Collaborative Roadmapping

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http://gistlabs.com
John Heintz
• Developer since 1995
• Agilist since 1999
• Architect since 2002
• Founded Gist Labs in 2008
• Co-Founded Aptage in 2016

Collaborative Roadmapping since 2010
Effective Roadmaps

- Collaborative
- Living Documents
- Connected (String....)
- Strategic/Temporal
- Help answer key questions...
Strategic Questions

• Who are my markets/market segments?
• What do they care about?
• When, how, and 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 internal or external factors that I must address to deal with these issues?
Anemic

• Lacking in color, spirit, or vitality
Anemic Roadmaps, Fail

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

• “Beyond Software Architecture, Creating and Sustaining Winning Solutions”
• Luke Hohmann, 2002

• Appendix B: A Pattern Language for Strategic Product Management
## Example Template

<table>
<thead>
<tr>
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<th>Q1</th>
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<td>Market Map</td>
<td>Who?</td>
<td>Who do we serve? Who do we want to serve?</td>
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<td>Features Benefits</td>
<td>What? Why?</td>
<td>What do they care about?</td>
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<tr>
<td>Architecture /Systems</td>
<td>How?</td>
<td>How do we deliver?</td>
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<td>Events /Rhythms</td>
<td>When? How Often?</td>
<td>When does this matter to them?</td>
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Successful Roadmap
Workshops...

• Active participation of key constituents
• Engineering (architects), Marketing, Business, Support, Fulfillment, etc.
• Extended in-person meetings
• Low Tech
• Time to research issues (need to sleep on it)
• Quarterly reviews
• Clear (written) distribution plan
• Easy to say, hard to do
Quotes…

“I don’t think we can do everything”, participant

“We’ve unearthed two or three strategic disconnects”, participant

“I didn’t think we were over-committed, but we are”, CEO
More Examples

- Published Roadmaps
Activity: My Career

- Exercise: 5-year “my career” roadmap
- Two rows: Milestones and “In Order To”
- Milestones are extrinsic (put on LinkedIn)
- “In Order To” are intrinsic and supporting
- Find a stranger, help each other
- 15 minutes, then debrief
Example from Gist Labs

<table>
<thead>
<tr>
<th>Milestones</th>
<th>Q1</th>
<th>Q2</th>
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</thead>
<tbody>
<tr>
<td>Develop Network</td>
<td>Land a Contract</td>
<td>File LLC</td>
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<tr>
<td>Learn Negotiation</td>
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<tr>
<td>Get a Lawyer</td>
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</table>

In Order To:

- Develop Network
- Learn Negotiation
- Get a Lawyer
- Land a Contract
- File LLC
Biz-Dev Alignment?

• When we have honesty between the
  • Who/What/Why
  • How
Clarify the “Who” in your market

- Personas, Goals, and Problems
  - Often it is helpful to clarify who the product is being built for
  - Buyer Personas (who buys our product not necessarily uses)
  - User Personas (who we build products for)
  - Technical Personas (implements and/or manages the product or the IT architecture it will be installed into)
Major Features

- Features
  - Our delivery of features drive (hopefully) the customer benefit
  - List ONLY the major features (those that “move the needle”)
  - These features would likely have many User Stories
  - Remember that a feature may have multiple benefits or serve multiple segments
...and their Benefits

• Benefits
  • Describe in business terms what benefits each feature will deliver to the customer.
• General is OK. Specific is MUCH better!
  • Reduce Costs (How? How much?)
  • Avoid Costs (How?)
  • Increase Revenue by…
  • Avoid human error by…
  • Reduce manpower by…
Feature and Benefit Map - Activity

• **Context**
  - You want to make certain that key marketing objectives match key development efforts. You have a Market Map to identify the key market segments you’re targeting.

• **Problem**
  - What is the best way to capture compelling features and their benefits for each market segment?

• **Forces**
  - People often think they understand the key features and benefits for a given market segment when they really don’t.
  - A feature may be a benefit to more than one market segment.
  - Features that apply to multiple market segments may not provide the same perceived benefits to each one.
  - Developers tend to think of features (cool), while marketing people tend to think of benefits (compelling advantages, reasons to purchase). This gap often results in poorly designed products and/or products that can’t win in the market
  - Developers need to understand the nature and intent of future benefits so that they can be certain the tarchitecture is designed to meet them.
How are you going to deliver?

- Mapping in the Technical Architecture and Capabilities (Tarchitecture) required
Technical Architecture

• Typically just the large pieces
• Required Technologies
• Known updates to embedded technologies
• New technologies to improve stability, performance, flexibility, etc.
• You may want to break out development phases such as exploration, POC, development, beta as they span over quarters.
Architecture Roadmap Activity

• Context

• You are building an application expected to have multiple, ongoing product releases. You have a Market Map and a Feature/Benefit Map to identify specific markets and the features/benefits that they want. You may have an existing architecture that supports one or more markets.
Architecture Roadmap Activity

• **Problem**
  • How do you manage/leverage technological change?
  • What kind of looming cruft needs to be re-designed?
  • What new technologies/platforms are emerging?
  • What standards need to be adapted to?
Architecture Roadmap Activity

• Forces
  • No matter how well an application has been architected, changes in technology can invalidate prior assumptions. Technologies usually appear on the horizon with enough time to accommodate them if they’re planned for.
  • Developers like to understand where they are headed.
  • Developers like to learn new things.
  • Developers want a way to manage the tearchitectural evolution of poorly implemented features. The want a way to make both the poor feature known to others and register their desire to change it.
  • Technology can enable new features that marketing may want.
  • Marketing may demand features that can be supported only by adopting a new technology.
  • Competitors’ adoption of a new technology may put you in a disadvantageous, reactive state. Technical people will argue over emerging technologies. Sometimes the arguments are a way of learning more about the issues. Most of the time the only way to reach consensus is to give them plenty of time to discuss the issues.
Temporal
Events and Rhythms

- Things that occur one-time are events
  - IPO of competitor (or of your company)
  - New IRS / Govt. mandate or regulation in effect
  - Hurricane/Flood (part of Disaster Recovery Planning)
- Things that occur regularly are rhythms
  - Industry conferences
  - Holidays
A word on Rhythms

- Rhythms effect everything we do;
  - Life rhythms
  - Firsts – single events
  - Life Rhythms – recurring events

- Business events follow the same patterns
Rhythms - Scheduling Considerations

- Holidays & vacations
- Internal events & rhythms
- Quarterly earnings calls
- Peer reviews
- Customer commitments
- Product dependencies
- Other milestones
Activity: Your Orgs Roadmap

• Exercise: Use the template with 4 quarters
• Partner with anyone from your company
• 20 minutes, then debrief
# Exercise Template

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Conway’s Law

organizations which design systems ... are constrained to produce designs which are copies of the communication structures of these organizations

— M. Conway[3]
Draw a triangle....
# My Current Template

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