

The Customer-Obsessed

Product Manager's Playbook

Expert Advice You Can Apply Now
From 50 of Today's Most Powerful
Product Leaders



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**There are two ways to extend a business.
Take inventory of what you're good at and extend out
from your skills. Or determine what your customers need
and work backward, even if it requires learning new skills.**

- JEFF BEZOS



Introduction

Decades ago, product management wasn't a typical career path, as we know it now. However, as the product-led movement continues to gain ground, the tables are turning. **Customers have become the heroes of a product's success story**, while internal teams collaborate to help the heroes succeed. Companies that once prioritized business growth over customer success, are now focused on delighting the customers and growing the business in the process.

To understand and delight customers, the product team needs a leader to give direction, offer support, and build bridges for productive collaboration. In other words, they need a product manager who isn't solely laser-focused on the competition but one who is first customer-obsessed before anything else.

So, how can one go from being competitor-obsessed to customer-obsessed? How can product leaders find a balance between focusing on company goals/business needs and customer needs? We gathered expert insights from **50 product leaders** to help you focus on solving customer pain points. From defining product success to developing customer-centric products to optimizing workflows, you'll find practical advice to help you succeed in your career as a product manager. We hope the insights you glean from this playbook will help you identify areas that need improvement and take the right action.

Thanks for reading!

Sprig

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01 How Customer-Obsessed PMs Define Success

It's easy to become consumed with tracking your competition's every move and optimizing your strategy to get similar or even better results.

That might yield some good results, but only for a short period.

Keeping an eye on the competition is great, ignoring your customers' voice can cost you your career/business – everything you've worked for. As a PM, it's important to have a healthy balance of both sides. Success shows up when your customers' pain points has been eliminated and replaced with real comfort and satisfaction, perhaps with some help from your competitor's strategy playbook. This kind of success requires a willingness to wage internal battles, make tough judgment calls, face criticism, learn from failure, and try again.

Successful product managers prioritize data-driven product development over assumptions.

They ask questions, listen for feedback, and take action where (and when) it counts most. Together with the different teams they work with, they create more value than what previously existed. As a result, they increase revenue, trust, loyalty, and the number of paying users.

In this section, top product experts explain what success means for product managers and share helpful tips that reveal where you should focus your efforts and take action to move the needle.

Experts quoted in this section:

Radhika Dutt
Product Leader & Author,
"Radical Product Thinking"

Sachin Rekhi
Founder & CEO, *Notejoy*

Rich Sanchez
Former Product Manager, *Disney*

John Franck
Product Manager, *WEX*

Hunter Walk
Former Director of Product
Management, *YouTube*

Don Richard
Senior Product Manager, *Shopify*

Noah Weiss
VP of Product, *Slack*



John Franck
Product Manager, WEX

Success is having a steady net growth of paying users.

If you have steady customer growth, it is easy to see how you are having success in smaller ways: your features match your price point; your features make customers stay with the product; your marketing language fits what you deliver. You are marketing to the right people; you are serving the right marketing verticals; you have created the right upgrade path. Don't become confused by all the other metrics and numbers you could pay attention to. Metrics such as LTV, session duration, sessions per user, returning visitors, cart conversion rate, etc., can all be worth gathering data from, but they should never become the ultimate metric you measure success by. A Product Manager first and foremost cares about the customer. You win when the customer wins. [Source]



Radhika Dutt
Product Leader & Author,
"Radical Product Thinking"

Product success should be defined by whether you achieved what you set out to accomplish in the first place.

When we define the product before defining the impact we're seeking, how do we know where our galloping product is heading? How do we know if this "successful" product makes the world a little more like the one we want to live in? The success of the product should be defined by whether you achieved what you set out to accomplish in the first place. [Source]



Sachin Rekhi
Founder & CEO, Notejoy

Great product management is 60% substance and 40% style.

The substance of product management is the hard skills you need to learn and excel at to build great products: customer discovery, prioritizing a roadmap, deriving insights from data, and so much more. But equally important are the soft skills needed to get things done: effective communication, influence without authority, executive management, and more. I call this the style of product management. I find that the best product managers spend about 60% of their time on the substance of product management, while the remaining 40% is spent on the style of product management. [Source]



Dan Richard
Senior Product Manager,
Shopify

Use insights from user feedback to build and ship products that delight customers.

View your data and user experience through a lens of moments. These moments create a path that guides your customer or user to success using your product. These moments are levers for growth that you can pull. These moments can also serve as failure moments in need of iteration. User feedback is most useful when it helps users get to the "success" moment faster and in a more delightful way. Secondly, user feedback is useful if it helps highlight a failure moment. [Source]



Hunter Walk
Former Director of Product Management, YouTube

There are four qualities you need to excel in Product Management, regardless of the nature of the product: Curiosity, Communication, Purpose & Empathy.

Curiosity: You always have to be asking questions and always wanting to learn.

Communication: You have to be a good communicator. You're going to be talking not just to engineers and designers but cross-functionally across the entire company. You're often an external-facing champion of your product as well.

Purpose: You need to be working in service of something greater than you. Product management is about service leadership. It's about realizing that you're there for some time to take a product from one stage to another.

Empathy: You also need to have empathy and customer focus. You have to be able to put yourself in the shoes of others and understand their points of view, even if you don't always agree or act upon them. [Source]

Successful products create more value than what existed before.

The way I view product success is based on one principle that has helped me in my 8+ years of working in Product Management. That is answering the simple question: did the product create more value (faster or more accurate) to the users than what existed before? I am a strong believer that knowing how to work with data is very important. You have more power on your side when you can use data to make decisions. [Source]



Rich Sanchez
Product Manager, Disney



Noah Weiss
VP of Product, Slack

There are five things great PMs do to amplify their team's impact on the customer experience and business.

