Building an Effective Roadmap

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Agenda

- What is an effective roadmap?
- What are roadmap benefits?
- Why do roadmaps typically fail?
- How can roadmaps be successful?
- How should we approach a strategic roadmap?
- What is an approach to roadmap layout?
- What is iterative roadmap development?

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What is an effective (Agile) roadmap?

- A living document designed to answer key strategic questions:
  - Who are my desirable markets / market segments?
  - What do they care about?
  - When / how often should I serve them?
  - What technologies can I leverage?
  - How must my current product change to deal with the answers to these questions?
  - What are the external factors that I must address to deal with these issues?

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Benefits of a Roadmap

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- Roadmaps identify and clarify the tactical and strategic intent of your product
- Internally:
  - Becomes the filter for backlog prioritization
  - Gains consensus around direction
  - Ensures the “ship is headed in the right direction”
  - Avoids the “last/loudest” priority problem
- Externally:
  - Provides customers with access to near-term commitments and long term “points of view”
  - Binds customers to your company

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Typical Roadmap Failures

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

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Sample Product Roadmap (for a major partner)

Q105

Objective:

• 5.1 Maintenance release

Product Highlights:

• Performance & security

Delivery Timeline:

• 5.1 GA 3/18

Q205

Objective:

• 5.2 Server performanc monitoring (Phase 1)

Product Highlights:

• **R**eporting and analysis for servers and applications

• Partner integration

Delivery Timeline:

• End Q2 GA Reporting

• End Q3 GA Analysis

Q305-Q106

Objective:

• 5.3 Server performance monitoring (Phase 2)

Product Highlights:

• More data sources

• Packaged applications

• Additional analysis models

• Optimization analytics

• Partner requirements

Delivery Timeline:

• Q4-Q1

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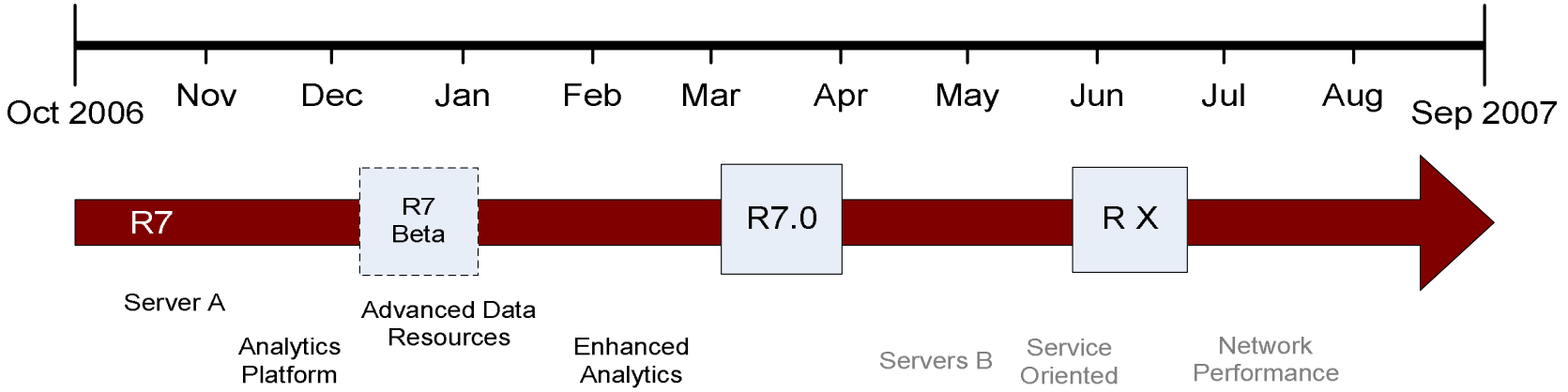
Sample Product Roadmap (External View)



R5.2 - Network Performance (GA)

- Enterprise scale network platform
- Business context integration
- Reporting and visualization platform
- Solution packaging – A, B, C

R5.3 - Network Consumption & Demand (Limited Availability 11/06)

- Improved exception reporting
- Audit trail
- Performance enhancements
- Support for Partner product (R5.2 and R5.3)

R7.0 – "X Module" (GA 3/07)

- Support reporting of server performance data
- Supported data sources:
  - A
  - B
  - C (candidate)
  - D (candidate)
  - E (candidate)
- Modular platform configuration, admin, and management
- Analytics and Visualization

R X – (Planning)

- Advanced Integrations
- Advanced Analytics Platform and Reporting
- Candidate Features:
  - F
  - G
  - H
  - I

