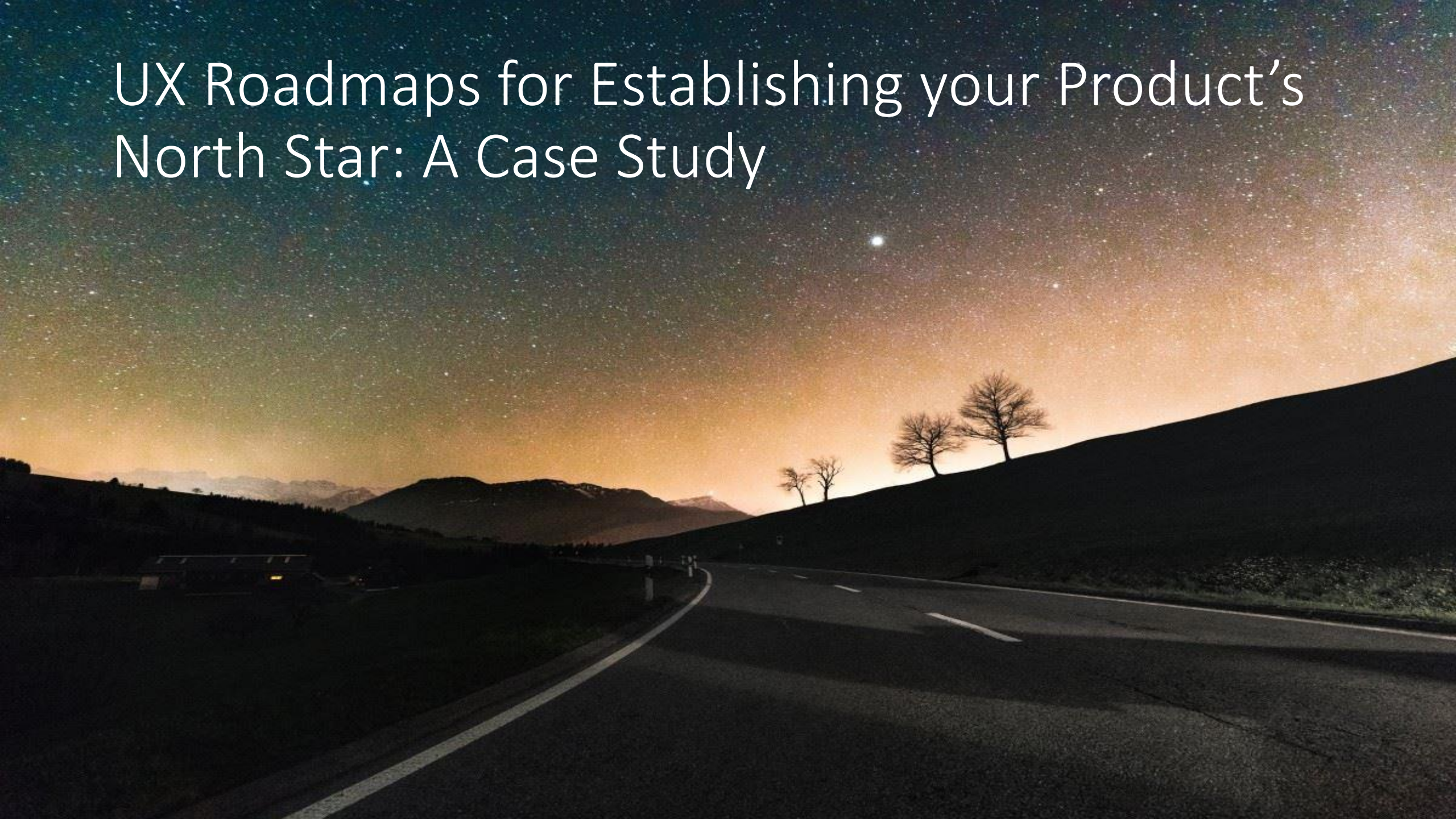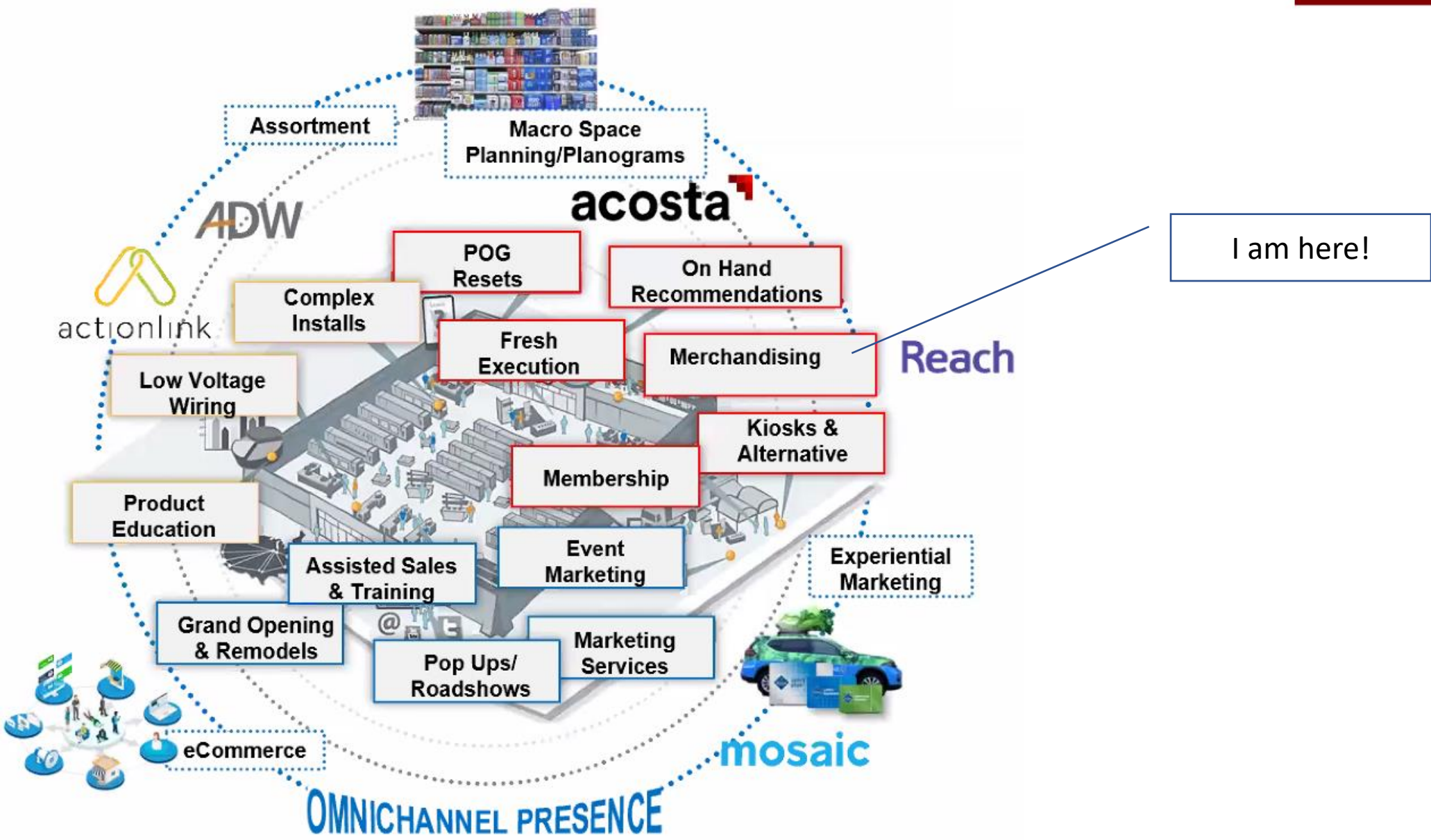# UX Roadmaps for Establishing your Product's North Star: A Case Study

