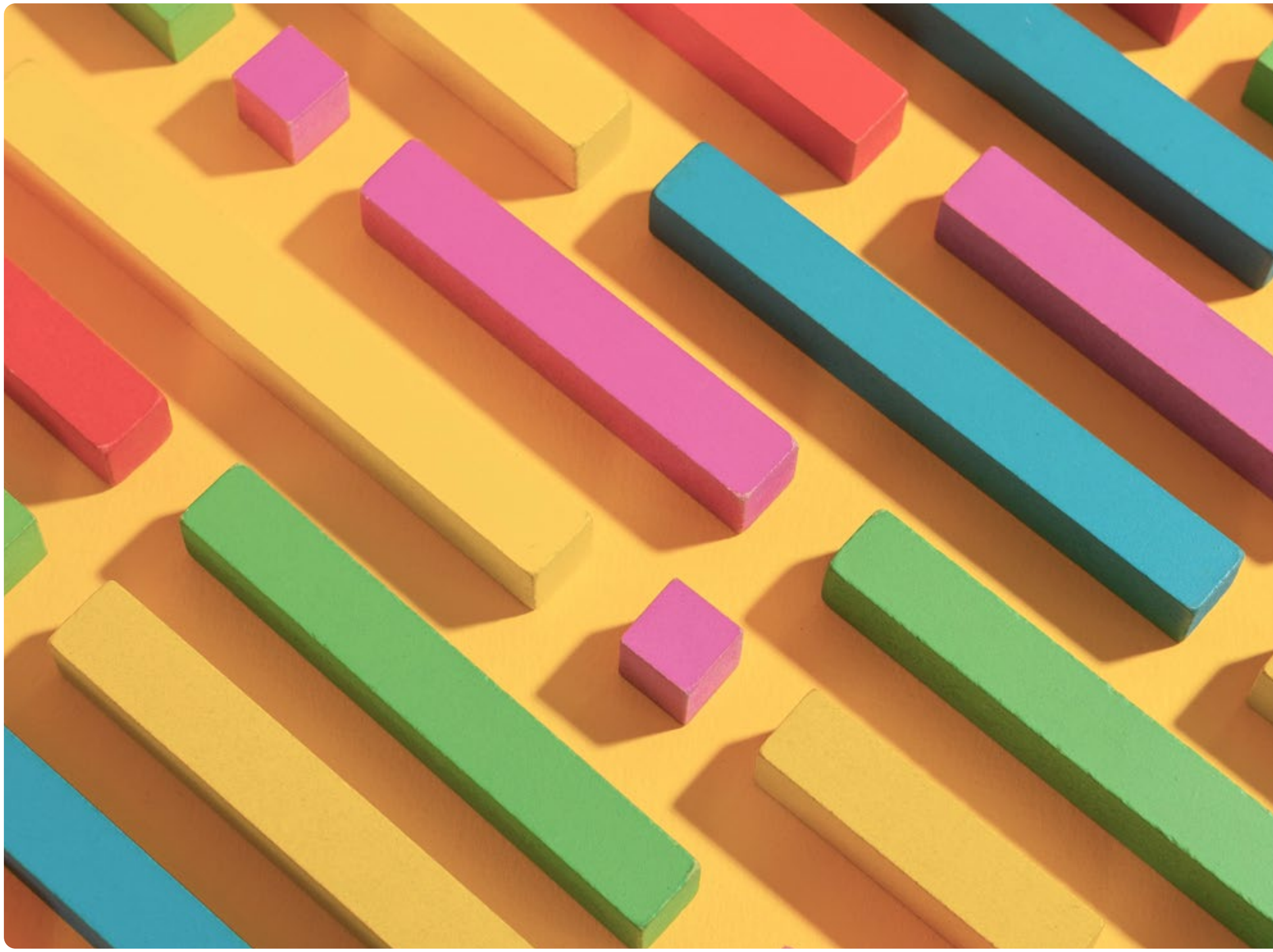
Rules of the roadmap

An expert-led guide to centralizing product feedback, prioritizing investments, and bringing the roadmap to life



Airtable

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Introduction

Here's something most teams already know: good product development doesn't happen in a vacuum. It's about working together as a Product org, and as a company, combining each team's skills to make something bigger than the sum of their collective parts, all in the name of the customer.

But surprise: delivering great products to customers at scale and at speed isn't as easy to do as it is to say (or write, for that matter). That's especially true when you're balancing the demands of your customers in one hand, and a spider web of workflow hurdles like resource planning, feature prioritization, and deadline tracking in the other. And just when you think you've mastered it: the needs of the business continue to evolve.

