

You Can't Get There Without Knowing Where "There" Is

A Real and Practical Starter Guide for a Product Marketing Roadmap



A tragic tale...

In 1996, a ranger flying a helicopter over Death Valley, Calif., spotted a minivan in a wash near Anvil Canyon. That was ominous for several reasons: There was no road leading up to the spot, and the area wasn't passable without a four-wheel vehicle.

After investigating the vehicle, park rangers determined that four tourists — a man, a woman, and their two sons, ages 4 and 11 — had last rented the minivan. But there was no trace of the family itself.

Their remains were not found for about 15 years, until Tom Mahood, a physicist-turned-adventurer, retraced their steps. As he recounts, a series of reasonable mistakes, such as misreading the steepness of a canyon descent and being led astray by confusing map landmarks, likely led to the decisions that ended in them separating from each other, then dying in the scorching desert heat.

Being “directionally-challenged”, when it comes to managing your product, will not lead you to a tragic death. But, without a path to get where you're going, your product will definitely suffer the same fate. A fate that could lead to your product's demise in the marketplace.



Have you ever noticed that anybody driving slower than you is an idiot, and anyone going faster than you is a maniac?

— George Carlin



You need direction...

Roadmapping is an essential strategic planning process for product managers. The artifact that comes from the planning process, the product roadmap, is used by almost all product managers in the course of doing their jobs. In his e-book *On Roadmaps and Roadmapping*, product management industry leader Steve Johnson writes “Product and portfolio roadmaps are key deliverables in any product planning process. A roadmap looks beyond what you’re doing now. It explores not where you’ll be soon but where you could be a year or more down the road.”

Yes, roadmaps are essential. They are used to provide direction to the development team, improve communication with executives, customers and the sales teams, and offer credibility to the product’s and company’s focus as well as the product team.

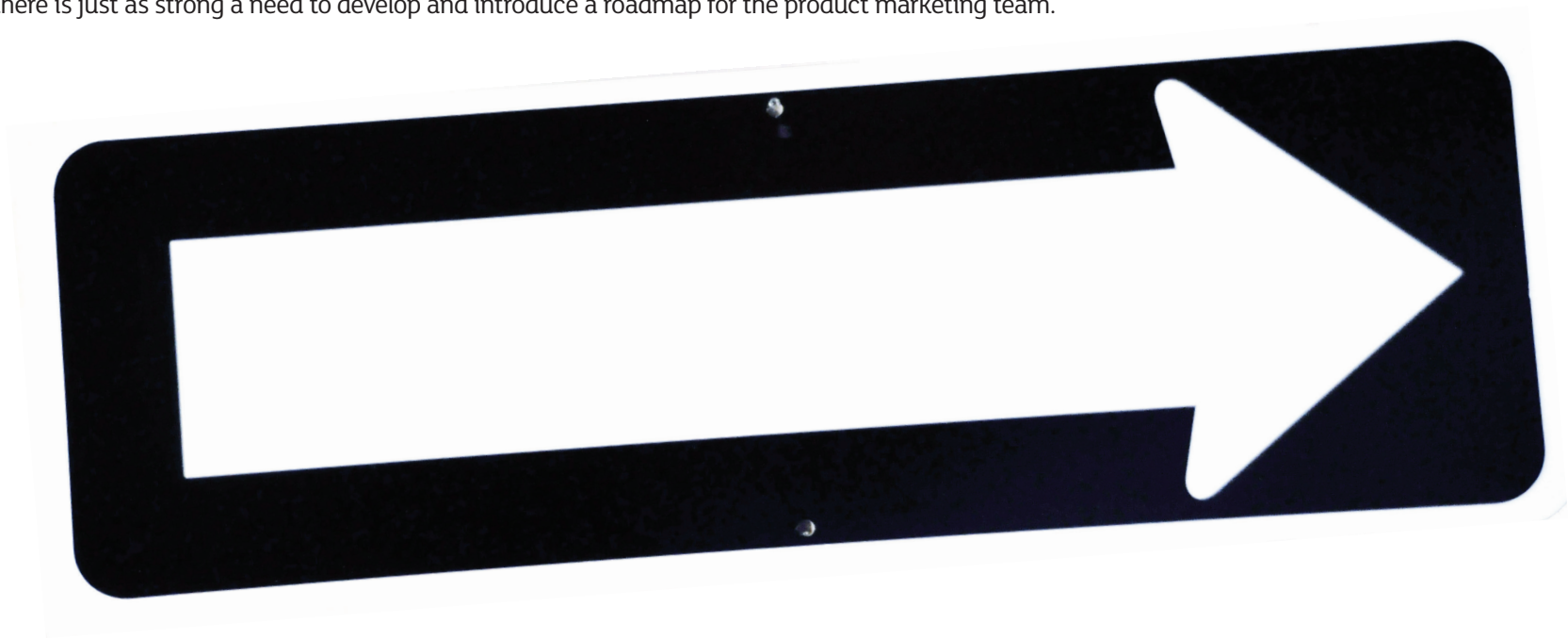
Roadmaps are also a constant source of discussion in the product community as there are many views on the right elements to include in a roadmap, the right timeframe to include, and how this information should be shared. Many views. Many opinions.

But, what are often overlooked in these discussions are the roadmaps for other efforts that are part of the product planning lifecycle. Too often a technical direction for the product is all that is mapped out; however, there is just as strong a need to develop and introduce a roadmap for the product marketing team.



*Directions are instructions
given to explain how.
Direction is a vision offered
to explain why.*

– Simon Sinek



Shouldn't *product marketing* have a roadmap?...

Of course they should. The product marketing team has the same need for a strategic planning process as their counterparts in product management; and, they have the same need for an artifact that will share their direction as well as improve communication and credibility.

Too often product marketing is misunderstood. Many executives are unsure of what value product marketing offers the organization. Why? These executives see the data sheets, whitepapers, and PowerPoint slides that are developed, but these are not viewed to be of strategic value. Furthermore, these documents are perceived to be contributions from Marketing Communications (Marcom). But of course, product marketing developed all of the meaty content goodness in the documents. After all, it's product marketing that typically provides the content for Marketing Communications deliverables.