I am here!

Merchandising Field Tools Group

SOFTWARE:

○ **ENGAGE App** allows field reps to:

- plan store visits and coverage for their territory
- leverage advanced analytics to drive priorities
- perform scripted merchandising tasks
- respond to data-led inventory level alerts
- capture & perform value-added work to drive sales revenue

○ **Enterprise Category Management** software with client data and workflow integrations

USERS:

○ field service reps, category & field managers, category analysts

CLIENTS:

○ CPG companies, industry analysts

MY ROLE: Product Design Lead

MY TEAM: just me ☺ - within product team

FOCUS: 50% concept & design; 50% strategy & research

IMPACT:
○ influencing upwards into product and larger organization to align vision to value outcomes

○ established initial research to drive feedback curation, prioritization of features, and roadmap visualization

FIELD REPS: Our primary user
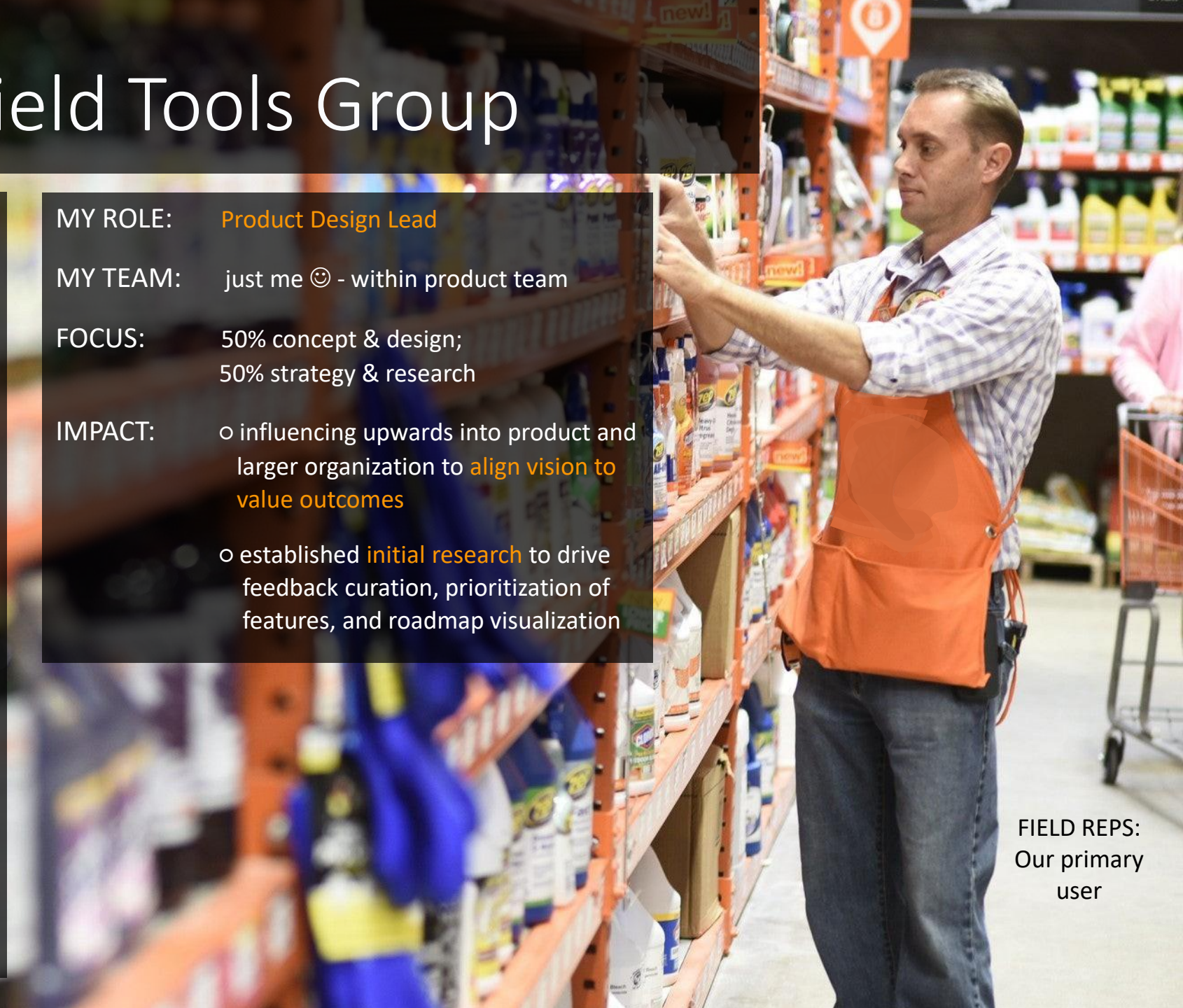
As a (new) designer where is my North Star?

