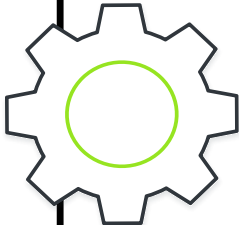


From Insights to Roadmaps:



Build better products



with  productboard

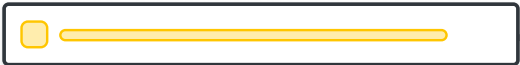


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Introduction

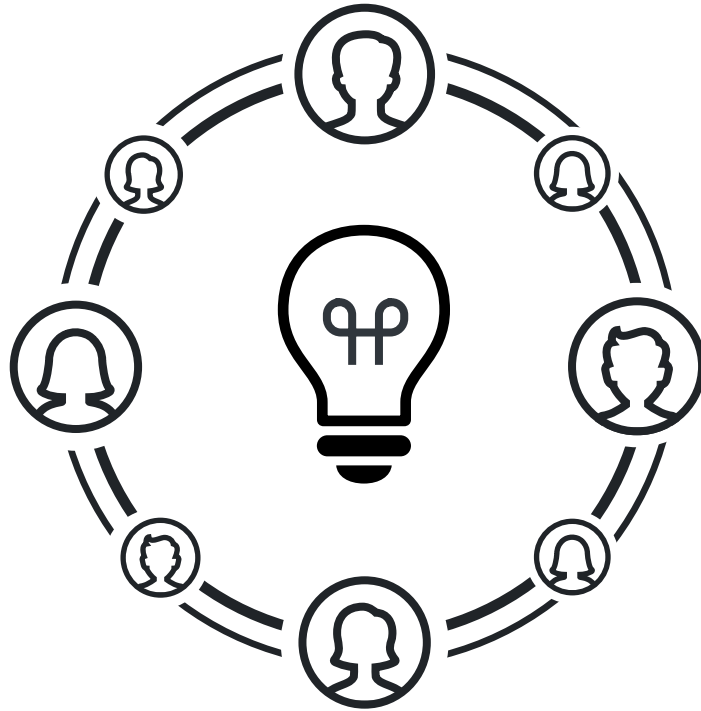
Product Excellence is an approach to product management that emphasizes getting the right products to market, faster via three core product management workflows:

1. **Achieve deep user insights:** The entire product team has a shared understanding of what users need
2. **Set a clear product & prioritization strategy:** The entire organization is aligned around key strategic objectives
3. **Create and share inspiring roadmaps:** Everyone understands and rallies around where the product is headed and why

It's not always easy to achieve Product Excellence. Fortunately, Productboard's customer-centric product management platform is designed to help you streamline and optimize these critical workflows. With its powerful insights capabilities, easy-to-use prioritization tools, and intuitive roadmapping features, Productboard can help you make data-driven decisions and align your team around a clear vision for your product.

Whether you're just getting started with product management or looking to organize your team around a more efficient way to manage your existing products, Productboard can help you achieve your goals and deliver the best possible product experience.

Let's dive in!



CHAPTER 1

Achieve deep user insights

How many times have you built a new feature only to discover later that few ever used it? According to our annual [Product Excellence Report](#), only 29% of product people strongly agree that the products and features they release are consistently well-received by customers. Why does this happen so often? Because we end up focusing on solutions instead of problems.

When we focus on solutions, we tend to lose sight of the “why” behind customer requests. As a result, we end up using precious time and resources in pursuit of something that doesn’t ultimately matter to customers.

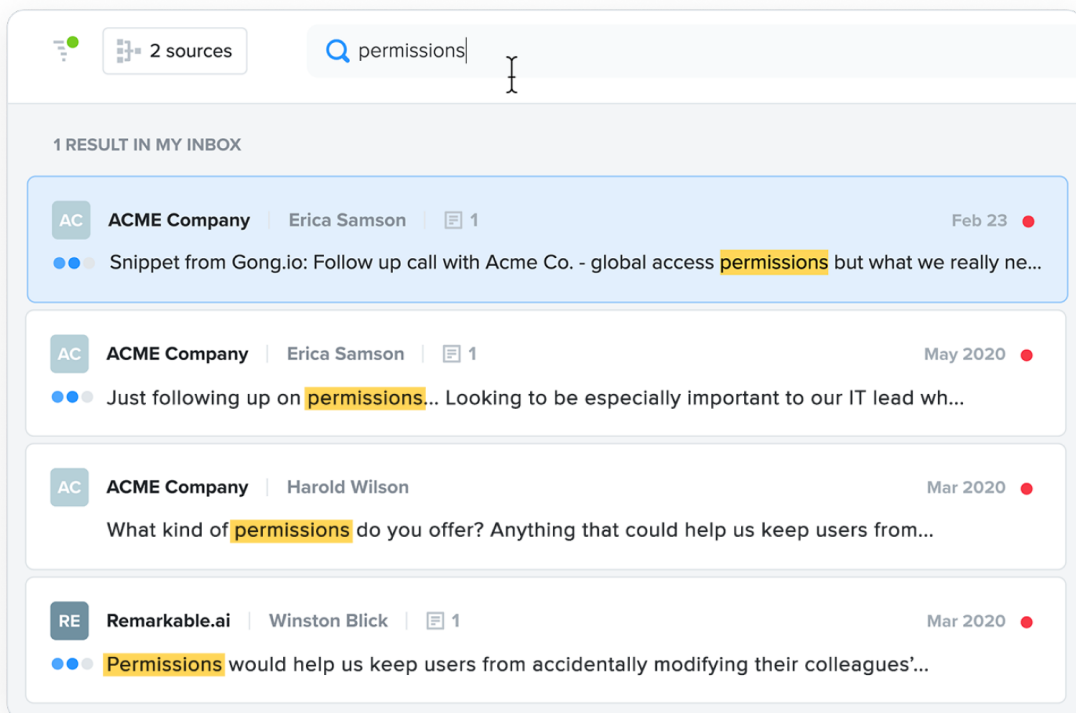
So, how do you ensure that customer-centricity is the guiding force behind your product decisions? It all begins with developing a deep understanding of your customers and their needs.

Let’s dive into all the ways that [Productboard](#) can help.

1. Collect customer insights in a central repository

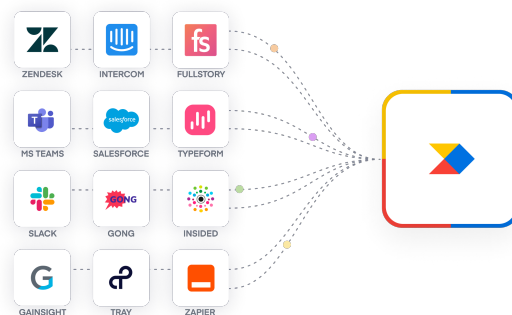
Currently, only [12% of product people](#) say they successfully capture feedback and insights from all available sources. Without a dedicated system for capturing user feedback, you risk building features without a firm understanding of the problem you're solving. Not to mention all the missed opportunities.

With Productboard's [Insights board](#), you have a centralized, searchable repository for collecting feedback on an ongoing basis.



This feedback arrives from many integrated sources like support platforms, CRMs, messaging solutions, and sales tools. This one centralized location for collecting feedback makes life easier for everyone in the product organization.

Say hello to valuable insights at your fingertips, and goodbye to time spent manually searching across dozens of systems.



2. Get the right feedback to the right colleagues

If your product organization consists of more than a few colleagues, incoming feedback can quickly grow unwieldy, especially if you don't have a system for ensuring that it gets to the right person for review.

Productboard helps you define workflows to triage incoming feedback by categorizing it or assigning it to the right colleague to be reviewed in more detail. You can even automate this process with rule-based automations that assign tags or ownership based on what source the feedback is arriving from, or even what topics the feedback relates to.

