

The Product Discovery Playbook 2.0



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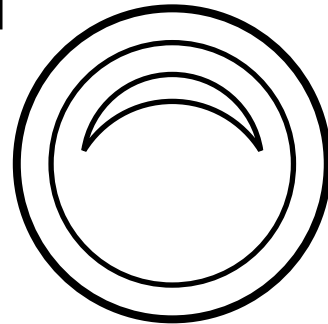
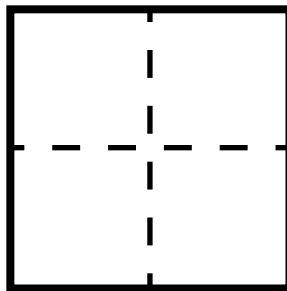
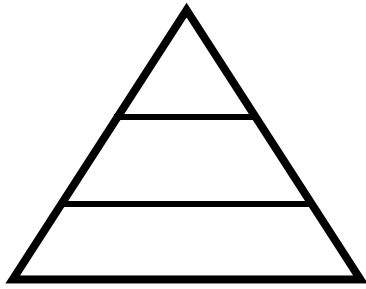
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CHAPTER 1

The fundamentals of product discovery

Why risk building the wrong products or features? With product discovery, you can ensure you're on the right track.

》 “There is nothing quite so useless as doing with great efficiency something that should not be done at all.”

Peter Drucker

What is product discovery?

When we say “product discovery,” we’re typically referring to the process of understanding customers’ pain points, identifying potential ways you could solve those problems, and validating whether the product you’re going to build will solve those problems.

Product discovery

A process that helps product teams **refine their ideas** by **deeply understanding real user problems** and then **landing on the best way to solve them**.

Gaining a deep understanding of problems and opportunities before you set out to solve them helps reduce risk and uncertainty around investing time and money. It also gives you a solid foundation from which to launch and grow your product and business once you’re ready.

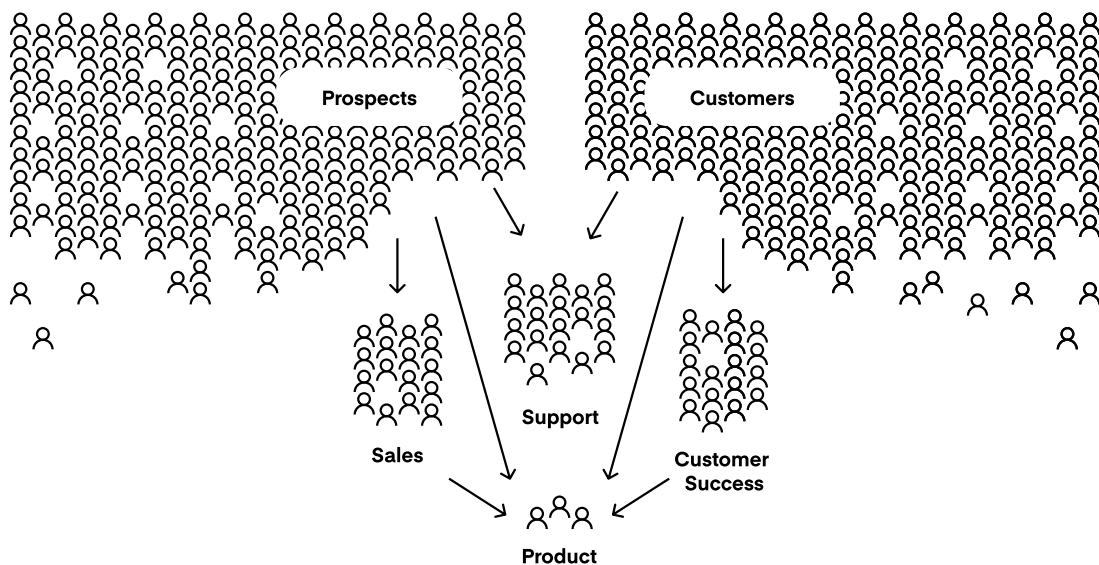
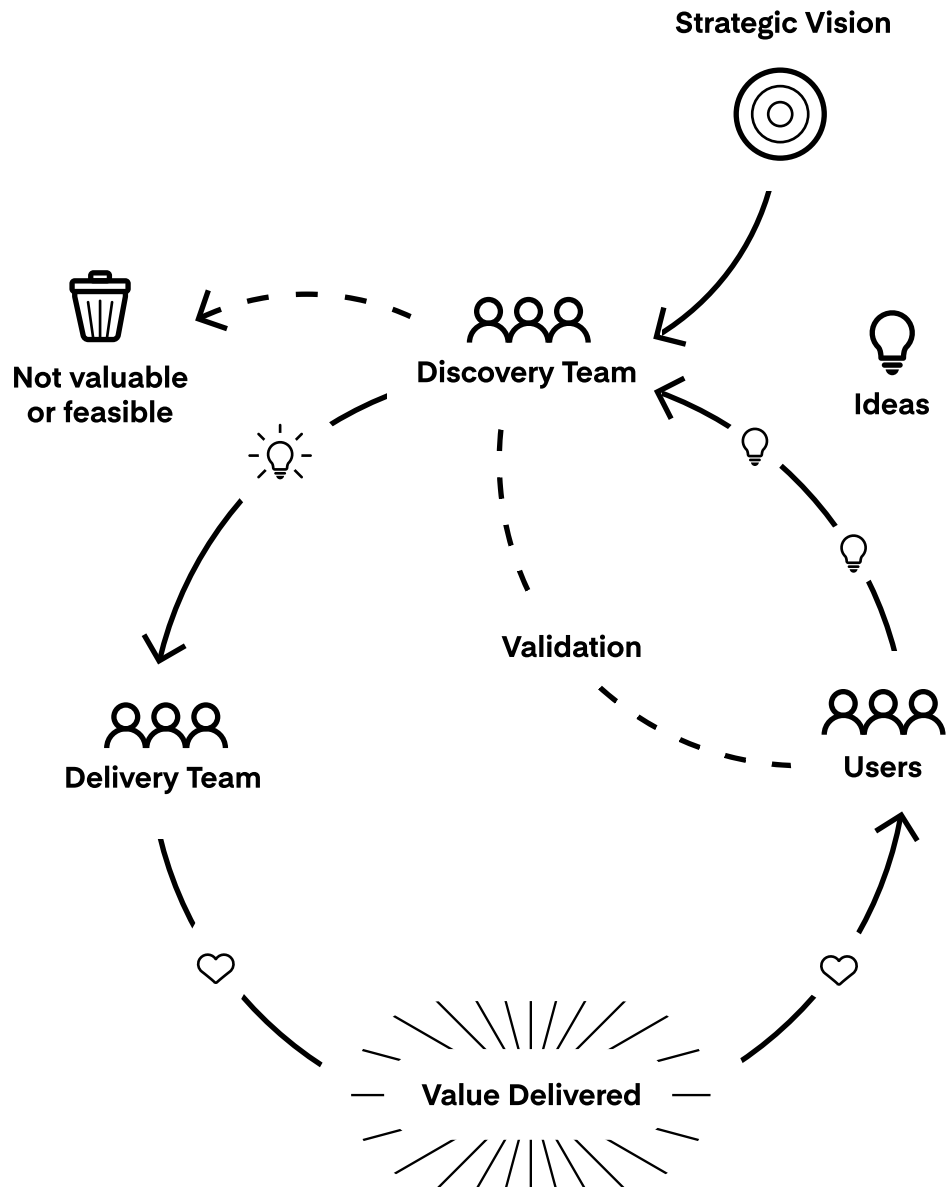