Design Priorities from 1 of 3 sources:

- **Product Roadmap**
  - feature-based priorities
  - traditionally against business problems

  NOT AVAILABLE

- **Experience Outcomes**
  - research-based priorities
  - against user problems

  NOT AVAILABLE

- **Corporate Strategy**
  - organizational priorities
  - against problem themes

  AVAILABLE BUT HIGH LEVEL

How to align Vision to Value?
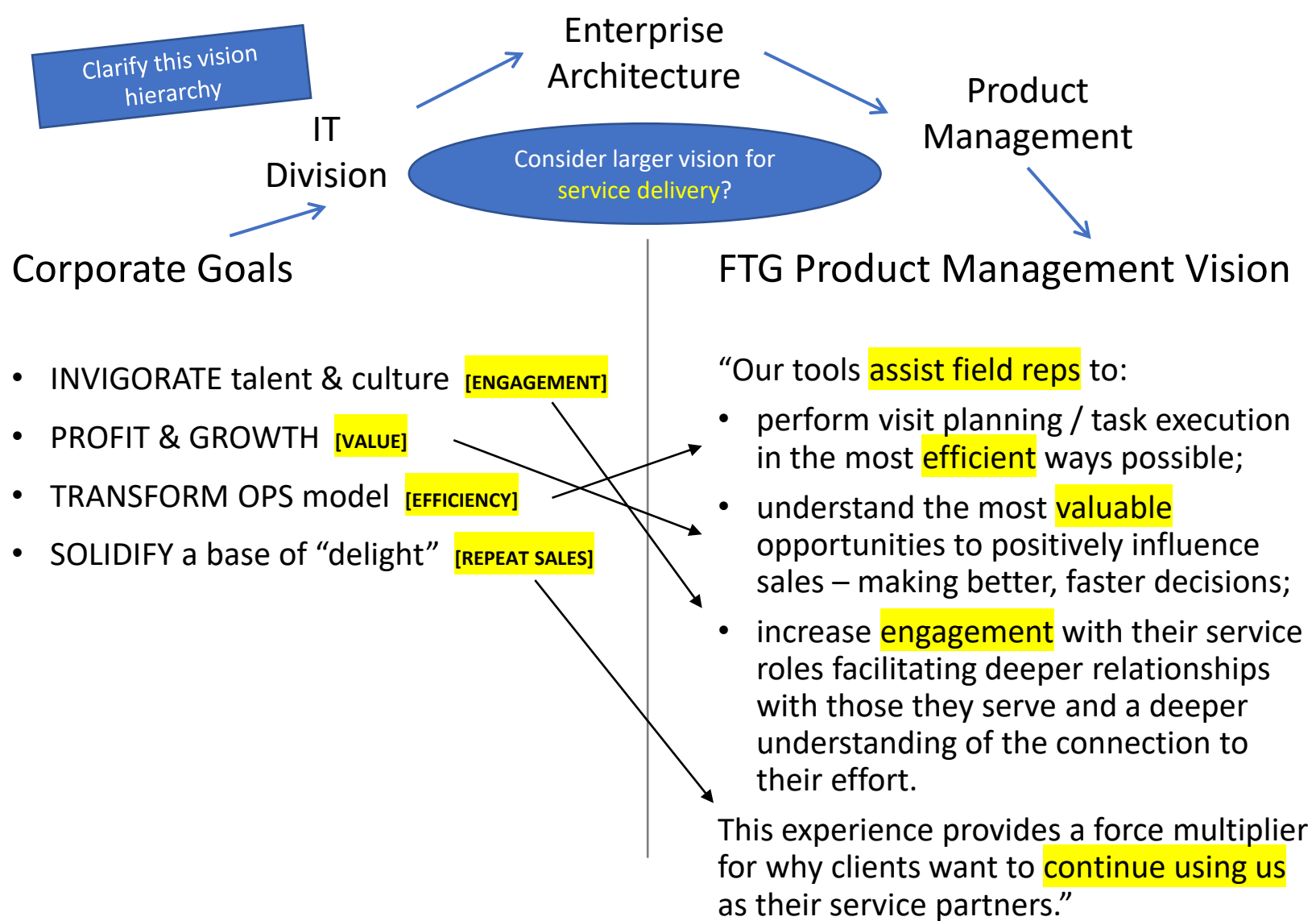
- **Problem (Value) Architecture**
  - establish problem theme hierarchy with strategic value assigned to each and mapped to features(ets)
  - understand KPIs and labels (each problem)
  - assign priorities to features based on value

- **Process**
  - establish user research methods
  - prototype feedback process to categorize feedback into problem themes
  - curate top ideas based on feedback
  - promote top ideas into roadmap

Product Value Architecture

Aligning Vision to Value

Clarify this vision hierarchy

Enterprise Architecture

IT Division

Product Management

Consider larger vision for service delivery?

Corporate Goals

FTG Product Management Vision

- INVIGORATE talent & culture [ENGAGEMENT]

- PROFIT & GROWTH [VALUE]

- TRANSFORM OPS model [EFFICIENCY]

- SOLIDIFY a base of "delight" [REPEAT SALES]

"Our tools assist field reps to:

- perform visit planning / task execution in the most efficient ways possible;

- understand the most valuable opportunities to positively influence sales – making better, faster decisions;

- increase engagement with their service roles facilitating deeper relationships with those they serve and a deeper understanding of the connection to their effort.