All of this means that you have more valuable feedback on hand to identify new opportunities based on what your customers really need.

The screenshot shows a three-step configuration process for an automation:

- 1 When:** Choose a trigger to start the automation. The selected trigger is "Note created".
- 2 If:** Set up a desired condition for the trigger. The condition is "Tags" with the operator "any of" and the values "API", "APIs", "SDK", and "Integrations".
- 3 Then:** Select the actions that will be executed if the conditions of the automation are met. The selected action is "Assign owner" with the user "Jaro" assigned. There is also a checkbox for "Skip owner assignment action when the note has owner already" which is currently unchecked.

At the bottom, there are two buttons: "Create automation" (in blue) and "Cancel".

Productboard helps you define workflows to triage incoming feedback by categorizing it or assigning it to the right colleague to be reviewed in more detail.

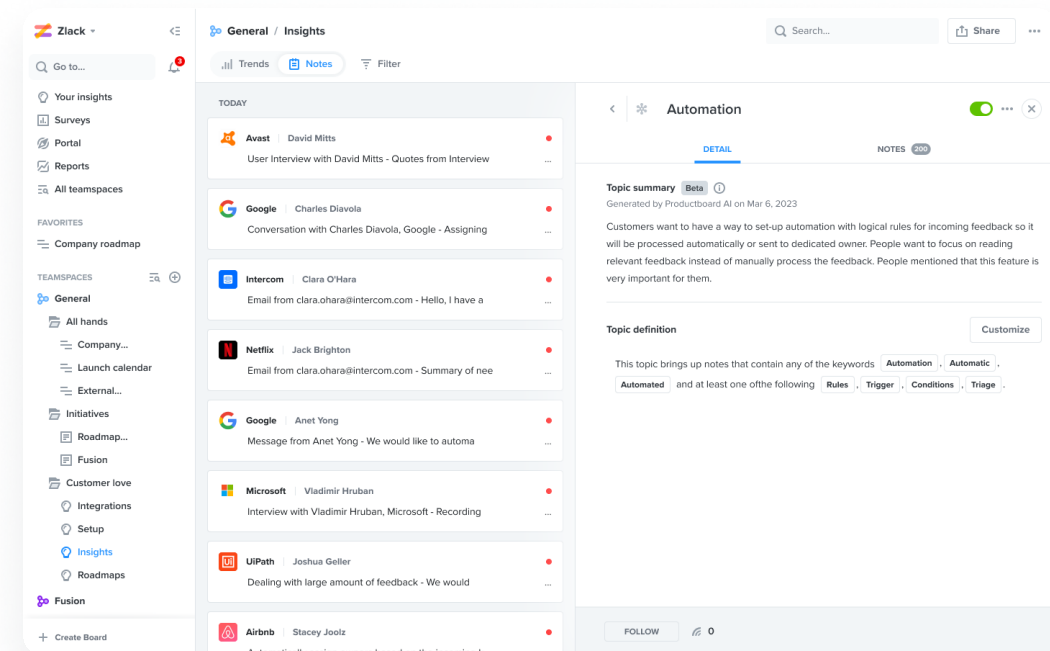
3. Sort, filter, and identify feedback trends in seconds

Because feedback comes in so many shapes and sizes, it can be difficult to identify recurring trends or know how to prioritize if you're filtering through it manually. Maybe that's why only [14% of product people](#) say they can effectively categorize feedback to inform prioritization. Luckily, Productboard allows you to identify trends around what your customers, segments, and companies really need.

The user impact score, for example, is an auto-calculated score that can help you surface your top-requested feature ideas. It represents the number of people who have requested a feature or expressed a need that would be solved by the feature, weighted by its level of importance to them

Insights trends allow you to quickly identify and stay on top of the most relevant, recent, or trending themes in your collected feedback. You can also see how these themes change over time and which segments are talking about them. Productboard can even intelligently detect what topics are trending across thousands of pieces of feedback to give you a better understanding of common patterns. And not only that, its new AI capabilities enable intelligent summaries of what customers and colleagues are saying about those topics.

Now, feedback analysis that used to require tens to hundreds of hours of manual work can be completed in seconds.



Productboard's AI capabilities enable intelligent summaries of what customers and colleagues are saying about specific topics

4. Dig in deeper with qualitative feedback

To achieve deep insights about your customers, you must go beyond the surface to understand their unique needs and pain points. Even better is if you're hearing it in their own words.

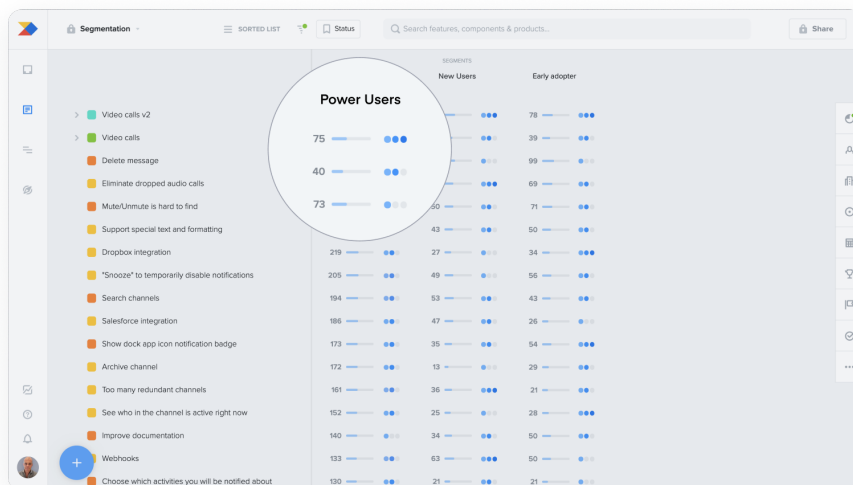
Productboard gives you seamless access to qualitative feedback and links it to specific features ideas or items on your roadmap. By seeing the exact wording your customers are using, you can get a better sense of their specific needs and validate ideas before kicking off product discovery. It's also easy to share this context with other business stakeholders, designers, and developers, to keep everyone aligned on ideas you pursue.

And, if you decide you need more feedback, you already know who this user is and have their email address in Productboard, so it's easy to follow up with them to ask more questions or schedule a conversation. You can even follow up with any other users who have expressed similar needs since their insights will be linked to this feature idea in Productboard.

5. Differentiate between the needs of different segments

With Productboard's latest segmentation capabilities, you can easily find out what your most important customers are asking for.

Back in 2021, we shipped the Salesforce integration, which lets you define customer segments in Productboard based on company attributes like the number of paid seats, how much money they're paying you, company size, and industry. Now you can also define user segments based on data from product analytics solutions like Amplitude and Mixpanel and zero in on the needs of your new users, power users, or early adopters of your newest product or feature. This way, you can always build what matters most to the customers that are integral to the success of your business.

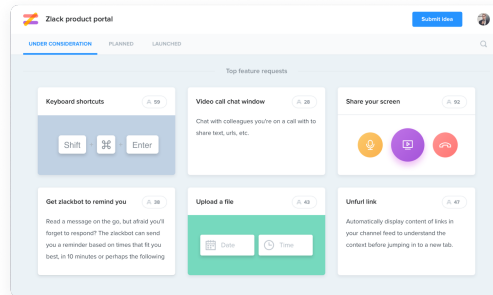


6. Invest customers in your product

By leveraging [Productboard's Portal](#), you can show customers that you're really listening.

Notify them by email when a feature they asked for is progressing — maybe it'll soon be worked on, is available in beta, or is officially launched. Publicly showcase ideas that you are considering and have customers offer feedback. Inform customers about all the newly released features they can get started using.

And while the Portal is a great way to engage all your customers, Productboard's Customer board lets you track requests coming in from key companies and see the status of all the feature ideas related to these requests.