Great PMs live in the future and work backwards: They immerse themselves in research, feedback, data, discussions, and the market. They craft thoughtful, inspiring narratives for where the product should go — and the best path to get there.

Great PMs amplify their teams: They listen well, infuse urgency, and foster collective creativity. They build consensus by default but can drive hard decisions when they have to. They take the blame and pass on praise.

Great PMs focus on impact: They constantly fine-tune product strategy to maximize business impact, so their teams never worry about whether their hard work will matter.

Great PMs drive a fast pace of high-quality decisions: PMs should lay out well-researched tradeoffs, set timetables, and structure great discussions. Only in rare situations should they actually “make the call.”

Great PMs optimize for learning: They voraciously seek out insights about customer needs and pain points through research, experiments, and cross-functional partners. [Source]

02 Develop a Customer-Centric Product

Any company can brag about having a customer-centric culture. However, when push comes to shove, how many execs and product leaders choose to deliver value to their customers at any cost, even if it means forgoing a critical company need temporarily?

A customer-focused company makes customers their north star. Customer needs primarily guide their decisions. So, they invest time getting to know their customers, understand what matters most to them, and create/implement a process that puts customers at the center of their efforts. They inspire trust and loyalty in customers by creating products that leave customers feeling satisfied. It's just like Maya Angelou said, "People will forget what you said, people will forget what you did, but people will never forget how you made them feel."

In this section, our experts share their tips for developing a customer-centric product. From focusing on delighting early adopters to using customer interviews to gathering insights to letting customers' voices direct your efforts, you'll learn how to build products that people love.

Experts quoted in this section:

Dan Slate
Senior Director of Product Management, *Wealthfront*

Ezinne Udezue
VP Product, *Procore*

Jason Evanish
CEO, Co-founder, & Head of Product, *Get Lighthouse*

Casey Winters
Chief Product Officer, *Eventbrite*

Karthik Sankar
Director of Product Management, *Loblaw Digital*

Ben Foster
Chief Product Officer, *WHOOP*;
Co-Founder & Executive Chairman, *Prodify*

Paul Philp
Founder & CEO, *Amity*

April Underwood
Former CPO, *Slack*



PHOTO COURTESY OF DAN SLATE VIA TWITTER

Dan Slate
Senior Director of Product Management, *Wealthfront*

Focus on delighting the Early Adopters before moving onto opportunities to expand further.

It doesn't make sense to expand to new product lines if you haven't first delighted your customer on the core use case that hired you for. It's critical to know what your customer is hiring you for on that first use case, and make sure you delight them before moving on to sort of adjacent markets or problems. When we look at building the products at Wealthfront, we focus on delighting the early adopters. We make sure that the product works well for them. We try to understand the source of the value, and we figure out whether or not we've found a product-market fit before moving onto opportunities to expand further. [Source]

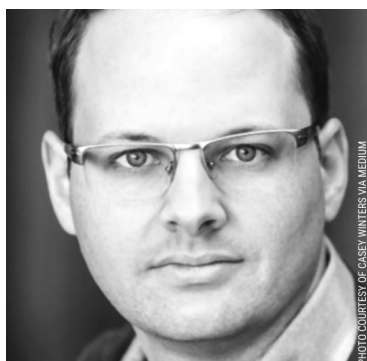


PHOTO COURTESY OF CASEY WINTERS VIA MEDIUM

Casey Winters
Chief Product Officer, *Eventbrite*

Find new people to delight or figure out how to delight people who weren't initially delighted by your product.

Your customer focus should always be on new or potential users, not early users. Early users will bias experiments, prompt you to build more and more niche features, and stunt growth. Power users can't be much more engaged, so building more things for them doesn't usually help the business. It does, however, make the product harder to understand for new customers. Sure, you have to do enough to keep these power users happy enough to stay, but the much more daunting and important task is to find new people to delight or to figure out how to delight people who weren't initially delighted by your product. [Source]



PHOTO COURTESY OF JASON EVANISH VIA LINKEDIN

Jason Evanish
CEO/Co-founder/
Head of Product, *Get Lighthouse*

How to structure (and get the most out of) customer development interviews.

I structure my customer development interviews into three parts:

People – Aka – Who Are You?: Before you get into anything about problems or your solution, you need to figure out who you're actually talking to. This practice warms up your interviewee with some softball questions and allows you to build some rapport with them.

Problems – Aka – What are your greatest pains?: This section is where you try to find out whether the person has the problem you believe you're solving. Your goal is not to lead them to the problem. The less you lead them while listening to the problem, the more validation you have.

Your Solution – Aka – See if your idea survives customer interaction: If the problem you think you're solving comes up naturally from your interviewee (while discussing), you're on the right track! Bonus points if the way they describe solving it with their "magic wand" remotely resembles what you're doing.

If all goes well and you really are solving a pain, then your customer would want access to the product right away. More likely, you're going to learn a ton about what they do and do not want, and your idea will begin evolving. [Source]

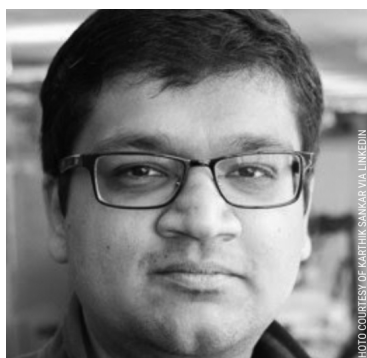


Ezinne Udezue
VP Product, *Procore*

Build beyond what your customers ask for.

When you only build what your customers ask for, you are building for today.

Make time to understand the market opportunity so you can anticipate their future needs. [Source]



Karthik Sankar
Director of Product Management, *Loblaw Digital*

Eliminating the noise in the pursuit of customer-focused product management.