This experience provides a force multiplier for why clients want to continue using us as their service partners."

"When the long-term perspective vanishes, it becomes difficult to feel like you've made any significant progress. Sure, you'll have checked many items off the ever-growing to-do list, but have you really improved how the business serves its customers?" – Jared Spool

Engage App Design Principles*

Derived Design Principles:
(and associated Value Outcomes)

- Plugs Seamlessly into Process
  (onboarding, training, orientation)

- Symbiotic
  (adoption, churn, compliance)

- Single Point of Contact
  (trust, engagement)

- Timely / Real-Time
  (productivity, planning)

- Efficiency
  (2% efficiency gain = $X cost in savings)

- Engaging / Effective
  (attention to their job, feedback on actions they take)

- Minimal Learning Curve
  (cost reduction, speed-to-market)

* Need to vett with team
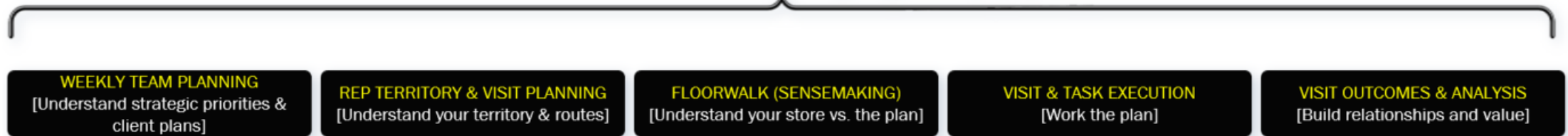
Establishing Roadmap Themes

Themes aligned to Value Outcomes

Field Tools (Engage App)

WEEKLY TEAM PLANNING [Understand strategic priorities & client plans]	REP TERRITORY & VISIT PLANNING [Understand your territory & routes]	FLOORWALK (SENSEMAKING) [Understand your store vs. the plan]	VISIT & TASK EXECUTION [Work the plan]	VISIT OUTCOMES & ANALYSIS [Build relationships and value]

- We categorized roadmap themes based on the rep's weekly workflow using the app

- Allows us to visualize the problem space and create a product and service architecture to deliver solutions against

- TODO:
  - Derive value-based weight factors for each theme to help prioritize product roadmap decisions for any given problem and feature

Need to establish weighted values for each theme

Product Roadmap
- feature-based priorities

App problem spaces mapped to themes

Experience Outcomes
- research-based priorities

NOT AVAILABLE

Corporate Strategy
- organizational priorities

High level North Star

Connection to Larger Portfolio & Service Delivery

Engage (Product/Service)

Field Tools (Engage App)

| CLIENT ONBOARDING [Setup client teams / initial training] | ACCESS MANAGEMENT [Setup permissions to the system] | WEEKLY TEAM PLANNING [Understand strategic priorities & client plans] | REP TERRITORY & VISIT PLANNING [Understand your territory & routes] | FLOORWALK (SENSEMAKING) [Understand your store vs. the plan] | VISIT & TASK EXECUTION [Work the plan] | VISIT OUTCOMES & ANALYSIS [Build relationships and value] | SUPPORT [Provide tech support to field] | VISIT AUDIT [Provide visit analytics to planning] |

Reflects:

- Alignment with our Engineering strategy (Retail Services domain model)

- Consideration of larger service delivery journey areas directly outside of the **Engage App** experience

- Does not consider larger Service Design, but should, as they are connectors to rest of organization

Need to map problem space to product architecture to segment value

Benefits:

- Visually understand the boundaries of the solution space so we're all talking about the same scope

- Subdivide themes into problem categories we support solving with technology (features)

- Allows us to begin to visualize the larger service design picture

- Positions us to align with Product Marketing and the larger organization

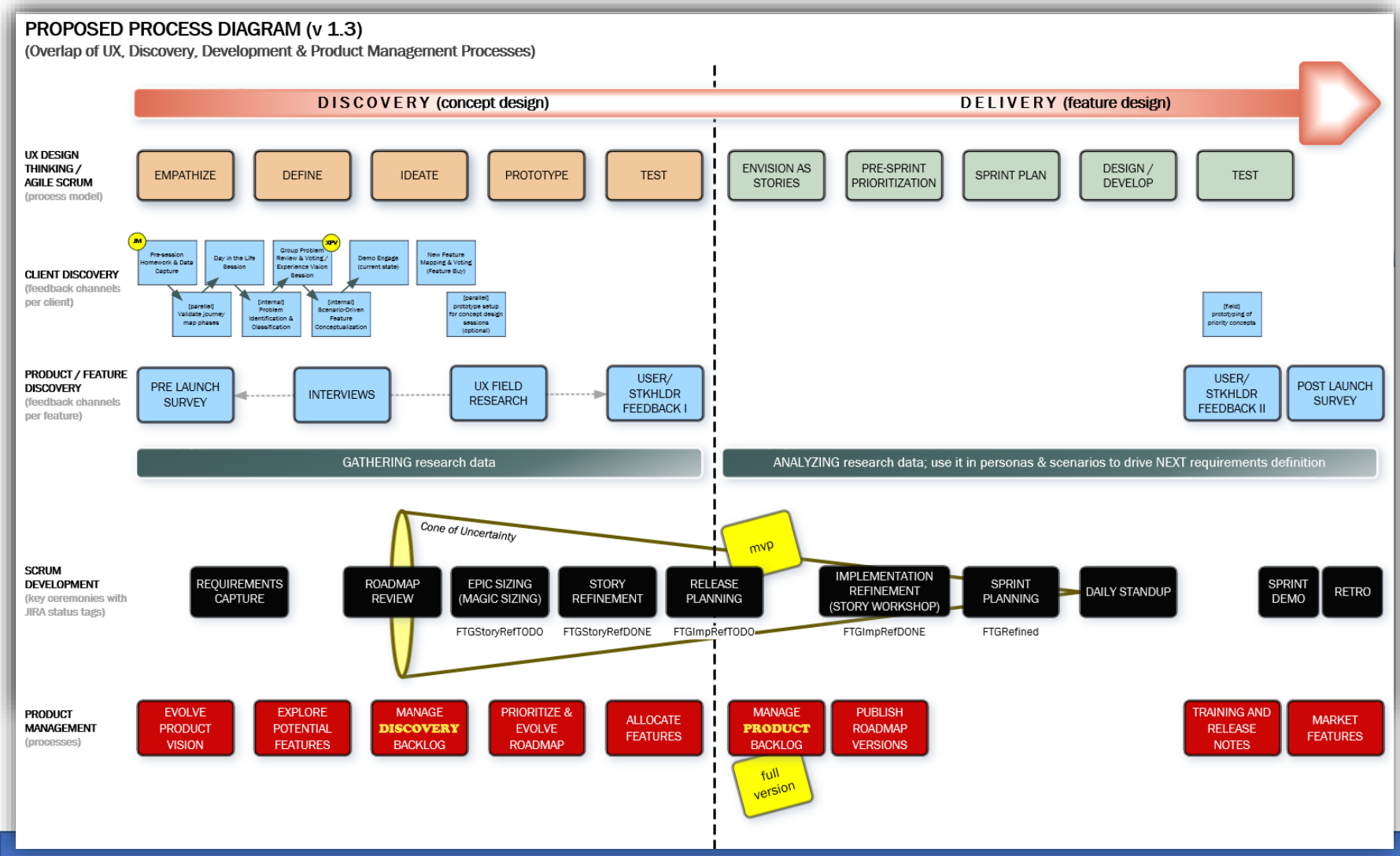# Process, Alignment, Collaboration: Draft Problem Value Hierarchy