*** Dates are targets, subject to product development phase approvals. Last Updated xx/xx/xx**

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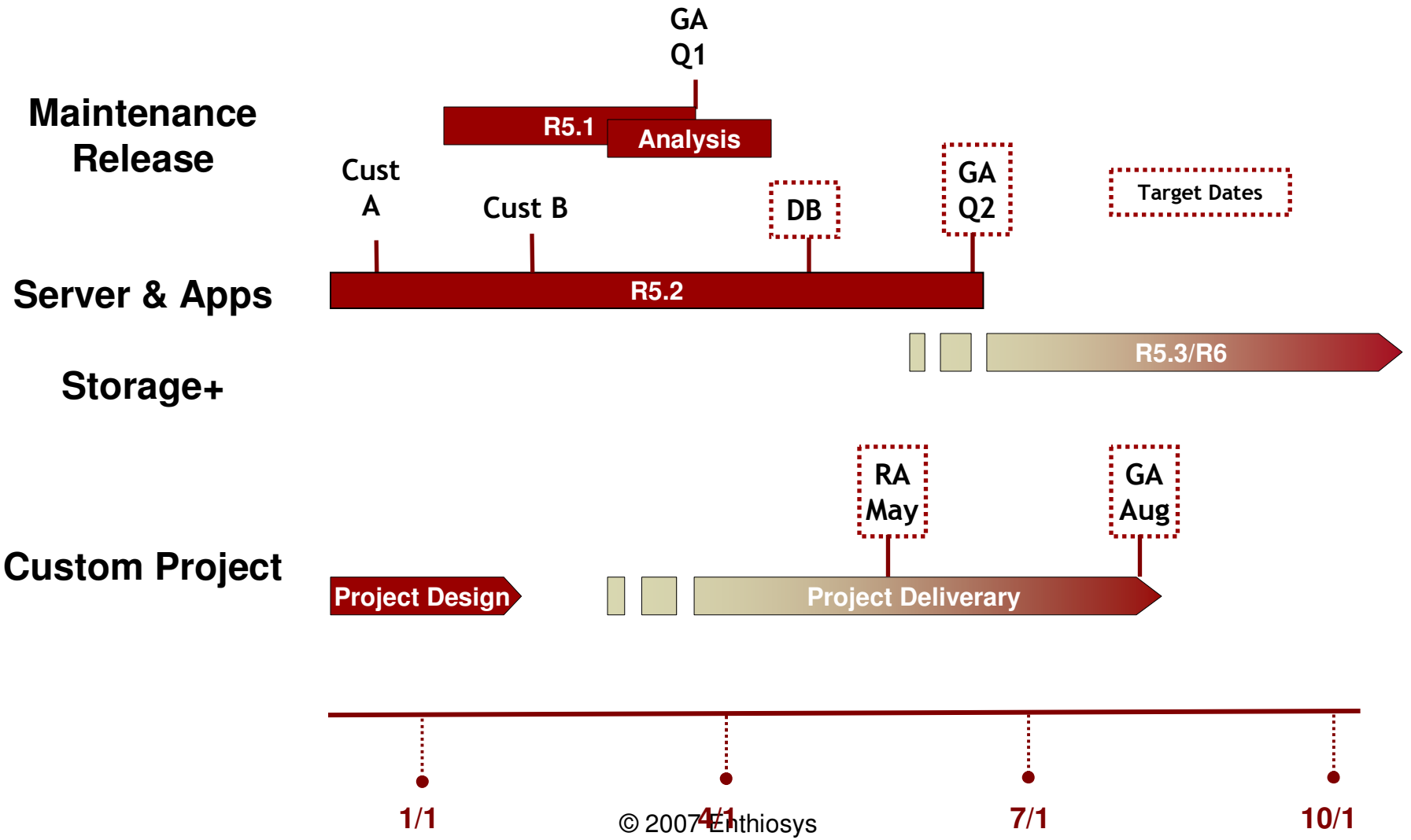
Another Sample Product Roadmap (Board Presentation!)



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Successful Creation of Roadmaps Need…

- Active participation of key constituents
  - Engineering (architects), Marketing, Support, next-level product strategists
- Extended in-person meetings
- Time to research issues
- Quarterly reviews and updates
- Clear (written) distribution plan
- Easy to say, hard to do

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Roadmaps are Scary

- Forces you to articulate what you are ***not*** going to build

- Makes you commit to an uncertain future

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Creating a Strategic Roadmap

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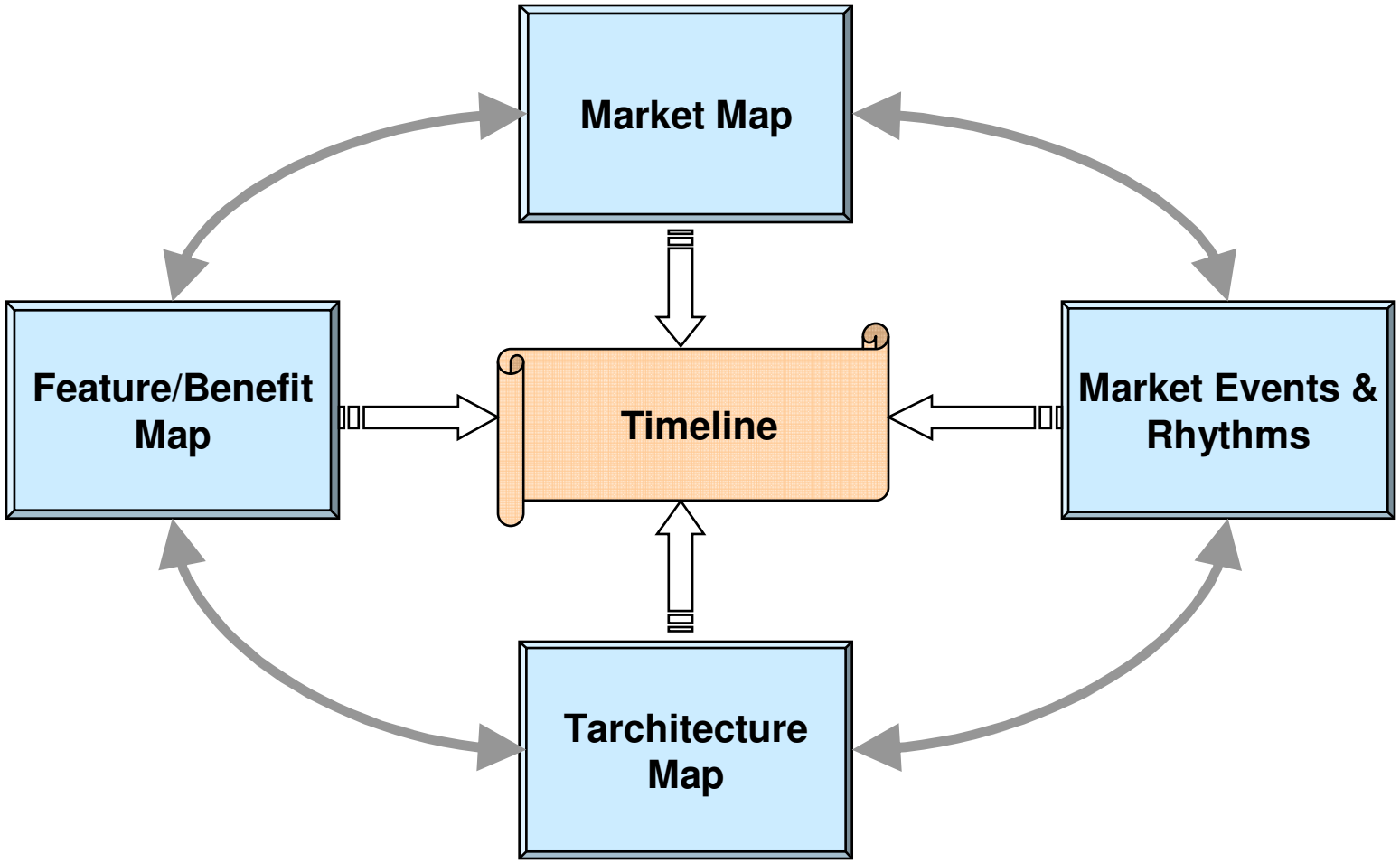