Image via [Productboard](#)

Why you need to be doing product discovery

Consider the typical responsibilities of a product manager:

- ◆ Processing inputs like feedback and feature requests
- ◆ Generating feature ideas based on user needs and strategic considerations
- ◆ Prioritizing the most valuable ideas, pushing them to the dev team’s backlog
- ◆ Discarding low-value or infeasible ideas



Adapted from [Kevin on Code](#)

But there's a problem:

Most startups spend more time focused on solutions rather than problems, but developing solutions in full before sharing them with users is risky and expensive.

Users have complex needs with subtleties even they may not fully grasp. Teams who don't take the time to understand the problem they're solving risk biasing their work towards their internal perspectives over true customer needs, or biasing towards well-understood solutions that still may not be usable or useful.

Data from CB Insights shows 42% of failed startups cite a lack of market need as the top reason behind their failure.

Either way, building the wrong thing is expensive—yet many teams only discover they've made a false assumption about what users really need after launching a new product or feature.

That's where product discovery comes in

Product discovery doesn't replace product delivery—it complements and precedes it.

Here's how the legendary Marty Cagan describes it:

“First, you need to discover whether there are real users out there that want this product... Second, you need to discover a product solution to this problem that is usable, useful, and feasible.”

Marty Cagan

See if any of these sound familiar:

- ◆ Features you spent a lot of time on in the past that ended up having fairly low usage among your target customer base
- ◆ Times where users might have told you "Hey, you built feature B but what we really needed was feature A..."
- ◆ Entire products that were a flop

Product discovery can keep you from repeating the mistakes of the past. By investing more in researching and validating your ideas upfront before sending them to delivery, you avoid wasting time and money building products customers don't want or need.

Who should be involved in product discovery?

The best product discovery doesn't happen in a vacuum. You should aim to involve the entire product team and key stakeholders from your organization in product discovery efforts from the very beginning.

Tim Herbig recommends breaking your discovery team into three groups:

- ◆ **Permanent collaborators:** Product managers, UX designers, user researchers, and engineering leads
- ◆ **Temporary collaborators:** Developers, product leadership, customer support staff, sales
- ◆ **Supporters:** Executives, other product teams, infrastructure teams

While permanent collaborators drive ongoing discovery efforts, temporary collaborators and supporters may be more involved in particular steps. For example, key executives may attend kickoff meetings but would not be involved in prototyping sessions.

Involving the right people from across the organization in product discovery helps unlock insights that might otherwise be missed and empowers the core product team to access the customers and resources they need to validate their ideas.

When should you do product discovery?

The short answer: constantly.

At Productboard, we're big proponents of using continuous product discovery to reduce the risks around every product and feature we set out to build. Instead of treating product discovery as a one-and-done task or switching back and forth between discovery and delivery, we encourage teams to adopt a structure where the two processes can overlap and intertwine with each other.

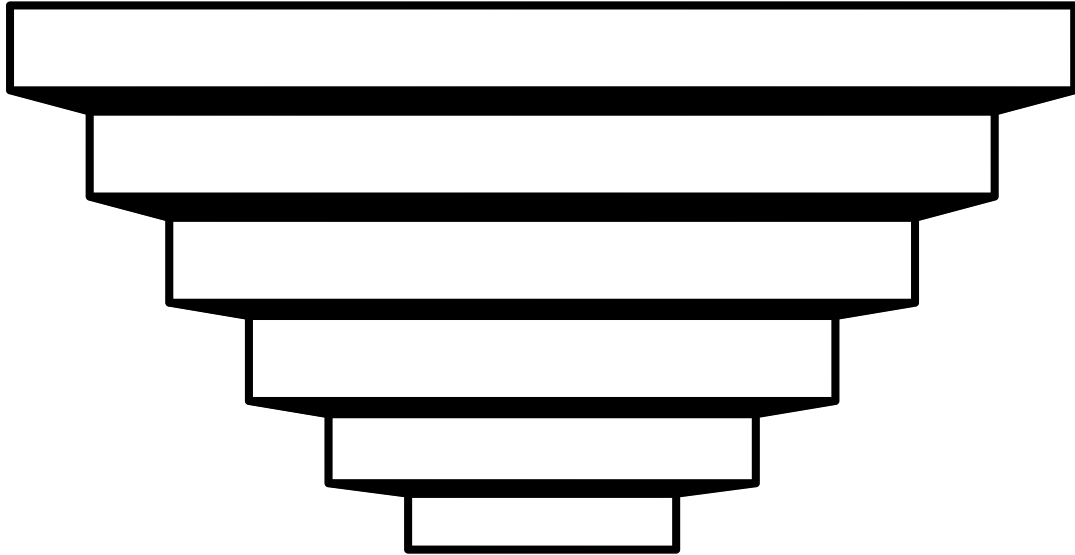
If you're not doing product discovery, you should be. If you are doing discovery, read on to discover how you can do it quickly, effectively, and build the right products in less time.

Product discovery is about more than just tools and frameworks

While popular tools and frameworks like Lean Startup and Jobs to Be Done can be useful for lending structure to a sometimes-messy process, they are only a small part of successful product discovery.

Other important factors:

- ♦ **Psychological safety:** Team members must feel empowered to share thoughts, ideas, and opinions—regardless of how controversial—without fear of losing their jobs
- ♦ **Team structure:** Leadership must empower teams with both tooling and an organizational infrastructure that allows for both open-ended discovery and focused delivery to happen in parallel
- ♦ **Clear outcomes:** Successful product discovery begins with defining outcomes you'd like to achieve



CHAPTER 2

A step-by-step guide for conducting product discovery

Product discovery is about promoting an environment of learning so you can improve your product incrementally and consistently.

