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The product-led organization

Workshops

Facilitator Guide

You won't become a product-led organization simply by reading a book. Product-led transformation happens when you take action on what you're learning, and when you get buy-in across your team, and across your organization. These workshops will bring The Product-Led Organization to life for your team, equipping you with the templates and action plans to take the first or next step along your product-led journey.

If you requested this guide, you are ready to take a big leap in your career. By guiding your team through these workshops, you will have an outsized impact on your company's product-led journey. So, let's jump in!

HOW DO I GET STARTED?

Flip through this guide to choose your own adventure through the ideas and frameworks introduced in The Product-Led Organization. Complete an exercise or two or all 10, at your own pace, in whatever order makes sense for your team.

WHO SHOULD PARTICIPATE?

You and your product team. Or expand the group to include individuals that have a stake in the customer experience: customer success, marketing, growth, or sales.

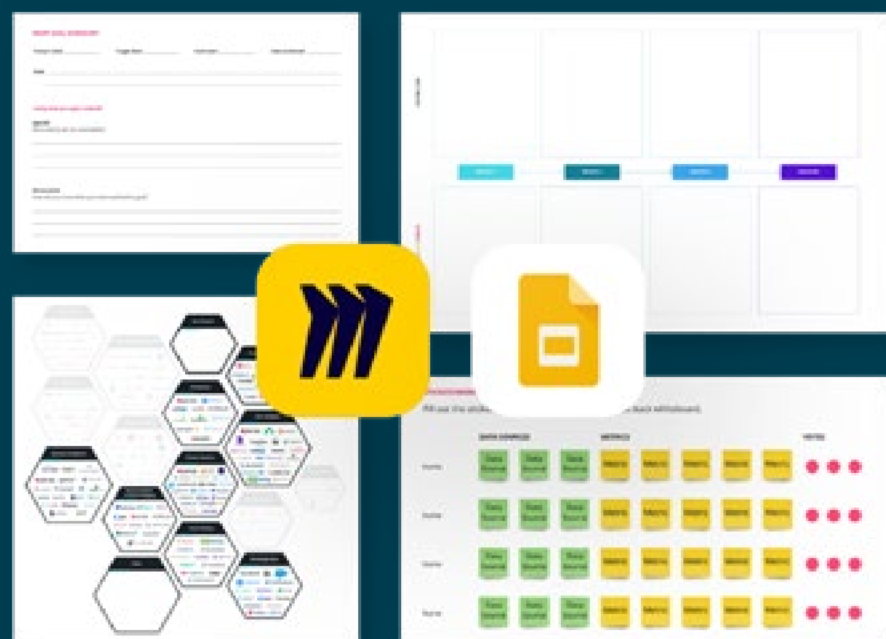
WHAT IS INCLUDED?

Three modules, each based on a section of the book, and a discussion guide for each chapter should you choose to create your own Product-Led Organization book club. Each module includes 3-4 group exercises and digital whiteboard templates, accessible by clicking the link on the following page.

WHAT IS EXPECTED OF ME?

These materials are designed to be self-guided and led by anyone. Facilitate yourself, or take turns with a teammate. This is an incredible opportunity to get out of your comfort zone or to hone your leadership skills. You can also earn really cool digital badges to display on your LinkedIn profile. Who doesn't love a new credential?

Tell us what you think! We'll follow up in a few weeks with a survey to capture your feedback on how it's going. In the meantime, take a photo of your box or your team during a workshop, post it on social media, and help spread the word to inspire more companies to become product led.



We're excited for you and your team to dive into the **Product-Led Organization Workshops**!

We built the templates for each exercise using Miro. If you also use Miro, simply duplicate the board, unlock the elements, and get started! If you're not familiar with Miro, but would like to try it, check out the "Getting Started with Miro" course here.

If you would rather use another digital collaboration tool, use our templates as a guide to build your board in the tool of your choice.

