



Roadmapping that Works

Webinar on April 25, 2014

Presented by Jason Tanner

CEO, Applied Frameworks, Inc.

Agenda



- Why most roadmaps fail
- Different types of roadmaps
- The best roadmap for product planning
- How to collaborate to build a product roadmap
- Questions & Answers

Roadmaps Bridge the Gap between



Vision

and

VERSIONONE Enterprise

Backlog

Item	Summary	Priority	Due Date	Status
Getting Started	D-10189	AS	2023-10-20	Not Started
Introduction Overview	D-10190	AS	2023-10-20	Not Started
Planning Overview	D-10191	AS	2023-10-20	Not Started
Getting Started	D-10192	AS	2023-10-20	Not Started
Introduction Overview	D-10193	AS	2023-10-20	Not Started
Planning Overview	D-10194	AS	2023-10-20	Not Started
Getting Started	D-10195	AS	2023-10-20	Not Started
Introduction Overview	D-10196	AS	2023-10-20	Not Started
Planning Overview	D-10197	AS	2023-10-20	Not Started
Getting Started	D-10198	AS	2023-10-20	Not Started
Introduction Overview	D-10199	AS	2023-10-20	Not Started
Planning Overview	D-10200	AS	2023-10-20	Not Started

“

”

Plan to Re-Plan

Applied Frameworks mantra for Agile
product management

How do we get from...

Here

to

Here?

Chartering Worksheet [insert date worksheet completed]

Project Name:	Scrum Master:
Product Owner:	Coach:
Other:	Other:

Planned Release Date: _____
Code: _____
Version: _____

Value Proposition:
[Clearly articulate the critical objective of the project such as reduce call volume. Ideally, include economic benefit relative to cost, e.g. this \$1M initiative will save \$5M.]

Business Goals [with associated Business Benefits]:

Key Stakeholders: (Primary/Impacted/Consulting/ Informed)
(Project Sponsor) (Business Owner)

Core Team Members:
Name | Role

Personas:

Trade-offs	Fixed	Flexible	Open	Architectural Impacts (and/or High Level Architecture):
Scope				
Schedule				
Resources				

Risk Profile

	High	Medium	Low	System Requirements [Can include Performance Attributes]:

Issues and Risks:
Date: _____
(Can include target schedule, budget, resources, etc.)
(Can include project delay costs/month)

Boundaries:
(Identify what is out of scope for this charter.)

Constraints:

Dependencies:

Assumptions:

References:
(List all documents that support this charter. Provide links to documents, e.g., RFPs.)

Implementation/Release Strategy:
(Pilot, single release, phased implementation, multiple releases, etc.)