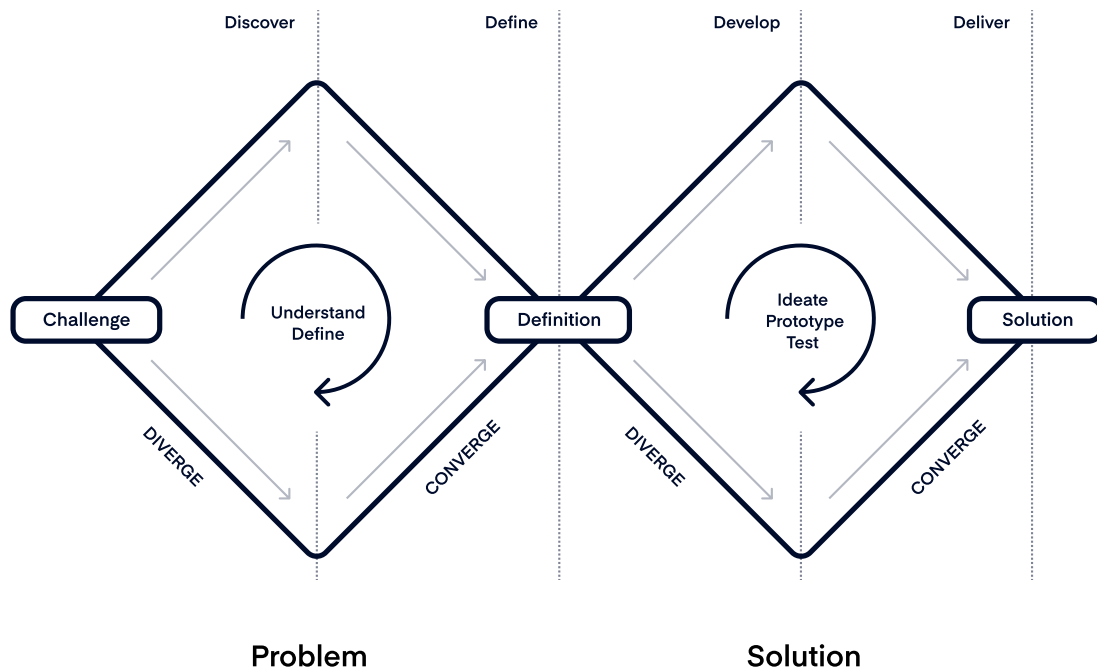
For new product teams, the product discovery process can feel like a bit of a mystery. There's no worksheet you can fill out or a box you can check.

While there's definitely an element of art to successful product discovery, the process itself is fairly concrete. Product discovery is about finding smart ways to mitigate risk, turning those techniques into habits, and building a process that works for your team and company.

How we conduct product discovery at Productboard

Here at Productboard, we use the popular [Double Diamond approach](#) to understand customer needs and explore innovative ways we can solve their problems.

Teams first begin by exploring the problem space—talking to customers and prospects and exploring user needs before nailing down the precise problem users are experiencing. Once teams understand how customers feel and how they're currently tackling those problems, they propose potential solutions and validate their ideas before landing on a valuable solution.



The double-diamond approach to product discovery

The four phases of product discovery

1. Uncover the underlying challenges
2. Interpret your findings and re-frame the problem
3. Identify creative solutions
4. Collect feedback and validate your solutions

Do we need to do product discovery for every product or feature?

Not necessarily. The goal of product discovery is to reduce uncertainty—therefore the amount of time you spend researching problems and solutions should depend on how much uncertainty surrounds your chosen problem.

If you're familiar with Productboard, you might assume that after building roadmapping solutions for over five years we'd know pretty much everything there is to know about roadmaps. Not true. We spent many hours running discovery around some of our recent timeline roadmap enhancements—particularly the most granular aspects like how features and objectives shown on the same timeline should interact.

We conduct discovery for pretty much all major features (and many minor ones) even though we're generally familiar with our market. Senior product manager Philipp Krehl sums up the problem well in [his post](#) for Mind The Product: "If the uncertainty you face is too high, start with product discovery and not with product delivery."

STEP 1

Uncover the underlying challenges

Product discovery begins not with the how, but the why. Products can only be successful when they solve a burning user problem, so you should begin by understanding the underlying challenges and struggles your potential customers face. Only then can you clearly define the problem you're solving.

This early phase is about taking a big step back, questioning your assumptions, and finding out what the need really is. Sometimes that might mean starting with a problem or opportunity, but frequently you're starting with a popular feature request or solution idea.

Let's say Productboard was working on ways of helping mid-market companies to better understand their customers' burning pain points. Our problem hypothesis might look something like the following:

》 *Mid-market companies often struggle when trying to communicate with multiple audiences at once.*

We might consider starting with some of the following qualitative product discovery tools:

- ◆ **Existing qualitative inputs:** Support tickets, transcripts from sales calls, past user research, feature request forums, and customer emails are all filled with valuable insights on the challenges prospects and customers face every day.
- ◆ **Customer interviews:** Speak to existing Productboard customers about their everyday challenges surrounding customer interviews.
- ◆ **Competitive research:** Reach out to users of competing products to ask about how those products aren't meeting their needs, or demonstrate how competitors' products are already solving similar problems.
- ◆ **Observation:** Use screen-sharing tools to observe users as they perform customer interviews, looking for places where they struggle.
- ◆ **Direct outreach:** Communicate with customers in person, over the phone, or using customer communication tools to ask why they're performing certain actions in our system.
- ◆ **Journey mapping:** Illustrate the steps people currently take to solve their problem, along with how they feel at various points along the way.
- ◆ **Focus groups:** Hold conversations with current or prospective customers to understand their attitudes about customer discovery.

STEP 2

Interpret your findings and re-frame the problem

As we progress through each discovery activity, we'll uncover more information about the problems users face. As we isolate specific problems, we aim to distill our learnings down to one single sentence that covers the entire problem that can attainably be solved.

Going back to our mid-market example, the broad challenge can be re-framed and narrowed down to the following:

⌋ *Mid-market companies experience limitations with Productboard's public Portal when trying to communicate with multiple audiences at once.*

At this point, we can begin to understand the scale of the problem and narrow down which problems are worth solving:

- ◆ How big is the pain that these users are experiencing?
- ◆ How much value will tackling this pain create for them?
- ◆ How does this value compare to other problems we might tackle?
- ◆ Which problems should we prioritize and which should we set aside?

Distilling your problem statement down to a single sentence helps you clearly communicate the challenges users face to your team, helping to keep them aligned around a common cause. If you formulate the problem loosely, it will be difficult to keep everyone focused.

