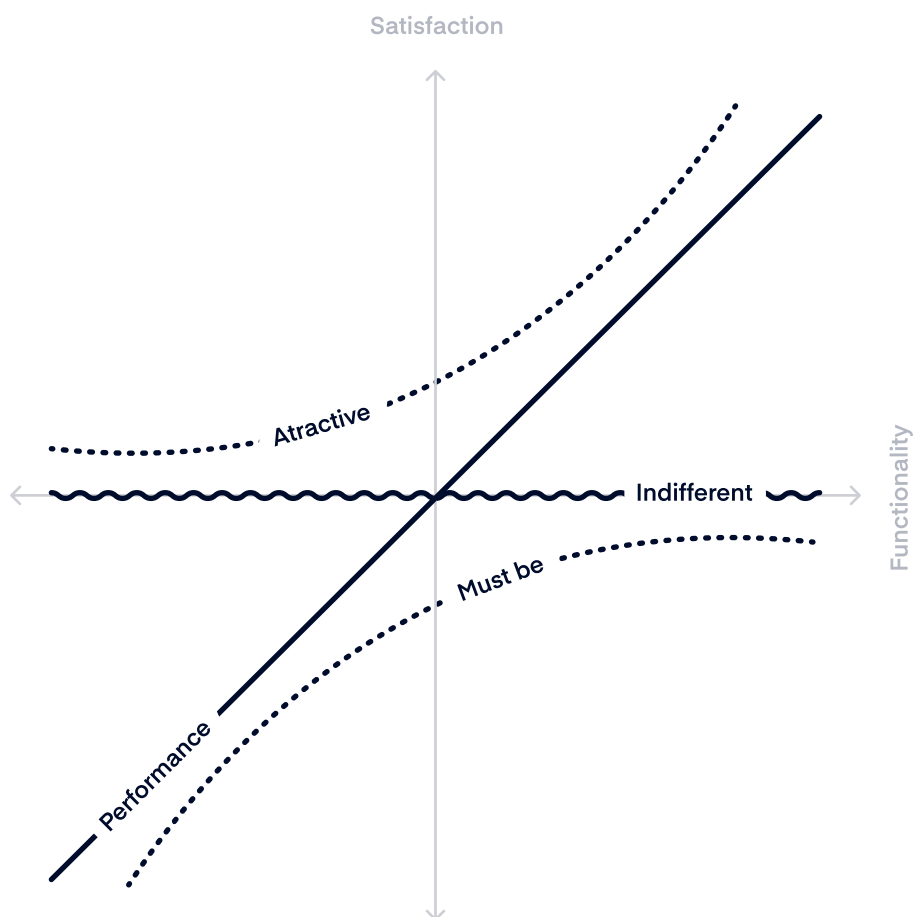
The Kano model provides a framework for understanding which features will delight users, and which features are essential.

You should think about all three buckets when selecting which needs your product will address first. A lot of highly technical products focus on performance and must-have needs—yet delight is what creates a sustainable competitive advantage. For example, our Salesforce competitor needs to provide basic CRM functionality as a must-have need, while features like supplementing prospect data using services like Clearbit would constitute a delighter. You want to come up with a product that is so much better than existing alternatives that people will want to switch to you.

> *A lot of highly technical products focus on performance and must-have needs—yet delight is what creates a sustainable competitive advantage*

STEP 4
Pinpoint your competitive differentiators

It's unusual for a company to be building a product with no direct or indirect competitors. Products can only succeed by setting themselves apart with clear competitive differentiators. Your product strategy needs to incorporate these aspects that make your product unique.

Examples of competitive differentiators include:

◆ Affordability

◆ Ease of use

◆ Performance

◆ Reliability

◆ Privacy

◆ Safety

Note that this list does not include the use of new technologies. Many startups believe that innovative solutions are somehow more valuable—but the simplest products are often the ones customers find most useful.

Begin by writing down all the features that make your product uniquely valuable among your competitors. Next, think about these features from your prospective customers' perspective—what are they struggling with? What benefit do they receive from using your product? If you have early customers already, you can also ask them why they chose your product over your competitors or alternative options.

Going back to our Salesforce competitor, the product is designed as an easy-to-use alternative to more complex CRM tools. Therefore, your competitive differentiator will be ease of use (and perhaps affordability). You might add to your product strategy "We help small business owners keep in touch with their best customers without the headaches of an expensive CRM tool."