There's really no such thing as nailing product operations once and for all. It's a set of workflows that continually grow, flex, and improve over time—whether by trial and error, or by crowdsourcing advice from peers.

In this breakdown of advice from our own Product team, we'll share what they've learned about building a roadmap from their experiences at Airtable and beyond: from centralizing insights, to planning and prioritization, to bringing the roadmap itself to life.

On centralizing product insights

Collecting feedback, unifying across various sources and tools, and making sense of it in the context of planning and prioritization is a daunting task. That's something that Zach Felsenstein, product strategy and operations expert at Airtable, knows all too well.

As a part of the product ops team, Zach helps the product team deliver better experiences for customers, faster. "I see us as force multipliers across the product org," Zach says. Zach, in particular, works on the systems, processes, and workflows that make that possible.

On centralizing product insights

"Our goal is to make sure that processes are able to flex over time and stay lightweight, but are also powerful enough to meet the needs of the company at scale."

Zach Felsenstein
Product Strategy & Operations Associate, Airtable

Bringing feedback together—and giving Product Managers (PMs) the tools they need to actually use that feedback—has been one of the bigger operational challenges the team has handled.

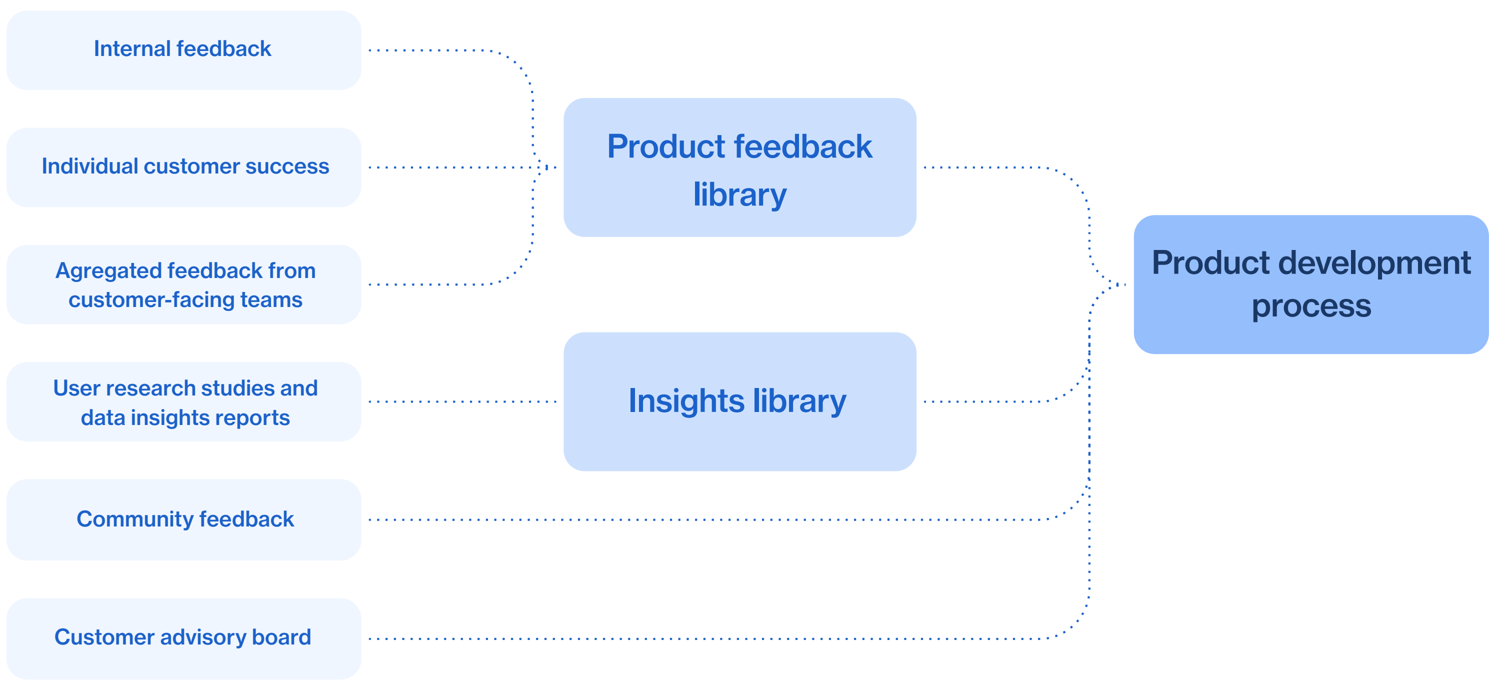
That's because no two pieces of feedback are the same—which makes it challenging to centralize it, and synthesize it in a meaningful way. Each piece of feedback has its own unique combination of surrounding metadata, like source, user type, and product area, that make it challenging to consolidate into a common denominator.