OPEN WORKSHOP TEMPLATES →

Password: ProductLed

CONTENTS

Module One: Leveraging Data to Build a Great Product

Product-led organizations start with the end in mind. That means setting goals that map to customer needs and establishing the right metrics to track progress toward those goals. These exercises are designed to help your team:

- Consider customer needs you might fill with a product-led approach
- Set actionable goals for what you hope to accomplish
- Identify what data can support or refute your assumptions
- Create experiments you can test inside your product

Exercise 1: Identify your Jobs-to-be-Done
Exercise 2: Set SMART goals
Exercise 3: Define your data stack
Exercise 4: Design a product-led experiment

Module Two: The Product-Led Customer Experience

Product-led organizations understand that users want to help themselves: they want an intuitive experience inside an application and easy access to education, help, or support. Product-led companies save humans for the highest value work—and they automate the rest. These exercises are designed to help your team:

- Guide users to the aha moments that lead to adoption
- Build a rubric for measuring the health of your customers
- Enhance the customer experience through self-service support

Exercise 1: Building blocks of onboarding
Exercise 2: Make support self-service
Exercise 3: Customer Health Score Bingo

Module Three: A new way of delivering product

As our products become a hub for the customer experience—where marketing, sales, education, and support converge inside our applications—there are new challenges for product teams, requiring an entirely new strategy for delivering product. These exercises are designed to help your team:

- Build product/feature launch plans that drive product adoption
- Collect, manage, and weigh customer feedback at every stage of product development
- Effectively communicate your roadmap internally and externally

Exercise 1: Design a launch plan that accelerates adoption
Exercise 2: Create a Product Feedback Policy
Exercise 3: Roadmap your way to success

Also included: The Product-Led Organization book club discussion guide

MODULE 1 EXERCISE 1

Identify your Jobs-to-be-Done

Introduction

Total time: 30-45 minutes

Product-led organizations have a clear understanding of why people “hire” their product and they design the experience to help users get those core “jobs” done. Use this exercise to identify the Jobs to Be Done of your product, so you can create an experience that best delivers on those customer needs.

As facilitator, you might use this exercise as a jumping off point for product roadmap planning, or to begin a discussion of what product-led activities might help your customers do their “jobs” more effectively and efficiently. Kick this session off by setting the stage for what you hope to accomplish through the exercise.

Materials

1. Digital whiteboard template with the JTBD diagram from The Product-Led Organization
2. Facilitator pre-read: **What’s Your Product’s Job?** from the book (pages 19-21)

Instructions to explain to your team

PART 1: 10 minutes

1. Start with a brief overview of the notion of “Jobs to Be Done” from the book, sharing the McDonalds milkshake and Intuit examples. Then pull up the framework on the virtual whiteboard.

2. Start on the left side of the diagram, by asking the group to consider: What is our product’s main JTBD? Have the group write suggestions on the whiteboard.

3. Then have the group put a dot next to the suggestion they think is most accurate. Discuss the group’s selections as a team and make sure you all agree on the top choice.

PART 2: 5-8 minutes

4. Participants now split into two groups
   — Group 1 describes at least 4 functional aspects of the main JTBD
   — Group 2 describes at least 4 emotional aspects of the main JTBD
   — Both groups add their answers on post-its in the appropriate box of the diagram

5. Now, the groups will explore the personal and social dimensions of the emotional aspects of the main JTBD
   — Group 1 will come up with at least 3 personal dimensions
   — Group 2 will come up with at least 3 social dimensions
   — Both groups add their answers to the diagram

PART 3: 10 minutes

6. Bring the groups back together, and discuss what you’ve come up with. If the number of aspects and dimensions feels unwieldy, you might want to use your dots again to pick favorites.

7. Next, ask the group to come up with a list of 5-10 related JTBD, using your dots again to pick a favorite.

PART 4: 5-8 minutes

8. Go through the same exercise again, for this related JTBD.

PART 5: 10 minutes

9. Once you’ve completed the exercise, bring the group together to discuss what you learned. How does the completed diagram map with the solution you offer today? Are there changes you need to make to better fulfill customer needs?

MODULE 1 EXERCISE 2

Setting SMART Goals

Introduction

Total time: 30 minutes

The product manager's job is to connect the why with the work. This exercise will help team members set clear strategic goals for what they hope to accomplish as they start or progress on a product-led journey. They'll also begin to think through a path to those outcomes.

You may want participants to set goals that tie to a broader company initiative for the quarter or year, or to a specific product launch activity. Kick things off by stating your intention for the exercise.

Materials

1. Digital whiteboard template that walks through the SMART worksheet
2. Pre-read: **Start with the End in Mind** from the book (pages 1-2)
3. Optional pre-exercise: Identify your Jobs-to-be-Done

Instructions to explain to your team

PART 1: 10 minutes

1. Start with a brief overview of the SMART framework, which provides discipline and structure to your goal-setting process. S.M.A.R.T. goals are:
   - **Specific:** What will be accomplished and what actions will you take?
   - **Measurable:** How will you get the data to know how you're progressing?
   - **Attainable:** Is the goal realistic? Don't sandbag, but also, don't set yourself up to fail.
   - **Relevant:** Does the goal ladder up to the strategic goals of the business?
   - **Time-bound:** Have you defined a timeframe for achieving the goal?

