ROADMAP SOFTWARE

IS A MUST HAVE

(NOT A NICE TO HAVE)

ProductPlan

Product centricity is the present and the future

During tumultuous times when cash is tight and budgets are trimmed, both consumers and businesses are a little more discerning about allocating their spending. Purchasers are more risk-averse and look for maximum value and return on investment.

For businesses that create products, meeting this market's needs requires a renewed emphasis on building fantastic product experiences and continually enhancing them. Things must be easy to use, quickly prove their worth, and provide long-lasting benefits for those footing the bill.

To achieve this, product leaders must keep their organizations focused on making products that fulfill core user needs and solve significant problems. That means setting goals and objectives that drive customer delight, repeat usage, drive retention, and meaningful value, including settling on KPIs that measure related metrics versus those that only the business itself cares about.

To calibrate a product roadmap that isn't a feature factory, a revenue-first mindset is essential. Using themes and goals as the primary framework for the product roadmap versus specific functionality and deadlines is key to keeping customers and product experience top of mind.

Translating these concepts into attractive visual product roadmaps that connect with a diverse set of internal stakeholders, external partners, customers, and prospects is no easy task. But with the right product roadmapping software, it's an attainable goal.

Let's start at the beginning

Complex undertakings require planning. Whether it's the Egyptian pyramids, the Panama Canal, or the space shuttle, these massive undertakings don't just happen by letting folks "wing it."

Moreover, even if the finished product in question won't be visible from space (or get you there), any initiative's evolution and maturity require clear goals and objectives, previously defined success measures, and a well-constructed plan to bring it into being.

Historically, the concept of a "project" existed well before the modern idea of a "product." Projects were typically one-off ventures to construct a shelter, develop farmland, build a dam, etc. There was a specific need, a particular timeline, and people moved on once it was done.

Gantt charts became a popular way of documenting and sharing these plans, well suited for the incredibly detailed nuances and dependencies of the project's execution. People leverage tools such as Microsoft Project and Excel to plot out each phase and account for every working hour in the digital age. This keeps things on schedule and under budget.

In the modern age, customers demand consistency, improvements, and enhancements. There is an implicit understanding that even once a product is "released," it isn't "done." There's a full expectation of iteration and continual improvement based on a pre-existing strategy, market research, and learnings from its user base.

While each iteration might need its project plan, the broader product strategy lives at a higher level spanning a more extended period, thus the need for a roadmap illustrating the key elements of the product strategy in sequential order. Product managers initially tried to graft this onto project management tools, but spreadsheets and Gantt charts were a poor fit.

Microsoft PowerPoint and other presentation tools became the next go-to solution for product roadmaps. Visual in nature, product leaders could paint a clearer picture of the product strategy and its path to implementation.

But as anyone familiar with these programs can attest, they require the author to know exactly what they want it to look like before they begin. These tools also aren't built for iteration or standardization, creating a legacy artifact that becomes more brittle with every round of edits.

So, as the product management profession became more accepted and widespread in many industries, a market emerged for purpose-built product roadmapping software. No longer forced to apply an off-label usage to generic productivity tools, product managers with the budget and foresight would now have solutions specifically designed to organize, prioritize, and present their product roadmaps to stakeholders.
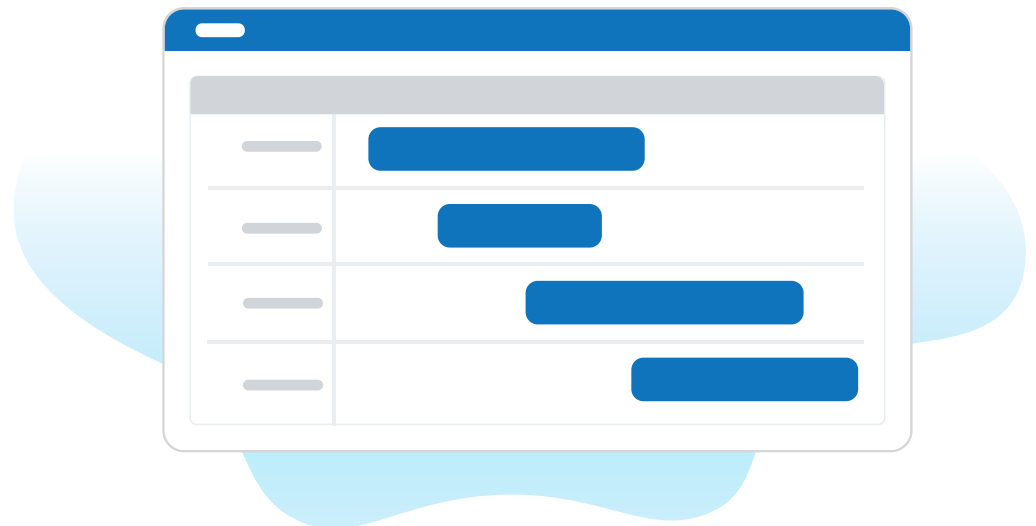
Today's tools