Once you've written down your competitive differentiator, discuss your findings with your team. Putting this on paper will help make sure everyone understands why your product is better and teach them how to communicate benefits to customers and stakeholders.

> *Many startups believe that innovative solutions are somehow more valuable—but the simplest products are often the ones customers find most useful.*

STEP 5

Develop your high-level strategic roadmap

Once you have clarity around which customers you will target and what sets your offering apart, you can begin creating your strategic product roadmap.

This is not the same as your product development roadmap. Instead, your strategic roadmap consists of a set of clear objectives and key results, informed by your target customer segments and prioritized according to customer impact.

Strategic product goals should be set by product leadership and listed as part of the product strategy. For larger companies, that responsibility might fall to the VP of Product, while startups should make certain the CEO or founder is heavily involved. It's their responsibility to communicate which problem(s) the team will solve, the strategic context and level of ambition, and how teams will collaborate within the broader organization to achieve those outcomes.

Each goal should be sufficiently ambitious that they provide multiple avenues for success without dictating direction (that decision should be left to the product design team).

For each goal, you want to write down one objective and one (or more) key results, often shortened to OKRs. OKRs provide a flexible hierarchy of objectives that cascade down through every team and individual, ensuring everyone knows what to focus on and that everyone's objectives are aligned.

- ◆ **Objectives** are inspirational (qualitative) goals that communicate the business outcomes you're looking to reach -- for your customers, product, or business. They're timebound, most often to a quarter, or sometimes to a year.

- ◆ **Key results** are the 3-5 indicators (often quantitative goals/KPIs) associated with each objective that help you track your progress and ultimately determine whether the objective has been met.

Let's look at our Salesforce competitor again. Gathering deep user insights has informed you that online retailers wear many hats, and are often so busy they forget to follow up with past customers.

Your strategic objective might be to increase the number of users reaching out to past customers, and your key result might include a 50% increase in the number of outreach messages sent in Q3.

As you come up with new strategic objectives, note them in your strategy document along with the key results you'll use to measure success.

But what happens when you inevitably have multiple competing objectives? Prioritization might be the biggest challenge facing product teams—but a strategic approach to prioritization can help. In fact, we wrote a whole book on the subject.

Learn more about strategic product prioritization here.

Outline your go-to-market approach

The final section of your product strategy document should provide an overview of how you'll bring your product to your chosen market. While more detailed information around pricing, packaging, partnerships, and other organizational and logistical decisions can be left out, it's important to describe your plan for reaching prospects.

Examples of strategic go-to-market approaches might include:

◆ Start with a small segment that has a big unmet need and build a really good solution for them. Grow into other segments with lower pain later. This would be the recommended approach for our Salesforce competitor.

◆ Start with a single need, solve it well, then expand to adjacent needs. Amazon only began selling millions of products after winning the online book sales market.

◆ Solve a small need of a large market for free, gain mass, and then monetize on bigger needs down the line. Evernote, Dropbox, and other B2C products rely on this strategy for growth.