PART 1 cont.

2. Then pull up the worksheet on the virtual whiteboard. You could already have a goal in mind for your team. Or, team members might have individual goals that map to a team goal. In either case, have team members write the goal at the top, and then begin to fill out the first section of the worksheet through page 1.
   - There's a great example on page 4 of The Product-Led Organization. Todd's team once set a goal to land in the market-leading position on a Gartner Magic Quadrant. They set S.M.A.R.T. goals to help achieve this team-wide goal.
3. Now, have the team quickly share what they wrote in the S.M.A.R.T. fields. (You might break up into groups if your team is large.)

PART 2: 10 minutes

4. Now move onto page 2 of the worksheet. Have team members document why their goal is so important for the company and then consider the obstacles they might face as they work toward their goal, as well as potential solutions to these challenges.
5. Have a group discussion about this section of the worksheet, allowing the team to offer each other advice about what other possible challenges or solutions they might consider.

PART 3: 10 minutes

6. Now have participants complete the last two sections of the worksheet, considering who they will ask for help along the way as well as their next steps toward achieving the goal.
7. Close the exercise by setting a time or process you'll use to circle back as a team to check in on the goals. You might plan a meeting to share progress, or create a dashboard where each team member provides regular updates. Regardless, you'll want to be sure you have a plan in place to track progress toward your S.M.A.R.T. goals.

MODULE 1 EXERCISE 3

Define your data stack

Introduction

Total time: 30 minutes

Product-led organizations are data-driven organizations. Data offers a common language for measuring progress toward the goals you set for your product. It also helps you know when to pivot. This exercise will help you identify available data sources, then narrow in on the most relevant business, operational, and qualitative metrics to enable your team to make decisions.

This exercise works best when you start with a specific goal, like improve user retention or reduce support tickets, or a specific JTBD. The team can then narrow in on the data sources and metrics that will help inform the decision-making required to achieve that goal or meet the customer need.

Materials

1. Digital whiteboard template with Data Stack graphic
    - Digital “Post-Its”: 3 green, 5 yellow for each participant
    - Digital “stickers”: 3 for each participant
2. Pre-read: **You Are What You Measure** (pages 27-44)
3. Optional pre-exercises: Identify your Jobs-to-be-Done or Setting SMART goals

Instructions to explain to your team

PART 1: 5 minutes

1. Explain the goal of the exercise, which is to:
    - Identify and categorize the team’s various data sources
    - Identify the metrics from these sources that you can use to make decisions
    - Rank these metrics based on how they help the team measure progress toward goal you’ve set

2. Explain how the whiteboard works.
    - Display the Data Stack virtual whiteboard and spotlight the various categories
    - Each participant receives 3 green post-its, 5 yellow post-its, and 3 circular stickers

PART 2: 10 minutes

3. Ask each participant to write down 3 existing data sources (these can be tools or platforms like Salesforce or even people like execs, customers, etc.), one on each green post-it.
    - Then, have participants place their post-its into the related “bucket” in the Data Stack board

4. Then, ask the group to consider what metrics these sources enable the team to track.
    - Ask each participant to write down 5 metrics, one on each yellow post-it. Give potential examples: NPS, feature adoption, revenue, ARR, MAU, DAU, etc. And say both qual and quant measures count!
    - Then, have participants place their yellow post-its on the relevant green post-it (for example, if Salesforce is a data source, someone might put ARR or win rate on it/next to it)

PART 3: 15 minutes

5. Now, it’s time to vote on which metrics are most important.
    - Give each participant 3 “stickers” and ask them to put them next to the metrics they consider most important.
    - Participants can allocate the 3 stickers however they wish (3 for one metric, 2 for one, one for another, etc.

6. Now, go through the votes and identify the highest-ranking metrics, noting how concentrated vs. “spread out” the votes are. Have a final discussion about those metrics and settle on the set you’ll use to make decisions and measure progress toward your goals.

MODULE 1 EXERCISE 4

Design a product-led experiment

Introduction

Total time: 30 minutes

One of the most effective ways of turning data into insights that can improve the customer experience is through experimentation. An Experiment Canvas offers a disciplined approach, forcing you to clarify your hypothesis, determine the risks associated, and set up a test that can validate your hypothesis within parameters like a time frame or with a segment of customers. It also provides a template for capturing results and next steps. And it's easily shareable with others on the team.