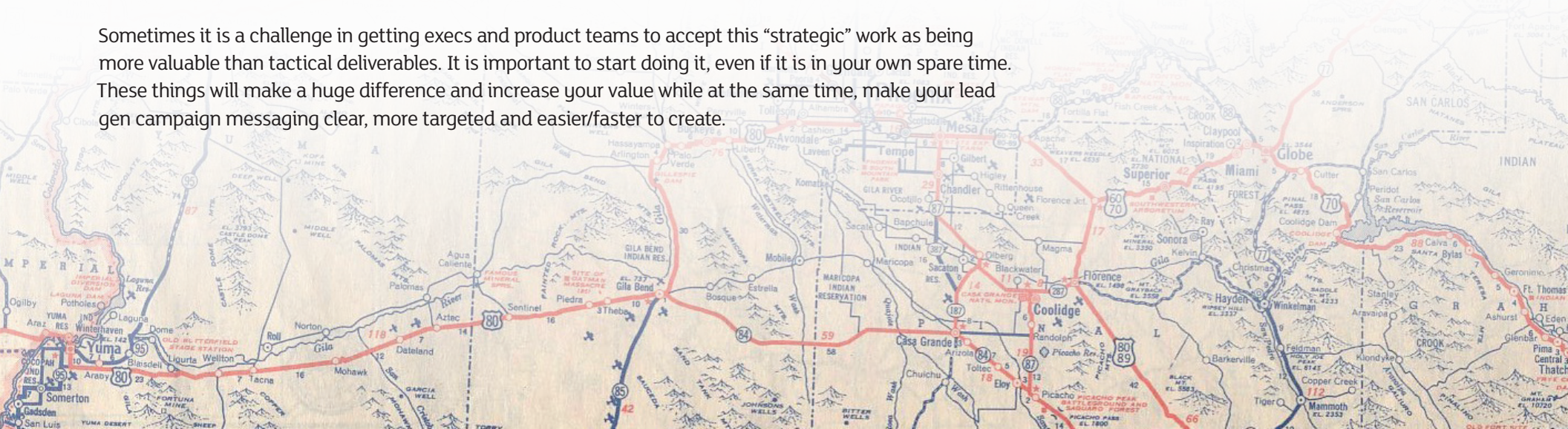
Going through the strategic planning process for how the critical work supporting the product will be done will increase the value and credibility of what the product marketing team provides and how it is viewed. But the outcome of building a roadmap moves the product marketing function from reactive or one-off efforts to one that is more about continuous or proactive development. It allows the main focus to move from “making sausage” – cranking out lead gen(eration) campaigns, to the more strategic – analyzing win loss data, developing better sales enablement tools like pain sheets or positioning guides, gaining customer insight, developing buyer personas, and creating competitive SWOT analyses and “kill sheets.”

Sometimes it is a challenge in getting execs and product teams to accept this “strategic” work as being more valuable than tactical deliverables. It is important to start doing it, even if it is in your own spare time. These things will make a huge difference and increase your value while at the same time, make your lead gen campaign messaging clear, more targeted and easier/faster to create.



Strategic planning is worthless - unless there is first a strategic vision.

– John Naisbitt



Getting Started...

Taking the first step in building a roadmap for product marketing may seem overwhelming, just as any new foray into unfamiliar waters. What is a product marketing roadmap? It is simply a guide you will follow, similar to what is developed for the product management team for their products, that provides direction on which strategic activities the product marketing team will focus. It may sound complicated; but, when you break it down, creating a product marketing roadmap is really a simple step-by-step process.

Before you start on the work of building a plan however, you need to start with your own communication.

Do you have regular communication with your product management team?

This is a critical question to spend a moment pondering. I'm not talking about sitting at their desk as they walk you through each feature. Is there a regular meeting – on a calendar – where both product management and product marketing come together to review their plans and simply discuss next steps? Do you allocate time here where both teams can share insights and ideas from the market? Do you brainstorm together to solve challenges or generate new ideas? Do you continuously work on understanding the shared goals, objectives, vision, markets and personas associated with it? Where in the queue are the feature requests uncovered in market visits? Do you know the direction of the product, product line or portfolio and the impact these have on product marketing? Do you understand what is shared internally, with sales, with executives, with customers? What about “official” development versus “skunkworks” projects? Do you know the timing of industry events and how the product aligns?

You need to uncover the “surprises” (so they don't come back to bite you later!)

If you have such a “formal” time carved out, good for you. If you don't – start here and set the appointment! You need this. Your product needs this!

Once you have a regular cadence, (monthly is a good recommendation,) established... you can start to build a roadmap.



*The single biggest problem
in communication is
the illusion that it has
taken place.*

– George Bernard Shaw



A step-by-step approach...

Note: this step-by-step approach is designed for a team of greater than 5 people. If your team has fewer people, you may not need to take a whole day offsite. If your team is larger than 10, you'll want to break into smaller teams. It's the idea here that is critical, not the actual mechanics.

1. Obtain a copy of your product's technical roadmap for the next 4-8-12 quarters. (An 8 quarter view is recommended as a best practice.) Two years is long enough to look at what is coming, but still offers flexibility to be responsive to shifting market dynamics. It provides you with the right amount of information to develop a vision that is flexible. Flexibility is the key here. Some technologies move fast, and you need to adapt to that rhythm if it is the norm in your environment.

Note: if your organization has a portfolio strategy and vision, connect with its owner and become familiar with it. This brings additional value in conversations with marketing, sales and executives.

2. Obtain your marketing team plans for demand generation, web, social media, events, papers, PR, etc. (Hopefully your marketing group has this organized in one place in a common format that is easy to share.) You need to understand what the marketing team is doing and how they plan to do it. What are their goals? What are their expectations? Again, try to get the plans for the same two-year view.
3. You want to obtain the goals and plans of ancillary marketing teams as well. Include the plans for strategic planning, direct and indirect channel teams, and alliance or partner relationships. Are they launching new programs in the next 8 quarters? Their activities may be relevant and it's best to be prepared.
4. Once you have plans from others in hand, arrange an all-day off-site meeting for the product marketing team. Building a product marketing roadmap is a highly interactive process. You need to do this as a team, in a face-to-face meeting. You need to do this together to obtain concurrence across the team in order to have complete support for the goals and outcomes.