http://martinfowler.com/ieeeSoftware/marketecture.pdf

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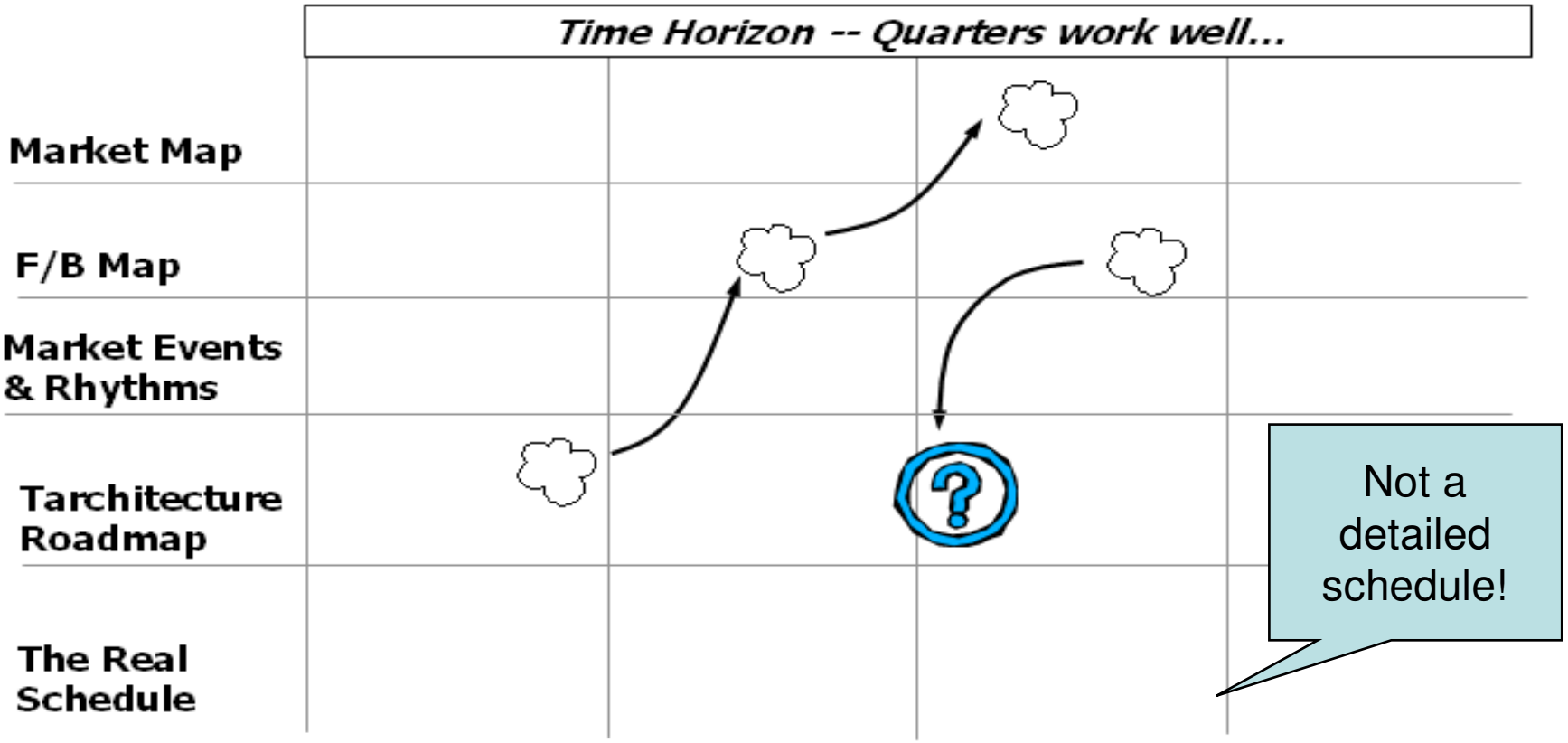
An Approach to Roadmap Layout



We're "Template Agnostic"!
Use a format that works best for you…

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Case Study: Acquisition Digestion

- Startup offering self-service access to small company benefits systems via “smart phones”
  - Want to support multiple devices
  - Innovator-adopters like the system but are frustrated with the slow frequency of releases
  - You’re unsure if system should be deployed as a service or as a customer-premise system
  - Customers have asked for backend integration
  - Development wants to leverage more devices