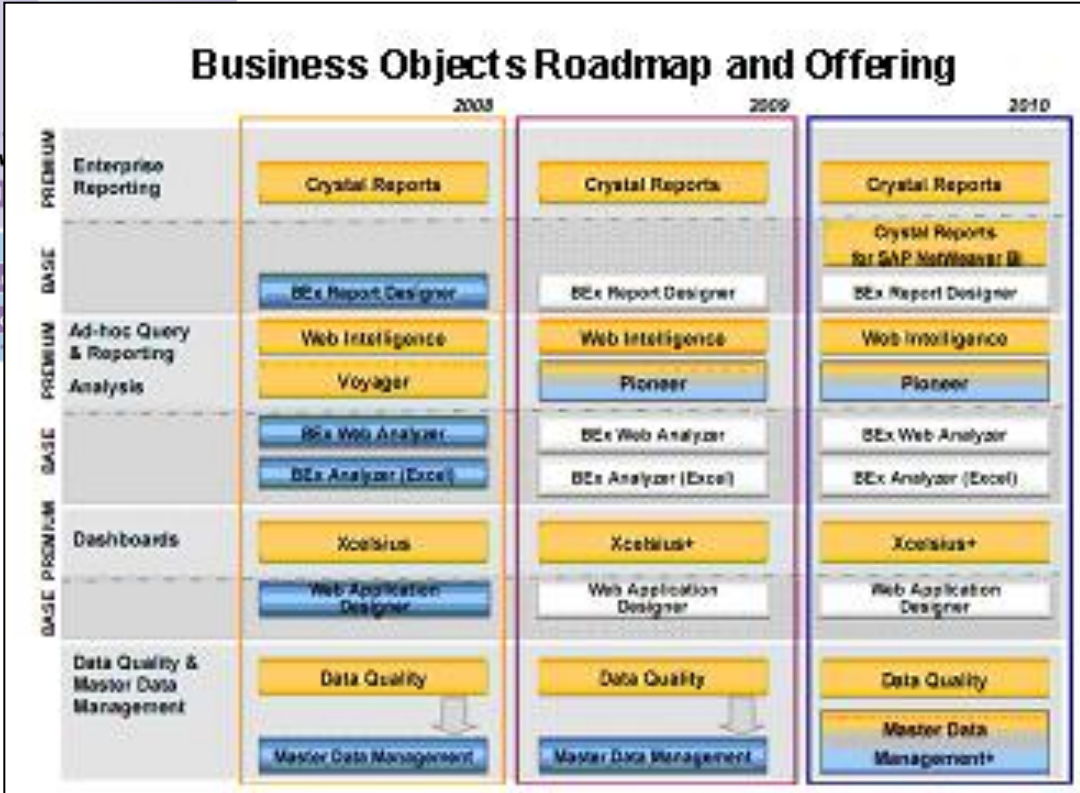
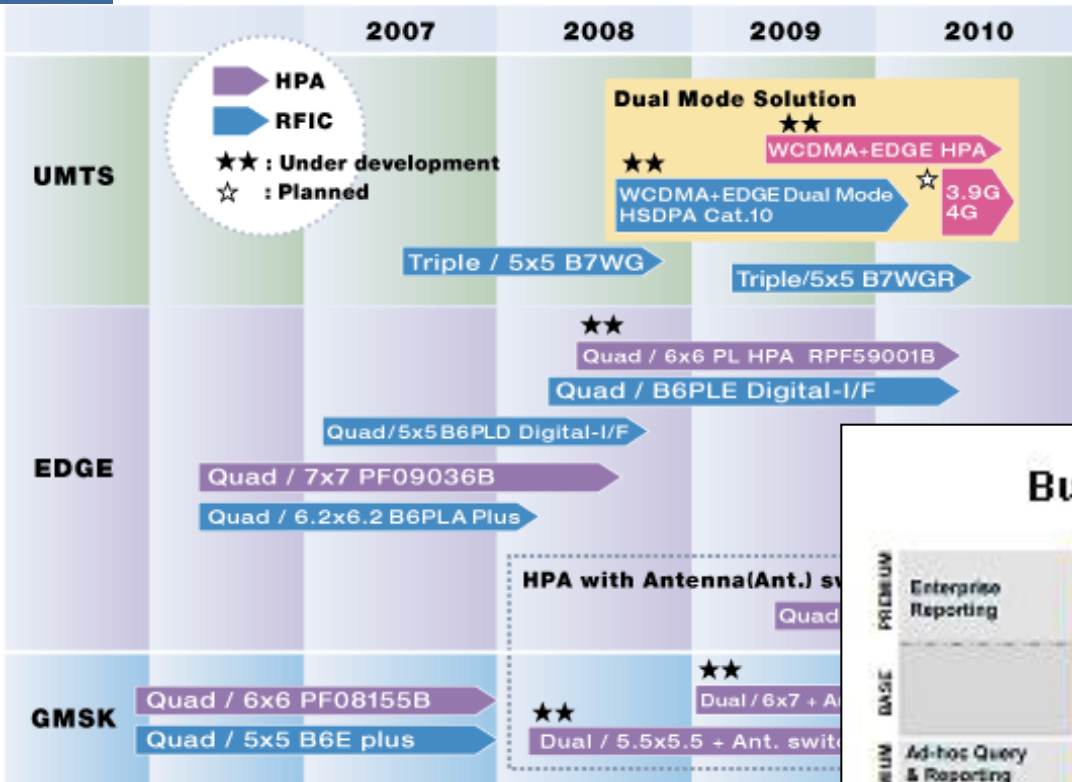
Funding Source & Method:
(How the project will be funded and whether costs will be capitalized.)

Vendor Management:
(Explain vendor selection, known vendor(s).)

[Add names of people present for group update of charter. May ask attendees to sign charter indicating their agreement and understanding.]

Title	ID	Owner	Status	Priority	Estimate (pts)	Project
Quick Status Check	S-01017	DD	Future	Medium	2.00	Release 1.0
Enter RMA	S-01019	TC	In Progress	High	2.00	Release 1.0
Inventory Levels Off in Warehouse	D-01009	AS	Future	Medium	1.00	Release 1.0
Add Shipping Notes	S-01020	AA	In Progress	High	5.00	Release 1.0
View Daily Call Count	S-01021	AS	Future	Medium	5.00	Release 1.0
Hold Order	S-01022	AS	Future	High	2.00	Release 1.0
Pick Lists Reversed	D-01006	AA	Future	Medium	2.00	Release 1.0
Update RMA	S-01023	DD	Future	Medium	2.00	Release 1.0
Export Missing ID Column	D-01007	AA	Future	Medium	2.00	Release 1.0
Multiple Ship-To's	S-01024	TC	Future	High	5.00	Release 1.0
Calculate Tax	S-01025	AA	Future	High	5.00	Release 1.0
Credit Check	S-01089	AS	Future	High	5.00	Release 1.0
Legal Check	S-01090	AS	Future	High	5.00	Release 1.0
Delete RMA	S-01027	DD	Future	High	2.00	Release 1.0
Partial Shipments Doubled	D-01010		Future	Low	0.50	Call Center
Calculate Shipping	S-01028	AA	Future	Medium	5.00	Release 1.0
Shipping Notes	S-01029	AA	Future	Low	5.00	Release 1.0
Forgotten Passwords	S-01030	AS	Future	Medium	5.00	Release 1.0

Are these good enough?