It was software that really accelerated the need for robust product roadmapping tools—and it's software that's made those tools possible. While physical goods are basically "done" once they ship, the software can always be patched, upgraded, and expanded upon.

With so many solutions being cloud-based, automatically updated, and subscription-based, these products remain living, evolving entities. Buyers and producers alike expect things to be updated regularly, adding new functionality, optimizing existing features, and expanding its appeal to new uses and broader audiences.

Not only is there an expectation of a frequent cadence of updates and improvements, but many products are brought to market with a full understanding that they're a work in progress. It places additional importance on product roadmaps as a communication tool for stakeholders of all flavors.

Purpose-built product roadmapping software is the most popular tool for creating product roadmaps today, with 28% of product teams using it. But that still leaves most product teams relying on solutions that don't offer the same rich set of features and functionality.

Presentation tools such as PowerPoint are still the go-to for 24% of product managers, while 23% rely on spreadsheets. These inferior tools are a continual burden, as two out of three product managers update their product roadmaps weekly or monthly, creating hours of unnecessary work regularly.

Shaking off the waterfall mentality

Although how software and other products get built has shifted mainly to more dynamic paradigms under the Agile umbrella, product roadmaps are often still trapped in the waterfall era. These roadmaps feature a series of projects with highly specific deliverables primarily driven by deadlines and dates.

This rigid approach neglects the flexibility and versatility that product-centric Agile delivery brings to the table. Agile's value mainly lies in reacting quickly, measuring, adjusting, and continually iterating. Old-school waterfall roadmaps don't account for the rapid revisions informed by testing and trials since everything is spelled out months or years in advance.

Shifting the focus to themes, goals, and objectives versus features and deadlines brings purpose and structure to Agile development while still reaping the benefits of shorter sprints, implementation latitude, and the continual feedback loop. And the product roadmap plays an integral role in this transformation.
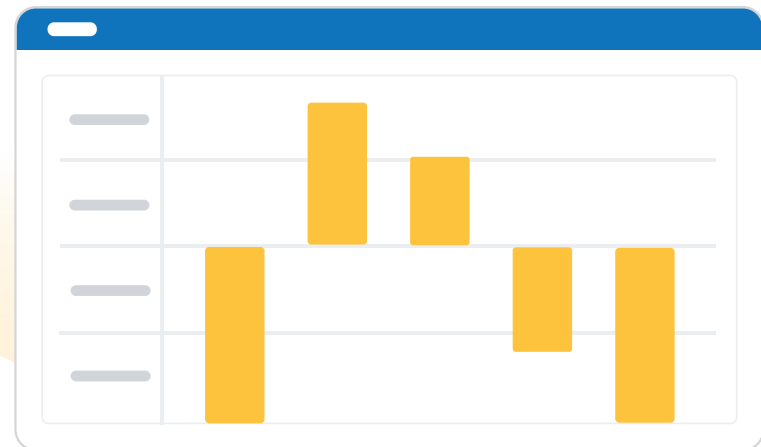
How do Agile and product roadmaps coexist?