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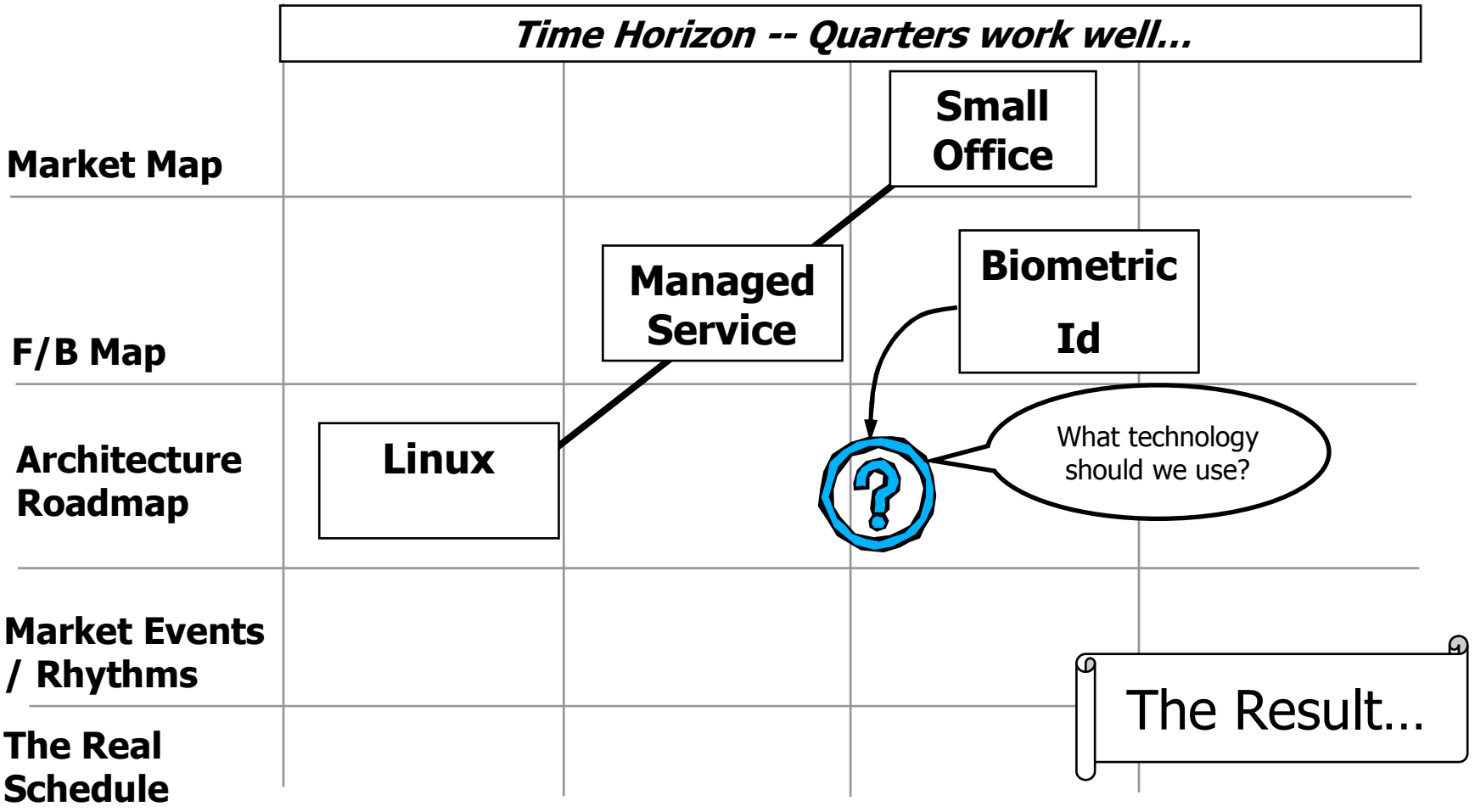
Build Your Strategic Roadmap Iteratively



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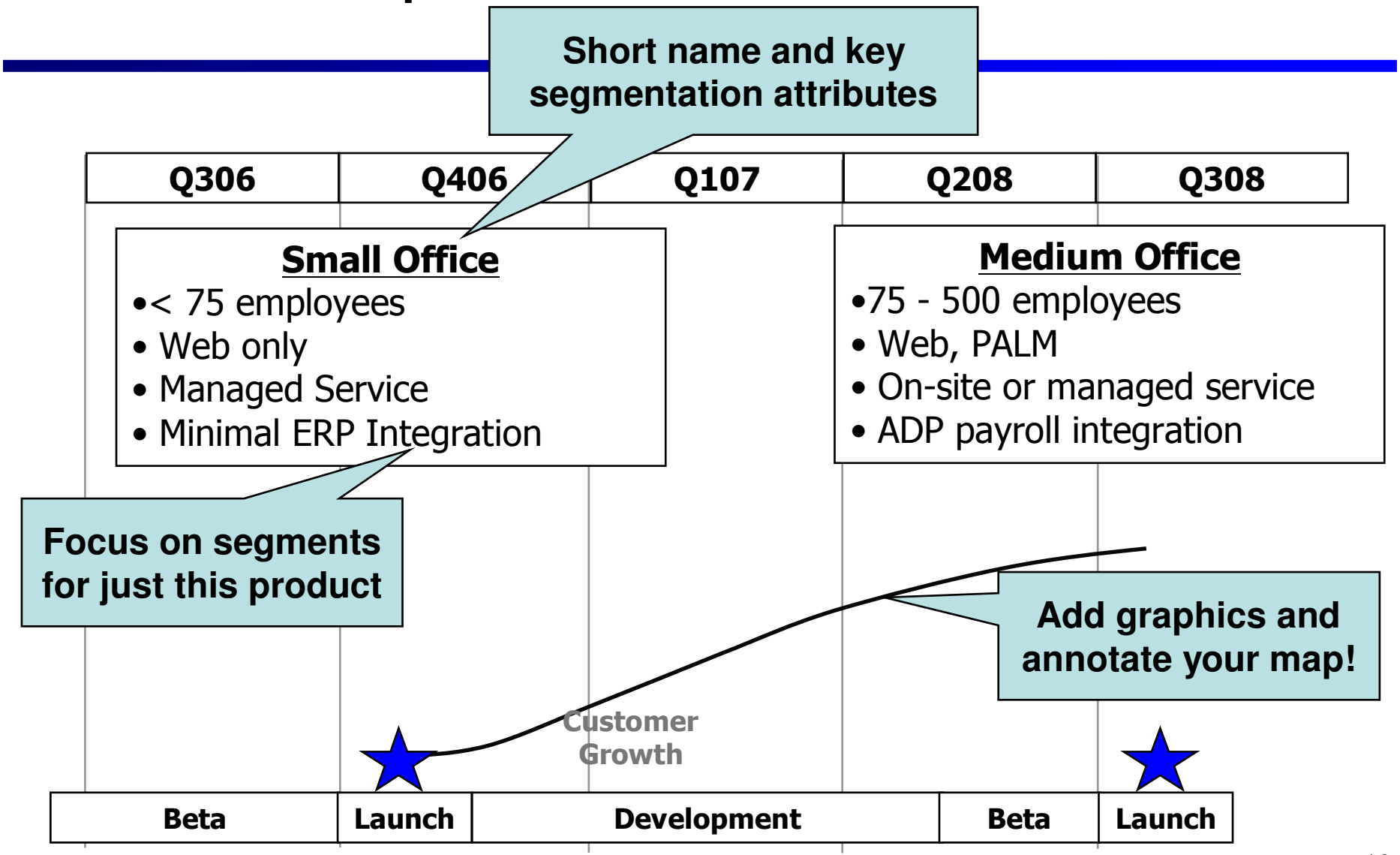
Market Map