It all starts with asking one critical question: “On a day-to-day basis, are we really being customer-obsessed?” There are other things that we actually obsess over. Instead of being customer-obsessed, a lot of us are obsessed with sales, marketing, or traffic. Are all these obsessions bad? Absolutely not. But what’s more important is doing right by the customer. It’s the foremost thing that we should all obsess about. If we don’t obsess about the customer, if we don’t think about the customer daily, no matter what we think about among this entire list, that’s pointless. And the reason I say it’s pointless is that it does not optimize, and it does not set us on the right path for the long term. All of these are short-term obsessions unless they are all grounded in a customer-centric reality. [Source]



Paul Philp
Founder & CEO, *Amity*

A great customer experience begins and ends with onboarding

A poor onboarding experience is hard to come back from, and it is the fastest way to lose a customer. It’s critical to actively think about the entire customer journey. Define it, Map it, Document it. [Source]



April Underwood
Former *Slack* CPO

Build software that is delightful and useful enough that people decide to use it.

In the consumer world, you have to build software that is delightful and useful enough that people decide to use it. You have to earn every user one by one. In an enterprise, historically those decisions don’t get made by the people who use the software day-to-day, they get made by CIOs or IT administrators, they get made based on negotiations and cost, and a lot of other factors. The usefulness of the platform has historically been an afterthought. There’s a whole proliferation of software tools that are getting better and better for every type of task that you need to get done at work. They similarly are being chosen by the employees that actually need to use them. [Source]



Ben Foster
Chief Product Officer,
WHOOP (Co-Founder
& Executive Chairman,
Prodivy)

Let customers' voice focus your efforts.

One of my most important responsibilities at GoCanvas was being the author and steward of the product vision and strategy. After I had worked to get executive alignment, it was time to present the package to the whole company. The team had done a great deal of customer discovery, quantitative research, stakeholder interviews, and more. However, there was still a risk that employees who were unaware of those efforts might think we were operating out of an ivory tower. Rather than bore them with a long preamble about our process, I decided to let the customers speak for themselves.

We recorded interviews with past and present customers. Then I cut audio highlights for each segment, splicing them together into "chapters" to hear them tell us what they were looking for at each stage of their journey, identify areas where they felt engaged, and areas where we fell flat. In the end, I took a photo of the whiteboard and then shared a pre-written document that mirrored the whiteboard notes. It became part one of a three-part series of presentations I gave at GoCanvas to generate enthusiasm for our product vision and strategy. It built enormous trust in product management from all corners of the company. [Source]

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It's critical to know what your customer is hiring you for on that first use case, and make sure you delight them before moving on to sort of adjacent markets or problems.

- DAN SLATE

03 Build Your Product Roadmap

After gathering customer insights to help focus your efforts, product managers need to create a roadmap to get all teams on the same page. A product roadmap is a detailed visual summary that gives direction and tracks the progress of internal team members and external stakeholders. It's a well-laid-out plan for executing strategy.

Customer-obsessed product managers see a roadmap as a compass, not a stationary guide. Roadmaps change as the scope of the project changes. So, product managers make changes to the plan throughout the product's lifecycle as customer needs and market demands evolve. They collaborate with customers, support, engineering, operations, sales, marketing, and partners to develop and navigate the roadmap for customer success.

In this section, the product leaders share practical tips on building a product map that serves the customer better.

Experts quoted in this section:

Joel Gascoigne
Founder & CEO, *Buffer*

Paul Adams
SVP of Product, *Intercom*

Des Traynor
Co-founder & Chief Strategy Officer, *Intercom*

Spencer Lanoue
Head of Growth, *Mobalytics*

Isaiah Greene
Product Manager, *Slack*



Spencer Lanoue
Head of Growth,
Mobalytics

Be transparent in your roadmap communications.

Regardless of the tools and techniques you use, it's important that you're transparent with your stakeholders, and that you give them some insight into the process you used to create your prioritized product roadmap.

By addressing their concerns and objections proactively, you make it much less likely that you'll get pushback. And the best way to do that is to show them that you used a systematic process, you based your decisions on hard data (not your opinion), and that your priorities are aligned with the strategic goals of the organization. [Source]



Isaiah Greene
Product Manager, *Slack*

Always Be Tying Back To The Vision.

Everything starts with a vision, and you should tie everything back to that vision to prevent yourself and your team from doing things like: focusing on the wrong use case, building tech for the sake of tech, and wasting time making a product faster when speed doesn't matter. The vision is the "why," and from there, you build out your strategy, roadmap, and later, plan your tactical sprints. [Source]



Des Traynor
Co-Founder & Chief
Strategy Officer,
Intercom

Balance is a key element to navigating a roadmap.

If you're setting out on your roadmap journey it's important that it reflects the point of the journey that you're on. Knowing how and when to define a roadmap, who to include and how long to plan for are key elements to finding the balanced approach that you need.

Balance is a key element to navigating a roadmap – between customer-facing and internal, creativity and productivity, between different functions. Getting this right allows your teams to work in lockstep together. [Source]



Joel Gascoigne
Founder & CEO, *Buffer*

Prioritize roadmap based on customer insights.

Customer support is an amazing reservoir of insights into what needs to change about the product. We prioritize our roadmap directly based on these insights. This has helped us to evolve our product and release features which we know in advance people will love. [Source]



Paul Adams
SVP of Product, *Intercom*

Build a strong partnership between the different stakeholders by putting process in place.

When I joined Intercom, we had no sales team, and then we started a sales team, and it was small. Then it grew, and now it's much bigger than it was back then. Sales represent the voice of the prospective customer in a roadmapping process, and the voice of sales will completely change over the years. You've got marketing representing the voice of the market.