Materials

1. Experiment canvas from *The Product-Led Organization*
2. Digital whiteboard template you can use to collaborate and share your experiments with the team
3. Pre-read: **Experimentation** (pages 47-49)
4. Optional pre-exercise: Identify your Jobs-to-be-Done, SMART goals, or pair this with an exercise in module two.

Instructions for your team

PART 1: 5-10 minutes

1. Start by brainstorming a product-led activity you'd like to build an experiment around (have participants do this alone or with a subset of the team). For example, if you are focused on improving the onboarding experience, you might use this exercise to design an A/B test for a new in-app walkthrough.

PART 2: 15 minutes

1. Next, have team members fill out the left boxes in the canvas. You'll revisit the right side of the boxes once you've completed your experiment. Here's how you can define each box for the team:
   - Riskiest assumption: This is the assumption that has the biggest impact on the success of your idea.
   - Falsifiable hypothesis: Set a clear goal for your experiment and a time frame in which you will see results.
   - Experiment setup: Think about what conditions need to exist to validate or invalidate your assumptions.

PART 3: 5 minutes

1. Bring the group back together for a discussion around the experiments you'll get started on. And plan a time to circle back on the results and next steps.

MODULE 2 | EXERCISE 1

Building blocks of onboarding

Introduction

Total time: 45-60 minutes

In this exercise, you'll brainstorm with your team what aspects of your human-led onboarding experience could or should be automated in-app. You'll also walk away with an action plan to ensure users get to a quick "Aha! moment" during new user onboarding.

Materials

1. Digital whiteboard template w/ 3 month onboarding timeline
2. Pre-read: **Getting Customers Off to a Fast Start Through Onboarding** (pages 99-119)
3. Optional pre-exercises: Identify your Jobs-to-be-Done or Define your data stack
4. Following this exercise, consider installing Pendo Free to begin to design and test your new ideas.

Instructions to explain to your team

PART 1: 15-20 minutes

1. Start by documenting your existing new user onboarding experience step-by-step along the timeline on your digital whiteboard. Denote the medium that is used for each step of the process (for example: once a CSM is assigned, they send an email to set up an introductory call), as well as the content shared during each interaction. (15 min)
   - Each group will pick a persona for this exercise.
   - If it starts to get too in the weeds, have the team focus on what happens generally in month 1, 2, 3, and on an ongoing basis.
2. Great onboarding experiences begin with a great first impression. Discuss what sort of impression you think your existing onboarding process leaves on a new user. (10 min)
   - Have a note taker document the conversation in discussion box #1 on your digital whiteboard.
   - Prompt the team with questions like: What is the user's goal? What is the pain your product helps eliminate or ease? How quickly are you helping alleviate that pain or helping them reach the goal?

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PART 2: 15-20 minutes

3. Getting the first impression right begins with an understanding of what your users are seeking to accomplish. The Product-Led Organization references the idea of "Aha!" moments—these are critical moments that help users see the value of your product quickly and get them excited to keep discovering more. Spend the next few minutes brainstorming possible "Aha!" moments in your product that get users off to the best start. Document these in discussion box #2. (5 minutes)

PART 3: 15-20 minutes

4. Considering the previous discussions, look back at your timeline and determine what you might automate (green dot), keep as is (yellow) or remove (red) to get users to those moments faster. Document the new flow in the boxes below the timeline. (10 minutes)
   - If there's time, start to consider the user's format preference. Would they prefer gifs or video tutorials over written content? How do they like to learn? Would a full onboarding walkthrough make sense or a small tooltip to prompt an early action? Finally, what might make the experience feel special? How might you use gamification or personalization to automate delight in the onboarding process?
5. Lastly, in discussion box #3, determine how you will test the assumptions you made today. Design an experiment or decide on the metrics you'll use to determine which Aha moments are the best leading indicators of a long term user of your product.

MODULE 2 EXERCISE 2

Create a customer health scoring model

Introduction

Total time: 30-45 minutes

This exercise is inspired by the team at Rapid7, who discovered as they added hundreds and then thousands of customers that it was increasingly difficult to identify the most successful users, as well as those who are struggling. By assigning customers a score based on product usage and a myriad of other indicators, they could begin to predict success and struggles, and intervene more quickly. A key point from their case study in the The Product-Led Organization is that your customer health scoring model will evolve over time as you observe customer outcomes. This exercise will get you thinking about the components of your health score and the action plans you'll put in place to retain unhealthy customers and leverage healthy ones.

Materials

1. Digital whiteboard template
2. Pre-read: **Renew and Expand: Creating Customers for Life** (pages 145-153)
3. Complementary exercise: Define your data stack, design a product-led experiment
4. Tip: This is a great cross-functional exercise. Get buy-in across the org by inviting marketing and customer success team members to join the conversation.