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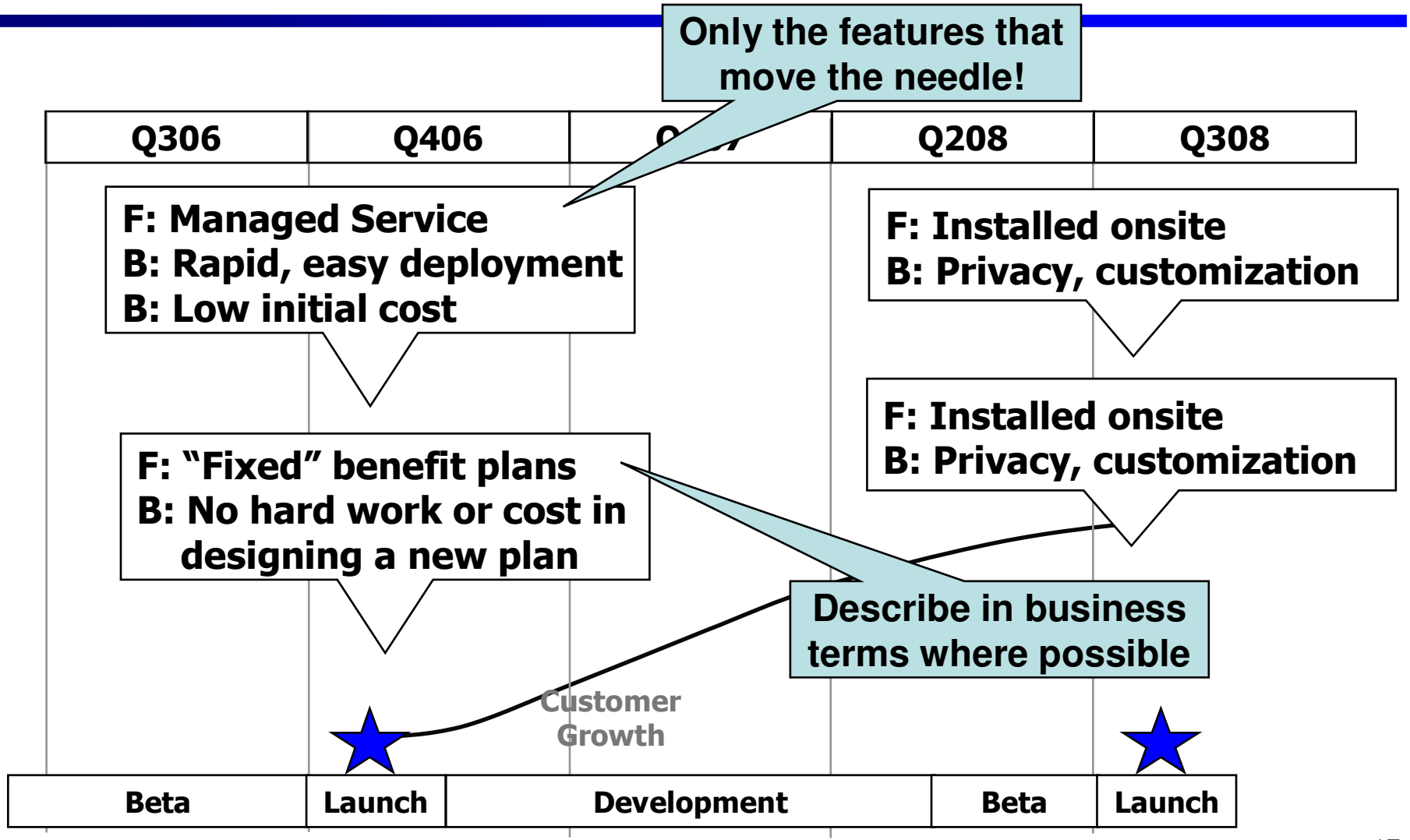
Feature / Benefit Map