Why list your go-to-market approach in your product strategy? Speed is crucial for the survival of a new product and you can't afford to waste time arguing about priorities. A clear outline for how you'll distribute your product will help you achieve organizational alignment on what you'll build next.
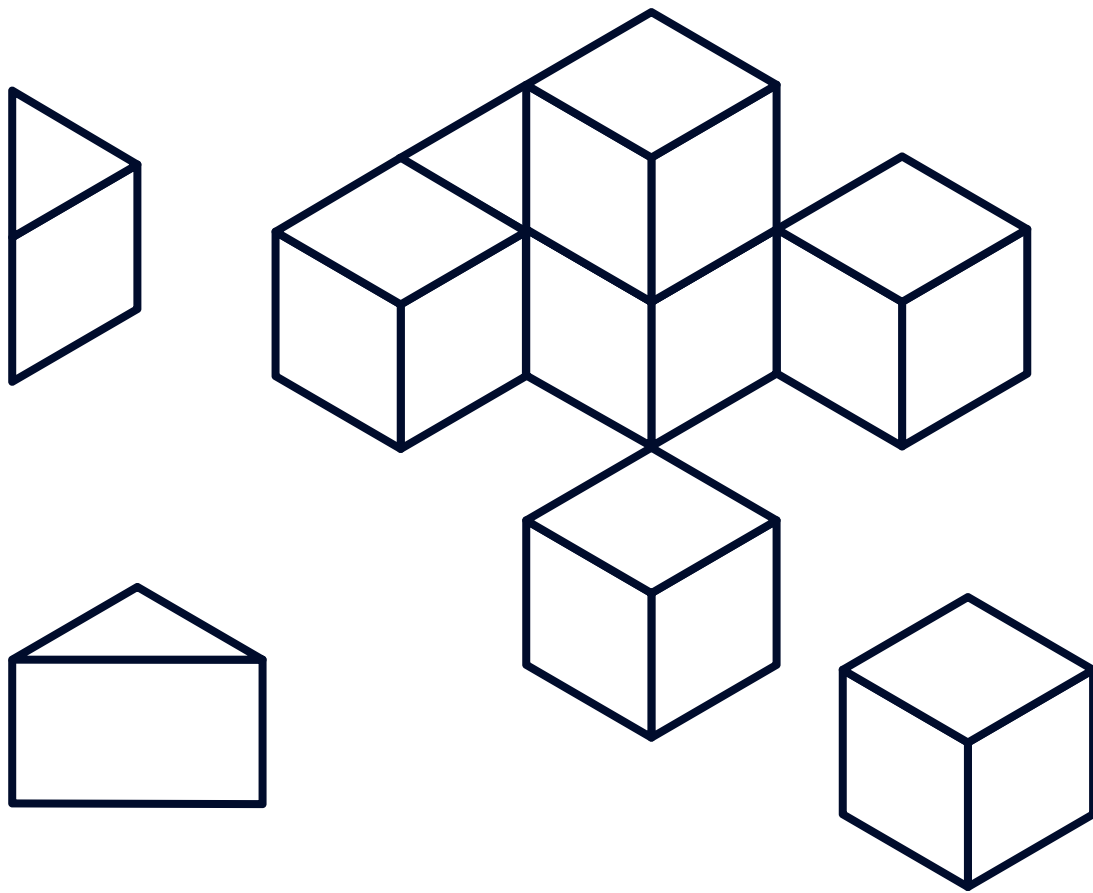
Rallying the team around an inspiring product roadmap

**Everyone understands and rallies around
where the product is headed and why.**

*"A good roadmap is a strategic communications tool, a statement of
intent and direction, and, done well, a way of rallying the whole
organization around the key problems that must be solved to
achieve your product vision."*

Bruce McCarthy,
Founder at Product Culture

The building blocks of excellent product roadmaps

Your roadmap should reflect desired outcomes

Roadmaps should reflect the desired outcomes the product is trying to achieve rather than just outputs. What exactly does this mean? Outputs are the stuff we produce for a customer (like car seats for babies) while outcomes are the difference our stuff makes (like keeping kids safe in cars). In an ideal world, the roadmap effectively communicates both outcomes (the why, and the problems we are solving) and outputs (the how).

Focusing on the "why" in your roadmap instead of just the "what" communicates more clearly where you are headed and what success looks like. An outcome roadmap is more stable over time with only the tactics employed to reach those outcomes shifting as different approaches are tested.

Still not sure if you're focusing on outcomes or outputs? Here are a few ways to tell, courtesy of Product Roadmaps Relaunched by C. Todd Lombardo.

Focusing on outcomes

- You focus on the problem space (missions, objectives, themes, problems to solve) rather than just the solution space (features)
- You tie your product initiatives back to a why
- You are open to adjusting your roadmap based on strategy or new learnings

Symptoms of shipping only outputs

- Stuff gets shipped, but there is little to no impact on goals and success metrics like OKRs or KPIs
- Implementing customer requests doesn't improve customer satisfaction
  Features released don't solve customer problems
- There's a lack of clear product vision and conversations focus on execution
  Product teams focus on delivery instead of discovery

How to focus on outcomes

- Align on common goals and priorities informed by product vision and strategy
- Change the conversation from outputs to intent and direction
- Identify the high-level objectives (needs, problems, jobs-to-be-done, themes, business outcomes), not just features
- Give guardrails, guidelines, goalposts, and allow delivery teams the room to decide how best to solve the stated problem
- Use leading indicators that tell you when you are done, rather than dates

Your roadmap is a product of cross-functional collaboration

Collaboration is one of the keys to roadmap success. It is a best-case scenario when stakeholders—leadership, sales, marketing, engineering, and more—understand what is on the roadmap and why. Even better, they are involved throughout the roadmap process, and thus know why their request has been included (or not).

