PCP: Select Ingredients

1. The Commercial Roadmap

2. Sales Enablement

3. Feedback Loops

4. MVP & Beta Process

5. Client Facing Product Team

The Commercial Roadmap

vs. Product Roadmap

- Defines at the highest level deliverables in 6 month increments
- Gives real time information including any adjusted delivery dates
- Shows for which clients/personas/verticals a specific product or feature is being built

Who is it for?

- Sales and Marketing teams; Exec leadership
- Provides anyone outside the Product & Engineering teams a look into where dev time is being allocated
- Bi-weekly or monthly cadence
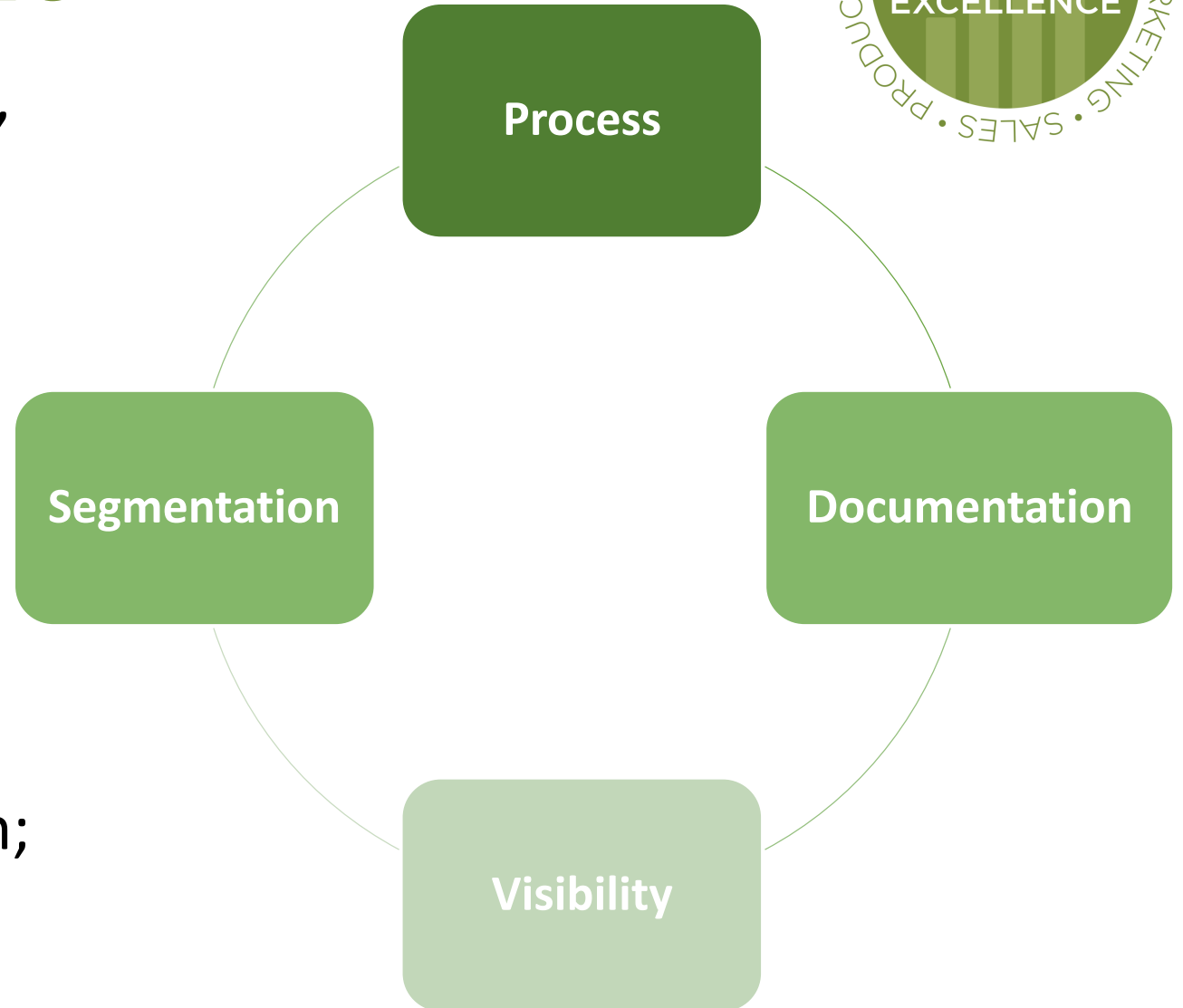
The Commercial Roadmap

Company A Commercial Roadmap
(4/1/19 - 9/30/19)