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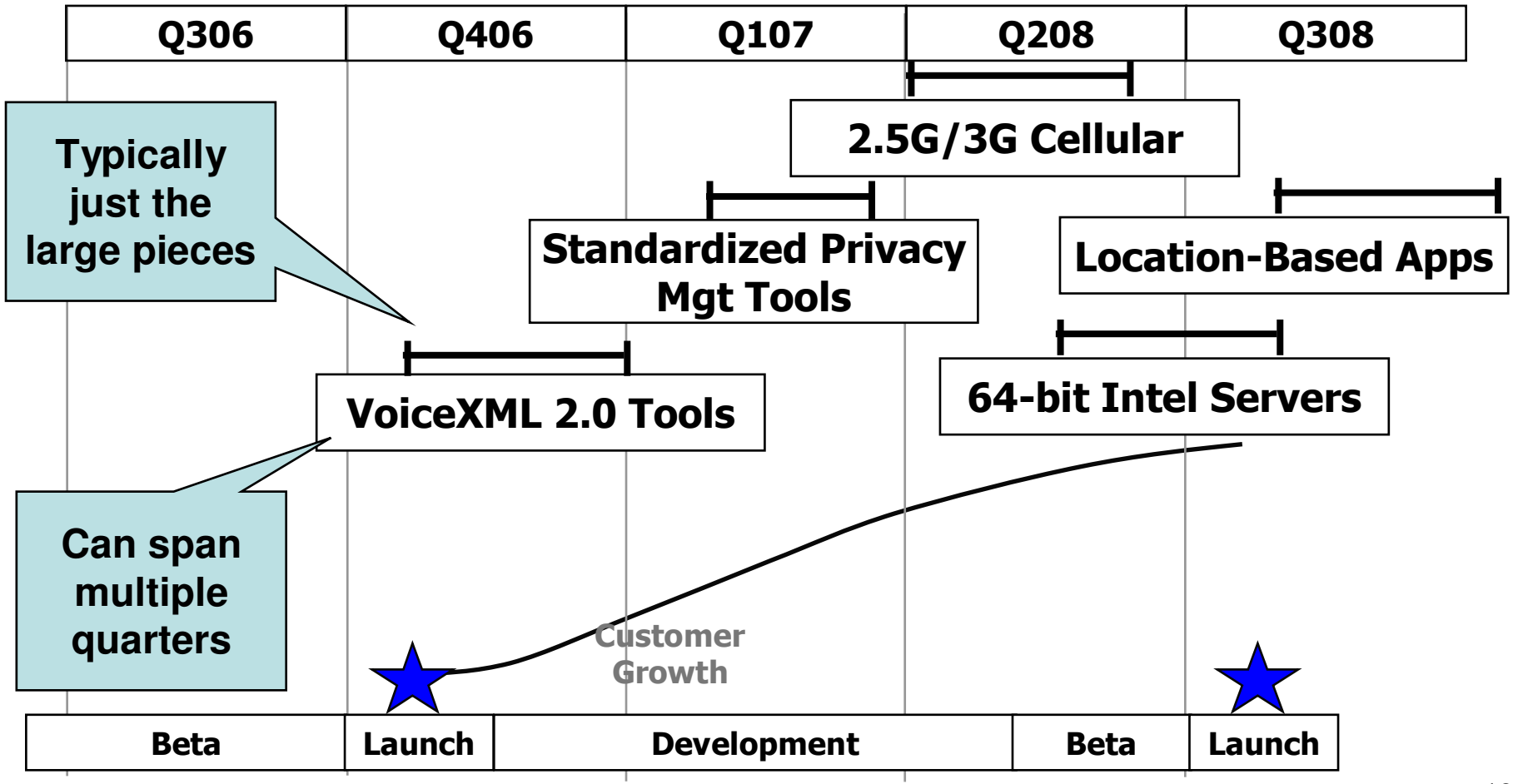
Architecture Roadmap



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Focus on Capabilities

- Major components of the application that enable multiple features
- Ex: Notification Engine
  - Allows users to send schedule, event, or conditional based notifications via any communication channel.

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Managing Architectural Change

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- SEI classifies changes as:
  - Local — fix a bug in a module
  - Non-Local — add new features within existing architecture
  - Architectural — swap out a user interface library with a new library
- To manage architectural change
  1. Lodge the change into the roadmap
  2. Ensure it is on the backlog
  3. Ensure it is prioritized into actual work

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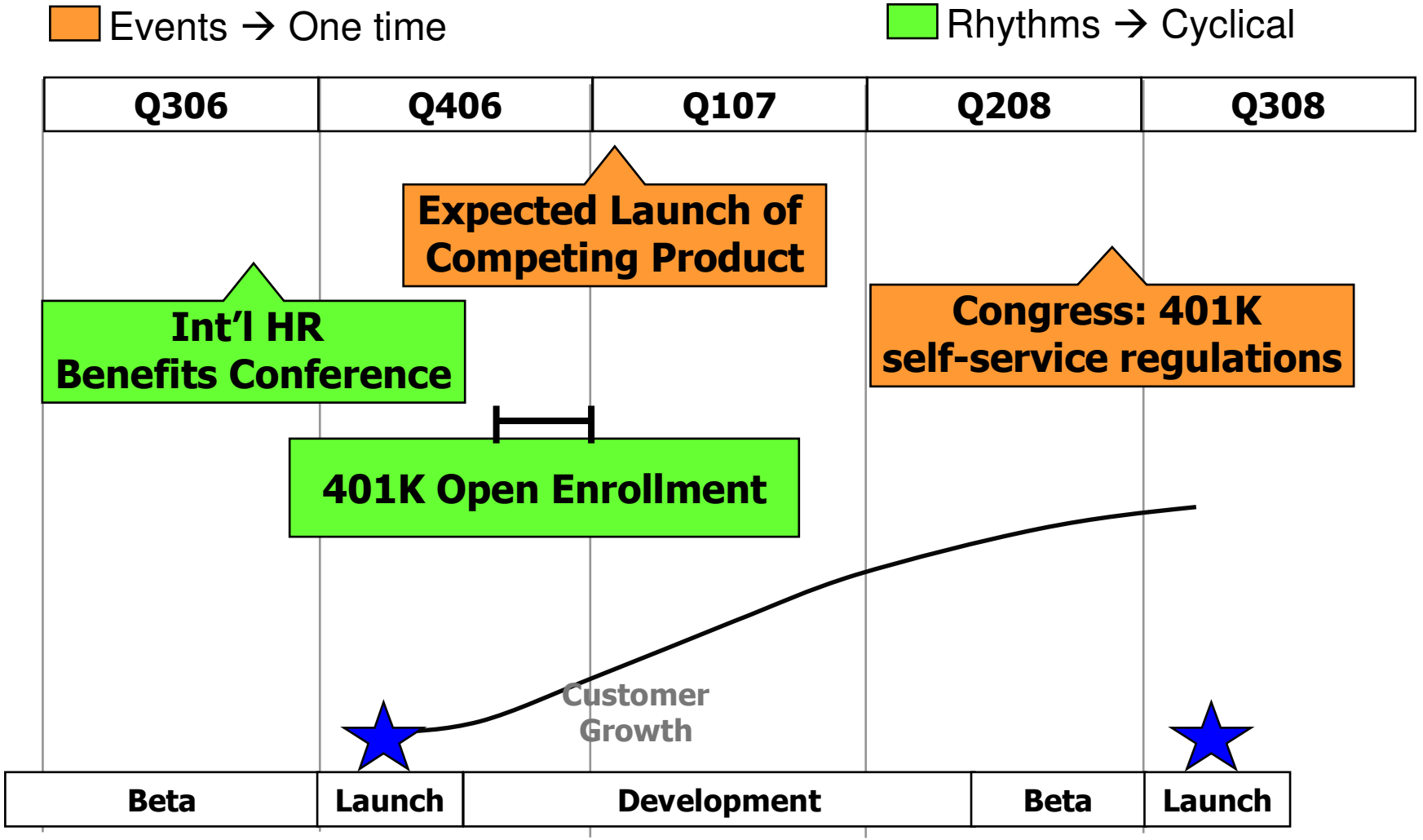
Market Events / Rhythms