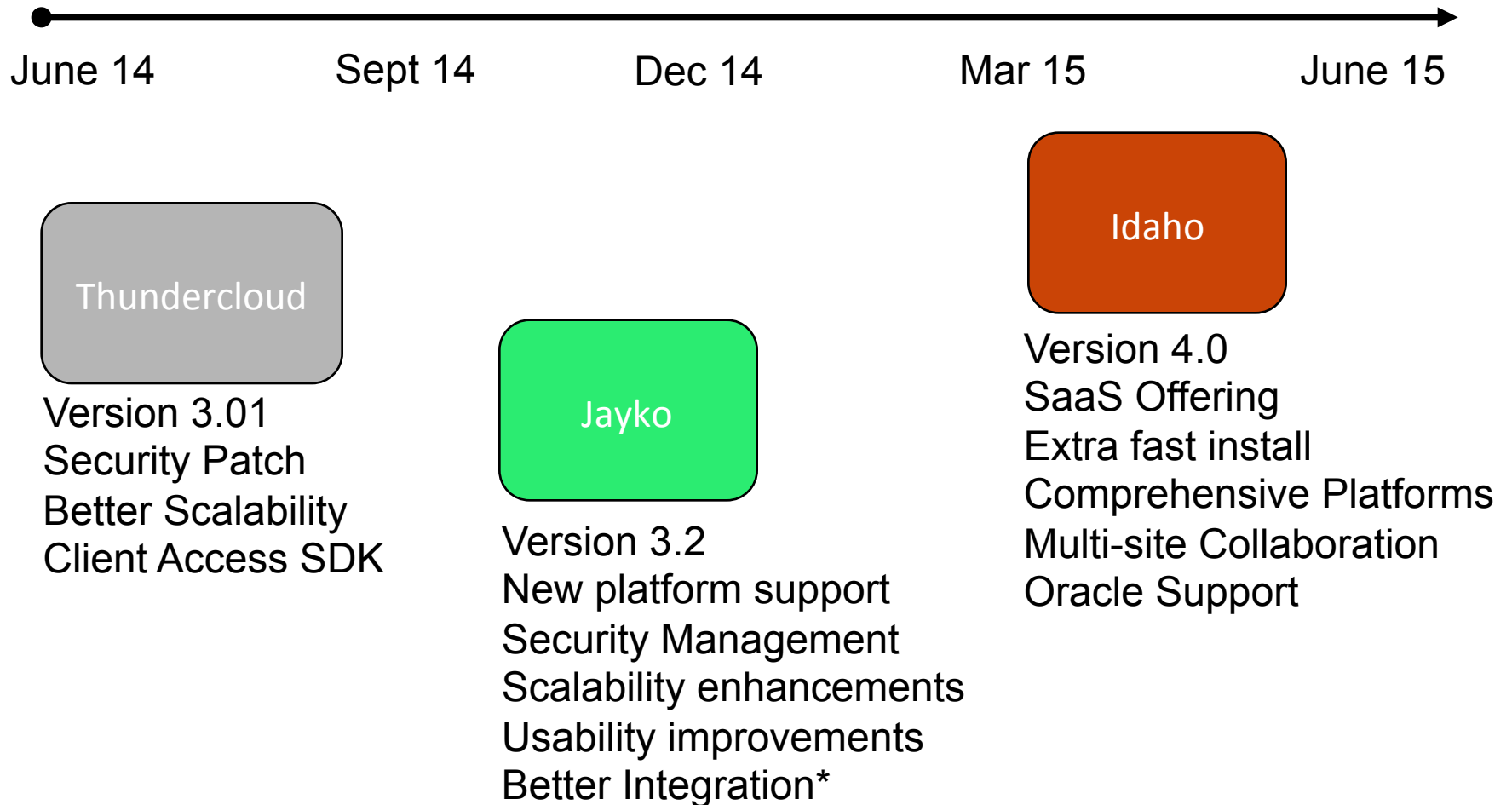


Typical Roadmap Failures

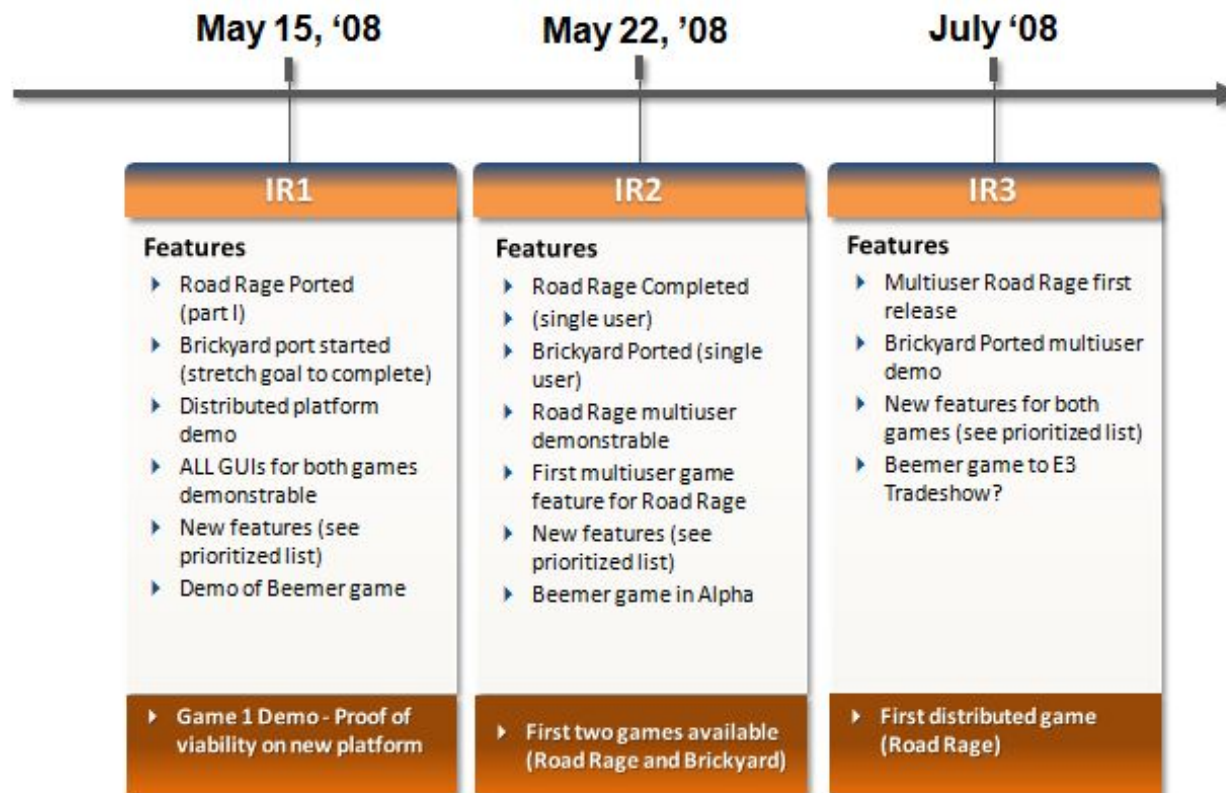
- ❑ No visible logic
- ❑ Created unilaterally
 - Lack of buy-in
 - Poor or no technical or market inputs
- ❑ No plan for internal sharing
- ❑ No plan for external sharing



Often see feature wish lists...



Which is (sadly) commonly taught as a practice



Roadmap – definitions and types

- Roadmap (n) – a detailed plan to guide progress toward a goal*
- Product Roadmap (n) – a plan that matches short-term and long-term goals with specific technology solutions to help meet those goals.**
- External Roadmap – an illustration of an organization’s plans to deliver value to market
- Portfolio Roadmap – a plan that aligns multiple product plans including dependencies
- Strategic, Market, Visionary, Technology, Platform, Themes?