CUSTOMER STORY

Envoy informs every product decision with deep user insights

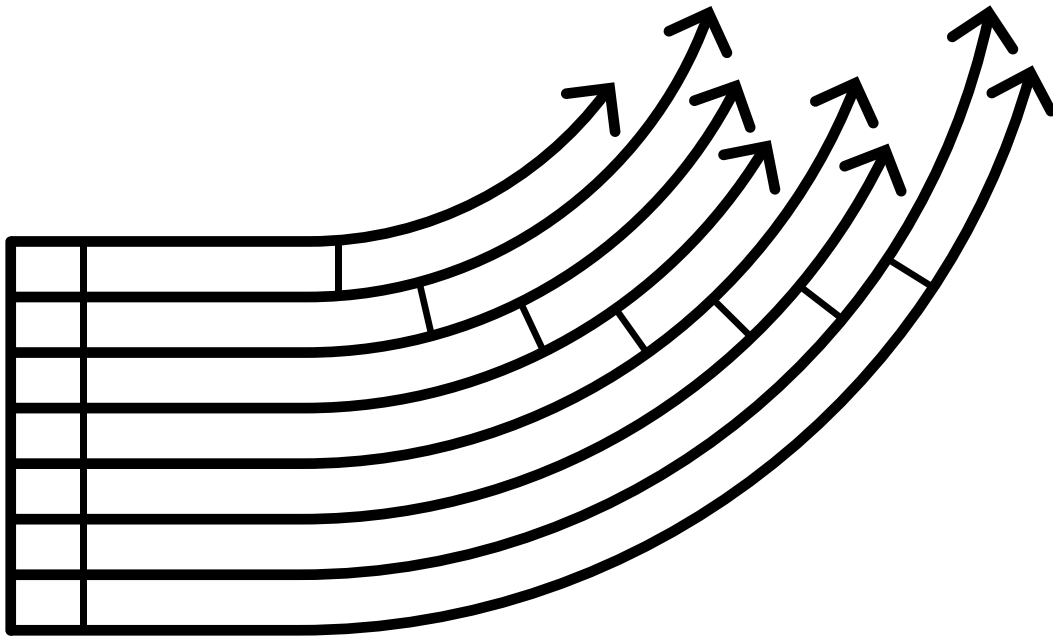
With Productboard, Envoy is able to gather and synthesize thousands of pieces of feedback from customers, sales, and support. They're able to use data to verify which features have received the most requests, and they can then go corroborate that through targeted research, ensuring that these users really do share a common need.

This approach helps the team rest easy, feeling confident that they're building the right thing. It also helps drive alignment and a mutual understanding across the org around what the team is working on and why.



"Productboard is like a CRM but for all things product. It helps you collect everything PMs care about in one place, and categorize it in a way that helps you make better product decisions."

[Request a personalized Productboard demo.](#)



CHAPTER 2

Set a clear product & prioritization strategy

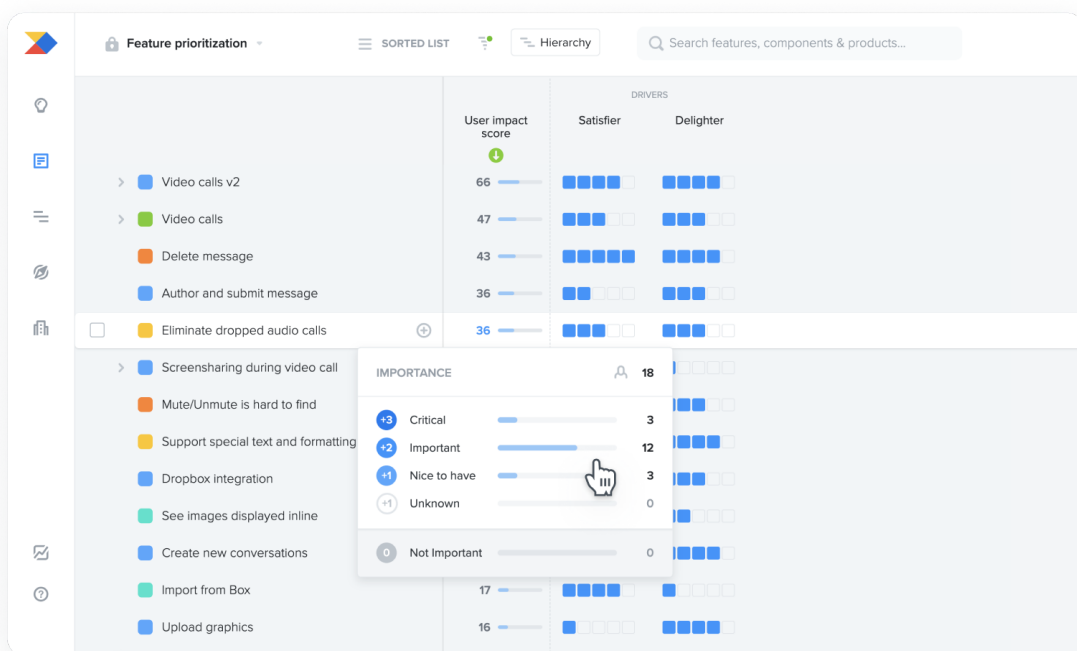
The reality of building products is that you simply can't do everything, and there's an opportunity cost associated with every decision. But how do you know which ideas are worth pursuing? How will you have the confidence to say no to eager stakeholders?

The answer is simple: with a well-defined prioritization process, informed by your product strategy. Let's dive right in to how Productboard's product management platform can help you streamline prioritization in a way that works for your business.

1. Build the most impactful products and features

If your goal is to make prioritization decisions by putting customer needs first, Productboard's user impact score can help. The user impact score is an auto-calculated score that surfaces your **top-requested feature ideas**. It represents the number of people who have requested a feature or expressed a need that would be solved by the feature, weighted by its level of importance to them.

When you arrange your feature ideas as a list and sort them by the user impact score, you'll quickly see your most-requested features rise to the top.



The user impact score is an auto-calculated score that surfaces your top-requested feature ideas.

2. Build the right products for your target customers

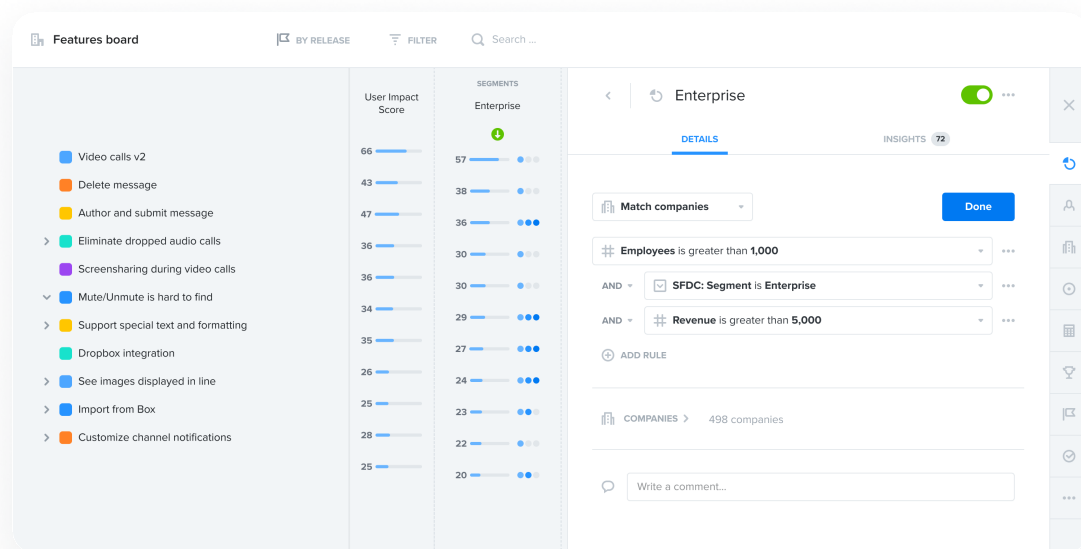
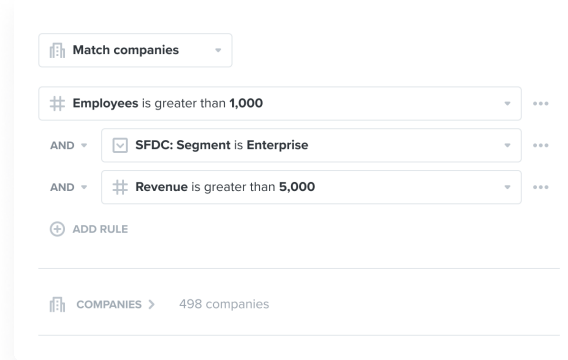
All of your customers are not created equal. Each business has different customer segments, and each segment has its own set of unique needs and use cases.