Instructions to explain to your team

PART 1: 5 minutes

1. Explain the goal of this exercise: to identify the components of a customer health score, create priorities for your scoring model, and a plan for how you will measure the health of customers and decide how to intervene. The team will come out of this exercise with the initial steps in place to launch customer health scoring at your company.

2. Next, direct the team to the digital whiteboard to explain the exercise.
   — They'll see post-its alongside 3 boxes: one large open box, a box below it with 3 squares: "initial," "medium-term," and "long-term," and a box below that with 4 boxes: "very unhealthy," "neutral," "healthy," or "very healthy."

3. If the group is large, you might break up into multiple teams to complete the rest of exercise.

PART 2: 20-30 minutes

4. Start by having participants write down every metric they can think of that might provide a signal to a customer's health.
   — Add these post-its to section 1 of your whiteboard.

5. Next, have a discussion about how you might group your metrics. Perhaps a handful of metrics indicate successful product adoption; another grouping relates to the support experience; another to sentiment; another to purchasing behavior. Move your post-its into these groupings and label each grouping. These groupings will be the components of your score.

6. Now prioritize the components by time frame.
   — Choose 3-4 components that you might incorporate into your score quickly and move those to the box labeled "initial." These could represent data that is accessible today.
   — Do the same with the medium and long-term categories based on when you feel you might be ready to incorporate those metrics into your model. Think of these as wish list data sets that you know would help make your model even more exact.

7. For this workshop, teams will think about values they might assign to each of the initial components. For example, if the team thinks product adoption is the biggest indicator of a successful customer, perhaps they'll assign 40% of the total score to that and smaller percentages to the other 2-3 categories. Write these numbers down on post-its next to each component.

8. Remember, this exercise is just a starting point—you won't walk away with a complete model. To make additional progress toward your scoring model, you'll want to assign a team or person to examine the mashup of metrics you identified to test your assumptions and truly understand how they relate to customer health. With data in hand, that group can help you set a value range that corresponds to healthy and unhealthy customers.

PART 3: 10-15 minutes

9. Last, spend a bit of time brainstorming in groups what plans of action you might put in place to address each type of customer. For example, a healthy customer might receive outreach to speak at an event or to provide a referral; an unhealthy customer might be offered a coaching session or targeted with content that might help them be more successful. Document your ideas in the 4 boxes labeled as such.

10. If you broke up into groups, you may plan time at the end of the session to come back together to share what you came up with, as well as your next steps toward creating an actionable customer health model.

MODULE 2 EXERCISE 3

Make support self-service

Introduction

Total time: 45 minutes

Empowering your customers with on-demand education and training in your application allows them to find the information they need, at any time, without creating a ticket. In this exercise, you'll analyze your product's support ticket trends, identify existing resources that might help address those issues, and design in-app messages you can automate inside your product to guide users to help prior to calling support.

Materials

1. Your support ticket data + access to your existing knowledge base or content library
2. Digital whiteboard template with post-its and guide examples
3. Pre-read: **Customer Self-Service** (pages 133-143)
4. Complementary exercise: Design a product-led experiment
5. Following this exercise, consider installing Pendo Free to begin to design and test your new ideas.

Instructions to explain to your team

PART 1: 5 minutes

1. In this exercise, come prepared with support ticket trend data from your product. Be prepared to supply your team with data like number of tickets submitted and ticket themes, average time to close a ticket, and cost per support hour. You'll notice sample charts in the pre-read section of the book. These metrics can be helpful for measuring the number of hours saved and the associated cost-savings when you implement the one-to-many approach of in-app guidance.

2. Direct the team to the digital whiteboard to explain the exercise.

3. They'll see a box with 2 squares: "quick wins" and "bigger bets" at the top and post-its for the team to post their observations from the data.
   - Quick wins are observations from support ticket data that could be solved with a single guide or in-app message.
   - Bigger bets are observations from support ticket data that might require a full walkthrough or multi-step guide.

PART 1 cont.

4. Then below those boxes, they'll take the quick win or bigger bet they plan to work on and add post-its for the knowledge base articles that exist or need to be created.

PART 2: 15 minutes

5. Next, break up the team into groups to each identify 3-5 support ticket trends they believe they can address with automated in-app guidance. Have each team write these down on post-its and place them in the box for quick win or bigger bet, based on their assessment of the amount of effort required to reverse the ticket trend.