There's a lot going on and a lot of different stakeholders now. What was really important for us, and I think we learned this the hard way, was that you need to build a really strong partnership between these functions, because they all represent an important voice. And I think the thing we did well was putting the process in place. Not too much process, going back to the idea that you can't have too much process for your stage, but just enough to keep these different voices of different constituents in the fold when roadmaps were created. [Source]

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Regardless of the tools and techniques you use, it's important that you're transparent with your stakeholders, and that you give them some insight into the process you used to create your prioritized product roadmap.

- SPENCER LANOUE

04 Optimize Collaboration on Cross-Functional Teams

Delivering products that people love is at the heart of your role as a product manager.

As a customer-obsessed product manager, you are at the center of the business. You are the middleman between your customers and the product team. You are responsible for working with your teams to help them understand what customers want and what they need. Building bridges that allow the engineering, sales, marketing, support, and other teams to collaborate effectively advances that goal.

You need to care about your teams just as much as you care about the customers. That means making information readily available, supporting instead of commanding, empathizing with your team, and answering questions without showing irritation. These qualities form a solid foundation for creating value-driven products for customers.

Let's review some expert tips on collaborating with teams.

Experts quoted in this section:

Kris McKee
Principal Product Manager, *Optimizely*

Parilee Edison Wang
SVP/Head of Product & Analytics,
Bread Finance

Carlos González de Villaumbrosia
CEO, *Product School*

Chris O'Donnell
SVP Product, *HubSpot*

Jeremy Wight
VP of Product & Engineering, *BaseHQ*

Chloe Oddleifson
Director of People Operations, *Dribbble*



Carlos Gonzalez De Villaumbrosia
CEO, *Product School*

Combine live and virtual interactions for better results.

One of my biggest insights for 2020 is that you become a team when you collaborate with someone. Even if you're looking to get different things out of the collaboration, your goals are two sides of the same coin. Treat the person/people you're collaborating with as members of the team. Empathize with them, make a human connection with them, but don't be afraid to negotiate. If the way you're communicating causes more problems than it solves, work together to find a better way to work. For example, if the email thread you're in has turned into a confusing mess (happens to us all!), suggest jumping on a video conference to clear things up. Or, if you're not in the same city, suggest using a digital tool to remove the collaboration hassle from your work. [Source]



Chris O'Donnell
SVP Product, *HubSpot*

Be remote-inclusive and encourage visual collaboration.

In addition to the written word (emails, Slack messages, wiki pages, etc.), people are turning to more visually focused tools in their collaborative work. It's becoming common to share a document with a short Soapbox video (a free tool from Wistia) that adds color and the human element of explaining, which adds energy to our collaborative communications. I suggest trying new things! Try everything under the sun to get your team collaborating in a distributed manner, keeping the visual and enhancing the human elements of storytelling that inspire us to create and execute in the workplace. [Source]



Parilee Edison Wang
SCP/Head of Product & Analytics, *Bread Finance*

Effective teams have a shared sense of purpose.

Great product leaders don't have to be the only ones to propose a vision. But they do have to create an environment where great ideas are heard, evaluated, and invested in. At Bread, we've focused on creating opportunities for everyone to submit ideas and share insights, carve out time and space for deeper thinking about our longer-term product strategy and introduce quarterly all-hands roadmap reviews to make sure everyone in the company understands where we're going. Building and growing an exceptional team means hiring, onboarding, coaching, and enabling great product people to bring products to market. I focus on allowing employees to do their best work in service of Bread's mission, vision, and strategy. Our executive team ensure that we are narrowing in on the opportunities that matter most to the company. We all work together to turn those opportunities into market-leading features and products. [Source]



Kris McKee
Principal Product Manager, *Optimizely*

Product management is a team sport.

You have to build a culture of pushing each other to stretch, grow and learn. At Optimizely, we are structured around constructive criticism. Our Product Requirements Review meetings can be tough, but always collegial and focused on a common goal: driving customer value. We trust each other and are focused on continuous improvement. [Source]



Jeremy Wight
VP of Product &
Engineering, *BaseHQ*

Build trust and transparency to reduce silos.

One lesson I keep having to re-learn is that the most effective product development teams have the best collaboration skills. When effective communication breaks down, so does the pace of value delivery. Products that break down “information silos” are going to rise and win. In the pursuit of becoming more specialized, many applications are actually creating larger information silos – preventing collaboration and information sharing. General applications that solve this challenge, like Zapier (which allows data from one system to be leveraged and actioned in another system), will continue to expand and gain in popularity. [Source]



Chloe Oddleifson
Director of People
Operations, *Dribbble*

Make sure you play as a team.

As a fully remote team of ³⁵ spread across North America, we’ve learned first-hand that working remotely doesn’t have to mean sacrificing the ability to collaborate successfully. We’ve seen the investments we’ve made in practices that foster remote collaboration pay dividends in our employee engagement and happiness levels and our company’s success. My advice is to keep in mind that collaboration is by definition a team sport! If you’re looking to make changes or improvements to the ways you work together, ensure you gather feedback and opinions from your team. This feedback will help you implement process changes that are rooted in team buy-in. A simple survey or feedback in Google Forms will allow you to gather their thoughts and get the information you need without investing much money or time. [Source]

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Empathize with them, make a human connection with them, but don’t be afraid to negotiate. If the way you’re communicating causes more problems than it solves, work together to find a better way to work.

- CARLOS GONZÁLEZ

05 Develop a Winning Product Strategy

A clear and effective product strategy is the secret sauce of great products. It defines a product journey. In other words, a product strategy gives you an overview of your product’s development phases. It provides the future direction of a product as well as guides product investment and planning efforts.