Productboard's **dynamic customer segmentation** gives you a quick and seamless way to strategically segment using data from Salesforce and other CRMs. You can also define user segments based on usage data from product analytics solutions like Amplitude and Mixpanel.

Once you define clear segments, Productboard lets you surface top features needed by each one based on the actual feedback those users have provided.

For example: “Show me the top-requested features by Enterprise companies with more than 1,000 employees paying us more than \$5,000 a month.” It’s that easy to identify important attributes such as market segment, ARR, company size, geography, or industry.

This enables you to make better product decisions for all your segments with a higher degree of confidence.



Productboard’s dynamic customer segmentation gives you a quick and seamless way to strategically segment using data from Salesforce and other CRMs.

3. Make data-driven prioritization decisions

Productboard offers a variety of different frameworks you can use to standardize your prioritization processes and make more data-driven decisions. Define formulas based on popular prioritization frameworks such as RICE, WSJF, and ROI. You can even customize them to your exact needs.

Remember the user impact score, the auto-calculated score we mention above that surfaces your top-requested feature ideas. You can incorporate this score into your custom formulas along with effort estimates and other numeric fields.

$$\Sigma = \frac{\text{Reach} \times \text{Impact} \times \text{Confidence}}{\text{Effort}}$$

This approach provides greater transparency, and Productboard makes it easy to share the right views of your prioritization data with the right groups of stakeholders. When you provide more visibility into how features are prioritized, everyone can more easily unite behind your “why”—the rationale behind your product roadmap

4. Prioritize based on ROI potential

If you’re like many product managers, you’ve long dreamed of being able to attach a dollar amount to every feature idea. Well, now you can with Productboard!

Once you’ve imported data about your customer companies from your CRM into Productboard — such as their contract value or how many licenses they’ve purchased — it’s easy to roll up these values and see what each feature idea would be worth to your business. These values are all automatically calculated based on which companies have requested which features.

This enables you to make better product decisions for all your segments with a higher degree of confidence.

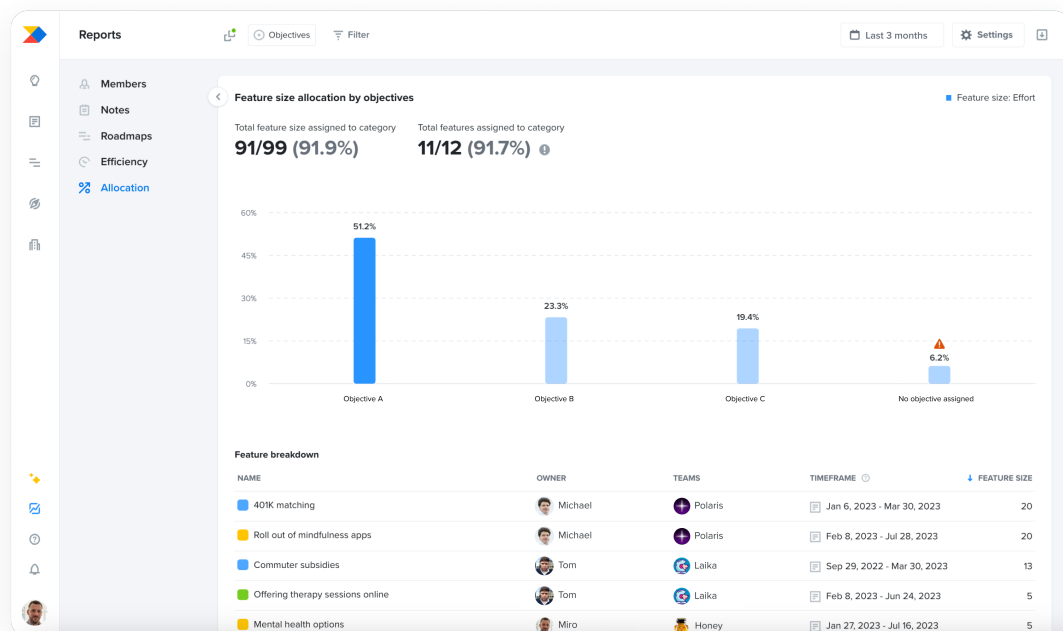
	User impact score	Aggregated ARR
PDF export	24	813,200
Real-time updates	28	404,300
Analytics dashboard	19	302,800
Enhanced notifications	12	260,100
Email digest	13	180,200
Onboarding 2.0	7	162,000
Slack integration	2	89,800

5. Prioritize around clear objectives

In Productboard, you can use objectives — clear, measurable goals aligned to specific outcomes for your customers, product, and business — as criteria to prioritize feature ideas and organize them on your roadmap.

Score features based on how valuable they are for advancing your objectives, along with how much effort they'll take. You can also zero in on the features within a given objective and visualize each feature's value/effort tradeoff using Productboard's prioritization matrix. This lets you easily identify high-value, low-effort features — and identify your true must-haves.

Finally, our allocation reports help product leaders ensure that the work their teams are doing advance overarching objectives.



Allocation reports help answer questions like:

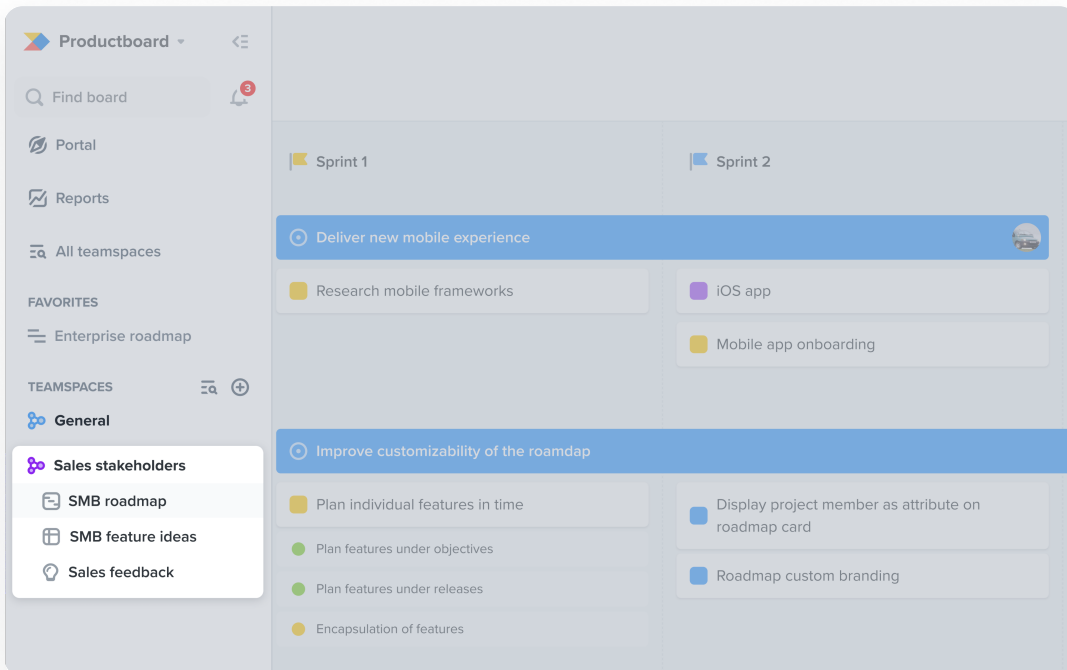
- ◆ How many features have you shipped within each objective, theme, or product area in recent months or quarters?
- ◆ How much effort have you expended toward each?
- ◆ How much work being done falls outside of your stated areas of focus?