Zach's advice on meaningful aggregation tactics & applying the 5 whys

On centralizing product insights

First thing's first: you have to bring as much feedback as possible into a single place. Zach's team does it by enabling PMs with a product feedback library (maintained by the Product Operations team) and an insights library (maintained by the Research team).

The feedback library holds all of the customer feedback gleaned from customer-facing teams, while the insights library hosts the user research and insights conducted by Airtable's internal Research team.



On centralizing product insights

The ideal approach to aggregating feedback happens through **tagging**. To do it, you first need to build a central feedback repository. Then, you can give Product Managers (PMs) access to a central feedback repository where they can evaluate and tag feedback against multiple axes, like:

Product area:
What surface area of the product does the feedback apply to?

User type:
How does the feedback giver interact with the product? What do they use it for, and how deeply do they work in the product?

Role:
What does their day-to-day job entail?

Sentiment:
What's the tone of the message they're conveying? Is this a nice-to-have for them, or a major blocker?

From there, the team can look for things like feedback density (how often is this feedback coming up?), and repetition (is this feedback solved by something existing or upcoming that the submitter didn't know about?). They can also spend some time digging into the context behind the feedback, like the user's use case, the product familiarity, and more.

The 5 whys method is especially popular with the Airtable team for getting to the root cause of feedback. It's a technique that involves asking "why" 5 times in a row to understand the underlying problem the feedback presents—as opposed to taking the surface-level feedback at face value.

How Airtable centralizes feedback

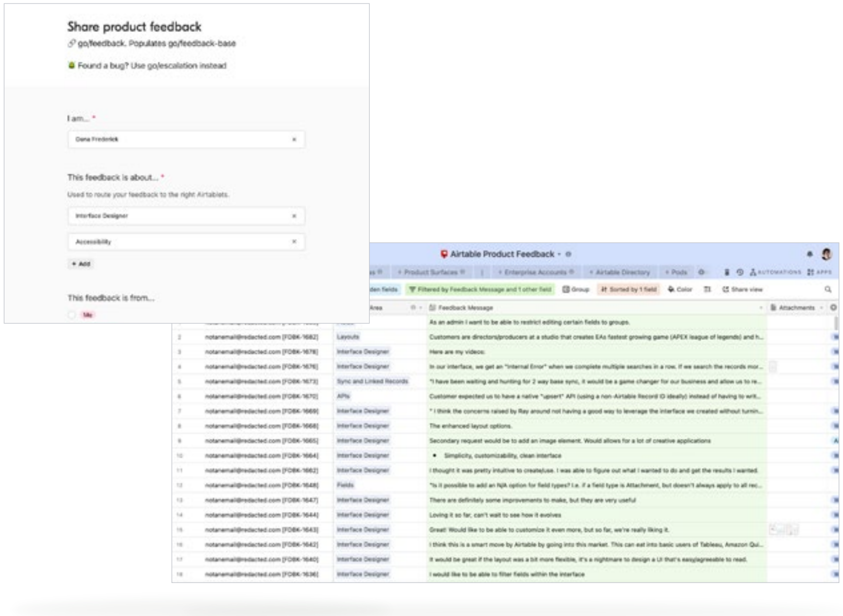
Step 1:
Pull the feedback in

First, the team kicks off with a form to solicit feedback. Generally, it's filled out by someone on a customer-facing team—but the resulting feedback can run the gamut from a verbatim customer quote, to summarizing a broader feedback pattern they've picked up.

On centralizing product insights

The form collects these inputs, specifically:

- **Submitter name**
- **Feedback giver (submitter or a customer**
- **Related product area(s)**
- **The feedback itself (quote or summary)**
- **Customer email (if applicable)**
- **Optional examples (e.g. screenshots)**



To keep things in sync with their customer list, the team has an automation that will automatically look up the customer email (if provided), find the matching contact in their CRM, and then tag that feedback to the account. That also populates details like the associated Account Manager, Customer Success Manager, and the like.

Looking to build your own workflow?
Get a step-by-step walkthrough in our guides.