While a product roadmap details the specific steps the team must follow to achieve the set goal, a product strategy helps PMs envision the final product before it is built. With a well-defined product strategy, you can tell the what the product will look like, who your target market is, how it will fit into the market, how it will add value to your customers, and how it will hit business/company goals. Since the product strategy plays a critical role in strategic business planning, decision-making, and defining direction, PMs must understand how to create a product strategy that sets customers and the company up for success from the get-go.

So, how do you build a winning product strategy? Hear what these industry experts have to say:

Experts quoted in this section:

Narguess Noshirvani
Group Director, Product Management,
Work & Co

Henrik Kniberg
Owner & Agile/Lean Coach, *Crisp*

Eoin Nolan
Principal Engineer, *Intercom*

Nico Rattazzi
VP of Product, *Zumper*

Claire Vo
Former Chief Product Officer,
Optimizely

Skylar Marcum
VP, Products - Data & Analytics,
Pitchbook

Ross Mayfield
Product Lead, Zoom Apps &
Integrations, *Zoom*

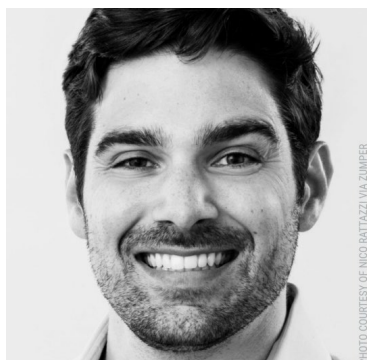


PHOTO COURTESY OF NICO RATTAZZI VIA ZUMPER

Nico Rattazzi
VP of Product, Zumper

Ensure the OKRs are well-defined.

At Zumper, we achieve alignment by ensuring stakeholders get visibility and sign off on the strategy of the roadmap. Before we get to a roadmap, we ensure the OKRs are well-defined. Each product area defines a set of OKRs, which is rooted in an ambitious objective directly to our company objectives. Then, we come up with key results, which should be specific and measurable targets to achieve our objectives. We make sure all stakeholders approve of these OKRs. Then, we determine a set of themes. Themes allow us to define areas or approaches, which we plan to investigate or utilize to hit our OKRs. We review these themes with our stakeholders so they understand how the product, design, and engineering teams plan to approach these problems. From there, specific initiatives are defined and sequenced into a roadmap. By the time the roadmap is defined and reviewed, there should be a high level of alignment, as the stakeholders are brought through the journey of how the roadmap was approached. [Source]

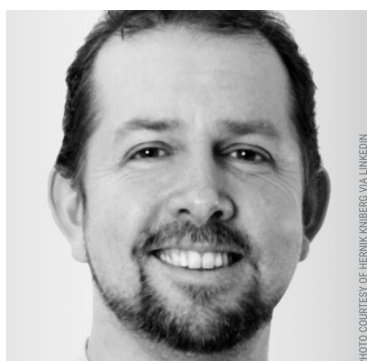


PHOTO COURTESY OF HENRIK KNIBERG VIA LINKEDIN

Henrik Kniberg
Owner & Agile/Lean
Coach, Crisp

Misalignment can be a problem if there's no cross-team transparency.

Team communication needs to be clear and transparent. Make sure your teams are working and communicating with each other, learn from your mistakes. Misalignment can be a problem if there's no cross-team transparency. You could end up working on the same problem with two different solutions (which have already been completed). This leads to time and money wasted. [Source]

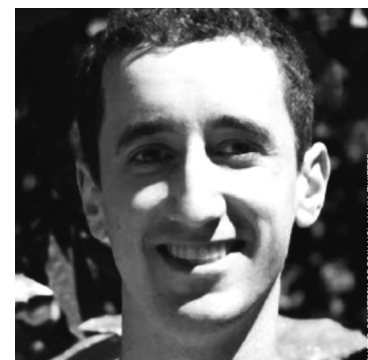


PHOTO COURTESY OF EOIN NOLAN VIA TWITTER

Eoin Nolan
Principal Engineer,
Intercom

To move quickly towards a mission, the core attributes of product teams need to be well aligned.

When I think about “product,” I think that there are three core pillars that it’s built upon: engineering, design, and strategy. I think of these as the dimensions of products. A really great product will be strong in each dimension. It’ll have a smart strategy, it’ll be well built and it’ll be easy to use and understand. At Intercom, we structure our product teams to try and capture each of these dimensions, too. Typically, a product manager will take on team strategy, a designer will take on UX and ensure that the whole system fits together and engineers will build, run and maintain our systems. But, we all work together in unison to try and make this product. [Source]



PHOTO COURTESY OF ROSS MAYFIELD VIA TWITTER

Ross Mayfield
Product Lead, Zoom
Apps & Integrations,
Zoom

Continuous Alignment can be achieved when Product Management makes plans visible, celebrates problems as an opportunity to change them, prioritize with ruthless abandon, and collaboratively learn and align with stakeholders to make plans change.

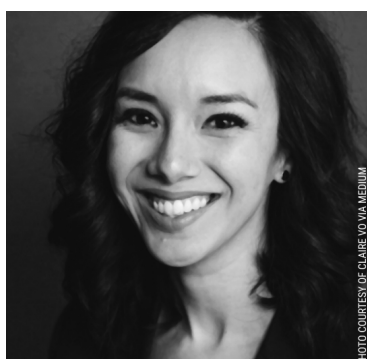
Alignment is episodically orchestrated in Slack channels, email, and meetings. Product Managers get by because they have great organization skills and communication discipline. But they lack a collaborative system that supports continuous alignment and the automation that enables the function to scale. Continuous Alignment can be achieved when Product Management makes plans visible, celebrates problems as an opportunity to change them, prioritize with ruthless abandon, and collaboratively learn and align with stakeholders to make plans change. [Source]



Narguess Noshirvani
Group Director, Product Management, *Work & Co*

Without clarity from the beginning, it's impossible to create alignment around a roadmap.