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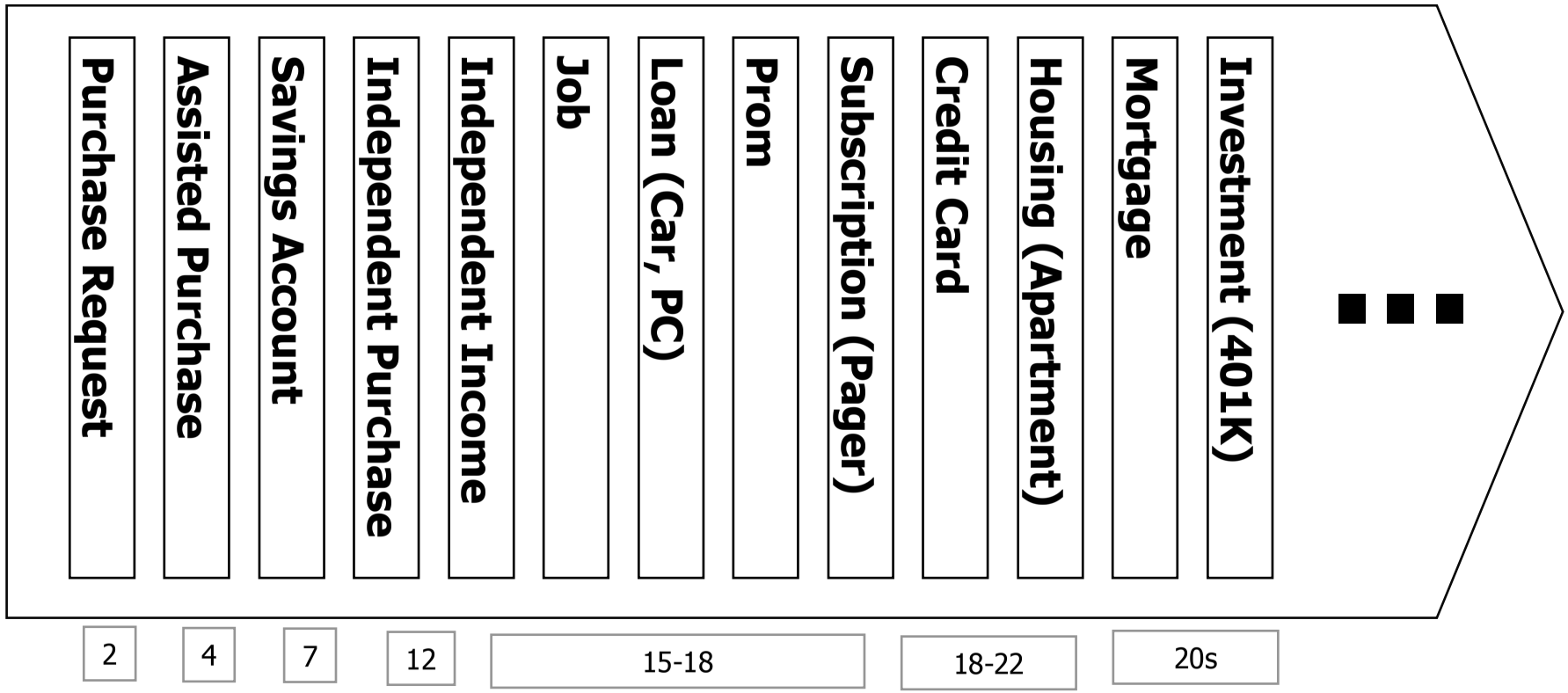
Life “Firsts”



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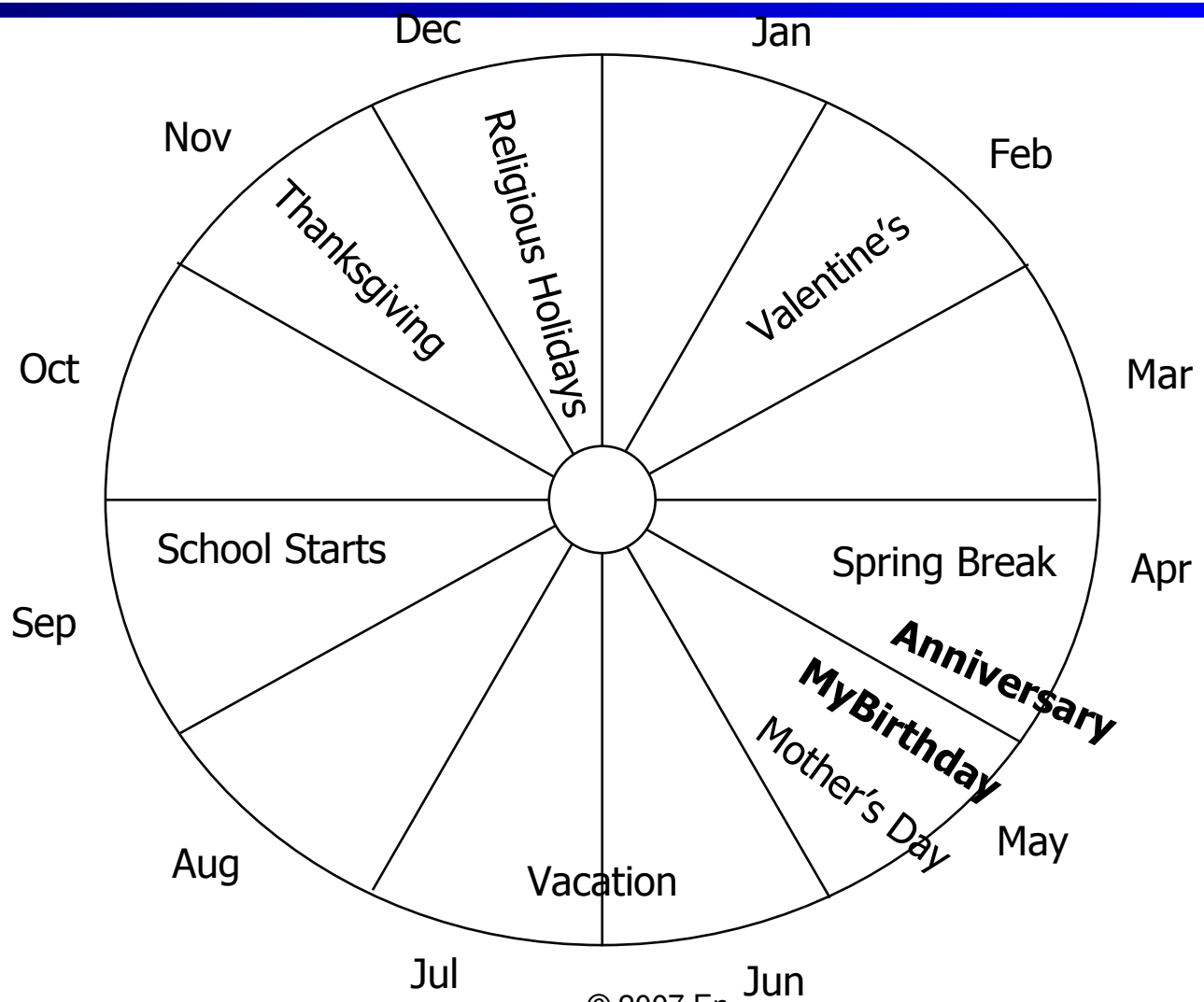
American Life Rhythms