PART 3: 15 minutes

5. Have each team pick one ticket trend to address using in-app guidance.

6. Next, have the teams determine where in the application would make the most sense to deliver in-app messages based on the ticket theme.

7. Then, dive into your existing knowledge base or content library and determine which articles would help users navigate through that part of your application. Write these on post-its and place them in the box below your quick wins or bigger bets.
   - You can link to your articles within guides to provide more context for your users, while being able to keep your guide content short and sweet for the most impact.
   - If you don't have a knowledge base, use this time to think through how you'd guide someone through that task or workflow. Document those ideas in the box below. Your goal out of this exercise might be to get some articles written on the main themes you've identified here.

8. If you have additional time, begin to choose the guide types you might use and craft the messages you'll place within those guides. For a quick win, you might choose a simple tooltip to place next to a button or form. A bigger bet might require a sequence of guides that help users through a workflow they are struggling to complete.

PART 4: 5-10 minutes

9. Come back together as a full group to discuss the support trends you identified and how you plan to address those trends with in-app messaging.

MODULE 3 EXERCISE 1

Design a launch plan

Introduction

Total time: 45 minutes

In a perfect world, every feature is immediately and enthusiastically adopted by every customer. In reality, that's rarely the case. As we add users and personas and our products become more feature rich, launch communication has to evolve. That means rethinking the way we educate and enable users. In this exercise, your team will design a process to ensure a successful feature launch every time. Your team will come away with a tactical plan that covers how they will: communicate feature launches and product updates, measure success using product analytics and sentiment, and capture and incorporate customer feedback.

Materials

1. Digital whiteboard template for 30-60-90 product launch plan
2. Pre-read: **Why Product Success Depends on Feature Adoption** (pages 169-174)
3. Complementary exercise: Define your data stack
4. Optional: Take this exercise a step further by using Pendo Free to create goals, announcement messages and polls to collect feedback.

Instructions to explain to your team

Decide in advance if you want the group to work together on one feature launch or in smaller groups based on features they plan to launch.

PART 1: 5 minutes

1. Explain the workshop and the goals. Make sure each participant has access to your digital whiteboard. Communicate if they will work together or in groups.

2. Then walk through the exercise, covering the 3 sections of the board.

3. Break into your groups.

PART 2: 30 minutes

4. Start with section 1 of your whiteboard, which asks the question: What does a successful launch look like or how will you measure success?
   - Ask participants to brainstorm goals they might set for the feature launch, perhaps in 30-60-90 day increments. For example, they might want to track the number of users interacting with the new feature or the time spent using the new feature. Write these down on post-its.
   - Ensure that participants write down how they will access the data alongside their ideas.

5. Move on to section 2 of your whiteboard, which asks the question: How will you communicate the launch?
   - Ask participants to write down ideas for how they might communicate a new feature release to customers and internal teams, and the level of detail for each audience.
     - *Make sure participants think about what communication methods are appropriate based on the size and importance of the feature launch (i.e. in-app message, email, digital campaign, etc.), as well as how they will drive adoption over the 30-60-90 day period.*
     - *Ask participants to also consider how they will partner with their marketing team on launch communications.*

6. In the last section of the board, consider the question: How will you engage customers around the launch?
   - Ask each participant to consider the most appropriate method for collecting customer feedback on the new feature (ideas may include interviews, surveys, a feedback tool), documenting the approach and time frame to reach out.
   - Participants should also think about how they will use data to make improvements post-launch, and document those ideas in the whiteboard.

PART 3: 10 minutes

7. Come back together and have each group give a high level read-out of their plan. Have a discussion about what each group can learn from the other and make sure each team assigns a person to make the necessary updates to ensure you have an agreed upon launch process everyone can follow moving forward.

MODULE 3 EXERCISE 2

Create a Product Feedback Policy

Introduction

Total time: 30-45 minutes

Customer feedback is vital to any successful software product—product teams should always strive to understand and incorporate the voice of the customer in everything they build. But this is especially important for product-led organizations, where everything the company does revolves around the customer. By creating a product feedback policy, your team will have a standard process to follow to gather and manage feedback from customers, ensuring customers have a voice as you evolve your product. In this exercise, you'll determine how you'll manage and weigh customer feedback; and create a document you can share internally and/or externally to explain the process you'll follow.