You will want to be outside the office to minimize distractions and interruptions. Don't worry about being at an extravagant location; you'll need room for walls, whiteboards, etc. It is best to avoid a home (unless *everyone* on the team is comfortable there). For some reason, when you leave the office, the energy feels different. Take advantage of the creativity and excitement. Of course, make sure you arrange for beverages, snacks, lunch, etc. At a local facility, with food, you can still keep the budget for the day to a minimum. Make the investment! It's a small token towards the significant strategic planning process.



*If you build it,
he will come.*

– The Voice, Field of Dreams

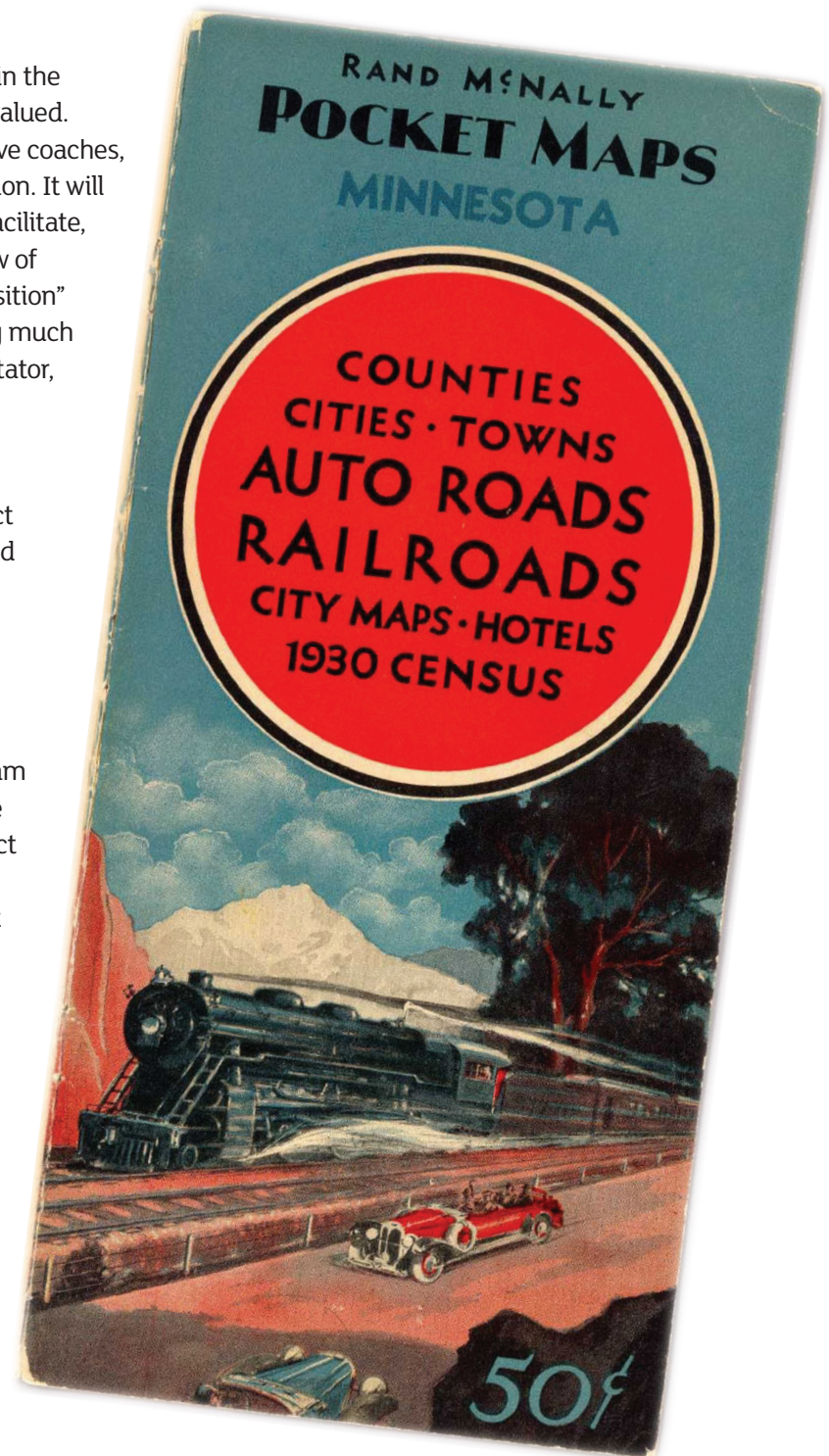


5. Arrange for an independent facilitator. This is someone who does not have a vested interest in the outcome, only that the process flows and all persons involved are listened to, engaged and valued. Does your organization already have one? Companies with agile processes in place often have coaches, facilitators, or trainers you can use. If not, ask a leader from a different part of the organization. It will need to be someone who the team respects; and, this individual should have the ability to facilitate, encourage, etc. If there isn't someone within the organization, ask your network if they know of someone who may be willing to help out. There are often network contacts who are "in-transition" and would be willing to help. If you use an outside person, you most likely won't have to pay much but you should expect to offer some sort of token payment. If you are unable to find a facilitator, you can contact a consulting firm. This option will cost you, but you are guaranteed of a professional facilitator.

The key to a successful meeting is prep-time spent with the facilitator. Find a sample product marketing roadmap so they know what the end result looks like. (Contact me if you can't find a sample.) Talk with them about how you would like to encourage participation and how to engage all team members in the discussion. You know your team best. You need to engage with someone who is not interested in the outcome but will make sure that everyone in the room is committed to the end result.

6. Take an Agile approach. One of the principles in agile development methods is to put the team together – in person – and work through the stories they will use to guide the building of the product. To make the product marketing roadmap concept work, start by putting the product marketing team in the room. Bring in sticky notes, paper, white boards and copies of the roadmaps and plans you collected, copies of your marketing artifacts (sales sheets, etc.) but **LEAVE THE COMPUTERS OUTSIDE** and **TURN OFF PHONES!** When we are in brainstorming sessions, technology tends to inhibit and distract. And distracted people lose rhythm and collaboration. If your team stays focused for the day, this activity can be accomplished. Cell phones and email can be checked at breaks, if you can't ask everyone to disconnect all day.