Agile's propensity for rapid iterations and leaving implementation details up to the teams building products might seem like an odd fit for a product roadmap, which seeks to plot precisely what will happen for the next six, nine, or 18 months.

It's a problematic misconception that Agile and product roadmaps are or should be mutually exclusive.

Agile is all about how to build things. It is an approach that prizes flexibility, independence, and speed. Teams are semi-autonomous in how they get the job done, making judgment calls based on what's possible and desirable given the work's context in the overall product strategy.

But Agile is not a free-for-all where software developers and scrum masters build whatever they want in whichever order they choose. While there is freedom for independent thinking and problem solving, what they're building and—more importantly—why they're building it is still defined based on the strategic goals laid out by the product team and subsequently approved by key executive stakeholders.

So, even though what happens in each sprint and whichever approach an implementation team takes to complete a task is up to them, the broader purpose for product iterations and the measurable goals and objectives for that work is still dictated to them rather than by them. There's no better way to communicate what's important and ensure everyone's on the same page than using a product roadmap.

However, a product roadmap in an Agile setting might look different than one in a waterfall-oriented counterpart. There won't be the same specificity level, and these Agile-friendly roadmaps may lack some of the hard dates and details people may have grown accustomed to.

But what they may lack in specifics they make up for in context. Since Agile teams aren't just blindly and unquestionably following precise marching orders, product roadmaps must firmly communicate the prioritization rationale for particular themes or goals, desired outcomes, and success defined and measured.

Because Agile provides so much leeway in the implementation phase, product roadmaps are more critical than ever. Product roadmaps create alignment and a shared understanding that keeps each Agile team on the right track and toward common goals and shared desires.

Continuous delivery also isn't an excuse to ditch product roadmaps. Once again, they provide immense value by conveying the overall goals and themes for the implementation team. Even when there's new code being shipped multiple times per day, engineering still needs to know what outcomes and objectives they're trying to achieve.

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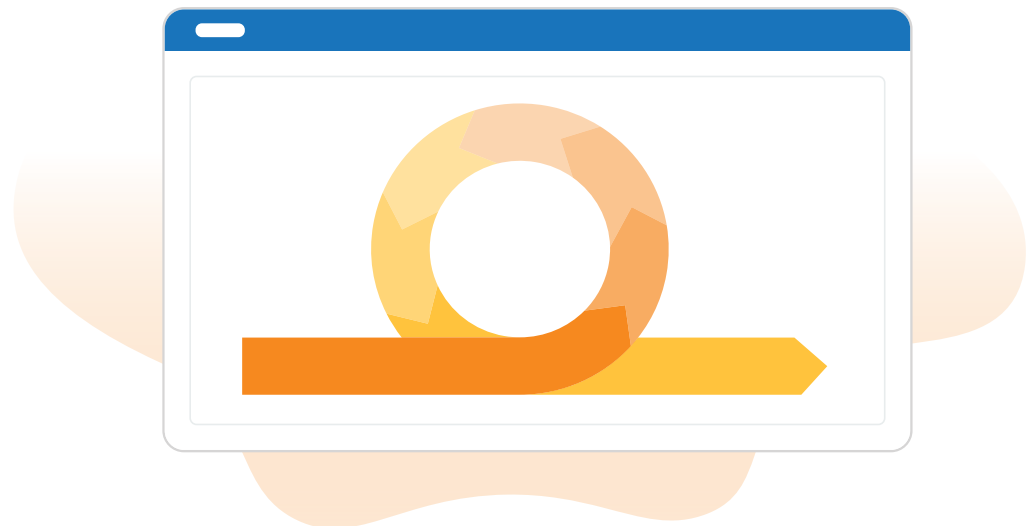
Roadmapping Software Capabilities

Product roadmapping software is designed specifically for product leaders' needs. Roadmapping software includes a collection of features you won't typically see under one virtual roof. Organizations or product managers considering investing in these tools should be aware of all they have to offer and their ability to help teams ship better products (or something similar).