At the start of each project, stakeholders need to be fundamentally aligned around the vision for a product. Without clarity from the beginning, it's impossible to create alignment around a roadmap. While Work & Co partners with our clients to both evolve and iterate existing products, we're also often creating net new digital products from scratch. Start by articulating the vision for the product and the value it brings to users. Share this information with key stakeholders and get buy-in from different parts of the business. Roadmaps can (and should!) change. But the vision itself must remain consistent. Our ultimate goal is to ensure a product is both high quality and actually launches. A roadmap that everyone can rally around helps us stay focused on achieving that goal. [Source]



Claire Vo
Former Chief Product Officer, *Optimizely*

Articulate a clear product strategy and maintain alignment through transparency.

At Optimizely, my job as a product leader is to ensure alignment by articulating a clear product strategy, which acts as a guiding light for the members of the product team. This strategy outlines what we are focusing on, why we are focusing on it, and how we are measuring success. If our strategy is clear, PMs should know if they are working on the right things. Each PM has full ownership of their area. They can, and do, set their own roadmaps and priorities. We manage global alignment and prioritization through staffing and trust each other to raise conflicts, dependencies, and trade-offs. [Source]



Skylar Markum
VP, Products-Data & Analytics, *Pitchbook*

Bring the team and stakeholders close to the root customer problem and get them involved as early as possible.

Strong alignment requires everyone to be able to clearly articulate the “why” behind a product initiative and feel ownership in the solution. Product managers must find a concise way to highlight the core customer need and ensure the resulting product strategy and roadmap are rooted in that user need. In practice, this means collaborating closely with design on user research and bringing in engineering leads and stakeholders early to proactively share insights on customer workflows, actual usage behavior, customer interview notes, and other product research. Once an opportunity or theme has been identified, it's important to set up ongoing check-ins and report out updates to solicit feedback and share progress. The earlier you can consult and include others, the more likely they'll understand what has been validated and take ownership of working toward the solution. [Source]

06 Optimize Your Product Team's Workflows

An optimized workflow keeps teams aligned and productive.

Teams become aware of what needs to be done to satisfy customer needs and stay focused on achieving set goals, taking it one task at a time. Everyone is responsible and accountable to each other. There are no silos, and teams can collaborate better without wasting time and resources looking for information.

Having a step-by-step guide that details the series of tasks that need to be completed to reach the desired outcome is critical to product success. Such flow makes it easy for teams to realize the result they want (a happy, satisfied customer), identify their roles in the mix, take ownership, and execute effectively.

So, how do you optimize your team's workflow? Read on to find proven methods top product leaders have employed to streamline their work, simplify processes, and help their teams crush deadlines.

Experts quoted in this section:

Ethan Hollinshead
Senior Product Manager, *Strava*

Ken Norton
Former Director, Product Management,
Google

Aditya Kothadiya
Founder & CEO, *Avoma*

Lenny Rachitsky
Former Product Lead, *Airbnb*

Daniella Latham
Senior Product Marketing Manager,
Canva

Richard Conn
Senior Director, Demand Generation,
8x8



Ethan Hollinshead
Senior Product Manager,
Strava

Have a deep backlog of well-prioritized projects.

The biggest product management challenge is resource alignment. Team sizes are always changing and frequently lopsided. Some weeks you have plenty of design bandwidth and no iOS, others you have no design and all iOS. Having a deep backlog of well-prioritized projects is key to operating an efficient team. Go deep on that backlog, including in areas you are resource weak at the moment. If you don't have much extra bandwidth in one area, it is too easy to have that part of your backlog go stale. If you let this happen, you aren't as likely to realize that there are big wins in that area or to speak up strongly when you have the opportunity to request more staffing in that area. Or you might all of a sudden get access to those resources and then be caught flat-footed, unable to prepare the high impact projects in time. [Source]



Daniella Latham
Senior Product Marketing
Manager, *Canva*

Ensure a top-level overview with a product marketing calendar.

At Kahoot!, we use Trello, and I've found it to be super versatile, going beyond a Kanban setup. I decided to repurpose an outdated board and created new lists for each month, thereby building a calendar. I then added cards with only the top-level detail of the activity or event. Finally, I added colored labels to define whether the activity was related to product, content, lifecycle, PR, commercial, and most importantly, to designate the relevant Product Manager. This static calendar helped provide a visual, high-level overview that could be referred back to as the source of truth if someone was unsure. [Source]



Aditya Kothadya
Founder & CEO, *Avoma*

Product Managers shouldn't be problem solvers.

Their focus should be to identify the right problems that their company and a team should solve, prioritize which problems to solve first and which can wait later, and communicate the rationale behind these decisions to their team and other stakeholders. Essentially, Product Managers should identify "what" problems they should solve, "why" their company and a team should solve it, "when" those problems need to be solved, and then communicate all these things well to their Design and Engineering teams and to other stakeholders. And then let the Design team come up with "how" it should work and look, let the Engineering team come up with "how" it should be built, and let Sales and Marketing teams decide "how" to give it in customers' hands. If you're a very early stage company and can't afford to hire specialized Designers, Engineers, Marketers, and Salespeople, then yes, as a Product Manager you might need to play different roles and get into "problem-solving" mode too. But as the company starts scaling, you should let go of your other responsibilities to specialized teams and focus only on identifying the right problems and prioritizing them. [Source]



Ken Norton
Former Director, Product Management, *Google*

Organize your product managers around customers, not code repositories.