Here's a tip: Start the day with having the team stand. Yes, remove the chairs in the room and have people stand up. Movement gets the blood flowing and tends to encourage more interaction, which allows different people to contribute. You will be moving around and working with boards on the wall. The up and down with the chairs can actually lead to distraction. (The chairs can be stored on the sides of the room for use later.)



7. Start your day with something fun, a team-building exercise of some sort. These are invigorating exercises and you'll walk away with some fresh ideas. This may seem "old school," but you're about to start a day where you need to be able to share honest communication, respect and trust your teammates and be willing to give and take. Make it short and simple; 10 to 15 minutes is really all that is needed. A small group exercise to start the day is a perfect way to get the team in the mood to work together.

A few ideas to get you going may include:

- Improv (Start with a story "A sales person walks.....," then by pointing to people they have to tell the story)
- Back-to-back drawing (where one person explains the picture to draw as the other draws it – without saying what the image is!)
- Cocktail Party (assign a character to each team member and by pretending you're at a cocktail party, you have to figure out what characters each team member is.)
- Build it! (Bring in a bucket of Legos or other building structure, and working as a team, build a structure – then explain why you built that. You can easily divide this into multiple teams who compete for the highest structure.)
- Human Checkers. (If you have enough, play a game of human checkers, taking turns amongst the team members as to who is the decision maker)
- Fast Word (Share a set of letters which have points assigned, and see which team can find the most words or get the highest point total.)
- Trivial Pursuit® (Make a copy of the board on a large paper to put on the floor, or hang on a wall. Using a combination of questions from the game – any card set – and questions about your organization, teams take turns to win the "tokens.")

You get the idea. The point of the exercise is to get everyone's mind cleared and open to new ideas, build trust and respect, and get the group working together, where everyone feels empowered to contribute. The activity should be highly interactive and not based on skill. It does need to be all-inclusive. If you need more ideas, look online, including the innovationgames.com web site.

*The secret of
getting ahead
is to get started.*

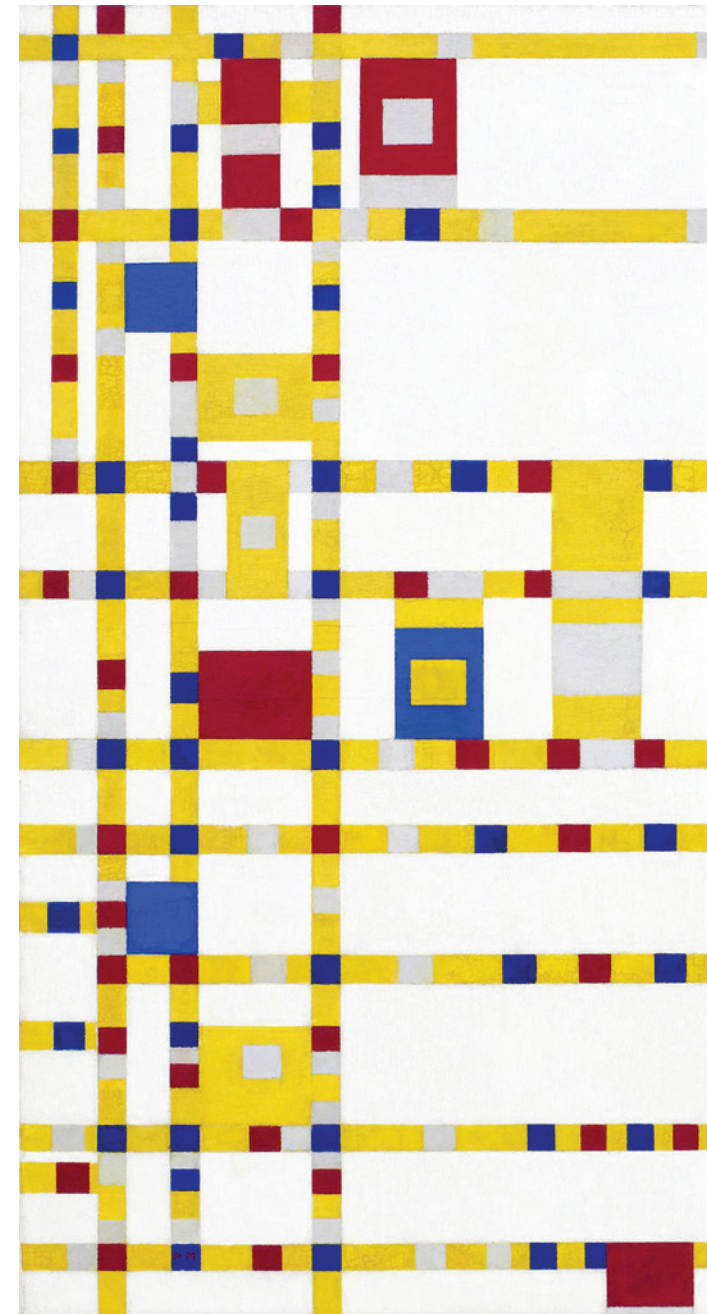
– Mark Twain

8. Now it's time to start the work. Ask a senior product management leader to come in and share the company's strategy and take a high-level view of the technical product roadmap. (Try to get the highest person in the organization you can. There is something about authority and approval that matters here.) Then, begin by discussing the plans you gathered from the other departments. Your goal in the review session is to come to an agreement on what activities by others will impact your work. If the alliance team is rolling out a new program, what will you have to provide to help? What is your expected role in that huge lead generation increase?

This is also where you can get up and stretch a bit if you brought the chairs back in to use. Ask your team to write down the elements that they just heard and discussed. Innovate here with the beginnings of the list, and you'll have the team engaged for the whole day!

Build the grid!...