STEP 3

Identify creative solutions

Now you have a clear understanding of your users' needs and the problem you're trying to solve, it's time to get creative. Once again, it's time to head back into divergent thinking, listing out all your ideas and potential ways you might solve your customers' burning problems. Sometimes this might involve brainstorming entirely new products or features, but oftentimes we're merely checking our assumptions on a feature that can only take on a few different forms.

- ◆ Team brainstorming
- ◆ Mind mapping
- ◆ Storyboarding
- ◆ Crazy 8's
- ◆ "How might we" questions

After ideas are proposed, your team can gauge their potential impact and value, assess any risks around feasibility, then prioritize which to prototype and present to customers. Marty Cagan identifies four big risks in product management:

- ◆ **Value risk:** Will our customers buy this solution? Will our users actually use it?
- ◆ **Usability risk:** Can our users figure out how to use our proposed solution?
- ◆ **Feasibility risk:** Can our engineers build what we need with the time, skills, and technology we have?
- ◆ **Business viability risk:** Will this solution also work within the various other aspects of our business?

If any unknowns around these questions still remain, you should capture them as hypotheses or open questions that must get resolved throughout the remainder of the discovery process. Questions around value will be answered in the next discovery phase by speaking with customers. Other questions will need to be answered by working with internal teams: design teams can assist with usability questions, engineering with feasibility, and legal, marketing, and sales with business viability.

For our mid-market example, we might consider the following solution:

》 *Let's enable customers to build multiple Portals so they can share/validate their ideas with each of their audiences differently.*

STEP 4

Collect feedback and validate your solutions

Now we're finally ready to present our proposed solution to customers and stakeholders. The goal: to build and demonstrate the smallest possible thing that will help you understand whether users would use a particular solution to solve their problem.

At Productboard, we're big fans of using prototypes to quickly bring ideas to life. Prototypes come in many different forms, from whiteboard sketches to high-fidelity interactive mockups. The type of prototypes teams choose to build depends on what they are trying to learn, what needs to be tested, and what open questions they still have.

To test this, we could build a low-fidelity interactive prototype of a tool that lets customers create multiple Portals so they can tailor their communication to each of their different audiences. We could demonstrate our proposed solution to both customers and internal stakeholders to gather feedback and determine whether our solution is feasible, viable, and valuable. If feedback is positive, the prototype itself can serve as a feature spec when the feature is sent along to the delivery team, saving additional effort down the road.

The goal of product discovery? Mitigating risk

The goal of product discovery is not necessarily to ship features. Rather, it's to promote an environment of learning that will help you prioritize the most learning for the least amount of effort, helping you consistently and incrementally make your products and features better.

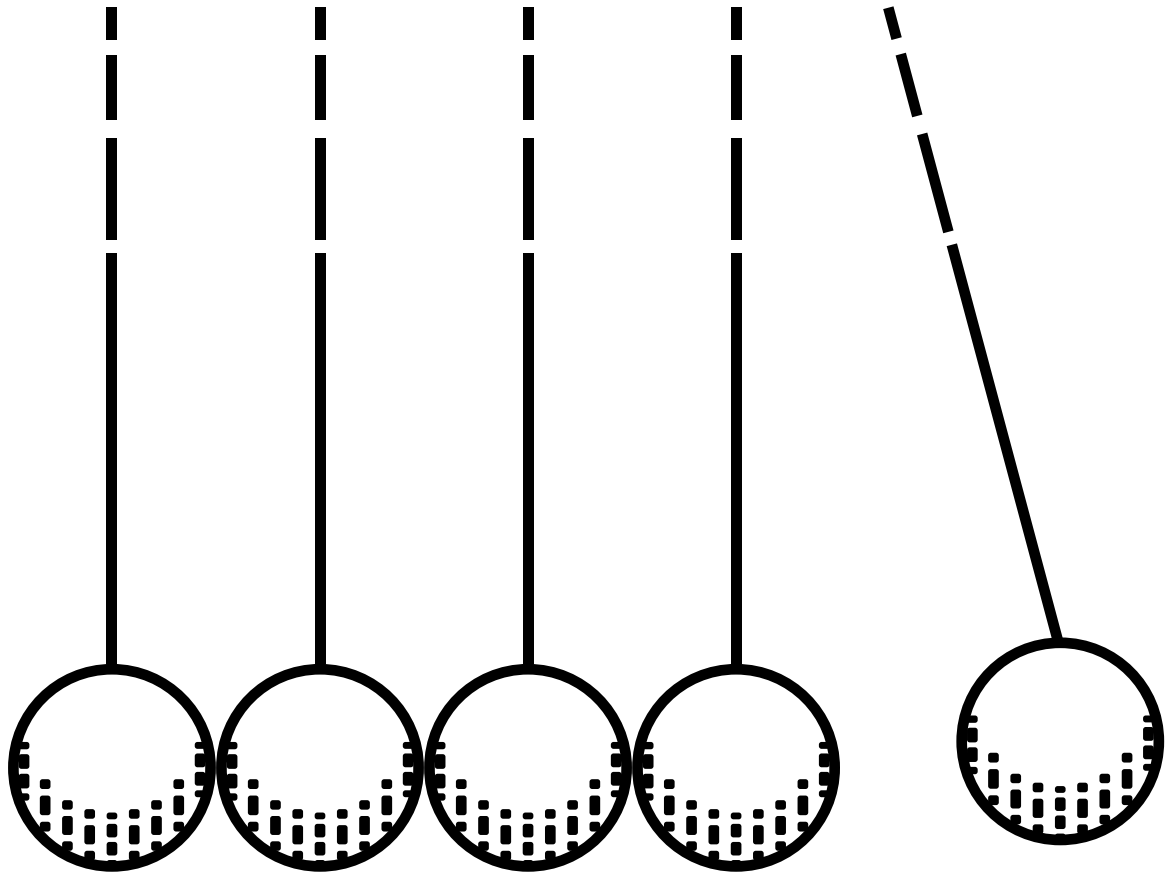
Ask yourself: what's the smallest thing we can do today to learn something new that would guide us in making decisions?

By using this framework and following its steps, product teams can create an environment of continuous learning that leads to truly excellent products.

Remember: the discovery process isn't always smooth. Product discovery isn't a linear process of going through two diamonds before arriving at a solution—it's an iterative process that changes as you learn more about user needs and reduce uncertainty.

At Productboard, we regularly have teams exploring the problem and solution space at the same time, or teams jumping back to the beginning as they learn more about the underlying problems users face. After all, the product team wants to be sure that they deliver the right thing to users.

(In case you were wondering, we did end up launching the ability to create multiple Portals in Productboard as a real feature!)



CHAPTER 3

3 common product discovery mistakes to avoid

Three mistakes that we often see in product discovery are:

1. Jumping to solutions before nailing down real user problems
2. Underestimating the importance of working with stakeholders
3. Not involving engineers early enough

Dive into details of each below and learn how to avoid them.