Materials

1. Digital whiteboard with Product Feedback Policy template and example feedback policies.
2. Pre-read: **What Users Want** (pages 183-191)
3. Complementary exercise: Design a launch plan

Instructions to explain to your team

PART 1: 5-10 minutes

1. Explain the process for the exercise, which is to work through the Product Feedback Policy template in the whiteboard, discussing and drafting the highlighted sections. If you have time, walk through one of the examples provided in your whiteboard template so teams can visualize the output of today's exercise.
    - For larger groups, you might break down into smaller working teams to come up with suggestions that you can review as a group at the end.

PART 1 cont.

2. Have participants nominate a "decision-maker." This is the person that will have the deciding say on what's appropriate to include in the Product Feedback Policy. Note that:
    - All participants should be involved in the discussion.
    - If there isn't a "decision-maker" present in the sessions, participants should nominate someone to make final decisions after the workshop. Your goal is to turn this draft Product Feedback Policy into something that can be shared. It will be very helpful to ensure you have an approval process baked into the exercise.

PART 2: 20-30 minutes

3. Work through each section of the Product Feedback Policy template, talking through the prompts included in the template.

4. Assign a notetaker to fill in the sections as you go.

PART 3: 5-10 minutes

5. If you broke into smaller groups, come back together to discuss what you came up with and make any adjustments.

6. As a group, decide how the Product Feedback Policy will be shared, considering the various communication channels available to your team.
    - If you are using Pendo Feedback, you should link to your policy in the default message that team members and customers receive when you set a product request to "Awaiting Feedback."
    - Document your plans in the discussion box of your whiteboard for the team to reference later.

MODULE 3 EXERCISE 3

Roadmap your way to success

Introduction

Total time: 40-60 minutes

Product-led organizations recognize their roadmap isn't just a document; it's a powerful planning, communication, and organizational alignment tool. Roadmaps are the most effective way to communicate with internal and external stakeholders the purpose of your product, and to solicit their feedback. They give everyone a chance to buy into your vision. Your team will come away from this exercise with a tactical plan for mapping roadmap decisions to the goals of the organization, factoring how they'll use data to inform those decisions and how they will communicate the roadmap to stakeholders.

You have two options for this exercise. Participants can complete and discuss the worksheet during the session, or they can complete the worksheet in advance and use the shorter time frame for alignment and discussion around what roadmapping improvements could be made.

Optional:
The first part of the exercise is to ensure that participants understand the goals of their company before they start planning their roadmap. You might start this workshop with a 5-10 minute presentation from a leader on the team to align around product strategy or company initiatives.

Materials

1. Current product roadmap(s) - Make sure your existing product roadmap is accessible during the workshop so team members can think through how they might change their approach as they complete the exercise. If you don't have a product roadmap, you can still use this exercise as a starting point.
2. Digital whiteboard template with roadmap planning worksheet
3. Pre-read: **Dynamic Roadmapping** (pages 195-206)
4. Complementary exercises: Define your data stack, create a product feedback policy

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Instructions to explain to your team

PART 1: 5-10 minutes

1. Explain the goal of the workshop: to ensure shared understanding of the company's goals and to work through the roadmapping worksheet, then to come back together to discuss each team's ideas. Then divide into smaller groups, ideally based on responsibility for different areas of your product.
   - *This could include the optional presentation mentioned above.*
2. Explain the digital whiteboard, ensuring each participant has access to the worksheet and the current roadmap(s)
3. Have each group assign a notetaker to capture the discussion on the whiteboard.

PART 2: 15-20 minutes

4. Start by having the group review the current product roadmap and discuss as a team how the existing product roadmap aligns to the goals of the company. Note that not every item on a roadmap will directly align to a company goal—you could be fulfilling an important customer request or fixing a bug— but the roadmap as a whole should support business goals. This discussion will get the group off to a good start on the worksheet. If you do not have a roadmap, have participants go right to the next step.
5. If you chose to fill out the worksheets during the workshop, ask each participant to complete the "Know Your Strategy" section of the worksheet. Otherwise, move on to the discussion.
6. Discuss everyone's responses: Are there any changes you would make to your current roadmap? Is it clear which roadmap items support which company goal?

PART 3: 15-20 minutes

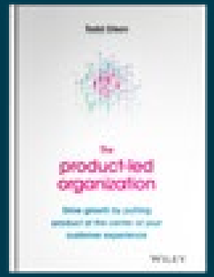
7. Complete (and/or discuss) the "Get Buy-In" section of the worksheet, where participants think about roadmap stakeholders: who they are, how they are kept informed, and what about that process should change.
8. Complete (and/or discuss) the "Understand Your Data" section, considering the data that informs the roadmap today and how current processes can be improved.
9. Complete (and/or discuss) the "Build with Care" section, considering how the team communicates the roadmap today and what should change about that communication strategy.
10. Record any ideas you have for improving the roadmapping process in the respective discussion boxes.