9. Once you have agreement on what's relevant, it's time to actually build the roadmap. Plot out the product roadmap against the marketing plans.
- Start by building a grid. Your whiteboards/ large paper taped to a wall and post-its are the tools to build this.
 - Down the side, the rows, place your initiatives, strategies, business, etc. What are the buckets of work that is being done called? One company may call it "Strategic Initiatives" while another may call the same "Organizational Directives." What the label is does not matter; it's the concept where you should focus.



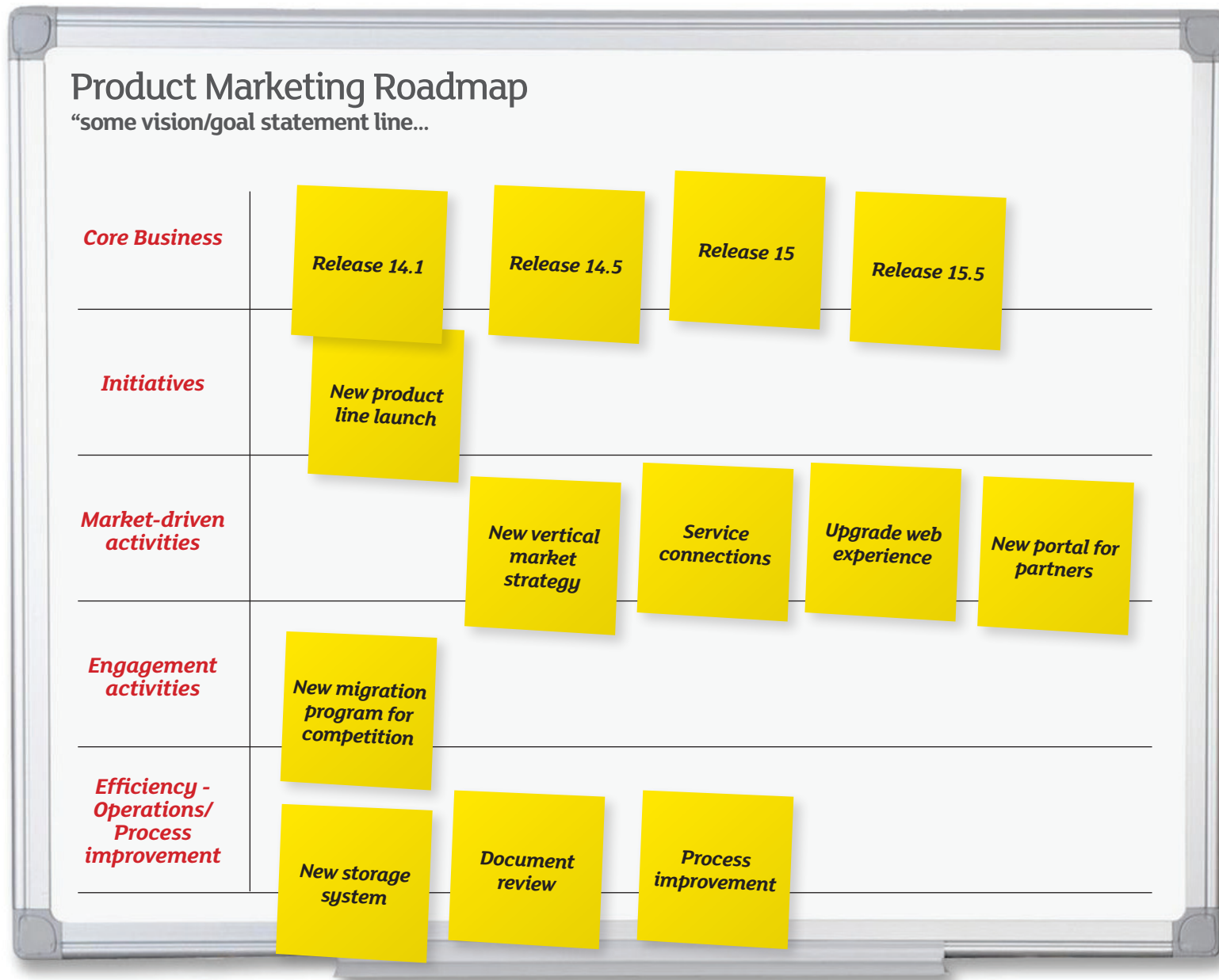
Broadway Boogie Woogie - Detail
Piet Mondrian 1942-43

When you're done, the board will look something like this:

Product Marketing Roadmap
“some vision/goal statement line...”

<i>Core Business</i>	
<i>Initiatives</i>	
<i>Market-driven activities</i>	
<i>Engagement activities</i>	
<i>Efficiency - Operations/ Process improvement</i>	

10. Look at the empty space to the right on each row. How are you going to complete the block? The content that belongs in here is what will bridge the conversation between you and the teams who provided input. How do you get the product from idea to your sales teams? How will you generate leads through the marketing plans? In each of the cell blocks, add the activities that must be performed to support the goal. This is the content for the product marketing roadmap. Have each team member write down a single activity on a post-it and place it in the space to the right of the category. When you are complete, it will look something like this:



11. Without dates and goals, this isn't much of a roadmap. Add in columns with the quarters or years as your headers. Shift activities to that were previously discussed to the proper timeframe when they will be accomplished. It will look something like this:



Once you have assigned your activities to the time frame, you most likely will have an exhaustive list of post-its hanging around. Take a photo of your starting point because now is the time for the editing process. It's rare to find that any one product marketing team will ever have enough resources to complete all the items on their list in the timeframe that is desired. In this case, you may find that you will have to rearrange or remove activities. Of course, this may also be a chance to illustrate how much work there is for your team and become an opportunity to visualize why you should advocate for more headcount or a larger budget.

While you are adjusting for time and resource balance, it will be obvious where gaps exist that should be evaluated. If you see a blank cell on the board, talk about it. Maybe you left that cell intentionally empty; or, maybe you should shift an activity or two into the empty cell. Are you addressing company projects? If you know there is a new initiative in the works, yet you don't see product marketing activities to match, then you are not in strategic alignment and need to address this with more communication, both inside your team and with the product management team. Go through each cell and talk about the activity and resource assigned. Are your expectations reasonable now? If not, keep adjusting until you have complete agreement amongst the team that the activities within each cell to address the goals, direction and needs of everyone in the room in a way that will continue to grow your product.