MISTAKE 1

Jumping to solutions before nailing down real user problems

Unless the problem is framed in simple, actionable terms, there really shouldn't be any focus on solutions yet.

The average product team spends 80% of their time in the solution space and 20% in the problem space. Ideally, that time should be split 50-50.

Product thought leader [Rich Mironov](#) describes the consequences of this mistake:

“A lot of organizations skip user research, testing, and validation and get right into solutions and what they want to build. The result is a struggle to find a meaningful market that will use and pay for the product.”

Rich Mironov

At Productboard, the team aims to define exactly what they want to solve in a short, succinct statement—the more specific, the better. To accomplish this, it's often necessary to refine their understanding of the problem through several iterations.

Here are some examples of user problems the team has narrowed down while conducting discovery:

- ◆ Makers from multi-team organizations who process insights are reading notes that are not relevant to their product area.
- ◆ Feature details of customers with multiple products [in Productboard] contain fields that are not relevant to the feature. It makes it hard to navigate and creates an opportunity to make a mistake.

MISTAKE 2

Underestimating the importance of working with stakeholders

It can be tempting for product teams to plow ahead with the discovery process without involving stakeholders from both in and outside the organization. This can cause big problems further down the road for a few reasons:

- ♦ **Product affects everyone.** Everyone's success—from top-level executives to individual contributors—is tied in one way or another to the product. Thus, it makes sense to consider diverse needs.
- ♦ **Stakeholders have valuable insights to offer.** Customer success and support, for example, interact with customers day-to-day. Sales is in constant contact with prospects and has an excellent pulse on the market. This expertise should be leveraged, not ignored.
- ♦ **Product teams need stakeholder buy-in.** Product teams need the support of stakeholders to push through major product decisions. Including stakeholders from the get-go ensures that time and resources don't go to waste.

Ideally, all stakeholders should have their needs considered during the discovery process so that when it comes time for delivery, they know why their request has been included (or why not).

MISTAKE 3

Not involving engineers early enough

“If you're just using your engineers to code, you're only getting about half their value.”

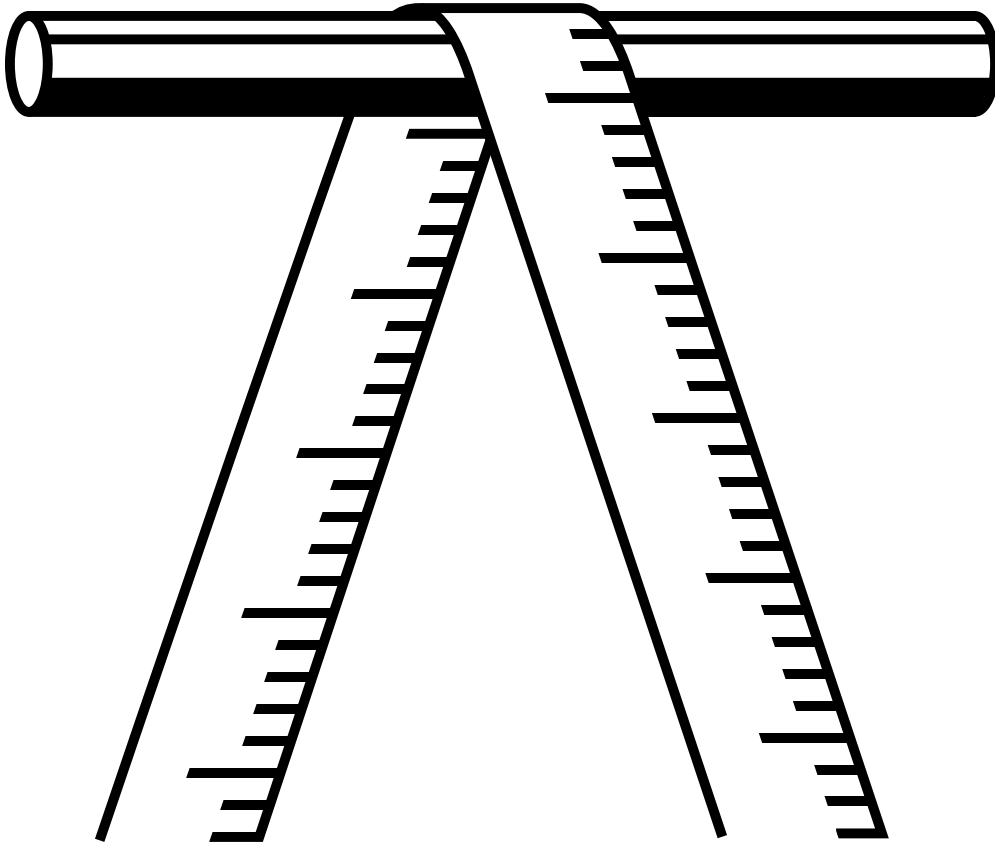
Marty Cagan

Too often, engineers are only brought into the fold during the delivery phase. After all, that's when their skills are needed to turn ideas into real-life products and features. This is problematic for a number of reasons.

First, engineers won't fully understand the problem they are trying to solve because they didn't participate in the process of defining it. They may question why a problem was chosen in the first place, and product teams end up justifying their decisions rather than getting things done.

Second, product managers will be their only reference for understanding users. Thus, when it comes to identifying solutions, engineers may come to completely different conclusions than the product team because they did not play a hands-on role in getting to the bottom of user insights. Essentially, the product team will be two steps ahead and the engineers two steps behind.

Third, the product teams risk missing out on great ideas if engineers aren't looped in. Engineers are often the smartest people in the room. They provide valuable technical insights, understand how to utilize existing functionality and reduce effort, and can help to quickly build a proof of concept.



CHAPTER 4

How a product management platform can help you conduct better product discovery

A purpose-built product management platform can help you streamline and structure your discovery activities.