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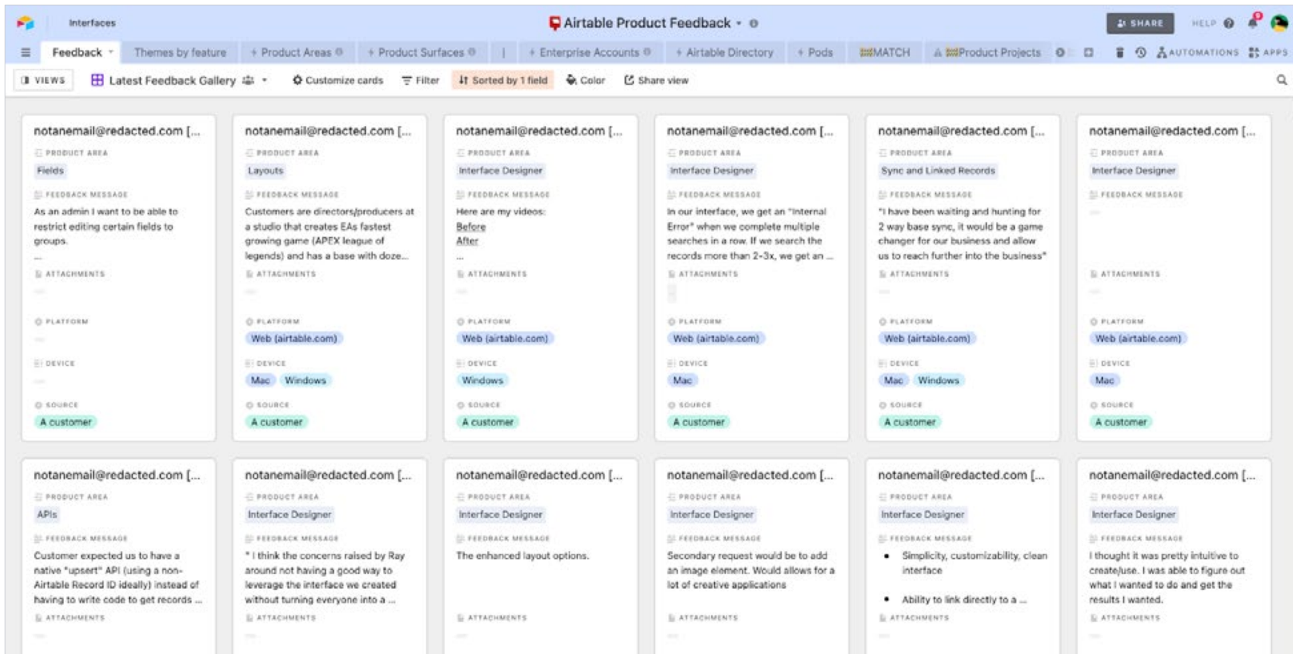
On centralizing product insights

Step 2:
Give PMs a sandbox

Once the feedback is pulled in, it's time to hand the reins over to the PMs. Some PMs like to check out the full library of feedback, and add tags as they see fit—while some prefer to create more filtered views that show only feedback related to their work stream.

Zach's team leaves it up to them to determine how to investigate. "My aim isn't to decide which feedback is important; it's to give them the tools to apply their own lenses to the feedback that we have."

On centralizing product insights



To make sure they're getting timely feedback, PMs even get notifications for new feedback, and digests of feedback related to their work stream. For example, they might choose to get notified any time a new piece of feedback gets tied to the product surface area they're focused on.

That helps them stay on top of new feedback without having to constantly check the feedback base for what's new.

On centralizing product insights

Step 3:
Pull it through to the product development process

The next step is one of the most important: pulling the feedback through to product development itself. This step is a little trickier, since the way feedback influences the work is ultimately determined by the way the PMs use it.

Zach's team, however, has a framework on where to consult feedback in the process:

- **At scoping/ideating**
- **During technical planning**
- **At development kickoff**
- **During dogfooding**
- **During beta**
- **During controlled rollout**
- **At GA (ongoing)**

And if PMs aren't finding the feedback they need in the feedback repository, or the company's research reports: they're given the tools to gather it themselves. They have access to detailed resources from the Research team on how to field their own research if they don't want to wait for the right feedback to trickle in, or for a UX Researcher to field a study for them.

Fielding your own research? Organize your work with this user research template.

See template

On planning and prioritization

If centralizing feedback is about analyzing insights from all over, planning and prioritization is an exercise in extrapolation, combining institutional wisdom, future aspirations, and data-driven insights to create strategic (and hopefully achievable) outcomes.