Set up a regular meeting cadence, send emails updating the team about any changes, or give stakeholders access to the roadmap so they can self-serve anytime they'd like.

A step-by-step guide for building outcome-driven roadmaps

STEP 1

Align on product vision, strategy, and objectives

In the previous chapters, we covered in detail how to begin thinking about your product vision and strategy. Apply these learnings to complete this first step of the roadmap process.

"A lot of folks say their goal is to have a roadmap. And I say no — our goal is to have a good product strategy where we make hard choices and prioritize the right things. The roadmap is simply a reflection of this."

Rich Mironov,
Product thought leader

Prioritize what to put on your roadmap
based on desired outcomes

Once you align the product team behind a common product vision, strategy, and objectives, it's time to prioritize the products and/or features that will go on your roadmap.

The following inputs are a great place to begin

- Insights from prospects, colleagues, and customers
- Market segments that your product serves
- Date-based milestones, such as conferences, industry events, or marketing campaigns
- Capacity planning—what is the bandwidth of your team?

This step can become a little overwhelming given the sheer volume of information you're working with, as well as the competing needs of stakeholders from both in- and outside your organization.

Despite the challenges, gathering and synthesizing these inputs changes your thinking from "I know what we should put on the roadmap" to "We're putting this on the roadmap because of XYZ." Chapter 2 on gathering and leveraging deep user insights will greatly help with this step.

Build your roadmap to summarize your plan

Now it's time to create a working draft of your roadmap that communicates the products and/or features you are building, when you will be working on them, roughly when they will be released, as well as why they are a priority vs. all of the options that were considered.

To make your roadmap informative and easy to understand for your end audience, try including these elements

◆ **Timeline**

Even in the agile world, it is important to set expectations around when short-term, medium-term, and long-term features will roll out so other teams can plan around them. We're not talking about specific dates or deadlines. Instead, show a general time, such as the month.

◆ **Solutions**

Communicate what features you want to roll out in the above timeline. You can be as high-level or as detailed as you want, just explain why you are including each feature to give context.

◆ **Strategic context**

Let all teams know where the product is headed and why you're building these features next. Currently, only 44% of product teams are confident that their roadmaps reflect the strategic context behind what they're building. If some roadmap decisions are hard for certain stakeholders to swallow, strategic context helps them to understand the rationale behind tough trade-offs, even if they don't personally agree with it.

STEP 4

Communicate your roadmap and rally the team

The final step is to rally everyone around the roadmap and empower them to get the information they need. For example, you can set up a regular meeting cadence or send emails updating the team about any product roadmap changes. Here at Productboard, we host a weekly product call that is open to the whole company where we look at a roadmap tailored for a large audience.

Provide product roadmap access to all members involved in the product lifecycle—from development to go-to-market. An easy way to do this is through a product roadmapping tool like Productboard, where stakeholders can view and track changes at any time with a consistent, single source of truth.

With Productboard, you can manage access to the roadmap and hide certain features based on roles and permissions—every stakeholder's roadmap can be tailored to their exact needs.

Once stakeholders have access, they can click on features and releases to learn more about the context, like what problem you're trying to solve and which objectives you're addressing. They can even see the customer feedback behind each feature or release. This self-serve approach is much more powerful than a static slide that's quickly outdated and forgotten.

Keep in mind that roadmap needs vary from stakeholder to stakeholder. Using multiple roadmaps tailored to different audiences can be extremely helpful.

The importance of tailoring your roadmap to the right audience

Different types of roadmaps work best with different stakeholders. You can choose which views best support how you want to communicate and rally your organization around your product vision.

◆ **Use leadership roadmaps**, such as a release plan roadmap or an objectives timeline roadmap, to give senior executives and stakeholders a 1000-foot view of the product team's work. These high-level roadmaps provide quick summaries of your product direction. They can include information such as the market opportunity and profit and loss details with the ability to dive in deeper if needed.

◆ **Use company roadmaps,** such as release plan or release timeline roadmaps, to share more details with cross-functional teams like sales and customer success. These roadmaps allow other teams to set appropriate expectations with prospects and customers and contribute comments and relevant customer feedback.