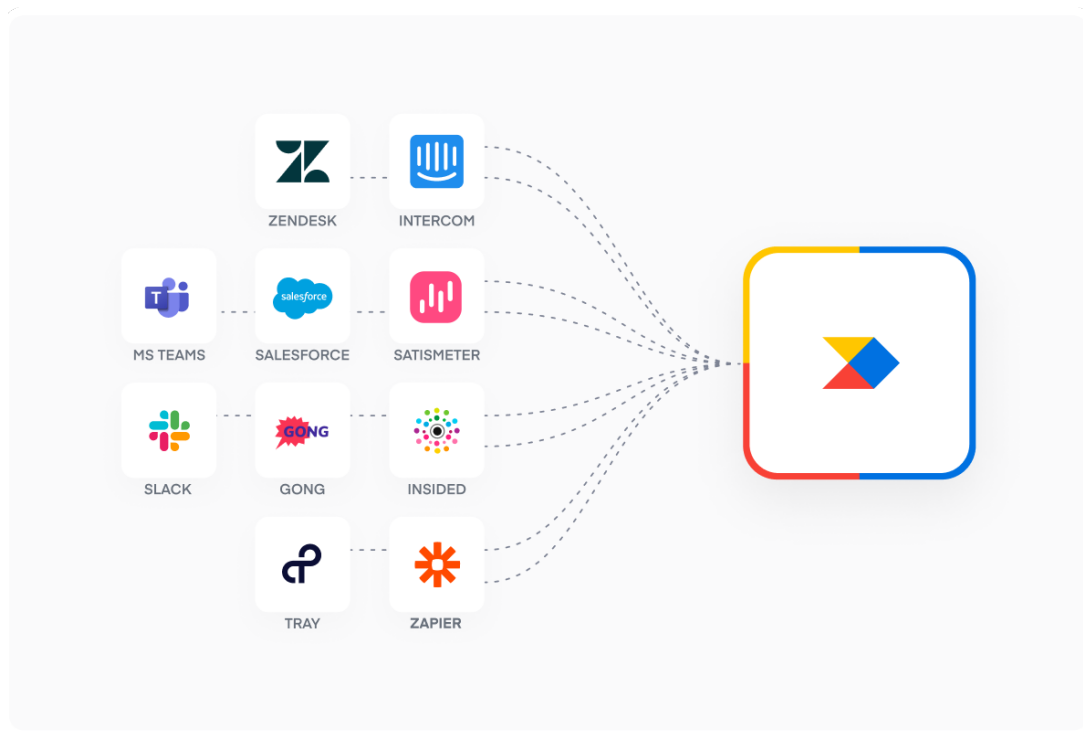
Let's take a look at some of the main ways Productboard supports product discovery.

STEP 1

Collect feedback from customers and segment trends and themes in Insights

Without a dedicated system for capturing user feedback, you usually only have time to explore a few select ideas to learn more about underlying needs, if at all. This means you risk missing opportunities, or else prioritizing (or even working on) features without a firm understanding of the real problem you're solving.

On the **Insights board in Productboard**, you have a centralized feedback repository for collecting feedback on an ongoing basis. And Productboard's numerous integrations enable you to source feedback from all the places you work, such as support platforms, CRMs, messaging solutions, sales tools, and CRMs.



Capture customer feedback from a **broad range of sources** in Productboard.

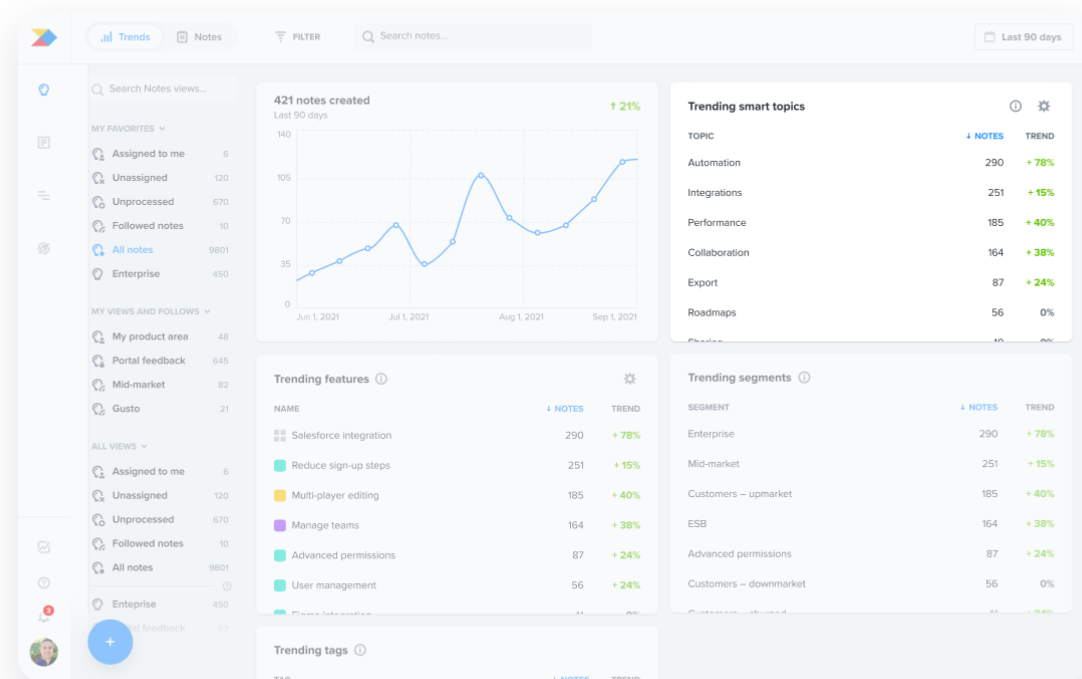
Having one centralized location for collecting feedback makes life easier for everyone in the product organization.

“Now, everyone understands there’s one unified location in Productboard where all customer and stakeholder feedback lives. Additionally, teams have clear expectations on how data should be used and triaged.”

Shira Bauman, Senior Manager of Product Operations at Zapier.

You can then review feedback to identify interesting user insights and link them to related feature ideas, or take advantage of Productboard’s intelligent capabilities for automatically distilling trends in large volumes of feedback—called “smart topic detection.”

The ability to pull out trends and themes as well as segment feedback in a meaningful way allows you to identify relevant and actionable insights. This is how teams can do continuous discovery in a scalable way and ensure that every customer conversation or touch-point contributes to shared learning across the organization.