On planning and prioritization

Param Sidhu has seen that process play out in plenty of different ways—both on the investing side, working on enterprise software investments at Accel Partners and on the operating side, leading planning at companies like Pendo and InVision.

Now, as the leader of the Airtable Product Strategy team, Param's role is to orchestrate the ins and outs of the product organization. It runs the gamut from choreographing org-wide programs, like our customer advisory board, to building the systems that allow the team to scale, to providing strategic guidance on how the org can make product decisions.

"I think of Product Ops as influencing the processes by which a product is created. So it's not just supporting processes that are already in place with better systems. It's really about upleveling the way that product development occurs through thought leadership and best practices."

Param Sidhu
Head of Product Strategy & Operations, Airtable

On planning
and prioritization

Nailing the balancing act

Param's 3-point framework for pushing through ambiguity in product investments

Setting the right priorities is a blend of art and science. It's the act of choosing what new investments to make, armed with intuition, a multifaceted dataset, and more than likely, a lot of conflicting opinions.

To Param, choosing meaningful goals and product investments is about operating in ambiguity: striking a balance between the drive to move things forward, and the ability to pivot quickly as you encounter new information.

On planning and prioritization

"We look for people with strong opinions loosely held. We need people who are able to solve ambiguous problems; people who are confident enough to be able to press forward and move projects through these stages of ambiguity, while also having the intellectual humility to say 'hey, wait, I could be totally wrong.' when confronted with new data."

Param Sidhu
Head of Product Strategy & Operations, Airtable

But for most, navigating ambiguity when making product decisions is a challenge. "With zero to one products, people that struggle with this challenge tend to fall into one of two camps," Param says.

"One is overconfident, and therefore, not able to react to the data they're seeing—so they kind of just go barreling forward in whatever direction they originally decided. The other is so crippled by the ambiguity that self doubt starts to creep in. And then they're second guessing every decision, and they have a hard time moving forward."

On planning
and prioritization

So what's the best way to strike a balance in those investment decisions? When you're thinking about setting objectives, start by considering these vectors:

Strategic value

Does this product investment align with the long-term product vision and near-term company strategy?

Compounding potential

Does this problem get worse over time if we fail to address it? Or on the flip side: does the value of solving this problem compound over time?

Your portfolio of product "bets"

Do you have a balance of payoff periods in terms of customers realizing value? Do you have a balance of investments that will GA this half, this year, next year?

Want the full walkthrough of how Airtable sets objectives? Let's dig into the specifics below:

On planning and prioritization

How Airtable sets objectives

Some of the most important work Airtable's team does around objective setting happens before planning officially starts. They take an inventory of company-level themes at the strategic level, plus investments that are already in flight. The team also collects any investments that need to be started, but aren't directly aligned to strategy—think foundational or maintenance work that needs to happen to keep the Product org humming. Then, it's time to officially jump into planning.

Learn how Hearst Magazines tracks and manages product investments for their portfolio of 25 different brands in this story.

Read more

On planning and prioritization

Step 1: Prioritize product investments

The first official step of the planning session? **Prioritization.** In this step, the team determines which broad themes of initiatives from pre-planning are the most important new (strategic) investments, continuation investments, and needed-to-run-the-business investments.

Step 2:
Identify homes (and owners) for your investments

The next step is to get a little more granular. That starts with taking the overarching themes, and breaking the problems they present into group-level initiatives—something discrete and specific enough to be owned by one person. “Ideally, we want to try to scope it down to the point that it can be a single driver for every single one of these new initiatives,” Param says.

From there, the team opens it up to investigating dependencies: surfacing connections between initiatives to get the full picture of how they’re related across owners and across teams.

On planning
and prioritization

Step 3:
Take a first pass at sequencing

To close out a planning session, finally, the group takes a first shot at sequencing initiatives. Using the dependencies uncovered in the last step, combined with an eye toward strategy, pacing, and business need, they make a preliminary running order for the initiatives.

After the planning session, their last line item is to bring in stakeholders. Working with cross-functional teams on the ground, the Product Ops team circulates the plan to get those stakeholders' point of view and flesh out details. It's a key step for getting buy-in.

"We take that plan back to the team, and allow for all of the different functions around the company—like Sales, Marketing, and more, to weigh in on trade offs we made during planning.

It's a chance for those leaders to meet directly with the Product owners to push back on certain initiatives and say, hey, why did we choose this trade off?" Param says. "And as a result, they're much more bought into the actual roadmap."