Corporate Capabilities

Innovation Programs

Product (Operational) Programs

Engage (Product/Service)

Field Tools (Engage App)

Foresite Product Suite

| FSHQ | Retail | Retail |

| 5% | 30% | 15% | 40% | 9% | 1% |

| CLIENT ONBOARDING [Setup client teams / initial training] | ACCESS MANAGEMENT [Setup permissions to the system] | WEEKLY TEAM PLANNING [Understand strategic priorities & client plans] | REP TERRITORY & VISIT PLANNING [Understand your territory & routes] | FLOORWALK (SENSEMAKING) [Understand your store vs. the plan] | VISIT & TASK EXECUTION [Work the plan] | VISIT OUTCOMES & ANALYSIS [Build relationships and value] | SUPPORT [Provide tech support to field] | VISIT AUDIT [Provide visit analytics to planning] |

Problem Hierarchy mapped to product features that serve them
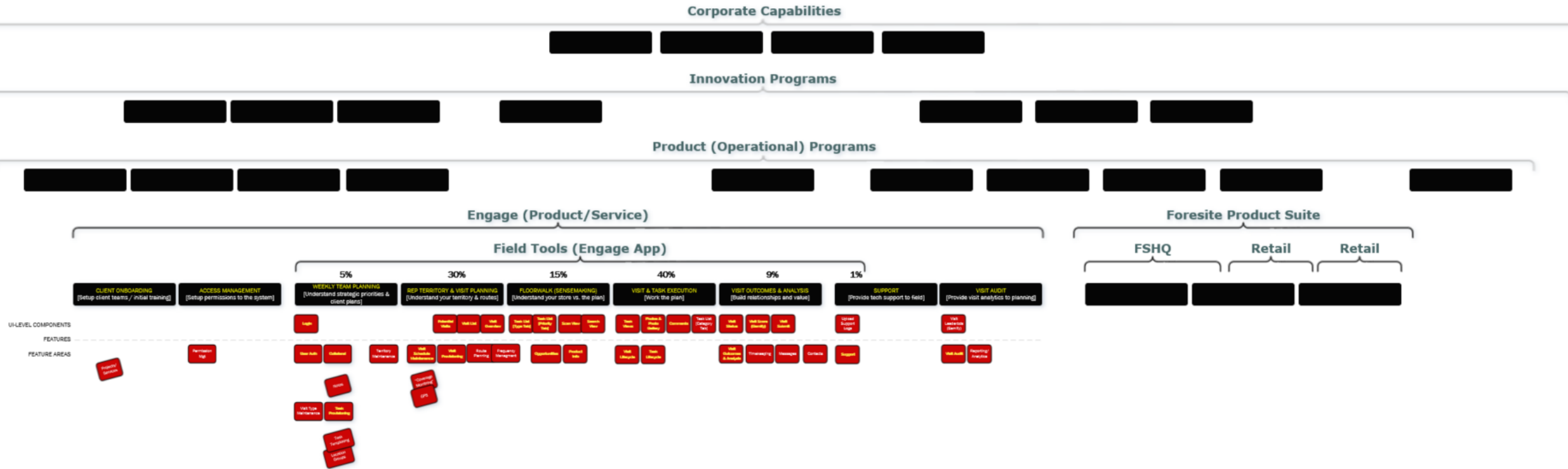
UX Process Overlap with Product, Engineering, and Research

PROPOSED PROCESS DIAGRAM (v 1.3)
(Overlap of UX, Discovery, Development & Product Management Processes)

- Established formal Discovery Phase (separate from Delivery) to prototype a "dual-track agile" approach to doing research

- Aligned existing **Product Discovery** and **Feature Feedback** channels into the process

- Created a process prototype to **curate** inputs from different feedback channels:
  - Client Discovery Feedback & Ideas
  - Insights from feedback
  - Pre- and Post-launch Surveys & Feedback sessions
  - Unstructured feedback
  - Field Observations (needed)
  - Competitive Intelligence
  - Market Intelligence

Need for research to inform detailed design and delivery…

Consolidating Feedback Channels to Guide Feature Curation

Shows:

- Feedback from all channels categorized against Roadmap Themes

- Ideas curated into potential roadmap items

- Roadmap items in the backlog
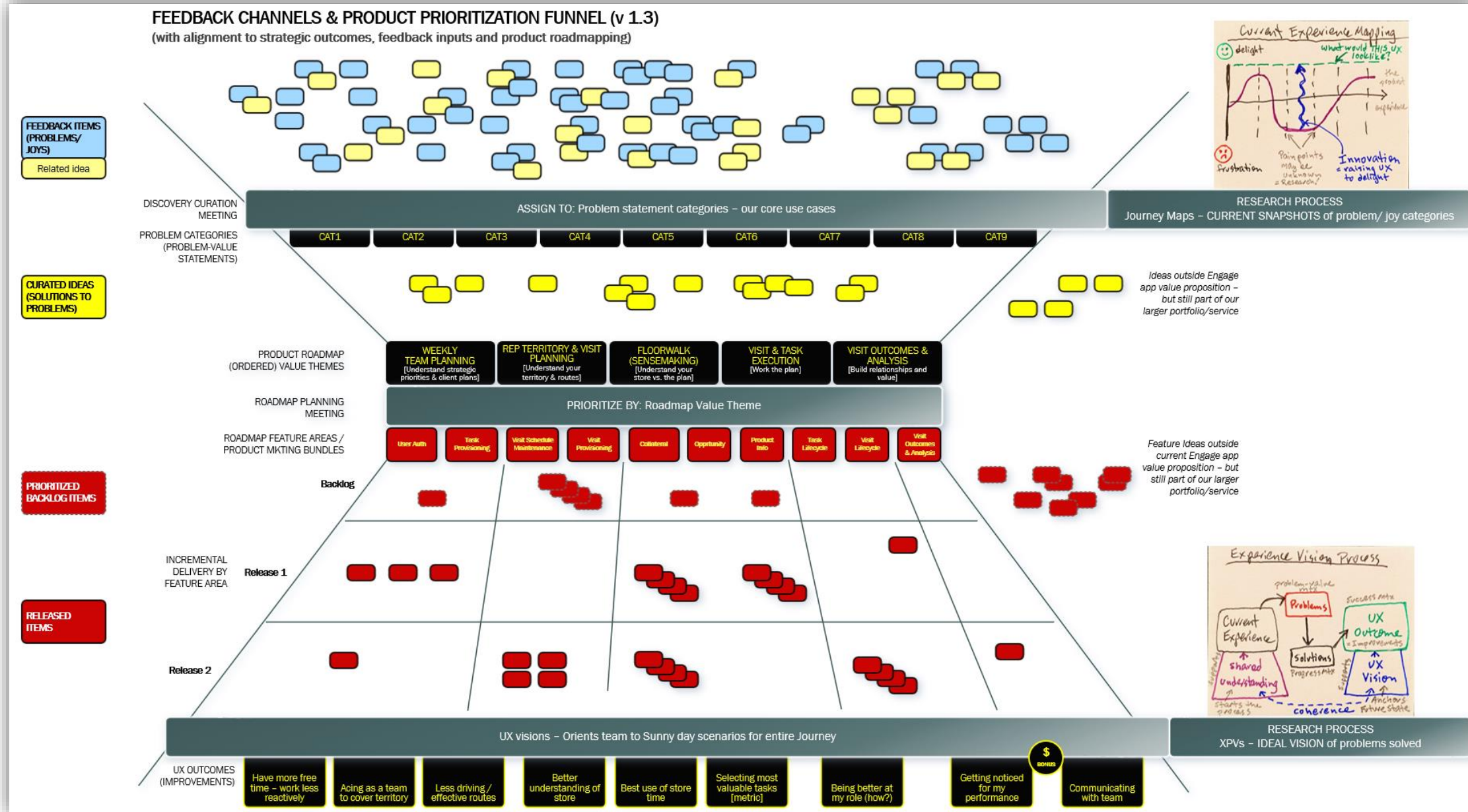
Prototyping the Approach in Client Discovery
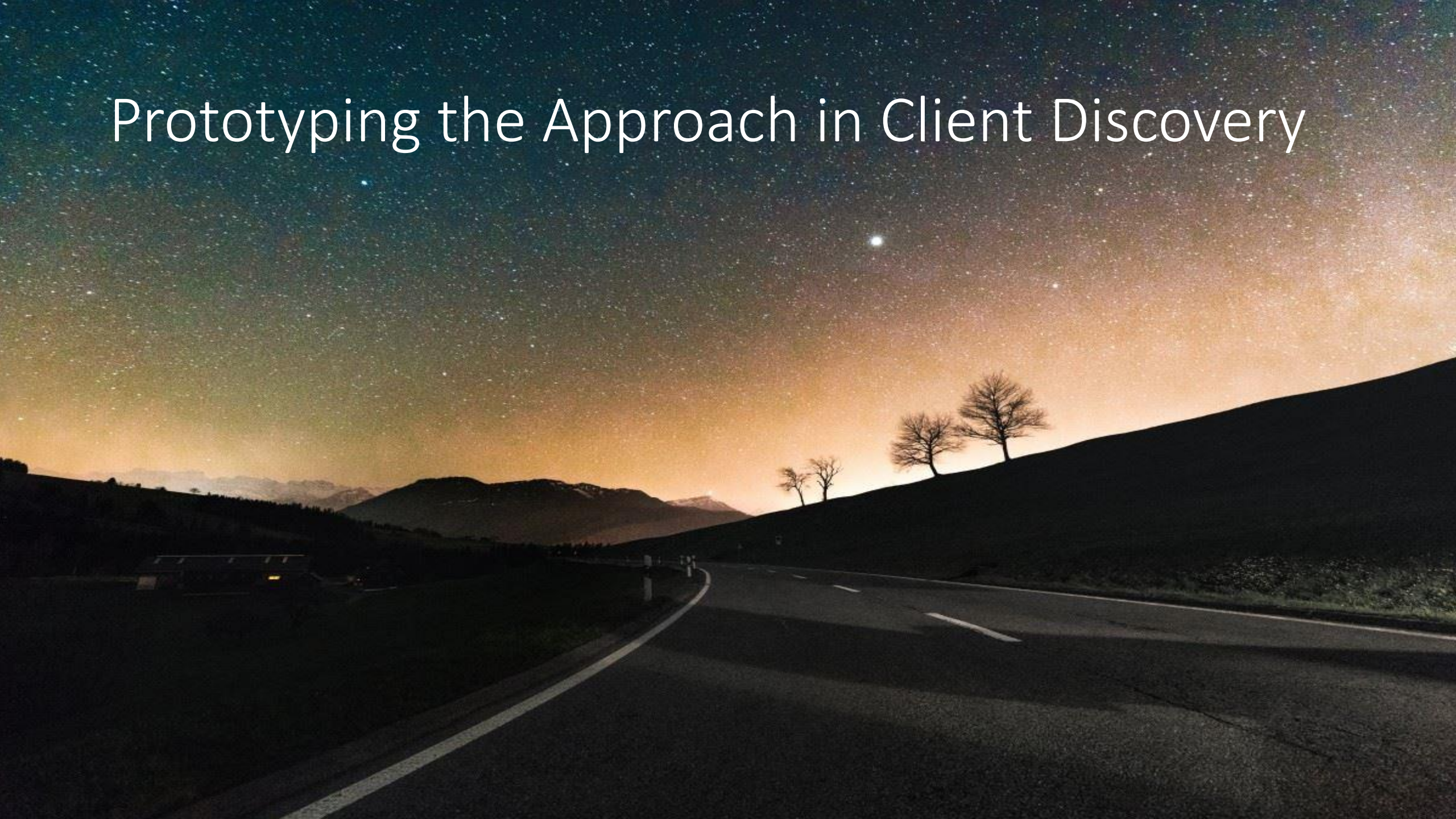
Journey Maps in Client Discovery Sessions