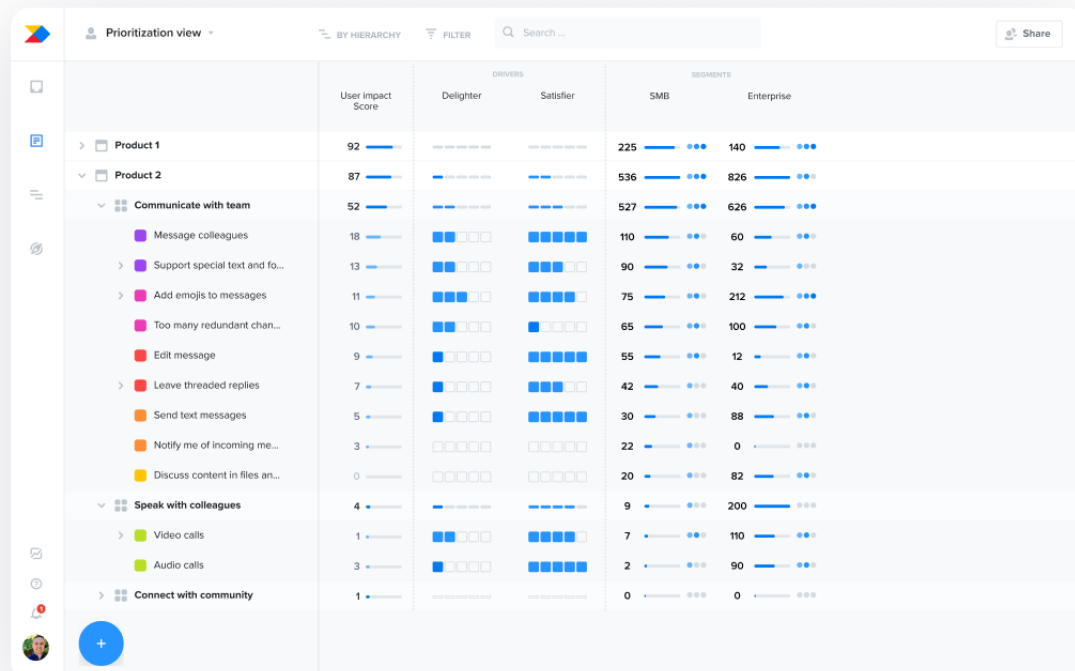
While the product team is likely to spend a substantial amount of time reviewing feedback and analyzing trends, product leaders can also benefit from periodically checking the Insights trends dashboard to monitor the topics trending in customer feedback.

STEP 2

Narrow in on a few ideas and filter them on the Features board

For many, product discovery really begins when you start narrowing down the user needs you're interested in pursuing and researching them further.

Productboard helps you do this with User Impact Scores, which shows you the features that are requested by the most users. You can even filter for individual customer segments, e.g. "Show me the top-requested features by Enterprise companies with more than 1,000 employees paying us more than \$5,000 a month."



The Features board allows you to sort ideas by User Impact Score and by what matters to specific segments, as defined by data from CRMs and product analytics solutions like Amplitude and Mixpanel.

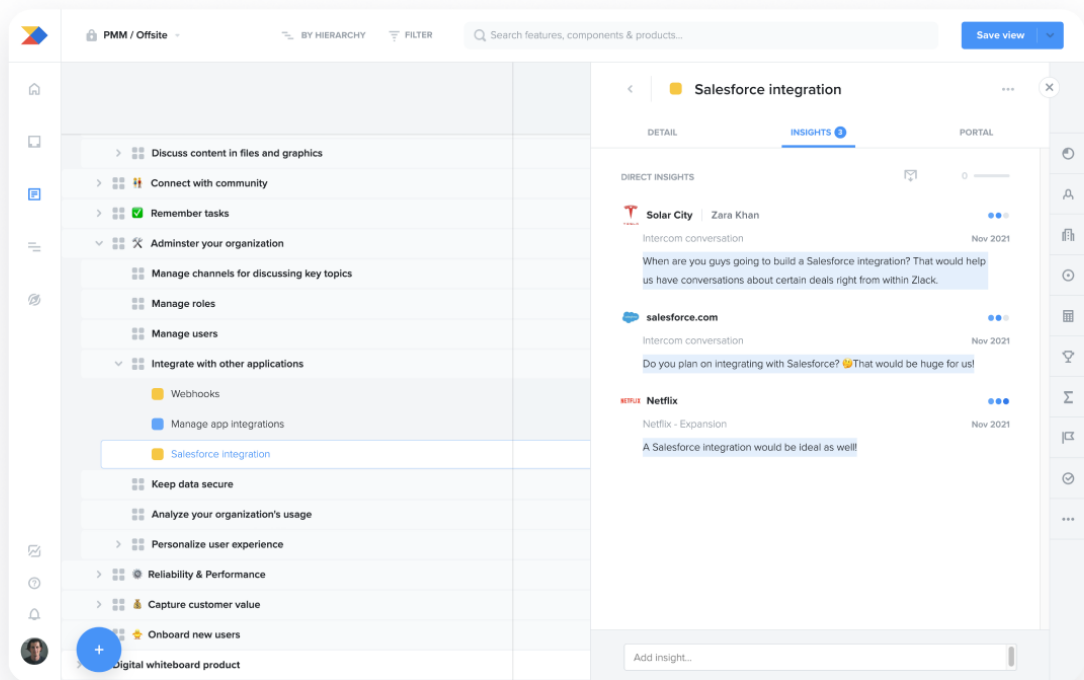
Organizing your feedback this way brings a whole new perspective to product discovery. Ted Burns, VP of Product at digitally connected inhaler company [Propeller Health](#), has seen this firsthand. After adopting Productboard, product managers at Propeller Health observed nearly 40 user requests for a notification that would show clinicians when a patient had first synced their Propeller inhaler sensor with their phone.

STEP 3

Get the full context of feature requests whenever you need it

Next, as you zero in on the ideas you want to discover further, Productboard helps by showing all the user insights associated with every feature idea. Reviewing these insights can give you a lot of clues into underlying user needs— especially because you can navigate from each insight back to the original source of the feedback.

For example, let's say you have one insight that's linked to a feature idea that says "User wants a Salesforce integration." When you navigate back to the full feedback captured on the Insights board (which might be something like a support ticket sent into Productboard from Zendesk), you can see even more context. The user says their real goal is to help sales reps capture feature requests from prospects and send them to the product team.



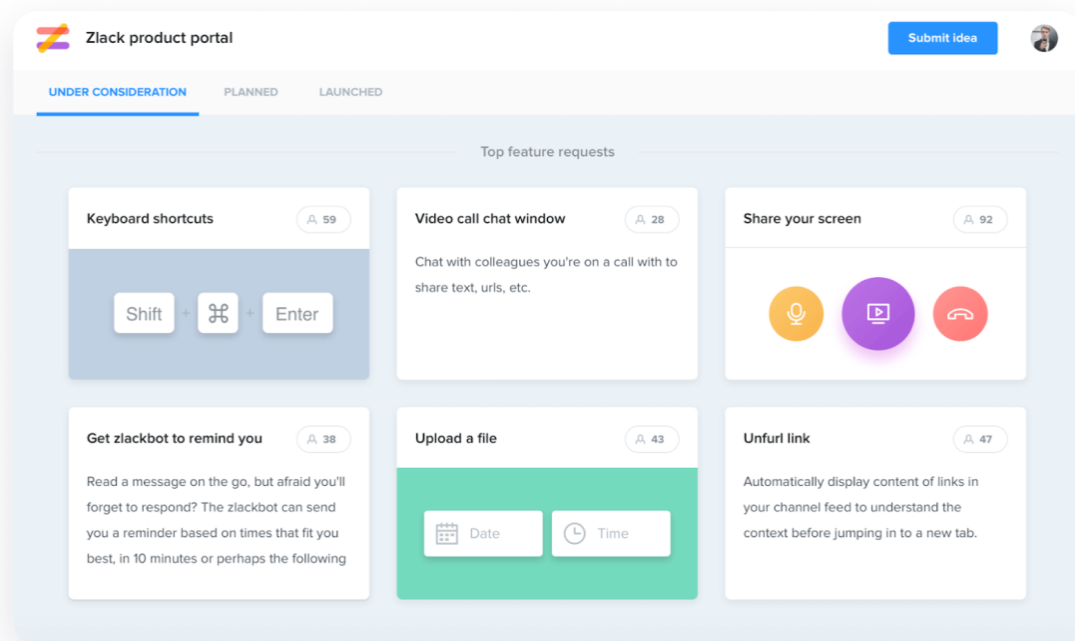
When you're interested in learning more about a feature request from a customer, you can navigate back to their original request to get more context.