*www.merriam-webster.com

**Wikipedia (technology roadmap)

A product roadmap should be

- A *living* document designed to answer key strategic questions.

When and how often should we ship?

What do customers need in the next release?

What market segments are we targeting?

How big is the market?

What new technologies can we leverage?

What services do we need to support the product?

What distribution channel is best for a specific market segment?

Are we addressing any technical debt?

How is our product plan aligned to our marketing plan?

Roadmapping Benefits



Roadmaps identify and clarify the technical and strategic intent of your product

□ Internally:

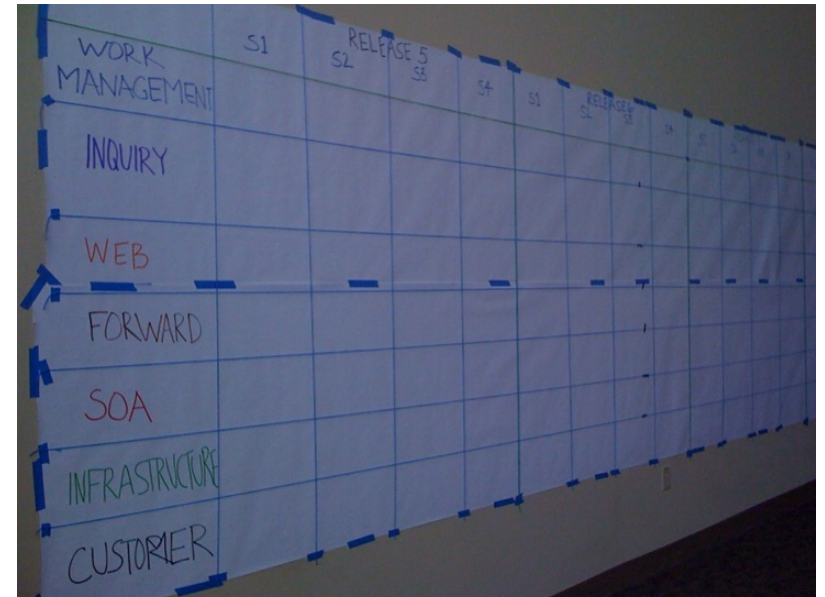
- ▣ Filter for backlog prioritization
- ▣ Generates consensus on direction
- ▣ Collaboration mitigates “last/loudest” priority problem