"Mapping out the customer journey is a prerequisite for creating a shared understanding of what your customers think, feel, and struggle with as they interact with your brand. A customer journey map can help your teams align around solving known problems, identifying new user pain points, and removing barriers to your customer's (and therefore your company's) success."
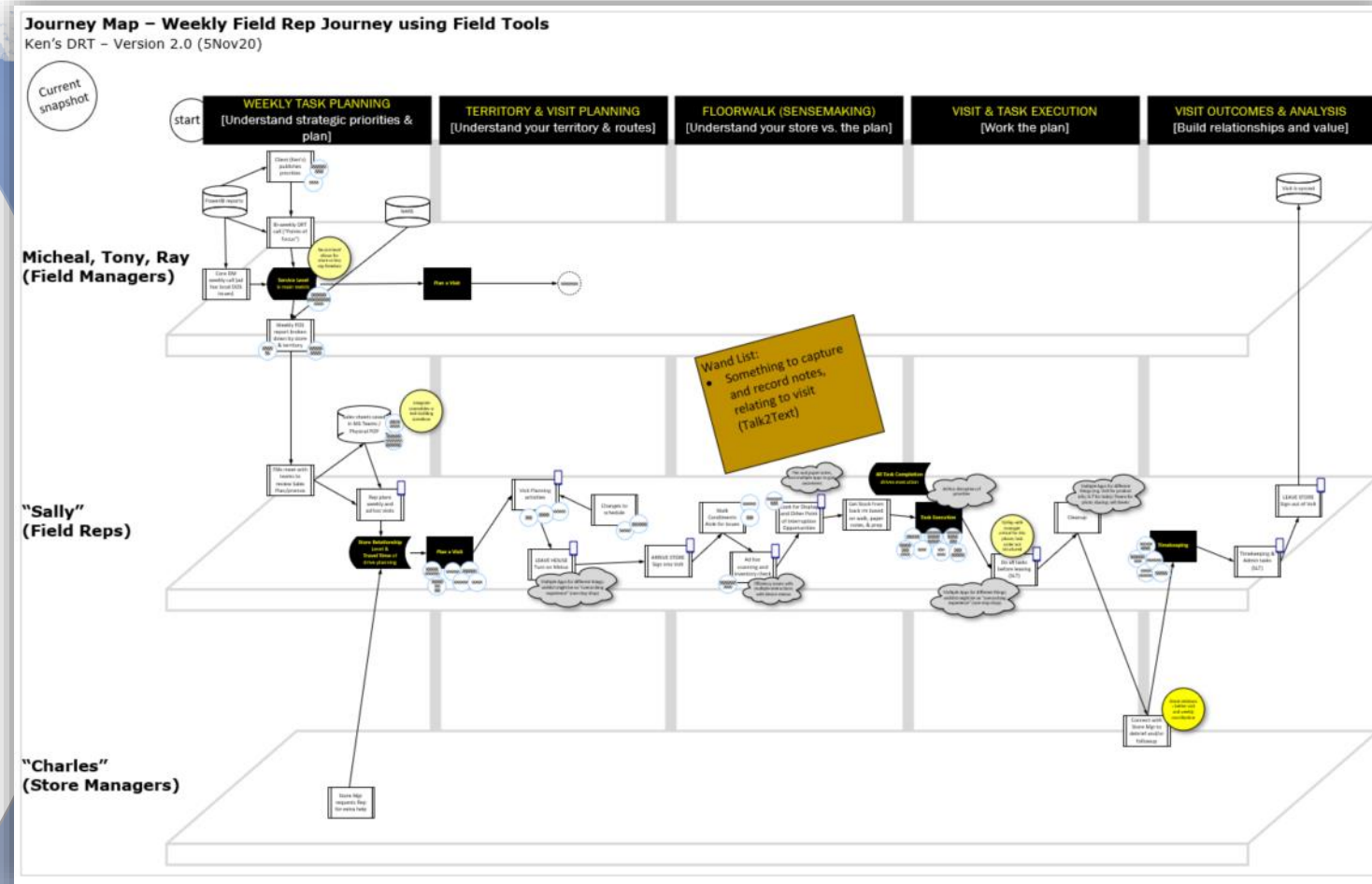
- Visual notetaking to show current snapshot with joys and pains.