Looking to get tighter alignment with cross-functional partners like Marketing? This blog post shares some best practices.

Read more

On bringing a roadmap to life

A roadmap is a living, breathing resource: flexing, growing, and rearranging to meet the changing needs of your business.

Wade Morgan, product strategy and operations expert at Airtable, helps to tame that would-be chaos. Once in Sales at LinkedIn and one of Airtable's earliest Sales hires, Wade now guides product operations and strategy at Airtable, and has seen the customer journey up close and personal.

Now, he splits time between influencing the Product team with world-class ops, managing team-wide communications, and spearheading key strategic initiatives—like Airtable's Customer Advisory Board, for example. It's all part of what shapes the way the roadmap comes to life.

On bringing a roadmap to life

Assume some friction

Wade's wisdom on balancing innovation and feedback

Defining a roadmap, ideally, shouldn't really be about pruning ideas back—it should focus on how to sequence them. It's a balance of comparing the short-term, long-term, and company context all in one.

> "Everything that we want to do is a good idea. It's not a question of what we should do; it's a question of when we should do it. That's where prioritization conversations come in."

Wade Morgan
Product Operations,
Airtable

It’s a complex problem—but an addressable one. A few things to consider:

Immediate needs

What are the features and functionalities that you need most right now—whether that’s because they’re strategic, a need-to-have for running the business, or have high compounding potential?

Long-term needs

What’s the long-term vision for your product? Are you making tangible steps toward achieving the mission the company set out to pursue?

Stage of the company, or product

What level of maturity is your company, or your product at? Are you still building foundations? Are you a long-time category leader with an appetite to grow into new surface areas?

One last thing to keep in mind: balancing out the role of innovation. “It’s easy to get in your head about the problems you believe need to be solved,” Wade says. “It’s a different thing to understand the problems that customers need solved.” To do that, you need to dig into the ask behind the ask—the true source of the problems your customers are facing. Solving their problem could involve building exactly what they ask for, or building something different, depending on the root cause.

In some cases, it could even involve looking beyond what customers are asking for. Customers' feedback is heavily shaped by your product's current limitations; it's the Product team's job to bring new ideas to the table, and to take calculated risks on innovative product investments.

"One of the most common tensions of any Product org is the balance between what customers believe they need, versus innovating to create the things they don't even know they need. Having the gumption to innovate—to be confident enough to put new things out there—is something you need in order to keep the balance."

Wade Morgan
Product Operations,
Airtable

Wade's advice? Make your best assessment, but expect to get some things wrong. The more a product org can encourage teams to build new things, and change their minds about how a problem should be solved, the better.

"If we can assume a little bit of friction—understanding that we might put something out there that doesn't get received as we thought it would, and we can learn from that—that's ok."

Need a roadmap upgrade?
Try using this product roadmap template.

See template

On bringing a roadmap to life

How Airtable builds and distributes a roadmap

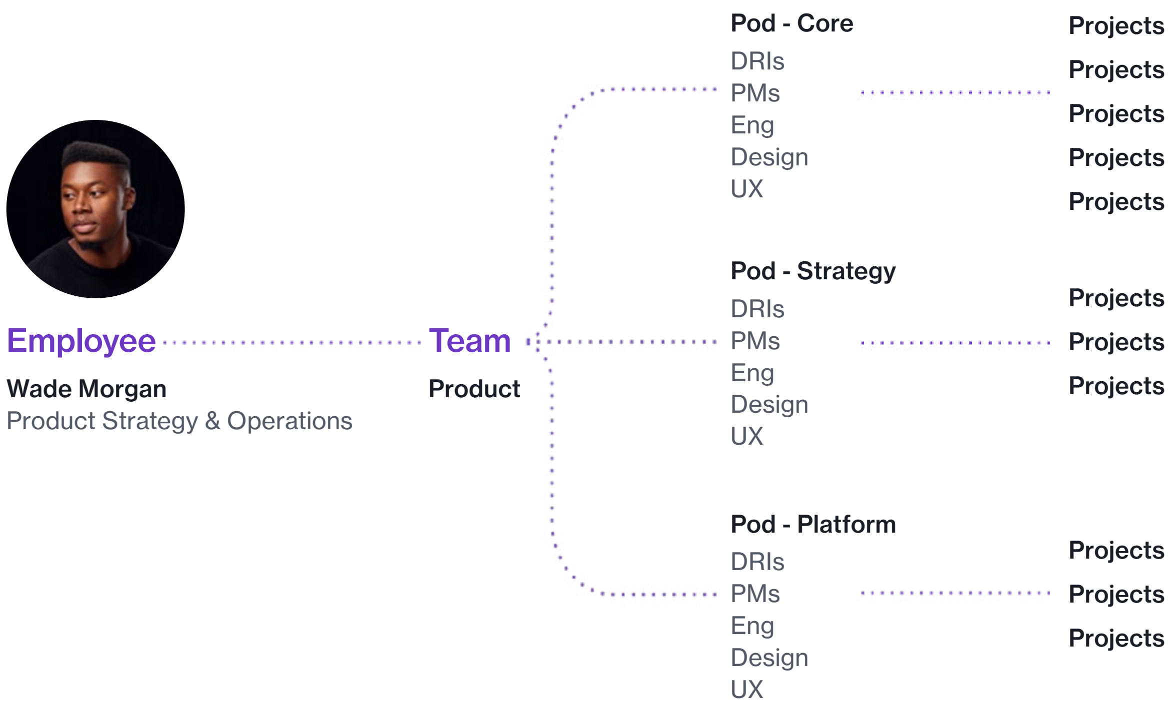
Building a roadmap is a cumulative process—so it's directly informed by the planning steps that come before it. At this stage, the rubber meets the road, and initiatives flip from ideas into plans.