All these insights help you take an objective-driven approach towards your prioritization decisions.

6. Rally the entire org around prioritization decisions

Taking a systematic approach to prioritization doesn't just ensure that your teams are working on the right things, it also makes it a lot easier to communicate the rationale behind your decisions with the rest of your organization.

Now, Productboard lets you save your most important feature ideas, prioritization data, release plans, and roadmaps as "boards" that you can share with specific groups of stakeholders. You can curate a collection of boards to share with your executives or your customer-facing colleagues, so they can focus on just the product data that's most relevant to them. You can also share roadmaps with customers, prospects, and external stakeholders to give them a detailed look at your plans and the "why" behind them.



Productboard lets you save your most important feature ideas, prioritization data, release plans, and roadmaps as "boards" that you can share with specific groups of stakeholders

Generate a public link they can use to access your roadmap, or embed it in your website, application, or another system like Notion, Confluence, or Salesforce — wherever your stakeholders spend their time.

With these resources, it's a lot easier to communicate the rationale behind your decisions with the rest of your organization.

CUSTOMER STORY

Salesforce aligns teams faster with data-driven prioritization

No product manager will say it's easy to convince a cross-functional team — especially developers and leadership — about a big product bet. But extensive insights and feature scoring capabilities have helped Drew Lau and Andrew Lawrence, both senior directors of product management at Salesforce, to more effectively advocate for roadmap decisions.

Today, the duo uses Productboard to:

- ◆ Aggregate user feedback coming in from a range of channels
- ◆ Plan feature releases in collaboration with multiple orgs and stakeholders

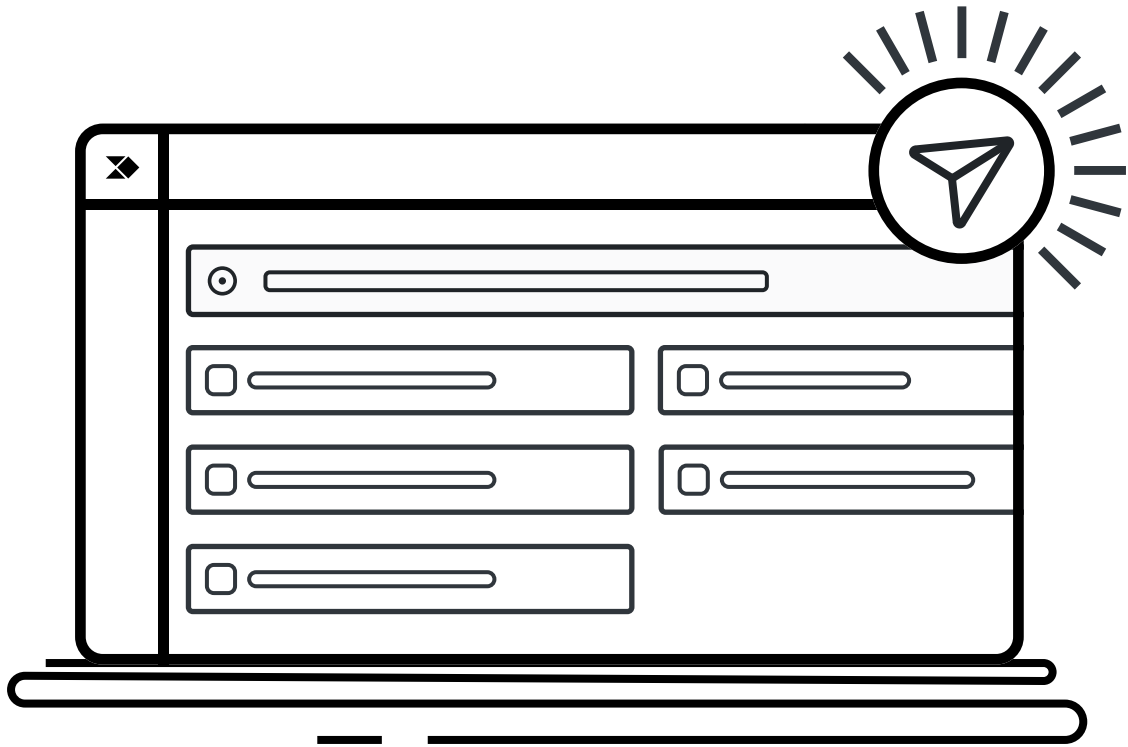


"If we're looking at a feature that is attached to a lot of red accounts or a larger customer who has a major impact on our revenue, we can really get into that segmentation in Productboard."



— Drew Lau
Senior Director,
Product Management, Salesforce

[Request a personalized Productboard demo.](#)



CHAPTER 3

Create & share inspiring roadmaps

“A good roadmap is a strategic communications tool, a statement of intent and direction. And, done well, a way of rallying the whole organization around the key problems that must be solved to achieve your product vision.”

— Bruce McCarthy, Founder at Product Culture

A vast majority of roadmaps miss the why behind what they are building and just focus on features — they are disconnected from the product strategy and have no clear goals or themes.

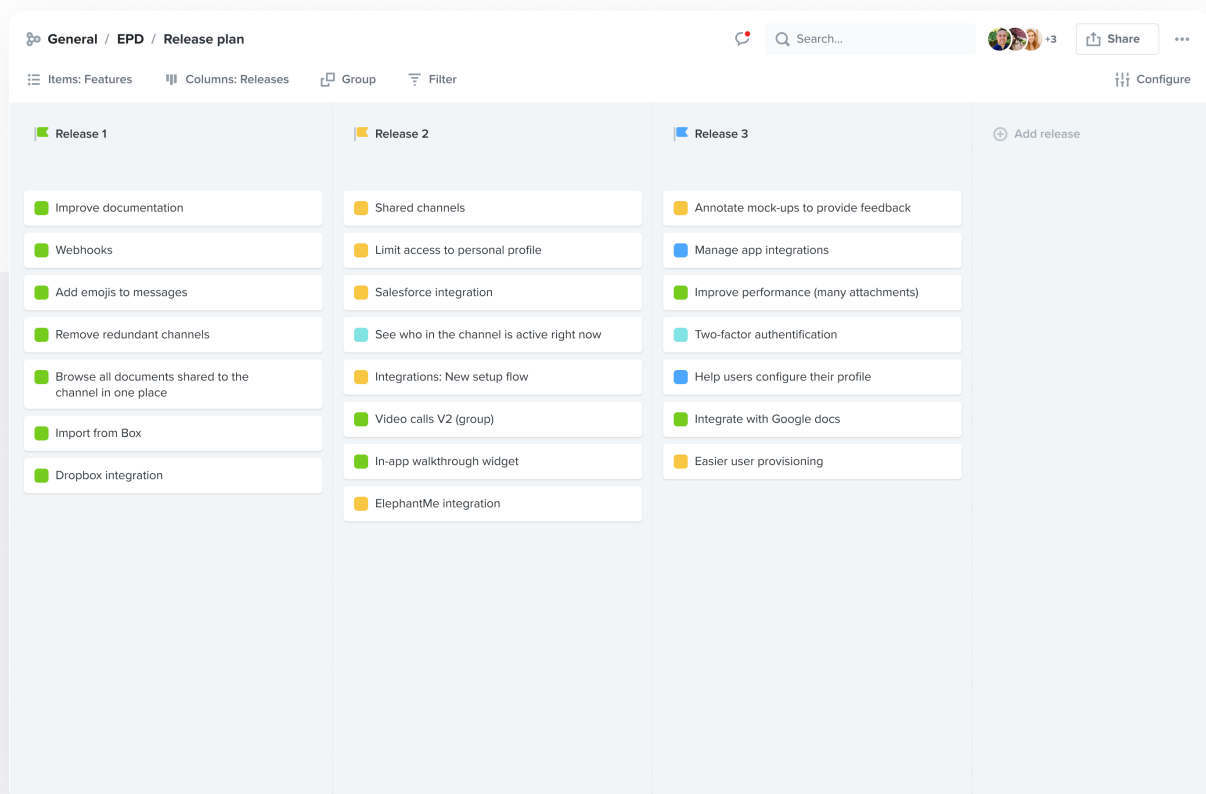
Instead, excellent roadmaps should be a product of collaboration and include the input of many stakeholders and cross-functional teams. They should always be up-to-date, not one-time documents that are outdated once you hit the save button. And, they should reflect the outcomes your organization wants to achieve, not simply outputs.