□ Externally:

- ▣ Provides customers with access to near-term commitments and long term vision
- ▣ Strengthens relationship with customers

Collaborative Roadmapping

- Creating, managing and communicating strategic product intent
- Engage key contributors across the organization to create a strategic, integrated, holistic, market-driven roadmap



Where's the beef?



- MVP Goal – Who, What, When, How, How often, Why

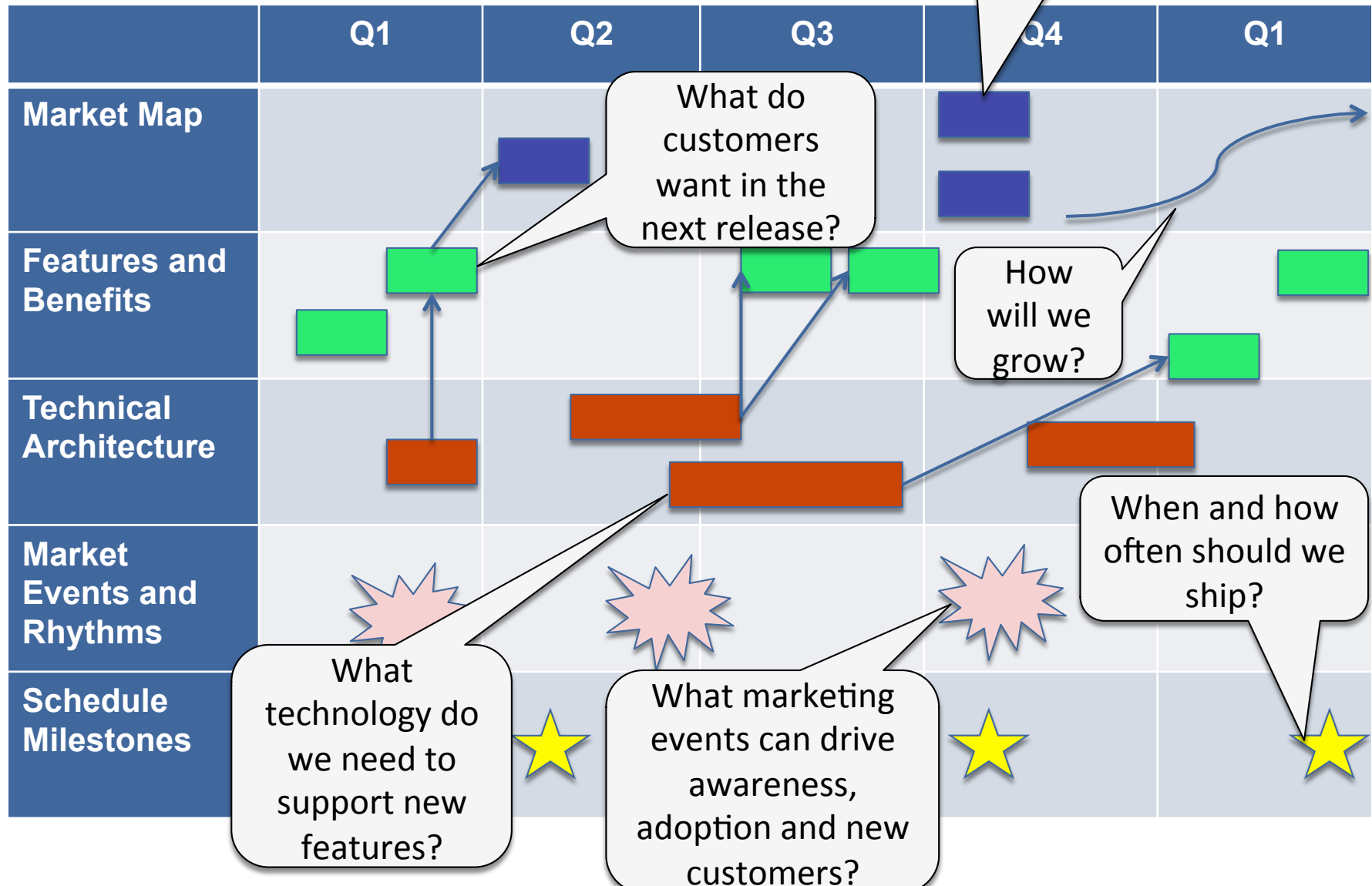
- Market Map = Who
- Feature/Benefit Map = What/Why
- Technical Architecture = How
- Market Events/Rhythms = When/How Often