You can use any format you choose for your final output. Some people enjoy working in PowerPoint, others in Word, and yet even some in Excel. The program you use to display the roadmap is not the focus here – the content is. Use the format where you are most comfortable; especially since you will be in the document often with updates.

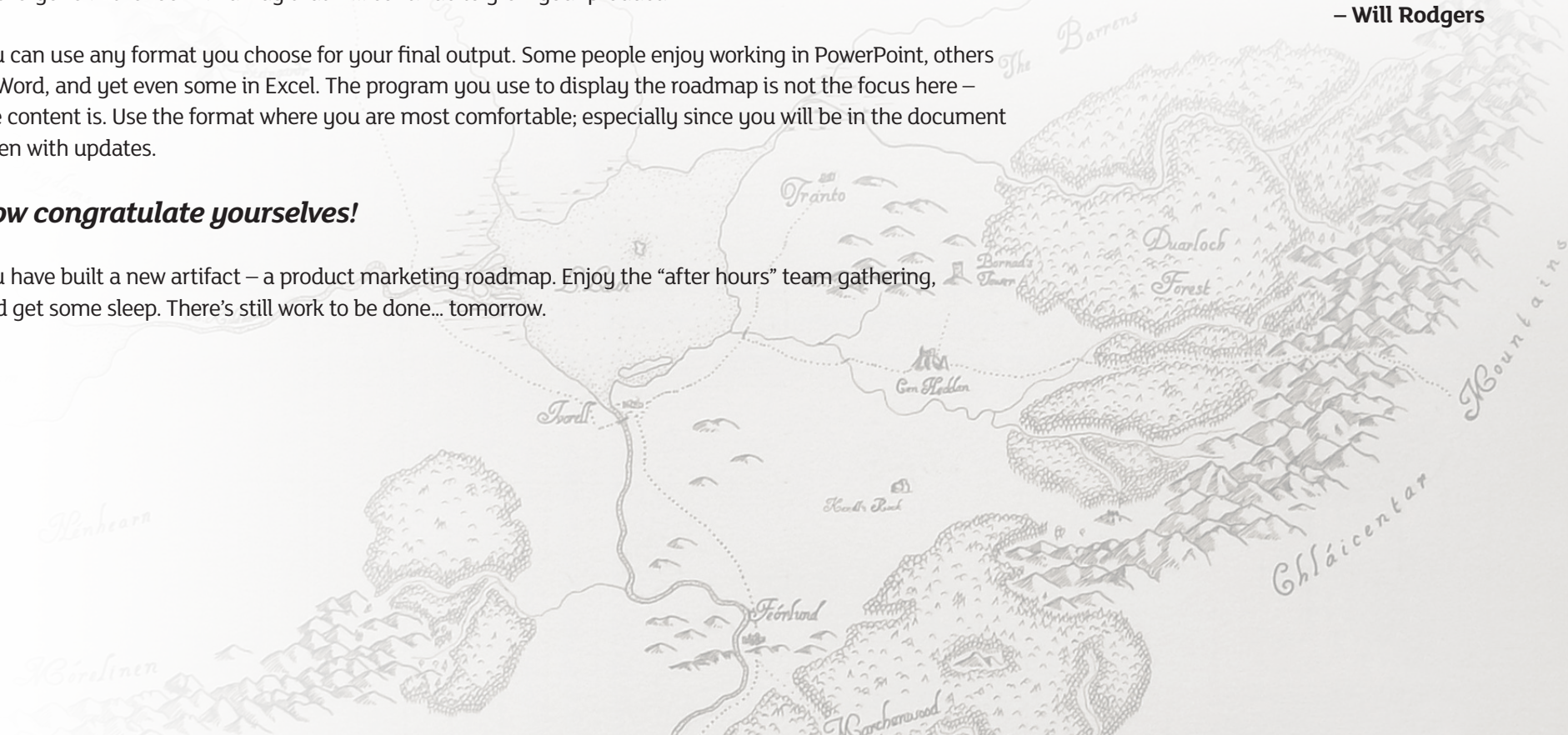
Now congratulate yourselves!

You have built a new artifact – a product marketing roadmap. Enjoy the “after hours” team gathering, and get some sleep. There's still work to be done... tomorrow.



***Even if you're on
the right track,
you'll get run over
if you just sit there.***

– Will Rodgers



The hard work comes now...

Now that you have built the product marketing roadmap, the hard part is upon you. Unlike the product roadmap, which is built around features, the product marketing roadmap is built around activities and actions that drive the “promotion” of the product in the market. But the need to get the organizational support internally is what takes the real work.

You need to take the artifact to your peers and partners to obtain their buy-in. Without the support of your colleagues, the activities on your roadmap will not be accomplished and you will be unsuccessful in meeting the strategic goals set forth. And, remember, you built your plans from their plans making your efforts intertwined with theirs – highlight those connector points.

It's only a workable roadmap when you get agreement of all the parties together!

In obtaining the support of your partners, you should be prepared to share the specifics of what they provided and how that translated in your process. Point out, to each individual group, the specific items and impact. Help them understand why an activity may have been deferred and the relationship between different activities that drove decisions on placement. In other words, prepare to justify and defend. At first glance, the roadmap may look like you are planning to spend more money and take longer. If this is the case, be prepared to be challenged by execs who question the money and sales who will ask why it appears everything is taking longer. Point out the reasons and work behind what you're doing. If you have truly used their plans as the backbone of your roadmap, defending your plan should not be a difficult task.



Opportunity is missed by most people because it is dressed in overalls and looks like work.

– Thomas Edison



Share...

One of the major differences between a product roadmap and a product marketing roadmap is with whom you share this artifact. A product roadmap is often shared with external customers and market prospects, while a product marketing roadmap is never shared externally and rarely with the sales team. (One exception to the sharing with the sales team may be at the annual sales kickoff, where you share the content of your roadmap with the team to explain your plans.)