PART 4: 5-10 minutes

11. Get the group back together to discuss what they learned as they completed the worksheet and any improvements they'll make to the roadmapping process.

BOOK DISCUSSION QUESTIONS

The product led organization



Chapter 1: Start with the End in Mind

- Which approach to setting strategic goals do you think is best? (Revenue, “Cost of delay,” 60 second business case, etc.)
- Have you had success with empathy maps? Or, did you feel that it gave an incomplete picture of customer behaviors?

Chapter 2: You Are What You Measure

- How are you instilling data-driven practices into your team’s work?
- How do you choose which metrics to measure?
- Were any of the metrics listed new or surprising to you?
- Were there any metrics you felt were missing from the list(s)?

Chapter 3: Turning Customer Data into Insights

- Do you have any favorite ways to segment your data?
- Do you have any examples of how you’ve combined quantitative and qualitative metrics to derive better insights?

Chapter 4: How To Measure Feelings

- How frequently do you think product teams should measure sentiment?
- Do you think NPS is the best way to measure sentiment?
- How have you been able to increase the number of NPS responses you receive?

Chapter 5: Marketing in a Product-Led World

- Do you have a freemium product? If so, how did you decide which model to use (e.g. letting users access the entire product for a limited time or offering a scaled-down version of the product for free)?
- Have you used product data to inform your freemium strategy? If so, how?

Chapter 6: Converting Users into Customers

- “Customers love when companies give them more power to control their own outcomes” – How are you adding “DIY” elements to your product experience, or what are some ways you could do this?
- If you’ve used any, which tactic for converting prospects has been most effective for you and your team? (Usage limit, heavy usage, advanced features, etc.)

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Chapter 7: Getting Customers off to a Fast Start Through Onboarding

- What do you think every onboarding experience should include?
- Are there any onboarding tactics Todd mentioned that you aren’t currently doing, but want to start doing? (E.g. personalizing based on role, leveraging data to decide what to highlight, etc.)
- Do you have any onboarding “mishaps” that you learned from and used to improve your onboarding experience?

Chapter 8: Delivering Value

- Do you have any examples of a friction point or drop-off you uncovered using product data, and how you helped remedy it?
- What do you think makes for a successful product-led customer success team?

Chapter 9: Customer Self-Service

- Are you tracking support tickets? If so, which metrics have been most useful to you and your team?
- What’s something you learned about your product from a support ticket that you didn’t know before?
- What was most interesting or surprising to you in the Jungle Scout case study?

Chapter 10: Renew and Expand: Creating Customers for Life

- Had you heard of the term “negative churn” before? Is your company focused on this?
- What are some pros and cons of a customer health score? Or, if your team uses customer health scores, what are some challenges you’ve faced?

Chapter 11: Product-Led Design

- What are some ways you’ve been able to bring stakeholders (customers, developers, sales, marketing, etc.) into the product design process?
- If you’ve adopted a design system, what did that process look like? What advice would you give to those who are building or planning to build design systems?

Chapter 12: Launching and Driving Adoption

- Do you have an example of a product/feature release that went wrong? What did you learn from it?
- Do you currently measure feature adoption? If so, how? And has your strategy changed over time?
- How do you announce new features to your users?

Chapter 13: The Art of Letting Go

- Do you have an example of a feature you had to let go of? How did you come to that decision?
- What product data do you think would be most useful when deciding whether or not to remove a feature?

BOOK **DISCUSSION QUESTIONS**

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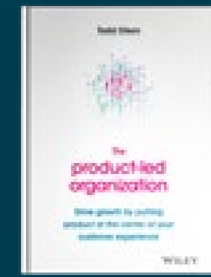

Chapter 14: What Users Want

- What do you think is the best way to gather customer feedback?
- Do you have a single repository for qualitative feedback? If yes, what is it? If no, do you think you need one?
- How have you been able to avoid only listening to the "loudest" customer?

Chapter 15: Dynamic Roadmapping

- Do you use data to inform your roadmap? If so, which metrics do you look at?
- What's been an effective way to communicate to stakeholders that the roadmap is subject to change?
- How often do you revisit your product roadmap? How often should teams revisit their roadmaps?

Chapter 16: Building Modern Product Teams

- What are some ways you (or your product team) have worked to create stronger alignment with stakeholders across the organization?
- Had you heard of product ops before? Do you think it's something your organization would benefit from?
- What part of the product ops function is most appealing to you, in terms of the impact it can have on the broader team?

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