It's true that aligning your PMs with the user's view of the world can be messier in other ways. The development work is likely to cut across product surfaces – both the patient and doctor PMs will need something from the iOS engineers, for example. Who takes priority? It's important that as an organization everyone knows what the priorities are or this gets decided case-by-case in tiny inconsistent transactions. Having this conflict upfront is a feature, not a bug. It's more desirable to hash this out before engineers write a line of code. You'll need a good process to make quick prioritization decisions to avoid randomizing your engineering team. [Source]



Richard Conn
Senior Director, Demand Generation, *8x8*

A properly optimized workflow captures all the detail and ensures that everyone is clear on their responsibilities. around customers, not code repositories.

Collaboration is a primary cog in the successful turning of the workflow wheel. Often, this needs to be carried out across continents and time zones, without losing out on time or efficiency. Making use of the right tools to connect and engage teams is essential. Software teams can also be working on multiple projects at once. A properly optimized workflow that captures all of this detail ensures that everyone is clear on what they need to do, when it needs to be done, and who plays a supporting or management role in what they're doing. There are several communication tools, task management, and collaboration tools that make this aspect of work easier. [Source]



Lenny Ratchitsky
Former Product Lead, *Airbnb*

The W step-by-step framework to improve process planning.

Step one is the leadership group giving context to the themes of “here's what we believe needs to happen on a high level strategically for us to win.” And I found that that is really important and often missed. We found that it's really important for there to be top-down guidance like, “Here's what we know, and here's what we believe is important.” Then it goes back up and the team delivers a plan, “here's what we think we can do. And here's what we need to do.” The next step is where the leadership group integrates it. So that comes back down to the teams that integrate all the plans into one big plan. And then there's a final part of the W where the teams get feedback, tweak. You know, like, if they're told, “Hey, you're not getting these resources,” they adjust their plan, adjust their impact. So that's what it's all about. [Source]

07 Find the Right Tools

What's a furniture maker without a toolbox? And what's a product manager without a set of agile project management tools?

The right product management tools help teams collaborate on all phases of the product life cycle. They can be used to automate product-related tasks such as managing sprints, product road mapping, prioritizing features, mapping user journeys, analyzing product data, and managing product releases. They also help remote teams keep each other aligned, accountable, and productive.

Choosing the right product tools can be challenging, and knowing which to prioritize and stick with is another challenge. In this section, product leaders share product tools that have helped them hit their goals and deliver without hassle.

Experts quoted in this section:

Nicole Wojno Smith
VP of Marketing, *Tackle.io*

Hiten Shah
Co-Founder & CEO, *Nira*

Ertugrul Cavusoglu
Product Manager, *UserGuiding*

Robert Drury
Product Manager, *Watchfinder*



Hiten Shah
Co-Founder & CEO, *Nira*

When you're trying to pick new tools to use, first assess whether they're built for a general-purpose or a specific purpose, and then go from there.

There are several categories of tools. General-purpose tools can be used for many different things. These include G-suite, Miro, Zoom, Notion, Slack, and more. Then you have specific-purpose tools that are designed for a specific department or use case. Productboard is an example. It's an end-to-end product management tool—a system of record—for all your product development efforts. You can put feedback in there, manage your roadmap, and many other things. For design, I recommend Figma. It's a highly collaborative tool compared to the alternatives that are out there. If I want to do research and see what people think about a flow, a prototype, a website, an app, or a mobile app, UserTesting is what I use. [Source]



Nicole Wojno Smith
VP of Marketing,
Tackle.io

Product Management teams have the right tools in place to democratize valuable customer data.

SaaS businesses will struggle to focus on strategic alignment in the customer journey if they lack a common source of truth to capture, prioritize and act on product data, and the ones who suffer most are customers. Customer growth solutions serving as a primary source of insight would, in contrast, mitigate not only this problem but also bring transparency and a shared language between customer success and product managers. Both teams could access a dashboard tailored to their requirements and see firsthand the friction points existing throughout the customer journey all from the same sets of data. [Source]



Robert Drury
Product Manager,
Watchfinder

PMs need to be organized, and we need to utilize a few tools to help keep us on track.

In reality, to get things done in my role, I only use a handful of tools in specific ways, for specific purposes. The wiki tool Confluence (from Atlassian) provides me great opportunity to share with the wider business key information on how our business works. Our current roadmap tool of choice is Product Plan, which is simple to use and provides a nice graphical view of the larger features that we're planning to develop over the next twelve months. All the work that flows through our development team makes its way through Jira and it's the central hub for others to feed things into the process. I use Things, a To do list app, to ensure I don't forget to undertake an important task. [Source]



Ertugrul Cavusoglu
Product Manager,
UserGuiding

With the help of the following tools, PMs can conduct user researches needed to analyze user problems, needs, and behaviors.

User research is one of the most fundamental phases of a product or feature lifecycle, which requires a constant effort along the whole product journey. Tools like Intercom, Zendesk, EnjoyHQ, and more can help you conduct user researches much needed to analyze your user's problems, needs, and behaviors. Survey tools like JotForm, TypeForm, Survey Monkey, Google Forms can help you gather any information you need from your users as a tailor-made solution. One of our favorite solutions for collecting valuable customer information is monitoring live sessions of users while they're using your platforms. Fullstory and Hotjar are two amazing tools that can help you keep track of the user experience and create User Stories accordingly to tackle any UX problems you encounter. [Source]

08 Growing as a Product Manager

Everyone has career aspirations. Successful product managers at all levels share a healthy obsession with customers and learning about how they can meet their needs better than the last time.

Keeping this in mind, let's dive into what product experts have to say about advancing your product management career.