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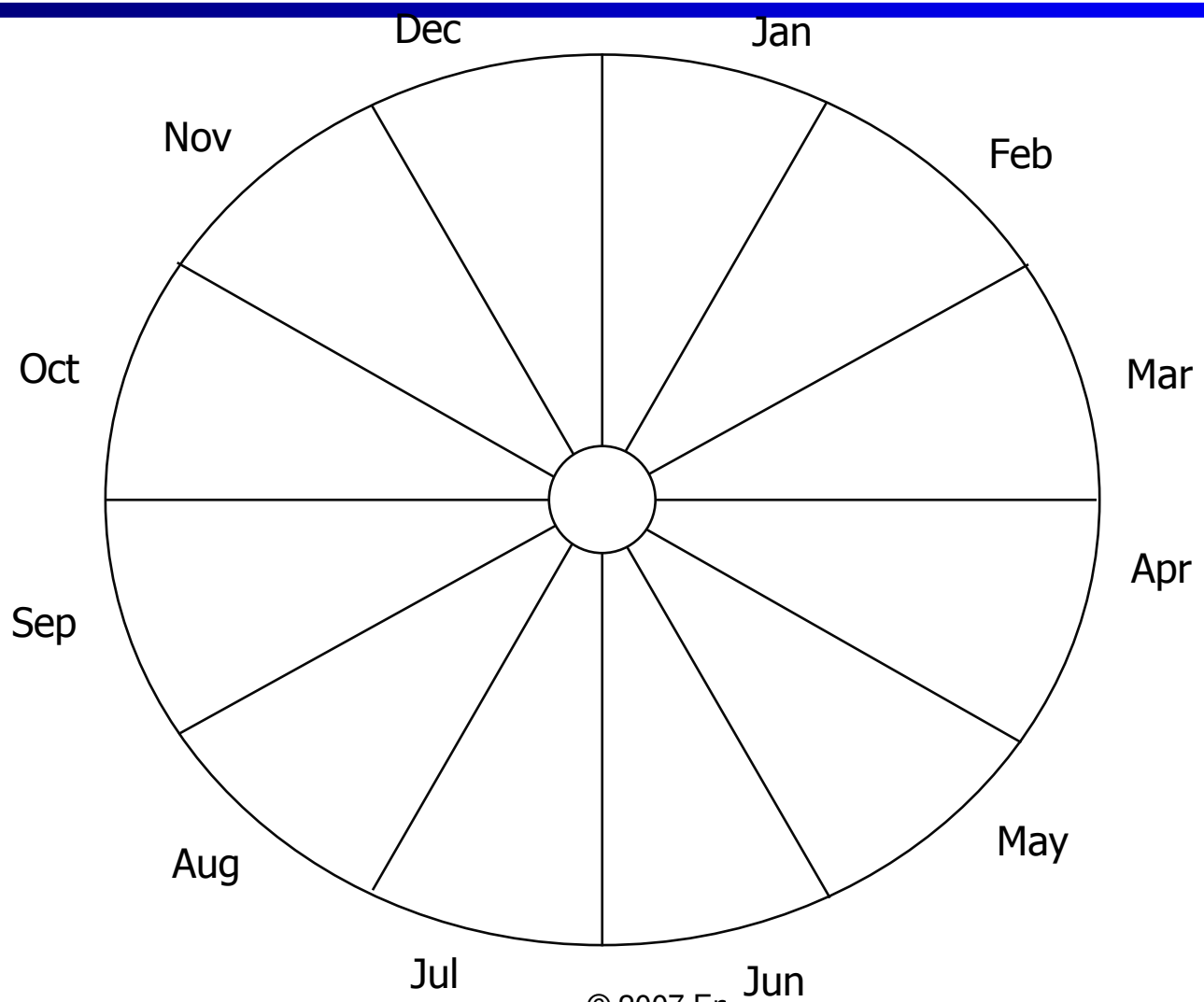
Market Rhythms



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Scheduling Considerations

- Holidays & vacations
- Internal events & rhythms
  - Quarterly earnings calls
  - Peer reviews
- Customer commitments
- Other milestones

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Low-Tech Speeds Collaboration

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Formal results can be transcribed in various tools

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