Visual presentations with total flexibility

When building and maintaining a product roadmap in PowerPoint or a spreadsheet, product leaders are forced to choose between an effective visual representation of their vision or an easy-to-manipulate but difficult-to-decipher one.

A slideshow-based presentation can be beautiful. And it also requires a ton of time-consuming design. Every slight change can create a cascade of tweaks and edits, making them demanding to develop and laborious to maintain. Meanwhile, spreadsheets have greater flexibility, but the information is often cluttered, and there's little room to use many visual elements that can help tell the product roadmap's story.

It leaves product teams in a tough spot, choosing a direction that only delivers part of the goods. The right product roadmap software, however, provides flexibility and visual polish.

The data and the visual elements can be modified independently of each other so that product teams can tailor an ideal roadmap experience for every kind of audience. When modifications inevitably occur, those changes are automatically applied across the entire view. Sparing product managers from resizing text boxes and messing with font sizes to squeeze everything into a single slide.

But beyond providing invaluable time savings and freeing up product managers from doing double duty as amateur graphic designers, product roadmapping software adds the ability to generate completely different views from the same roadmap data.

For example, ProductPlan allows users to toggle between a timeline-based roadmap and a Kanban-style one without rearranging or reentering data.

This option enables product teams to use either style for a given presentation or audience at the click of a button. Without duplicating effort or creating an inconsistency between the two versions.

Kanban style roadmap
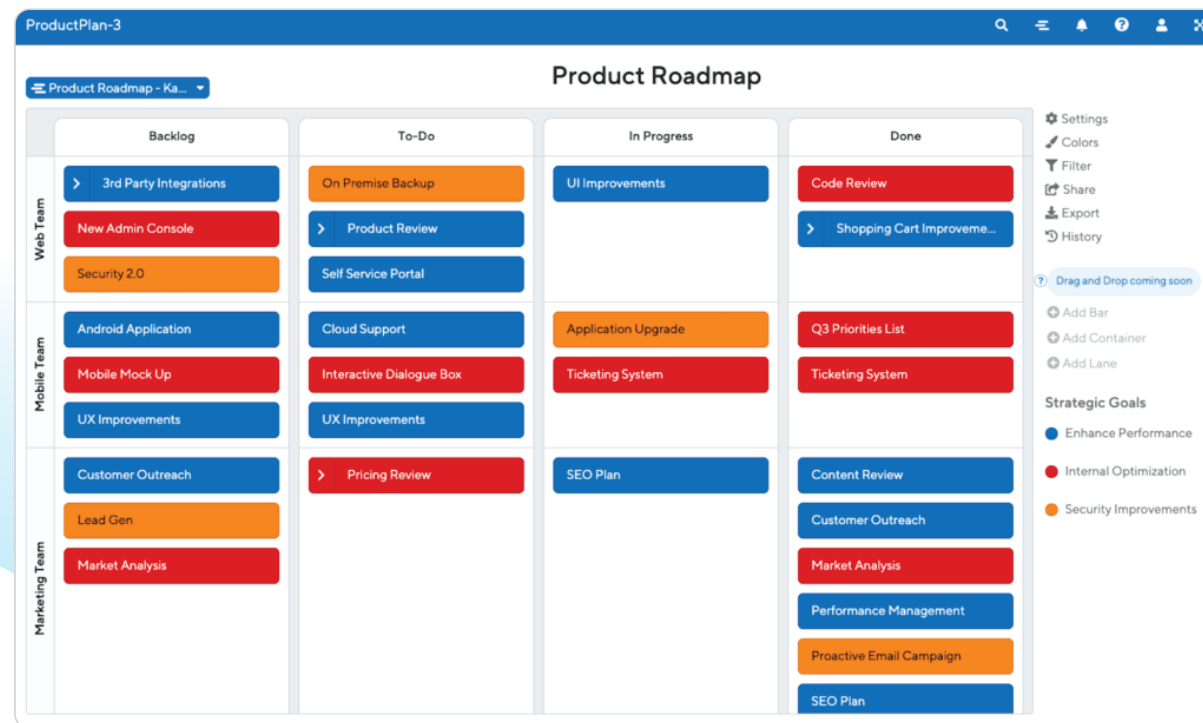
Just the right level of detail

Product roadmaps often suffer from not having the correct amount of information available for their audience. A PowerPoint product roadmap doesn't have much room for anything other than high-level items without turning into an eye chart. In contrast, spreadsheet-based roadmaps often contain more information than is needed.