Rocks	Rationale				Timing				Technical Owners			
	1	2	3	4	Original	Revised	Marketing	Sales	Product	FE	BE	QA
CRM 2.0 Stakeholder Lead: Sales — Revenue Impact / Vertical Expansion / Competitive Gap / Audience Expansion / Tech Optimization					4/1/2019	4/12/2019	3/1/2019	3/20/2019	James	Gary	Jill	Peter
Database Merge Stakeholder Lead: Engineering — Revenue Impact / Vertical Expansion / Competitive Gap / Audience Expansion / Tech Optimization					5/4/2019	5/4/2019	NA	4/1/2019	Bobby	Allison	Jill	Sara
SF/Pardot Integrations Stakeholder Lead: Customer Feedback — Revenue Impact / Vertical Expansion / Competitive Gap / Audience Expansion / Tech Optimization					6/1/2019	6/12/2019	5/1/2019	5/5/2019	Bobby	Gary	Yu	Peter
Auditing Functionality Stakeholder Lead: Customer Success — Revenue Impact / Vertical Expansion / Competitive Gap / Audience Expansion / Tech Optimization					8/1/2019	10/1/2019	8/17/2019	9/1/2019	James	Gary	Jill	Sara

Sales Enablement

- Side car your enablement process, don't box car it

- Documentation & collateral is as important as in-person communication

- Customer segmentation and targeted messaging biggest value add

- Short term sales goals should be reflected in roadmap prioritization; enhanced visibility serves as a bridge

LEADERSHIP · FINANCE · MARKETING · SALES · PRODUCT ·

CENTERS OF EXCELLENCE

Process

Documentation

Visibility

Segmentation

Sales Enablement

- Battle cards – Properly position new features/products for **different audience types**

- Competitive Landscape – Not only an overview of all players in a particular space, but competitors at a **product and feature level**

- Decks - **Feature specific** decks with case studies

- One Pagers – Graphics heavy to **facilitate easier onboarding**

- Sales Cheat Sheets – Concise and varies by personas: different roles use product differently so **positioning must vary**

- Case Studies / White Papers – **Thought leadership** goes a long way

Customer Feedback Loops

- Feedback loops consist of internal and external stakeholders – must have both

- Customer Success, Client Support, Account Management all valuable for getting linear user feedback

- Product team attends client meetings regularly – read between the lines between what they actually say and what they actually need

- Target specific personas through focus groups or MVP releases

- Isolate highly engaged users/clients for smaller format meetings

- Direct vs. Indirect methods

Direct vs. Indirect Feedback

Direct

- Customer meetings
- GTM team feedback cycles (Sales, Success, Account Management)
- Product Surveys
- Expert/High Product Usage Networks
- MVP & Beta Programs

Indirect

- Sales Surveys
- In product usage & analytics capture
- Market & competition updates
- Executive feedback
- CRM system analysis
- AB testing

CENTERS OF EXCELLENCE

LEADERSHIP • FINANCE • MARKETING • SALES • PRODUCT •

MVP & Beta Programs

1 AUDIENCE	2 PROCESS	3 SUCCESS	4 DIVERSIFY	5 EVALUATE
Be deliberate in who you are targeting and why and ensure a balance between friendlies and critics. Critics often times give the best feedback and allow for extended visibility into competitive gaps	These programs won't work unless expectations are clearly defined to start; have a set length of evaluation trial and set up post-trial feedback steps in advance; have a schedule of type and time of interactions with the evaluator	Define measurable success metrics that will be tracked and the communication plan to share success and/or shortcomings; have a minimum threshold of set interactions with new product or feature to constitute value	Diversify user/client sets in order to understand how the same product or feature is received by different personas; AB test frequently to quickly understand things that work, things that are confusing or things that need to be discarded	Make a final evaluation based on all available information gathered throughout the program and come to a conclusion whether or not the product or feature is ready for market; communicate results to evaluators

- Competitors force adjustments

- Market is constantly evolving

- Ensure intended use cases and not misinterpretation

- Internal stakeholder goals can change

Product Team as a Sales Cog

- Contract feedback cycle by involving Product Managers in Sales meetings/discussions

- Remove intermediaries or software from regular communication between Sales, Marketing and Product teams

- Business objective plans and regular communication avoid "boy/girl who cried wolf" reputation

- Product leaders ensure that Sales and Marketing teams are adequately equipped to bring releases to market

- Sales updates target lists based on commercial roadmap

Upcoming CoE Webcasts

Employee Engagement Webcast: **The Role Employee Engagement Plays in Scaling Your Company**

Thursday, April 11 at 2:00 p.m.

Alex Symos, *VP, Sales & Marketing Centers of Excellence*

edisonpartners

Santiago Jaramillo, *CEO & Co-Founder*

Emplify

Finance Webcast: **Risk & Compliance: Protecting Your Assets and Preparing for Exit**

Thursday, May 23rd at 2:00 p.m.

Eileen Covey, *Director of Finance & Operations*

edisonpartners

Erin Burns Walters, *National Practice Advisor*

USI

THANK YOU
for joining us