Check In



- ✓ Why most roadmaps fail
- ✓ Different types of roadmaps
- ✓ The best roadmap for product planning
- How to collaborate to build a product roadmap
- Questions & Answers

Our Basic Roadmap Framework



How to do it



- *Market Map* – short names and descriptions or segmentation characteristics
- *Features and Benefits* – what will move the needle? Clear, concise description of value delivered
- *Technical Architecture* – the big needs – required product technologies
- *Market Events & Rhythms* – things that are known but out of your direct control
- *Schedule Milestones* – release cadence

Go low tech to start

- Collaboration speed
- Easy changes
- Conversations
- Connections
- 3-8 hours
- Transcribe later



Effective Preparation

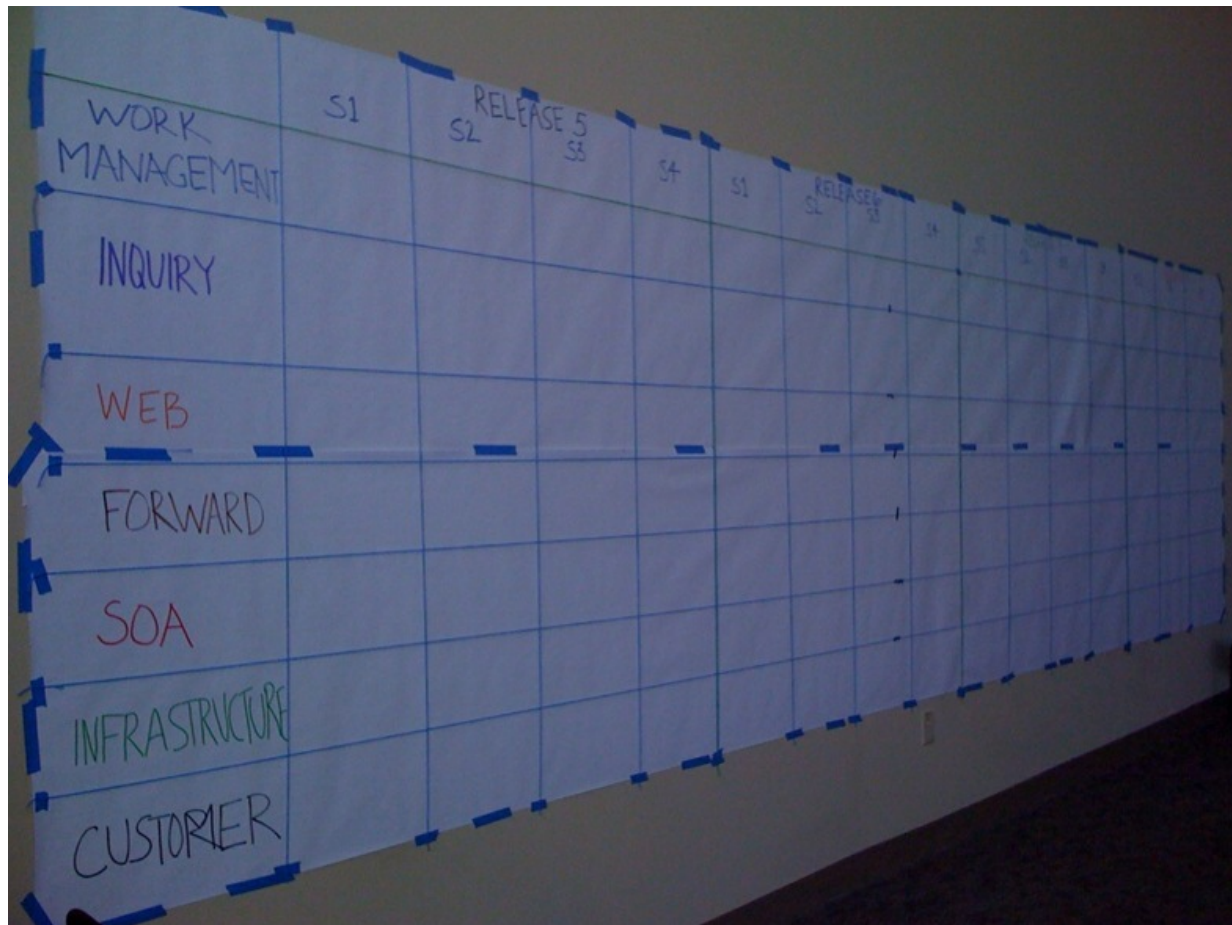


- Invite the right people
- Plan the space
- Plan the time
- Prep the space

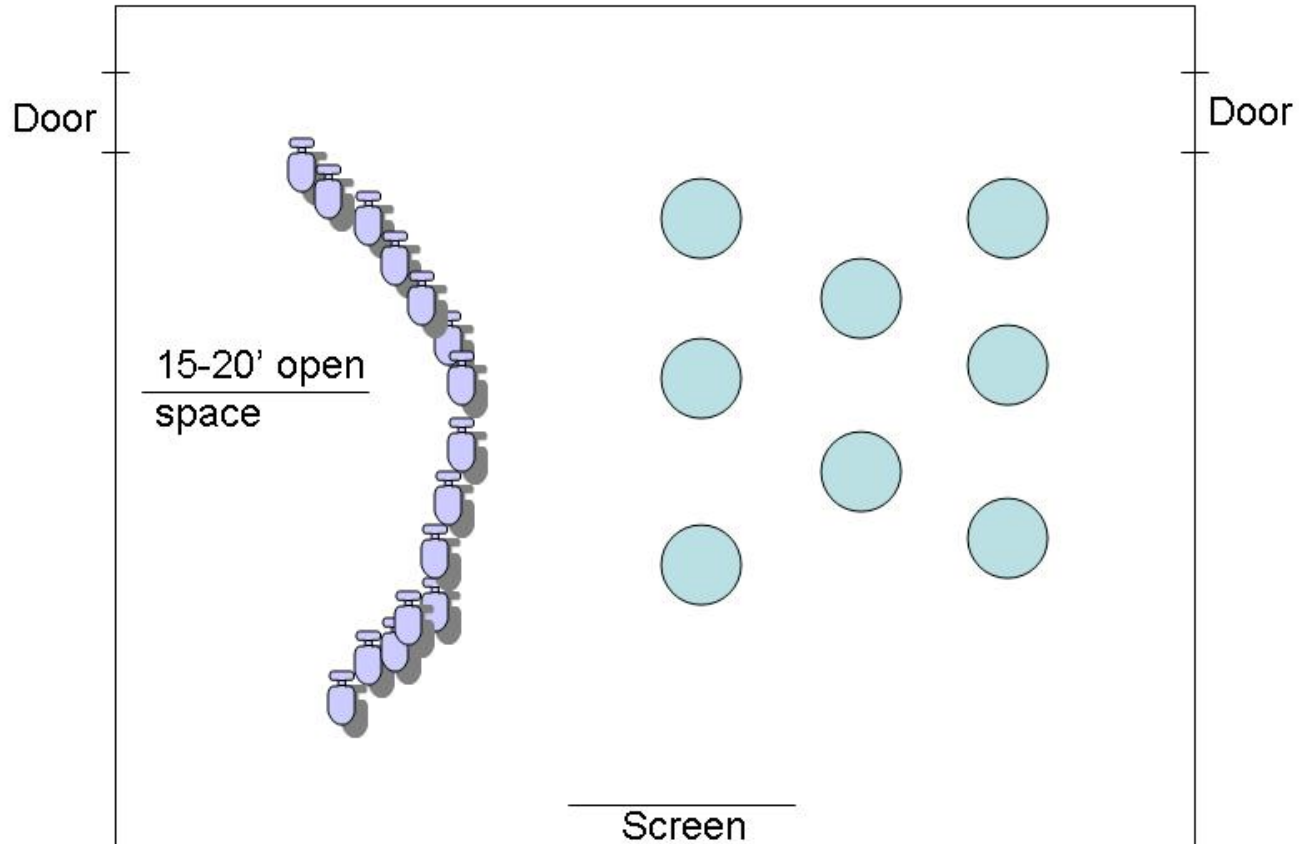
- Abundance of supplies
- Food and beverage
- Plan to capture everything

Scaling Up to Many Teams

- Design the space to support interaction
- Provide the materials to enable conversation
- Include a full team walk-through of the results