Using roadmapping software, product teams can build product roadmaps that present the big picture. They can do this while still enabling stakeholders to drill down into the details when the occasion arises. Although all the data is present, this approach keeps the small stuff from overwhelming the audience. It prevents a "can't see the forest for the trees" effect from setting in.

It's beneficial when building a product roadmap around themes, goals, or objectives versus merely listing every little thing on a timeline. This focus shift keeps roadmap discussions at a strategic level. The focus is on results instead of a laundry list of features and enhancements without much context.

Backlogs and parking lots

Just as important as what's in a product roadmap is what doesn't appear there. There will always be far more ideas than an implementation team can ever get around to. But that doesn't mean product managers should throw them out once they don't make the cut.

A crucial part of stakeholder management is keeping them apprised of each request's status or considered project. When an idea is in the backlog or a parking lot, they'll know the matter in question means it isn't in any upcoming releases.

Equally important is closing the loop with customers and coworkers who made the suggestion. The item's presence in the backlog or parking lot lets them know it was reviewed but not slotted for any time soon. Descriptions, tags, and approximate sizes also provide additional information on unstarted projects for stakeholders and team members.

Keeping a comprehensive record of all these potential projects also helps cut down duplicate requests clogging up the

prioritization process. They also serve as an excellent repository for future work. The refinement and review process can help the team rediscover promising ideas that might better fit the product strategy.

Integrations with the rest of the product stack

Product roadmapping software doesn't exist in a vacuum. Its ability to communicate with other vital systems can be a massive time saver and ensure the product roadmap is as accurate as possible. There are endless possibilities as to how these tools can add value through automated interactions.

Modern product teams often use a suite of tools to help them ship better products. Data should flow seamlessly to and from the product roadmap platform, saving time and keeping the entire organization in sync. For example, a product manager might link several stories in Jira to an initiative on their product roadmap.

Whether it's notifying stakeholders of updates using Slack or importing Jira's feature ideas, product roadmapping software shouldn't be an island but rather a vibrant interoperable part of the entire product stack.

Always accurate (or as precise as possible)

Static product roadmaps have some unhealthy staying power. Once someone gets their hands on one, they're likely to refer to it often, holding the product team responsible if things don't pan out as planned. They end up being circulated as email attachments or lingering on Confluence, for example, long after they're outdated.

However, when the product roadmap lives in the Cloud, and stakeholders are given links instead of PDFs, many issues disappear. Everyone knows to simply click the link to see the latest-and-greatest edition of the product roadmap.

This solves a litany of problems stemming from older copies of the product roadmap dwelling in the wild. Product teams can save time by not imposing new versions on stakeholders and imploring them to delete or destroy older ones, not to mention all the drama that can be avoided when everyone's looking at and referring to the same thing.

Version control

Any quality product roadmap software will have the ability to give some users edit rights while others can only view things. But beyond controlling who can make changes, it's also beneficial to have a record of any modifications made over time.

There are two key features in this area that can help product management control their living product roadmaps. The first is the ability to look back at every change made to see what it was, who made it, and when it occurred.

While this isn't likely to be a heavily used capability, when the rare occasion demands a forensic examination of how things happened, having this data available is priceless. It's convenient when answering questions such as "when did this get added?" or "who removed that?"

Additionally, the ability to digitally distribute a specific version of the product roadmap can also be useful. Giving stakeholders a particular snapshot in time versus live access allows the product team to continue iterating and tweaking the product roadmap without worrying that their audience sees those changes in real-time. Instead, they can wait until the appropriate time to lock in those modifications and then formally share it with stakeholders along with some fitting contextual commentary.