Let’s look at some common types of product roadmaps in Productboard to help you figure out which one will work best for you.

Release plan roadmap

Release plans are the **execution-level plan** of how you'll deliver the work that you've decided to do and the timeframe when you'll complete that work.

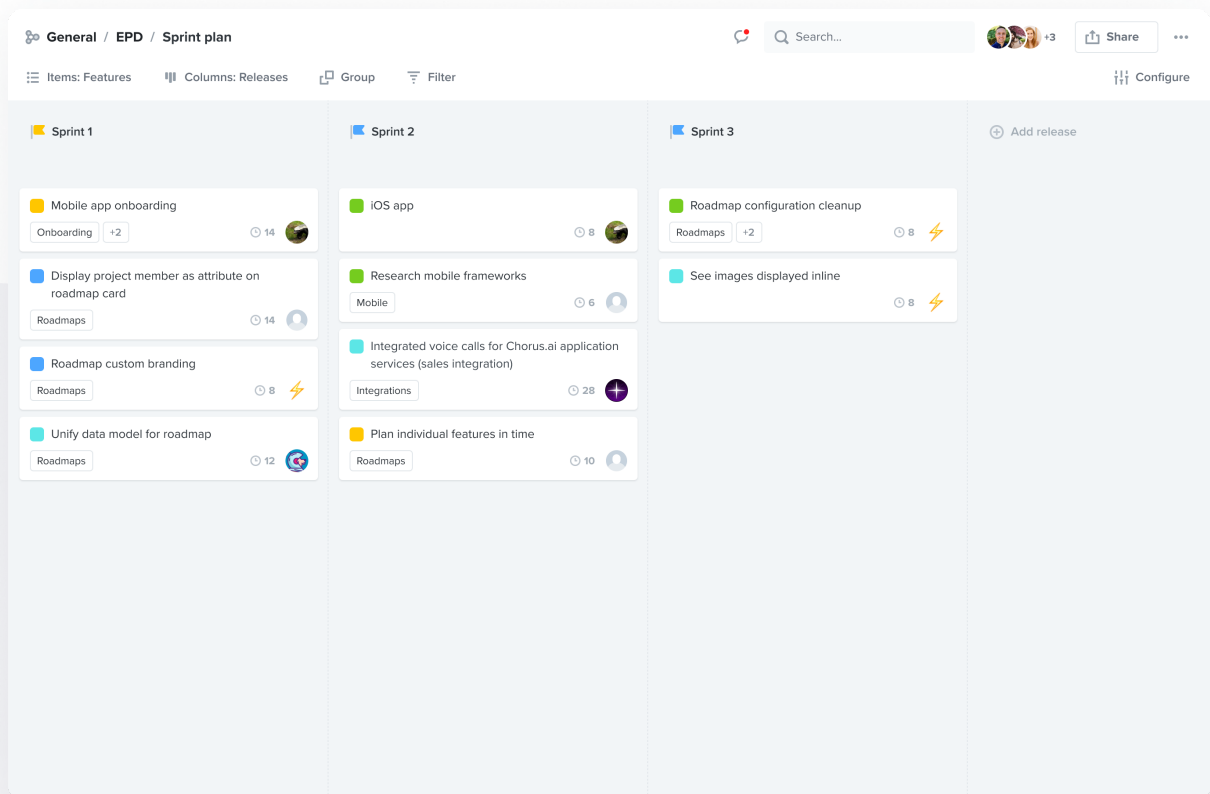
A release plan communicates a high-level overview of upcoming product releases to senior executives, stakeholders, cross-functional teams, and even customers. It's ideal for planning milestones not time-bound, but with a fixed scope or new versions of your product on a regular release schedule (e.g., mobile app). It lets other teams know features are coming soon without committing your team to a specific launch date.



Sprint plan roadmap

Sprint plan roadmaps are **delivery-focused** and, of course, useful for sprint planning.

Product teams use sprint plans to align their development teams with upcoming work so they're always up-to-date and in sync. You can plan your delivery over multiple sprints and show each feature's effort and owners to monitor your team's workload. You can even use swimlanes for additional context or grouping. You can make your sprint plan as granular as you need. This roadmap is only for your product and development team's eyes.

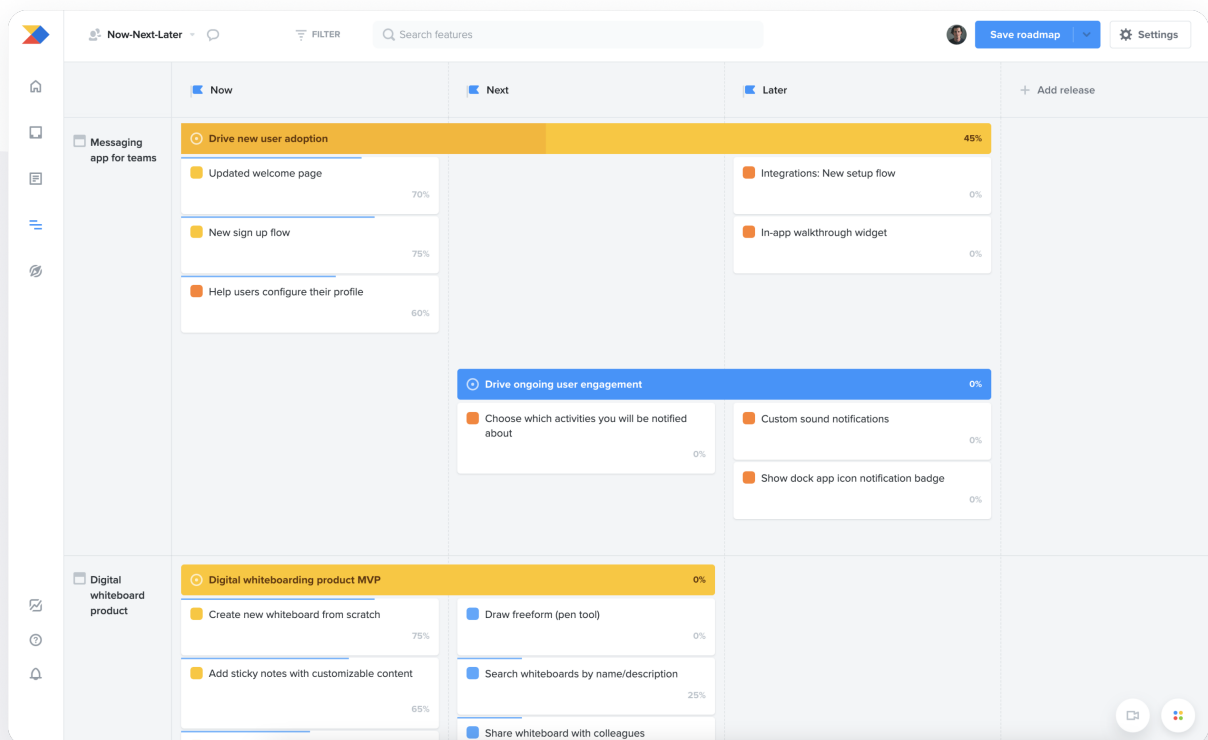


Now-next-later roadmap

Now-next-later roadmaps **communicate your priorities over broad time frames** with an emphasis on the near-term.