The audience for this roadmap is the internal stakeholders of your organization. The roadmap may prove to be helpful when having market discussions on calls and visits, replacing the more concrete product roadmap as a discussion tool; but, it is not an activity list that should be left behind after such a visit.



Share your knowledge.

*It is a way to achieve
immortality.*

– Dalai Lama



Build the tactics...

Now it's time to build out the plan from the strategic view of activities to one involving tactics. What tools need to be created to support the new migration? What training will need to be delivered to highlight the benefits of the feature coming next year? Is there a PR component that needs to be addressed?

Work a tactical plan, checking along the way to make sure you're delivering against the proposed roadmap. You have a guide now. If your actions don't match the strategy – toss them out! Be reasonable in your planning. For example, if your roadmap indicates that the website will be done in Q3, is it reasonable to expect that you will have all the messages/words complete in one month AND have a developer finish the programming? Plan smart. Be creative in your approach. Your activities may need you to make a tactical plan that looks more like a timeline than a list. Let the format of your list be the afterthought to the activities contained on it. As each roadmap is different, so will each plan that is built from one.

Plan your tactical activities from the strategic direction set, and you are likely to notice that the everyday work makes more sense. It supports a bigger picture now, when you tie it back to the roadmap.



*Creativity is allowing
yourself to make
mistakes. Art is knowing
which ones to keep.*

– Scott Adams



Still more to do...

It's not enough to simply focus on WHAT you share; but, you need to look at HOW you are sharing the information contained in your new product marketing roadmap. Your vision can't be realized unless you do this right.

Does your company do a quarterly business review? Does product marketing have a seat at this table? What about Product Management and Marketing summits or weekly staff meeting. YOU GOTTA SOCIALIZE THIS THING!

It takes courage to share what you've created. Don't be afraid. The more you socialize and share the effort, the better your roadmap – and the subsequent plan – will become. It does, in fact, take a community to launch a product. You cannot expect success if you launch a product alone. It takes the cooperation and resources of other teams for success. You must rely on the others' strengths and knowledge for a true communal success.

Socialize and share.

If you don't have a seat at the table, ask for one. If you aren't comfortable asking for one, create one of your own. Product marketing needs to understand what is happening throughout the business. It is just as important for you to validate your roadmap with those whose information helped you create it as it is to go through the effort of creating it. If you aren't aware of changes going on in other areas of the organization, then your plans could be derailed and made less meaningful. Having a seat, having a voice, is critical to the success.

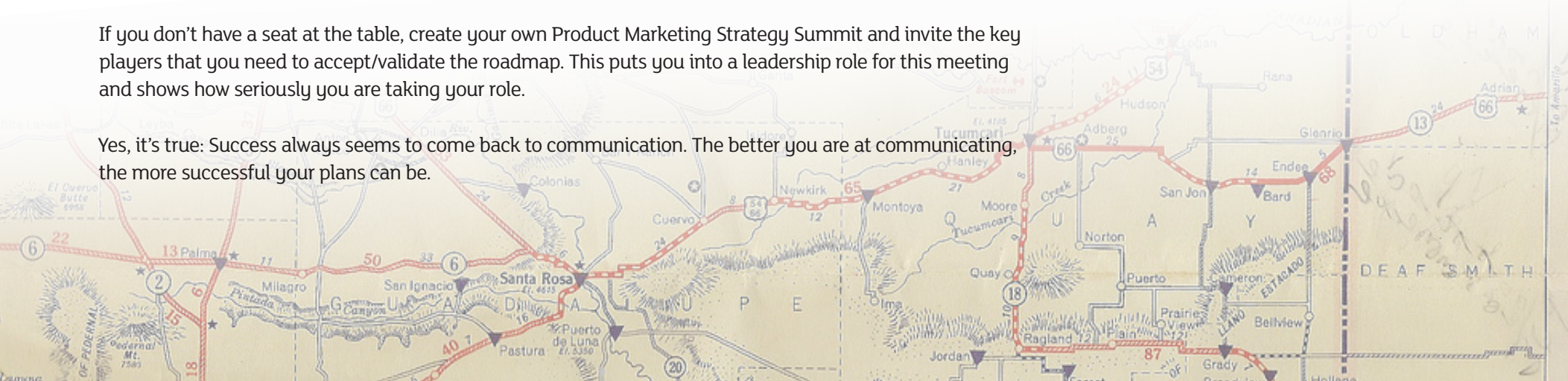
If you don't have a seat at the table, create your own Product Marketing Strategy Summit and invite the key players that you need to accept/validate the roadmap. This puts you into a leadership role for this meeting and shows how seriously you are taking your role.

Yes, it's true: Success always seems to come back to communication. The better you are at communicating, the more successful your plans can be.



*Vision without action
is just a dream,
action without vision
just passes the time,
vision with action can
change the world*

– Nelson Mandela



...A final thought (or two)...

Your roadmap is not about theory. It was not just a team-building exercise. It is real. It is practical and can be implemented in the organization.

It's critical to keep your roadmap alive; don't let it go the way of other team artifacts—written, filed, and forgotten. Time and resources were invested in the strategic process of building the roadmap. Work your roadmap. Measure and report your progress against it. Update it when needed.