Step 1:
Get PRDs built out—and automate distribution

Once the roadmap is sequenced, the next step is to align resources behind it. Airtable's team, like many others, starts with a product requirements document (PRD). Each PRD is scaled to the size of the project—so where a mini PRD might call for fewer steps and async check-ins, a standard PRD have more hoops to jump through (like more live syncs at the start of the project, or additional checkpoints between development and rollout).

On bringing a roadmap to life

When a PM submits a PRD, Airtable's roadmap base automatically tags the pod that project belongs to, and infer a decision-making tree for the folks that should be involved in the project. It's all thanks to the underlying org chart, and the data relationships within the org chart that build out a robust directory mapping:



On bringing a roadmap to life

With all of the relationships between those data points mapped out, they can easily build out automations that draw from that logic. For example, after a PRD is created, there's a set of automations that invite the team to scheduled check-ins, post project-related docs on the project's Slack channel, and more.

The richness of that dataset yields a whole new level of insights for the Product Ops team. "We can look at our base and say, okay, here are all the check-ins that happened in the last seven days, and here are all the updates that have been submitted in the last week," Wade says.

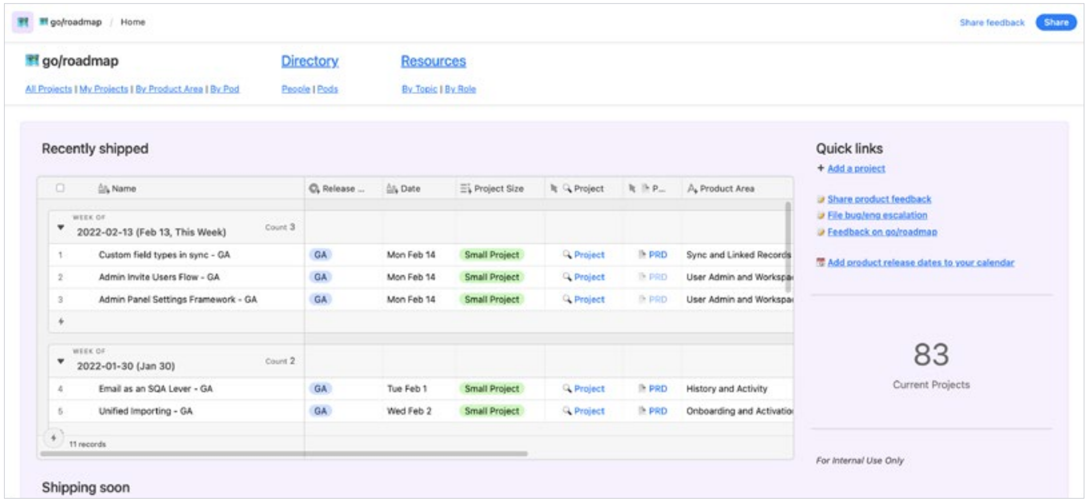
Learn more about building your own automated workflow in this blog post.

Read more

On bringing a roadmap to life

Step 2:
Communicate the roadmap org-wide—and make it a hub worth visiting

One of the meatier steps in the process is the task of communicating the roadmap. Airtable's team does this using an Airtable interface built on top of their roadmap base—so the updates from the roadmap pipe straight into a digestible view of what's coming.