Features in the 'Now' slot have more detail as you work on them, while features in the "later" bucket will be more high-level and reflect your long-term strategy. They are perfect for teams operating in fast-changing environments where release dates may change and allow you to communicate comprehensive plans to customers without committing to specific deadlines. Now-next-later roadmaps are great for sharing your product strategy and priorities with large audiences (e.g., at an All-Hands or Town Hall meeting)

While this view is great for organizations that move quickly, you'll want to keep things on track with a rigorous prioritization process. Otherwise, you risk having things in "later" stay there indefinitely, and ideas not aligned with your long-term strategy may make their way into the "now" or "next" buckets.

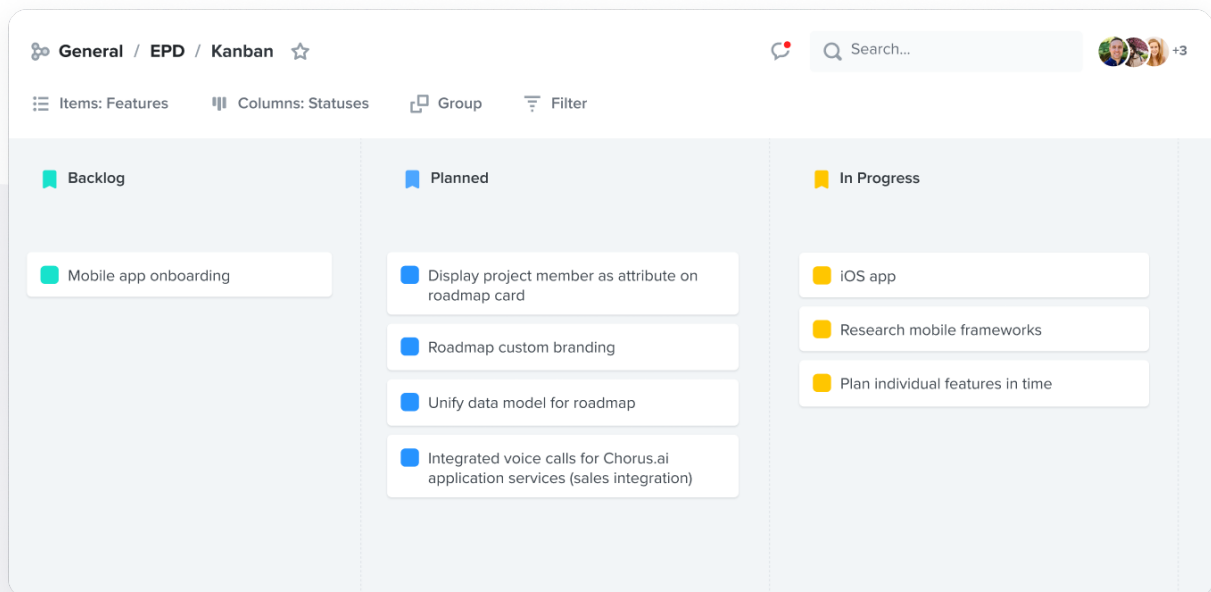


Kanban roadmap

A Kanban roadmap is another **delivery-focused** roadmap for development teams.

It helps product teams clearly group initiatives into buckets such as what is in the backlog, what you're planning, what is in progress, and what you've completed.

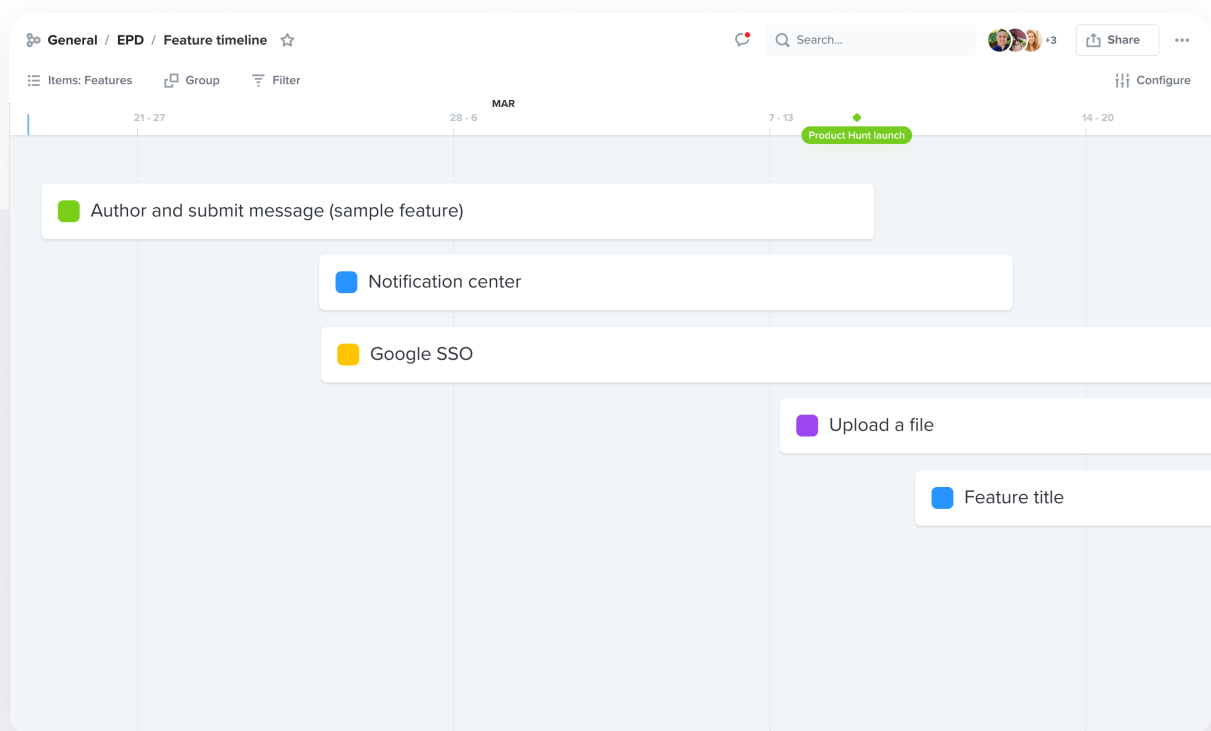
One of the most significant advantages of a Kanban roadmap is that it allows product teams to communicate their near-term plans without committing to exact dates. You can showcase when you're working on specific features and keep your delivery team motivated by reminding them what they're building towards.



Features timeline roadmap

A Features timeline roadmap is an **output-driven** roadmap that allows you to set the time frame for an individual feature.

Planning features and tracking progress with a timeline roadmap is ideal if you want to get a 1000-foot view of how work is progressing toward a deadline or time-bound milestone. You can track feature progress against specific deadlines and milestones and align internally with development teams on concrete dates. You can also allocate resources when and where they're needed.