◆ **Use delivery-focused roadmaps,** such as Kanban, sprint plan, or features timeline roadmaps with granular timelines for development teams that want to know the details. Communicate objectives, status/stage of development, areas of your product, and account for other work they need to support. Leverage dependencies and capture risks.

◆ **Use customer-focused roadmaps,** such as a release plan or a now-next-later roadmap, to customize a roadmap that zeroes in on features customers care about most. These roadmaps also communicate what's coming up next for your product to internal customer-facing audiences such as sales, customer success, and marketing.

Final words

Product Excellence is all about creating an environment where every part of the organization can execute together toward shared product goals.

As companies grow and scale, the path to Product Excellence can evolve. But with the right tools and systems in place, any organization can get the right products to market faster, exceed customer expectations, and make something truly excellent.

For more ebooks, blog posts, and webinars on the topic of Product Excellence, visit ProductExcellence.co

# Why a product management system is non-negotiable for product teams

These days, every department in the organization has a tool to help them succeed. Sales has Salesforce. Marketing has Marketo. Support has Zendesk and Intercom. Customer success has Gainsight. Engineering has Jira and Azure DevOps.

But up until now, product managers have been left hanging. Critical decisions have taken place in static spreadsheets, stale PowerPoints, disjointed feature request forums, and old-school feature backlogs stored in project management tools. All alongside dozens of systems used to capture user research and feedback (email, note-taking apps, CRMs, support platforms, survey tools, NPS tools, task management tools, Google Docs…the list goes on).

In this environment, it's unrealistic to expect any single person — let alone entire teams — to remember when a particular conversation about a feature request or product improvement took place or where they made a note of it.

Given the complexity of the product maker's core responsibilities — to arrive at a deep understanding of user needs, prioritize what to build next, and rally everyone around your roadmap — it's never been clearer that product makers deserve a solution of their own.

Enter the product management system. Every modern product organization urgently needs a dedicated system for capturing, sorting, and synthesizing information flowing in about the product (or products).

| Feedback | Insights | Prioritization | Roadmaps | Delivery |
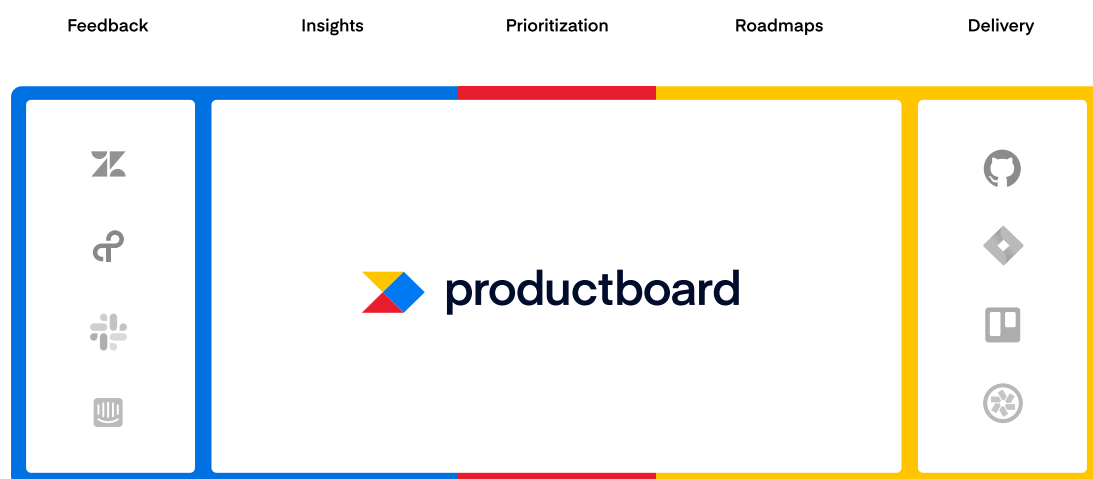
If you've already got a product management system in place, high five! You've taken the first step to becoming a customer-focused product organization. If this isn't something you and your team are using today, learn how Productboard can help.

About Productboard

Productboard is a customer-driven product management system that empowers teams to get the right products to market, faster. It provides a complete solution for product teams to understand user needs, prioritize what to build next, align everyone on the roadmap, and engage with their customers. Productboard is easy to use, enables company-wide collaboration, and integrates into existing workflows. Over 3,000 organizations around the world use Productboard to build excellent products.

Learn more at productboard.com