One size does not fit all

Product roadmaps serve many purposes, and the different stakeholders viewing them care about various aspects of it. Therefore, product leaders face the challenge of creating roadmaps serving multiple masters. Executives are the primary audience 40% of the time, but the product team (22%) or sales and marketing (13%) can just as quickly be an essential crowd (cite the report?).

Product roadmaps are most effective when tailored to a specific audience. Executives want the big picture, developers need the nitty-gritty details, and the sales team shouldn't always have hardened dates behind features and improvements.

Using tags, filters, and other mechanisms, product roadmapping software can generate customized product roadmaps that include all the information a particular cohort needs and none of the stuff they don't. This way, some versions of the product roadmap can be "let into the wild" while holding other views close to the vest.

Using a spreadsheet or a slide deck, recreating a custom version of a product roadmap is an arduous task that can quickly turn into a maintenance nightmare. With the right tool, all it takes is a few clicks to create versions for external customers, engineering, the management team, and more, each with their own levels of detail, scope, and focus.

All in the family

There are multiple products for many organizations to keep track of, be they part of a suite or completely discrete offerings. Regardless of how they're packaged and marketed, each product has its unique strategy and product roadmap.

However, there are plenty of occasions when stakeholders want to see the entire portfolio in a single view. If each product team manages its product roadmaps in slide decks and spreadsheets, creating this overview can feel like herding cats due to the lack of consistency.

But with a purpose-built product roadmapping tool, it should be a snap to create a high-level view of multiple products all on the same screen. This portfolio view is particularly useful for aligning marketing activities and optimizing shared resources.
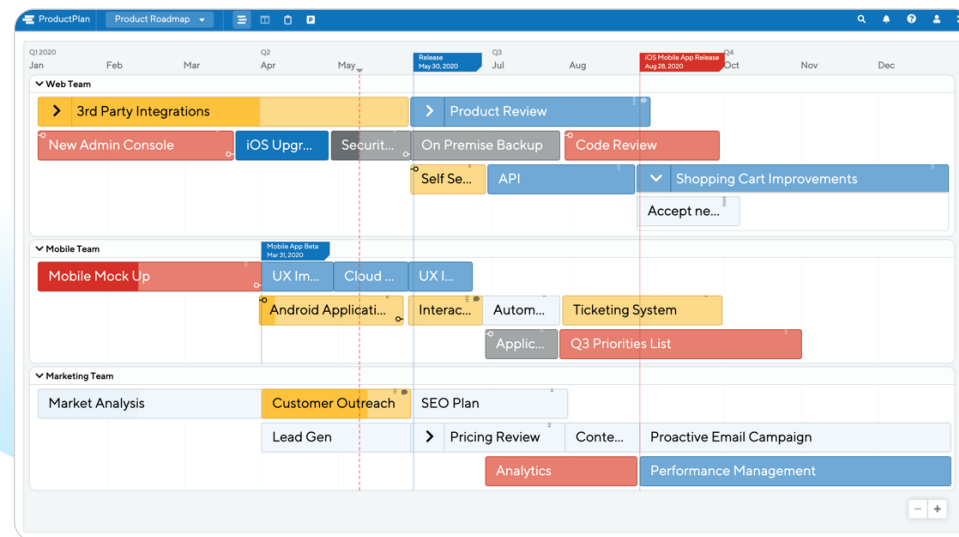
Incorporating product roadmapping software into the process

Product roadmapping tools shouldn't require significant modifications to how organizations do things today, but they can be catalysts for substantial improvements or strategic shifts. But as with any change, it's an opportunity to reevaluate the status quo and address any lingering issues.

While product roadmapping software makes its most significant impact in the actual generation and dissemination of the roadmaps themselves, their value begins much earlier in the journey. It's essential to keep things well organized when generating new ideas and revisiting old ones.

Product roadmapping software should include capturing these potential future features and enhancements, including importing epics and user stories from tools such as Pivotal Tracker and Trello. When the time comes to use a prioritization framework for deciding which items should make the cut, everyone can view these contenders and any related comments or notes when considering their ROI and alignment with the product strategy.