What if you want even more feedback? Easy. You know who this user is and have their email address captured in Productboard, so you can easily follow up with them to ask more questions or schedule a conversation. And you can do the same with everyone else who has expressed a similar need in the past since their insights are also linked to this feature idea in Productboard.

STEP 4

Gather more feedback from stakeholders in the Product Portal

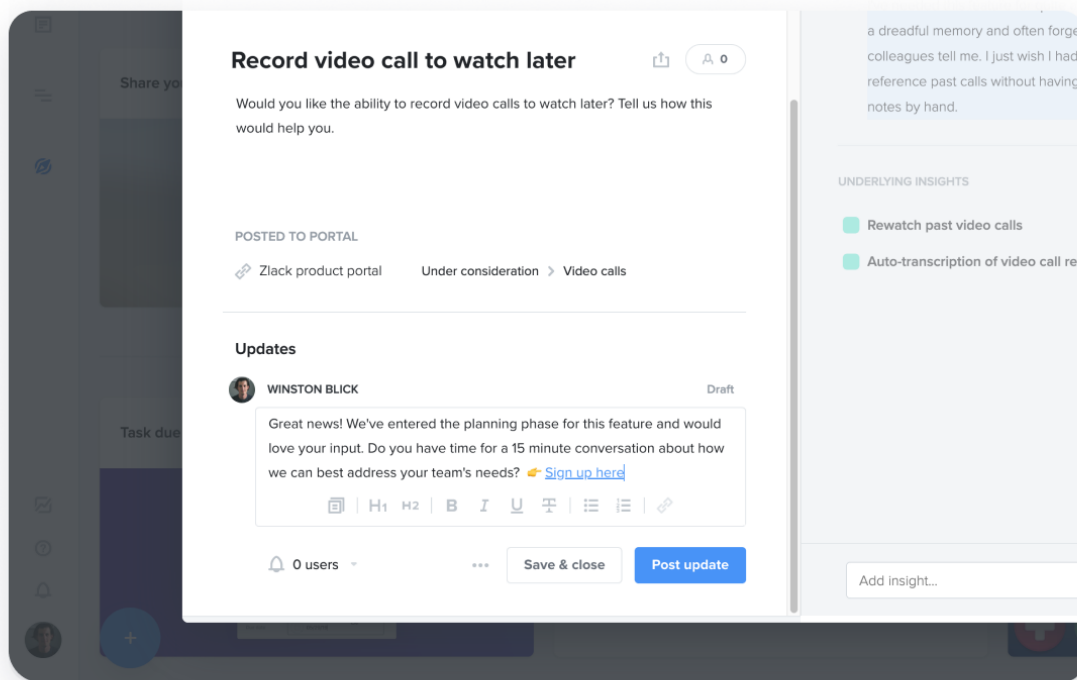
The Product Portal (we also just refer to it as “the Portal”) is an interface you can share with colleagues and customers to showcase what’s planned, collect votes and feedback on ideas, and source new requests. It’s a great way to both earn buy-in for where your product is headed and validate feature ideas before you work on them.



The Portal continuously collects customers’ feedback and votes in the background and you can refer to it anytime you want to explore an idea further.

The Portal allows you to do this type of discovery very efficiently, at scale. Since the Portal is continuously collecting your stakeholders’ votes and feedback on feature ideas for you, you have far more user insights already on hand when you decide to explore any ideas further. You can also use the Portal to easily follow up with every user who has ever expressed a need for a feature, whether they did so via the Portal or through some other feedback channel like email, a Gainsight PX in-app feedback widget, or Zendesk support ticket.

With the Portal card update feature, you can email all users who’ve expressed a need for some feature. And you can even include a call-to-action to provide more information about their need, provide feedback on early feature designs, sign up for a product discovery interview, or join a product beta. This can be done by including a link to a Google form or survey in the update you email out.



In the Portal, you can follow up with all customers who've expressed a need for a specific feature and even prompt them to provide more feedback, participate in a discovery interview, or join a product beta.

This process creates a virtuous cycle where customers are much more likely to evangelize your product and provide more feedback once they see that you're actually listening and acting on the feedback they've already shared.

STEP 5

Extend product discovery beyond feature launch

Usually, product managers consider product discovery as a process that ends when you actually begin working on a feature, or certainly when you deliver the feature to customers. But what if it didn't end there? What if you could follow up with customers immediately after a feature goes live, as they're using the feature for the first time?

In the near future, Productboard will help teams understand the impact of recently shipped features through SatisMeter, a survey solution and feedback platform recently acquired by Productboard. This is just one more way you'll be able to collect feedback on features and rapidly iterate on early versions of a solution to ensure you're solving customer needs in the best possible way.

How would you feel if you could no longer use this feature?

☐ Very disappointed

☐ Somewhat disappointed

☐ Not disappointed

☐ I do not use this service anymore

How could we improve this feature for you?

Next

SatisMeter allows you to quickly survey and collect feedback from customers and can be used to extend discovery activities after you've launched a new feature.



About Productboard

Productboard is the leading customer-centric management platform, helping product teams to deliver the right products to market faster. Over 5,400 modern, customer-driven companies—like Zoom, UiPath, JCDcaux, and Microsoft—use Productboard to help understand what users need, prioritize what to build next, and rally everyone around the roadmap. With offices in San Francisco, Prague, Vancouver, Dublin, and London, Productboard has raised \$262 million in funding from leading investors like Dragoneer, Tiger Global, Sequoia Capital, Bessemer Venture Partners, Kleiner Perkins, Index Ventures, and Credo Ventures.

Learn more at productboard.com and follow @productboard