- As an aggregate map, can be analyzed to derive problem categories for certain personas, teams, segments, etc.

Discovery Research Summary for Product Prioritization

Mapping **Prioritized** Feature Areas (solutions) To **Prioritized** Roadmap Themes (problem spaces)

6 WEEKLY TASK PLANNING
[Understand strategic priorities & plan]

6 TERRITORY & VISIT PLANNING
[Understand your territory & routes]

5 FLOORWALK (SENSEMAKING)
[Understand your store vs. the plan]

6 VISIT & TASK EXECUTION
[Work the plan]

3 VISIT OUTCOMES & ANALYSIS
[Build relationships and value]

3 Pre-Plan Future Visits
4 Timekeeping Functions
2 Add Tasks / Opportunities
2 Photo Gallery
2 Manage Rep Territory Coverage
2 Manager Access to Rep Territory
5 Contacts Management
4 Visit Attachments
2 Category View
[Backend] Task Management

Theme and Feature Prioritization fueled by ongoing research & strategy

Product Roadmap
- feature-based priorities

Experience Outcomes
- research-based priorities

Corporate Strategy
- organizational priorities

App problem spaces mapped to themes

Started with client discovery sessions

High level North Star

Prototyping a Feedback Management System

Roadmunk Integration – Feedback Capture & Idea Linking

Roadmunk Integration – Ideas & Prioritization (Scoring) Models

Ideas and Feedback are categorized by the problem categories.
Ideas that are considered solutions to problems are prioritized (scored using various methods) for entry into the roadmap as features.

Roadmap Planning, Timeline Visualization & JIRA integration

Once ideas have been planned and discussed in different views, they can be added to our JIRA backlog using a prioritization ceremony or project planning.
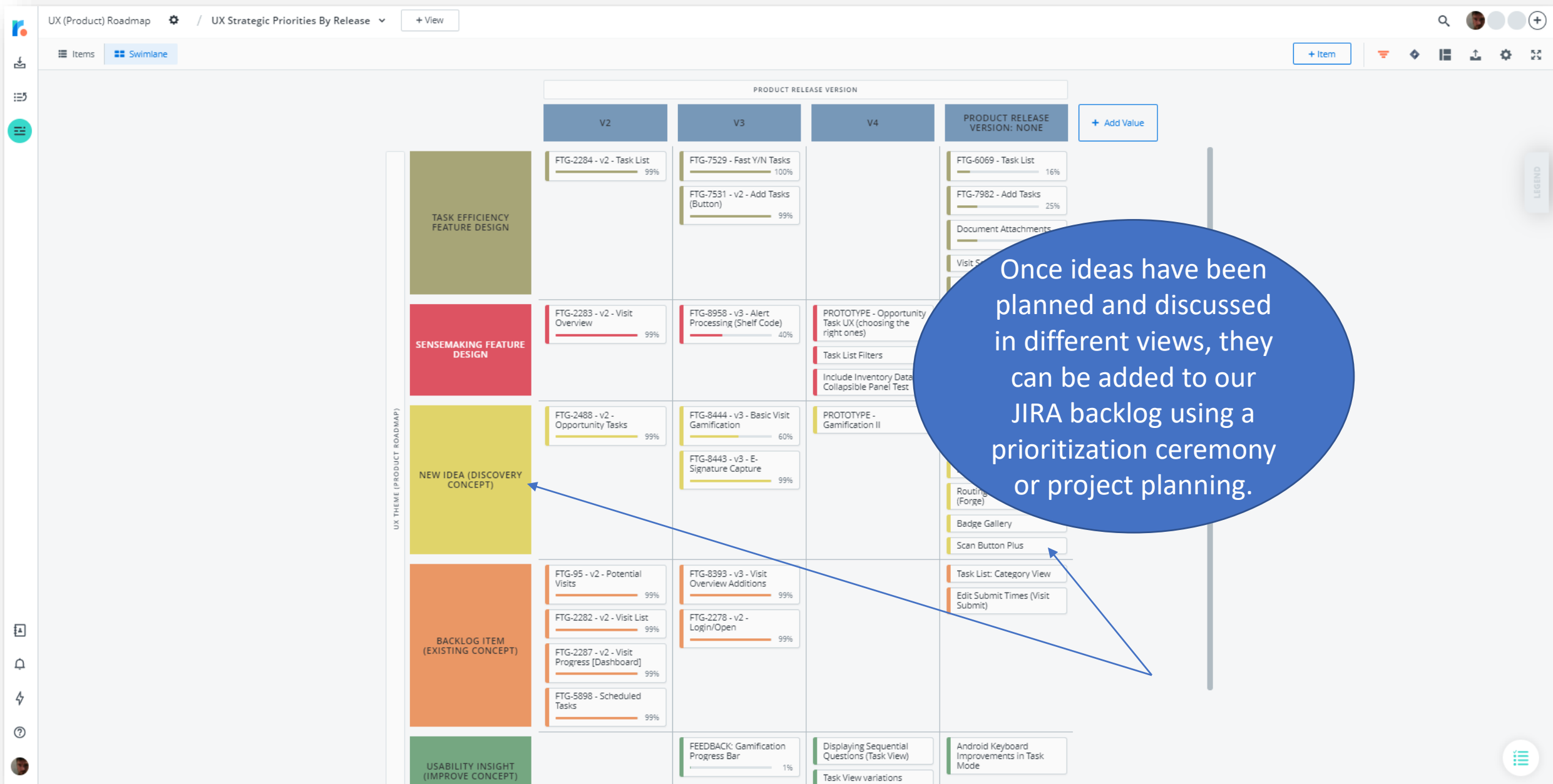
Thank you! Shoot for (your north) stars

Roadmap software used

Educational reference

linkedin.com/in/clairaudience/

@clairaudience

roadmunk

Roadmunk.com

Leaders of Awesomeness
(Jared Spool)