Once the organization agrees on its primary goals and themes, they set the product roadmap's baseline parameters. Using templates as a starting point can speed this process up and get creative juices flowing while covering all the major topics.

With a draft of the product roadmap established, the socialization process and securing stakeholder buy-in can begin. Custom views of the roadmap can be shared digitally, facilitating this dialogue and guaranteeing everyone is looking at the same thing. This includes the ability to embed the digital product roadmap in collaboration tools like Confluence.

After the product roadmap is approved and the implementation phase begins, product roadmapping software adds value. Using integrations with other tools in the product stack such as Jira and GitHub, progress on specific items can be viewed directly from the digital product roadmap, offering an accurate view of how well things are sticking to the schedule.

And when the product roadmap is modified, those changes can effortlessly be shared with key team members using additional integrations with the likes of Slack and Microsoft Teams. This reduces any communication breakdowns and keeps everyone involved, informed and up to date.

As things get closer to shipping, operations join the fun. Projects can sync with tools such as Azure DevOps to make sure deployments are well executed and come off without a hitch.

Once the product gets into customers' hands, there will inevitably be new feedback from users funneled through various support and account management channels. These ideas can be triaged and routed to the backlog or parking lot, where they'll be ready and waiting for the next round of prioritization.

And because they're tracked within the product roadmapping software, the feedback loop can be closed if and when they're eventually selected for implementation and released.

Try roadmapping for free
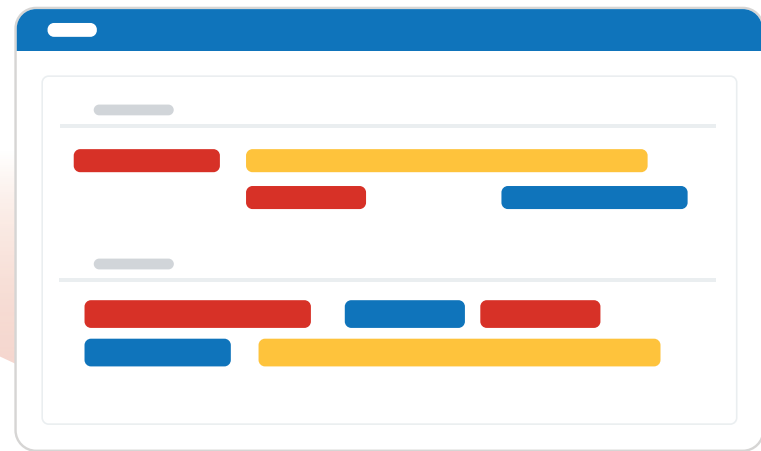
Don't be late to the game

Product roadmapping tools are no longer a new novelty item or an optional luxury item for product managers. At this point, they're table stakes for any product-led organization.

The market for these tools has grown because of a few key factors:

- Product management is now widely embraced by companies of all shapes, sizes, industries, and vintage as a necessary and valuable part of the product development organization and overall business.

- Communication and stakeholder alignment is more important than ever, and product roadmaps can be the catalyst for getting everyone on the same page.

- SaaS business models and cloud-based apps make it easier for the trial and adoption of product roadmapping tools since they don't require the same upfront costs nor require IT's involvement for the product team to begin using them.

- Agile development and digital transformation initiatives have made top-down, command-and-control management increasingly tricky, so comprehensive socialization and adherence to a strategic product roadmap ensure appropriate resource deployment. The company's common goals and objectives remain reflected in shipping products.

Managing the product roadmap is the second most time-consuming task for product managers. The others in the top three (setting priorities and sprint planning and getting consensus on the product strategy) also benefit immensely from product roadmapping software.

For a profession where the number one complaint is a shortage of time to perform the varied duties of their role, a tool that impacts so much of their day-to-day activities can be a gamechanger.

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Making the case

Product managers often aren't used to making big purchases and sometimes don't even have a budget of their own. That means building a case as to why product roadmapping software is a worthwhile expense for the organization.