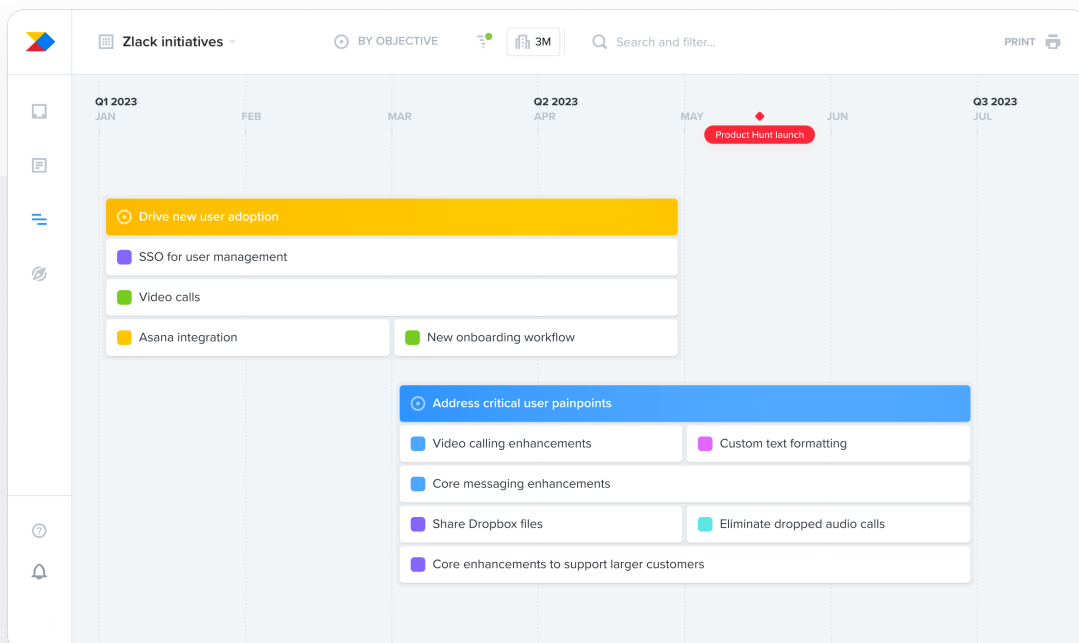
Objectives timeline roadmap

For larger organizations and those working in more complex environments, there comes a time when senior executives and stakeholders want a more **zoomed-out approach**.

An objectives timeline roadmap is an example of an outcome, not output-driven roadmap. This roadmap provides broad organization alignment on product direction. It's easy for anyone to understand when you'll work towards each of our business goals and where that sits relative to your most significant milestones.

Objectives timeline roadmaps are great to communicate your product strategy and goals across teams for the next 2-3 quarters. When using business-level objectives, this offers a clear connection between your product and business strategies and end deliverables, such as features.

When we decide which objectives to tackle next, we backward-plan from milestones in time (Gartner analyst briefings, industry conferences, marketing launches, commitments to strategic partners or major customers, etc.) and consider what would be most important to accomplish by then.



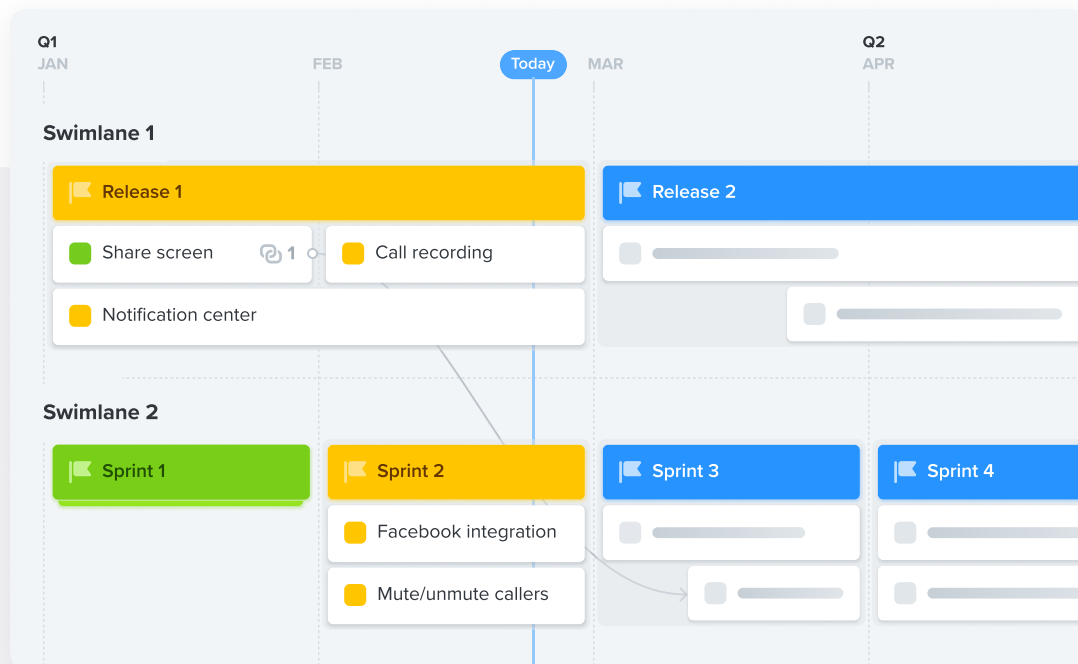
Release timeline roadmap

When you're planning objectives in time, you can remain high-level. But as you prepare for sprints and launch activities, you'll want to decide which features to release together and when.

Using a release timeline roadmap allows you to plan and communicate when you'll work on releases in the near future with clear timeframes to cross-functional teams, like sales and customer success. Stakeholders can see what's slated for the next app version, quarterly release, monthly bug fix, etc.

With Productboard, larger product organizations with multiple teams releasing features on different cadences can create multiple release groups to organize these and keep cross-functional teams in the know.

Plus, release timeline roadmaps are useful for creating a low-maintenance tactical roadmap to track progress against essential deadlines. If you're working in an Agile environment, you may resist planning releases much more than 4-6 weeks in advance for the reasons cited earlier. A release timeline roadmap allows you to keep using your specific release objects, while also conveying a time horizon with any essential milestones or company deadlines.



CUSTOMER STORY

1-800 Contacts streamlines collaboration with dynamic roadmaps

Striving for a real-time roadmap view spanning every product line, 1-800 Contacts integrated Productboard with Jira and Azure to strengthen strategic alignment and collaboration.

With Productboard, the product team has now streamlined a data-driven approach to prioritization. They save hours each week on prepping PowerPoints by instead sharing a constantly-up-to-date roadmap that helps the business understand the progress and justification for every feature underway.

Through Productboard's roadmaps, it became easy to see what each team was doing. That, in turn, provided the opportunity to go one step further to evaluate the sum of individual parts. When you look at all of the teams' roadmaps in tandem, 1-800 Contacts is now able to see if all initiatives are working together to advance the company's big picture strategy.

1800 contacts®

"We don't want a technical, dev-driven tool to communicate what we're going to work on. That's great for the devs, but it's not good for showing a clear roadmap."



— Noah Singer
Head of Product

[Request a personalized Productboard demo.](#)



Request a personalized Productboard demo

Whether you're just getting started with product management, looking to optimize your existing processes, or leading your team towards a more efficient way to manage your existing products, Productboard can help you master these core product management workflows and deliver the best possible product experience.



About Productboard

Productboard is the customer-centric product management platform that helps teams get the right products to market faster. Over 6,000 companies, including Microsoft, 1-800-Contacts, and UiPath, use Productboard to understand what users need, prioritize what to build next, and rally everyone around their roadmap. With offices in San Francisco, Prague, and Vancouver, Productboard is backed by leading investors like Tiger Global Management, Index Ventures, Kleiner Perkins, Sequoia Capital, and Bessemer Venture Partners.

[Learn more at productboard.com](https://productboard.com)