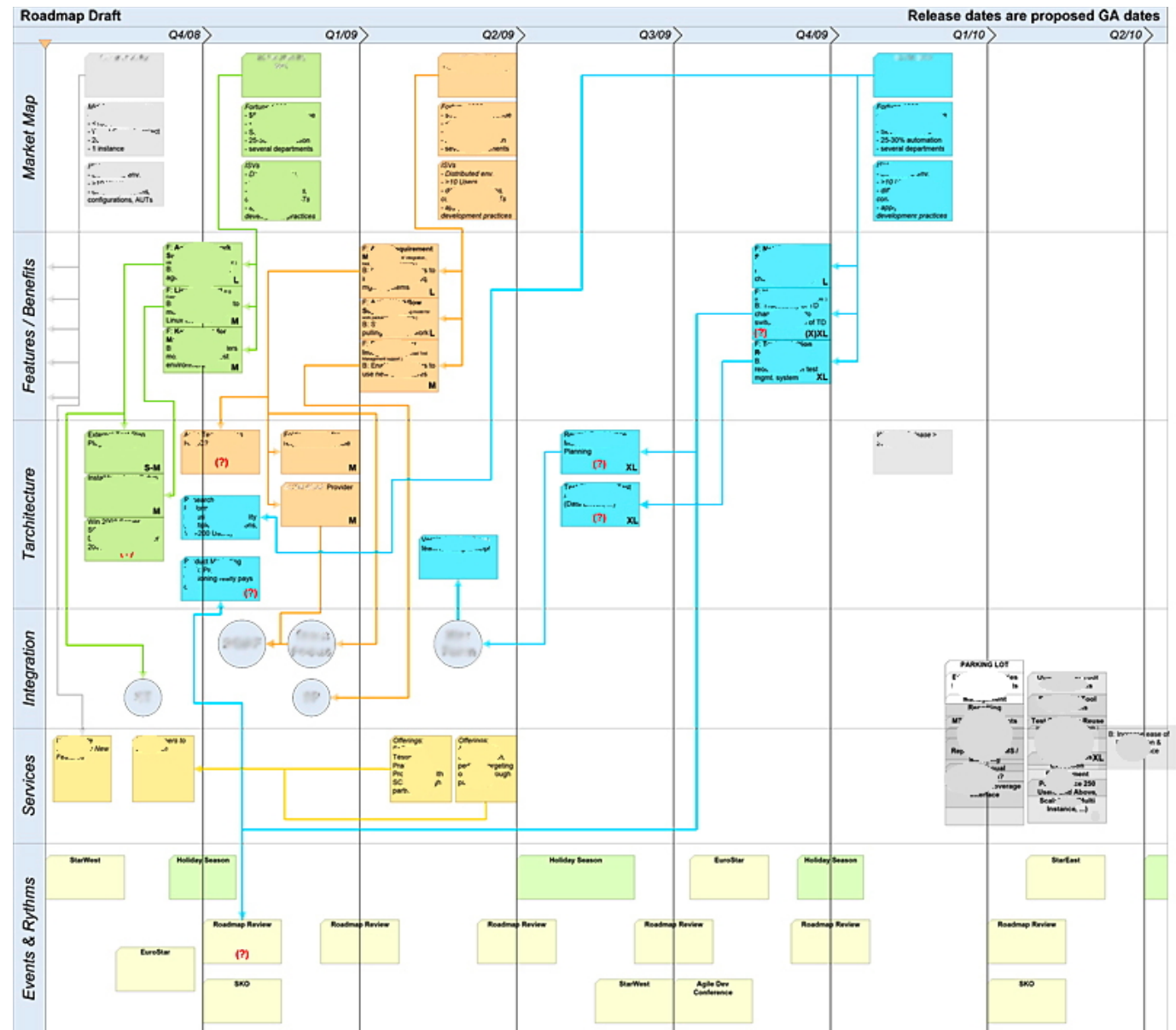


Example Room Design



Example final result

- Convert to share
 - ▣ Visio or Graffle
- Leverage color



Other good practices



- Create and expand a legend (colors, shapes, etc.)
- Maintain versions with dates
- Document
 - ▣ participants that created each version
 - ▣ assumptions, facts & decisions that drove each version
 - ▣ possible alternative scenarios
 - ▣ issues to be researched
 - ▣ connect items dynamically
- Schedule next session before leaving room!

What's next...

FRAMEWORK LIBRARY by Applied Frameworks

STRATEGY

PORTFOLIO

- › *BCG*
- › *Ansoff*
- › *3 Horizons*

BUSINESS

- › *Porter*

MARKET ANALYSIS

- › Market segmentation
- › Innovation Games®

BUSINESS PLANNING

- › Business model framework
- › *Business model generation/canvas*
- › *Lean canvas*
- › *3 Horizons*
- › **Battle card**

PRODUCT PLANNING

- › Collaborative roadmapping (pattern language)
 - Market map
 - Market events/ market rhythms
 - Feature/benefit map
 - Architecture roadmap
- › Product canvas
- › Prioritizing for profit
- › Product scorecard
- › In-person/online Innovation Games®
- › *Whole product (Levitt)*
- › *Personas (Buyer & User)*
- › *SWOT or competitive tool*

BEFORE ←

- › Alignment with corporate vision
- › Leveraging competencies with ASPIRE

← DURING

- › Product
- › Sales
- › Promo
- › Promo support

← AFTER

- › Retrospectives and scorecard

PRODUCT DEVELOPMENT "EXECUTION"

- › *Scrum*
- › *Kanban*
- › *SAFe*

PEOPLE

- › Product management
- › Job family and competency models
- › Leadership
- › Influence
- › Meeting management

SERVICES

- › Service Design

LAUNCH

- › Product bill of materials

Q&A



- Ask me about Product Manager and Product Owner positions available at Capital One in Virginia
- Upcoming events
 - ▣ Scrum Gathering May 5-7
 - ▣ Lean Kanban NA May 5-8
 - ▣ Agile2014 Jul 28 – Aug 1
- Contact me
 - ▣ jtanner@appliedframeworks.com
 - ▣ @jasonbtanner
 - ▣ www.appliedframeworks.com
- Thank you for your time and attention!