Experts quoted in this section:

Ryan Glasgow
CEO, *UserLeap*

Julie Zhuo
Former VP, Product Design, *Facebook*

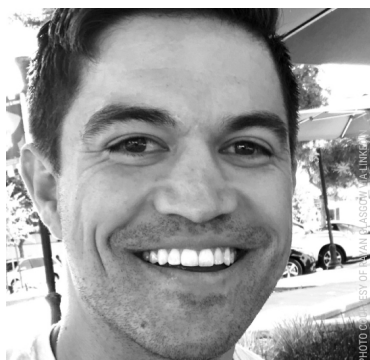
Daniel Elizade
Product Leadership Coach, Former VP, *Ericsson*

Saptarshi Prakash
Sr. Product Design Manager, *Swiggy*

Josh Elman
Product Builder

Ramin Shokrizadeh
Senior Product Manager, *Zendesk*

Thomas Vander Wal
Head of DevOps Strategy and Planning, *UTC Aerospace Systems*



Ryan Glasgow
CEO, *Sprig*

Don't be afraid to be wrong.

It's about questioning our decisions, making sure that those are the right decisions. We just hired our first product manager here at Sprig. And she said one thing that stood out is that we're focused on making the right decision. And there is no highest person in the room. There's none of that. It's really around what is the best decision for the business and the customers. And ultimately, I love to be wrong. I always tell the team I love to be wrong. It means I hired a good team. And we're looking at the right data or questioning our own assumptions. [Source]



Josh Elman
Product Builder

Great product managers understand the tricky balance between getting it right and getting it out the door.

Nothing matters more than actually delivering products to your users. You can be great at helping your team build cool things, figuring out the right products, or embodying the vision, but it only matters if you can ultimately help the team get to a point where you can ship it. Great product managers understand the very tricky balance between getting it right and getting it out the door. Teams should always be testing, trying out the products, and listening to early feedback, but at some point in every project, the team has to make a call that the product is ready enough (and it's never truly ready, of course). Teams with clear goals and objectives, and a good feel for the user and what they want the user to be able to do, can make the final trade-offs necessary. It's usually great product management that helps drive this to completion. [Source]



Julie Zhuo
Former VP, Product Design, *Facebook*

Be willing to do what your team needs you to do, even if it isn't exciting.

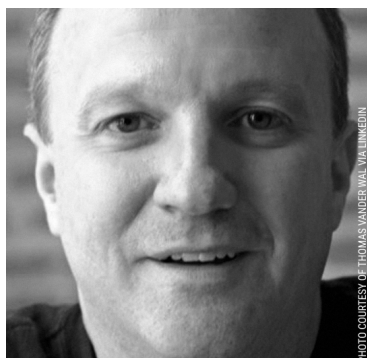
Being successful at management isn't about whether you have leadership qualities or not, or whether people look up to you. There's also an important element of, "are you more motivated by what the outcome of the team is, and are you willing to do what the team needs you to do, even if that particular thing isn't particularly exciting to you?" Because if you're the kind of person that cares more about the discipline of a particular craft, you care more that the visual design is the absolute best that it could be, or you care more that the collaboration process is really, really great, then it might be challenging for you to be a manager because you can't always pick and choose those things. Sometimes, you just have to do what the team needs you to do. [Source]



Ramin Shokrizadeh
Senior Product Manager, *Zendesk*

A good understanding of data analysis will help PMs thrive and survive.

One of the key skills PMs need to thrive and survive is strong data analysis and understanding of how to query data from databases. Funnel and segmentation analysis is key to SaaS product optimization. Focus on understanding data more generally and teach yourself how to write SQL queries. These skills will pay off tenfold. [Source]



Thomas Vander Wal
Head of DevOps
Strategy and Planning,
UTC Aerospace Systems

Learn from your mistakes and feed those insights back into the product development process.

The gold is often in what you initially decided not to do but is well researched and thought through. This often sets really good product teams and groups apart from others. Every product iterates when it gets tested by real users and or when released for wider use. Learning from what you chose, what worked and didn't work, but also what was iterated to is helpful. Understanding why one direction was chosen that didn't work optimally is good to know, not to assign blame, but to use that in consideration for the next rounds. [Source]



Saptarshi Prakash
Sr. Product Design
Manager, *Swiggy*

Seek to understand users and their concerns from a humane perspective, only then can you create solutions that leave a lasting impact.

Don't just know your user; know the feelings of your user. Think of them as a human with feelings and emotional desires. Try to think about what makes them happy, what makes them sad, and when you take a step in their shoes, how would you observe the product you have created. [Source]



Daniel Elizade
Product Leadership
Coach, Former VP,
Ericsson

Deep domain knowledge is a must-have skill for PMs.

Having deep domain knowledge means having a clear understanding of your industry and your users' pains and use-cases. The only way to get deep domain knowledge is to immerse yourself in your industry and learn everything you can. Talk to your users. Get a mentor. People in Sales, Product Marketing, or Executive roles are usually a great place to start. Attend trade shows. Read trade publications. Magazines, company blogs, and LinkedIn forums are great resources. Follow the experts. Social media makes it easy to locate and follow industry experts. They usually share great content and probably have books or blogs of their own. Study your competition. What is their value proposition in the market vs. your company? [Source]



Conclusion

A big shout out to all the product leaders who shared snippets from their strategy playbook with our audience. We appreciate you.

To the PMs reading this playbook, we hope you gleaned some actionable insights to:

- Move you from being competitor-obsessed to customer-obsessed,
- Drive your product development process and,
- Build products people love.

And we hope you start to take actions that move the needle for your brand.

Want to learn more about how top product leaders make products people love? Subscribe to **People Driven Products Podcast**, hosted by Sprig CEO Ryan Glasgow, where he holds weekly conversations with product leaders from some of the world's fastest growing and most successful tech companies in the world.

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