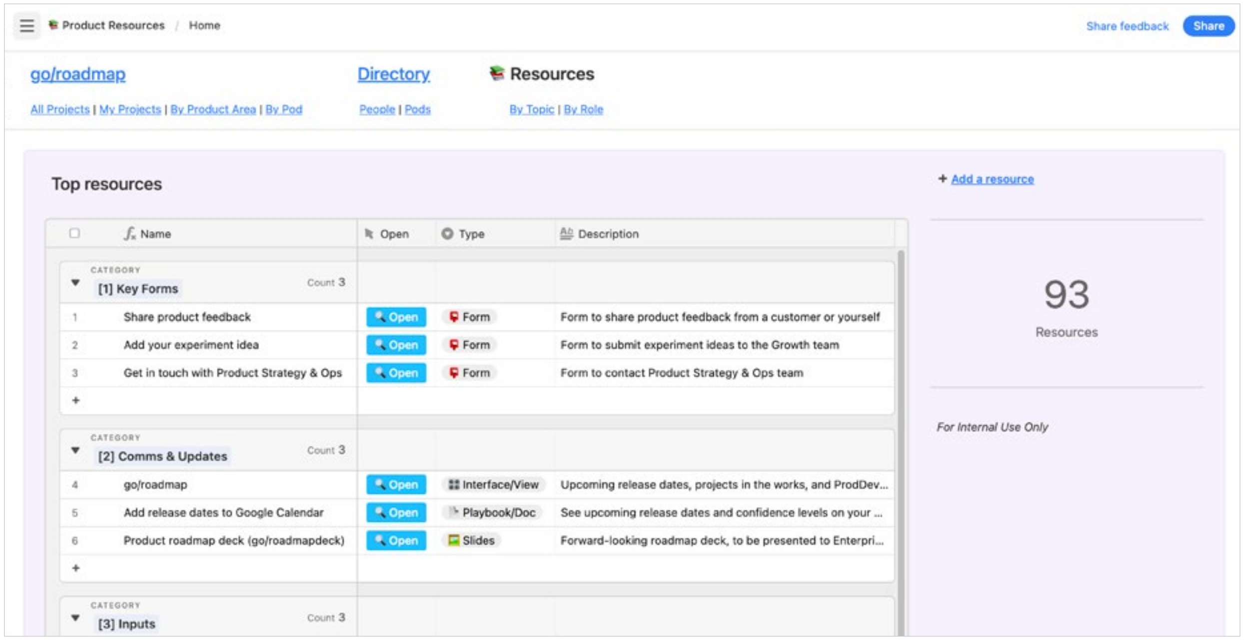
On bringing a roadmap to life

When compiling the roadmap, Wade's team made a point to make the roadmap into a catch-all resource for the Product team: a place where folks can not only learn about what updates are shipping next, but get access to supplementary resources that put it all in context.

"We've tried to make our roadmap a one-stop-shop for everybody, where I think it serves both information consumption purposes for stakeholders, and update purposes for the people tactically working on these projects," Wade says. To that end, the roadmap includes:

- **Updates shipping soon**
- **Recently shipped updates**
- **Product feedback form**
- **Bug reporting form**
- **Confidence intervals for each launch date**
- **People directory**
- **Product team resources**
- **Quick links to projects by owner, product area, or pod**

On bringing a roadmap to life



Making the roadmap less of a feature list, or a timeline—and more of a go-to resource hub—reinforces its usage (and updates). “It’s really cool to have one place where anybody can see all of their projects, and anybody can see what’s coming out soon,” Wade says.

Learn how to build your own interface in Airtable with our on-demand webinar.

Learn more

Conclusion

Balancing internal complexity with the evolving needs of the business—and doing it quickly under the scrutinizing eye of your customers, stakeholders, and leadership—is one of the hardest jobs in any organization.

In that sense, a roadmap isn't just a readout of what you're building; it's a living, breathing document that reflects the direction of the business, the state of your organization, and perhaps most importantly, the needs of your customers.

The work of mastering product ops is never done. But when you can design, define, and redefine the workflow you use to deliver products, you can enable your team to move quickly, and to stay focused on delivering more of what your customers love.

About Airtable

Airtable is an app platform that enables teams to build workflows that modernize their business processes. More than 250,000 organizations, including more than half of the Fortune 1000, use Airtable's visual, flexible tools to customize workflows that meet their exact needs, whether they're creating blockbuster movies, designing running shoes, distributing life-saving vaccines, or anything in between.

Learn more

Contact sales team