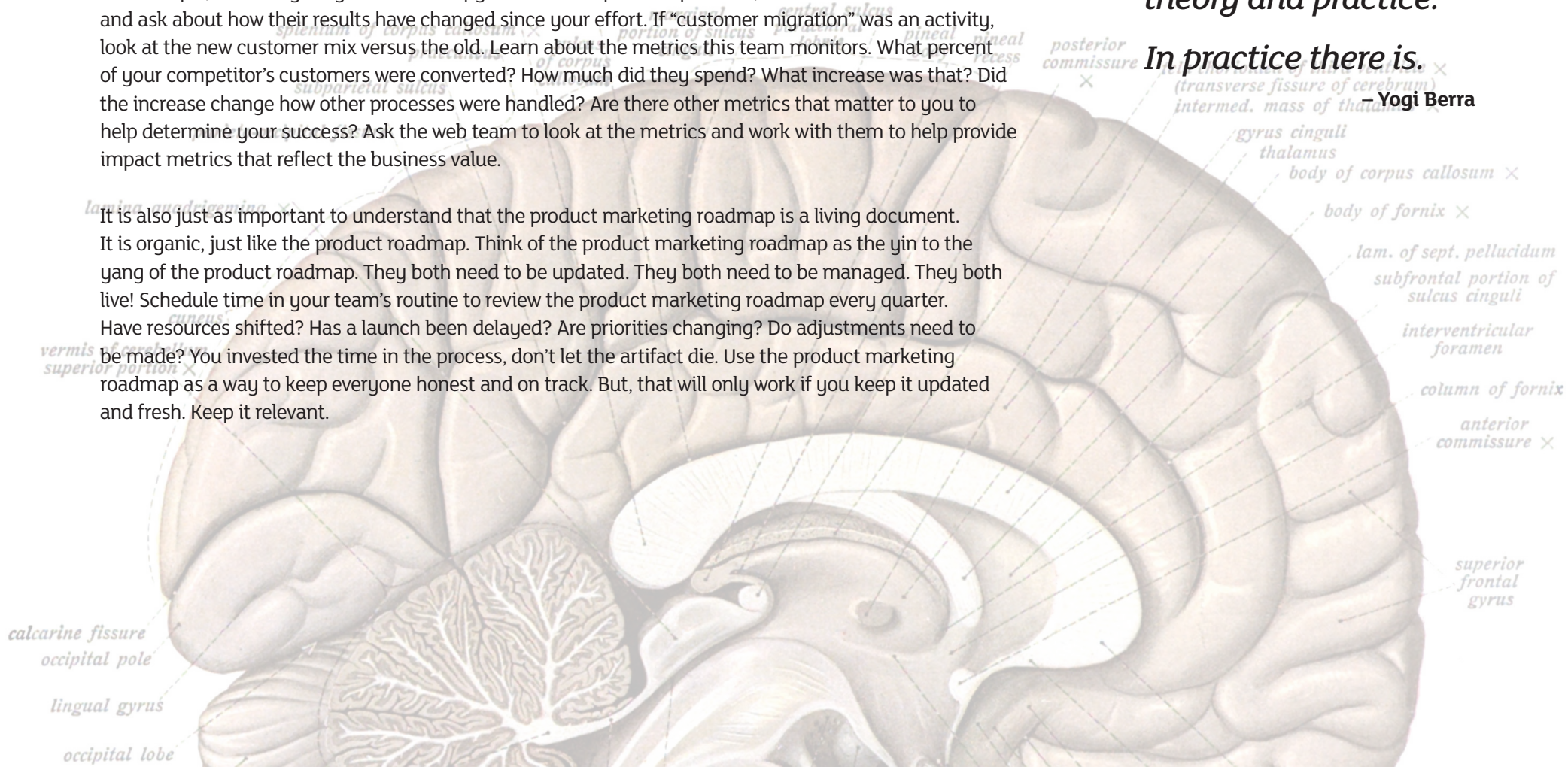
Metrics to include are not only how you have performed against your plan but the impacts of the activities. For example, if one of your goals was to “upgrade the web/portal experience,” then talk to the web team and ask about how their results have changed since your effort. If “customer migration” was an activity, look at the new customer mix versus the old. Learn about the metrics this team monitors. What percent of your competitor's customers were converted? How much did they spend? What increase was that? Did the increase change how other processes were handled? Are there other metrics that matter to you to help determine your success? Ask the web team to look at the metrics and work with them to help provide impact metrics that reflect the business value.

It is also just as important to understand that the product marketing roadmap is a living document. It is organic, just like the product roadmap. Think of the product marketing roadmap as the yin to the yang of the product roadmap. They both need to be updated. They both need to be managed. They both live! Schedule time in your team's routine to review the product marketing roadmap every quarter. Have resources shifted? Has a launch been delayed? Are priorities changing? Do adjustments need to be made? You invested the time in the process, don't let the artifact die. Use the product marketing roadmap as a way to keep everyone honest and on track. But, that will only work if you keep it updated and fresh. Keep it relevant.



*In theory there is no
difference between
theory and practice.*

In practice there is.
—Yogi Berra



Get to work...

The actual work of building a product marketing roadmap is not difficult. Anyone can sit in a room and throw the notes on a wall and then organize them. This whole concept is not about the exercise of building a roadmap. It's about the strategic planning process that comes with the effort.

The roadmap is a tool; the strategic process is invaluable. This is true for product management and it is true for product marketing. Don't devalue the time spent. Don't let your team out of the meeting/day. Make sure that everyone knows that this is a priority and that it really matters.

The end result will not only help guide your activities but also bring a spotlight to shine on the value of product marketing. It's common in product marketing to need to "influence without authority."

But, to influence, you need credibility. You need to not only know what you are doing, but to be able to communicate a coherent plan with goals and metrics. By building a product marketing roadmap, you won't be seen as the team who only prepares the sales enablement tools anymore. You will be the team that aligns those tools to a strategic vision. You now add business value.

And, that is value you can't buy – you need to earn it.



It had long since come to my attention that people of accomplishment rarely sat back and let things happen to them. They went out and happened to things.

– Leonardo da Vinci

About Jennifer Doctor



Jennifer is the managing partner of HarborLight Partners, a product marketing consulting firm focused on helping companies identify, develop, launch and bring their products to market. HarborLight helps companies better understand their market and organization so they can “unstick” their product and gain momentum unleashing the product’s potential.

In this role, Jennifer brings a unique blend of product management, product marketing, marketing, and IT knowledge to her work, allowing her to effectively speak to all roles and teams involved throughout the product lifecycle.

Her passion is helping the role of the product marketer to share the value of product marketing and earn respect and trust within organizations.

Jennifer has more than 15 years of experience in product marketing and product management, working with companies to help them bring products to life. Her experience includes “time in the trenches”, and she has done it all, from market segmentation and persona development, to gathering requirements, developing use cases, prioritization of features, and writing the stories and requirements, as well as messaging, launching and presenting to markets and buyers, writing and designing marketing collateral, and working with sales teams to enable them to deliver results.

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