The best bet is to highlight the software's benefits and how it will help more than just the product management team win over the people holding the purse strings. Here are some excellent points to touch on:

- **Time savings**—By spending less time fiddling with the product roadmap in a slide deck or a spreadsheet, the product team can spend more time on other essential activities.

- **Stakeholder alignment**—Cut down on endless meetings, misconceptions, and costly mistakes by ensuring everyone sees an accurate and appropriately detailed version of the roadmap.

- **Visibility and transparency**—Prioritization and the status of specific requests and ideas can often seem shrouded in mystery to those not closely involved. When viewing access is granted to a broader audience, they'll have a better sense of the decision-making process and why inevitable trade-offs are necessary to advance the product strategy.

- **Utility and versatility**—While the product team may primarily utilize product roadmapping software, many other cross-functional, strategic activities can leverage it as well. Whether it's product launch plans, IT infrastructure projects, or human resource initiatives, there's no limit to who may find this a useful tool.

Product roadmapping software may seem like a luxury, but once teams and organizations adopt it, they quickly wonder how they ever lived without it. Routine tasks are drastically simplified, crucial information is centralized, and product roadmaps can better serve as the source of inspiration and purpose for the entire company.

Take product management and strategy into the 21st century and invest for success.

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Resources

Ultimate Guide to Product Roadmaps: https://www.productplan.com/what-is-a-product-roadmap/

Glossary: Feature Factory: https://www.productplan.com/glossary/feature-factory/

Glossary: Gantt Charts: https://www.productplan.com/glossary/gantt-chart/

ProductPlan 2020 Product Management Survey: https://assets.productplan.com/content/2020-Product-Managers-Survey-by-ProductPlan.pdf

Glossary: Agile Framework: https://www.productplan.com/glossary/agile-framework/

Glossary: Waterfall: https://www.productplan.com/glossary/waterfall/

What Does the Agile Roadmapping Process Look Like in Practice?: https://www.productplan.com/agile-roadmapping-process/

How Do Roadmaps Fit into Continuous Delivery?: https://www.productplan.com/roadmaps-continuous-delivery/

Timeline vs. Kanban Roadmap: Different Ways To Present Roadmap Information: https://www.productplan.com/timeline-vs-kanban-roadmap/

Glossary: Backlog: https://www.productplan.com/glossary/backlog/

Product Management Tools: What Should Your Product Stack Include?: https://www.productplan.com/product-management-tools/

Tracking Your Roadmap's History: https://support.productplan.com/en/articles/2978892-tracking-your-roadmap-s-history

Using Versions to Publish Your Roadmap: https://support.productplan.com/en/articles/2978915-using-versions-to-publish-your-roadmap

What Your Executives Want to See When You're Presenting Your Roadmap: https://www.productplan.com/presenting-executive-roadmaps/

Custom Views: https://support.productplan.com/en/articles/2978910-custom-views

How to Align Your Product Roadmap across Multiple Products: https://www.productplan.com/align-product-roadmap-multiple-products/

Pivotal Tracker Integration: https://www.productplan.com/integrations/pivotal-tracker/

Confluence Integration: https://www.productplan.com/integrations/confluence/

Slack Integration: https://www.productplan.com/integrations/slack/

Microsoft Teams Integration: https://www.productplan.com/integrations/ms-teams/

Azure DevOps Integration: https://www.productplan.com/integrations/azure-devops/

Strategies for Effectively Handling Customer Feedback: https://www.productplan.com/handling-customer-feedback/

Product Launch Plan Template: https://www.productplan.com/product-launch-plan/

IT Infrastructure Roadmap Template: https://www.productplan.com/it-infrastructure-roadmap/

HR Roadmap Template: https://www.productplan.com/hr-roadmap/

About ProductPlan

ProductPlan makes it easy for teams of all sizes to build beautiful roadmaps. Thousands of product managers worldwide–including teams from Nike, Microsoft, and Spotify–trust ProductPlan to help them visualize and share their strategies across their entire organization. With our intuitive features, product managers spend less time building roadmaps and more time shipping products.

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