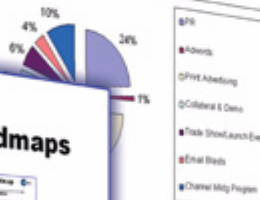


EXPERT PRODUCT MANAGEMENT

Advanced Techniques, Tips & Strategies for
Product Management & Product Marketing

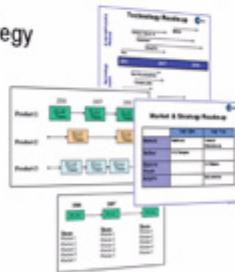
BY BRIAN LAWLEY

How To Plan & Execute A High-Impact Product Launch



Types Of Product Roadmaps

- Market & Strategy
- Visionary
- Technology
- Platform
- Product
 - Internal
 - External



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“Expert Product Management” Book Excerpt

Advanced Techniques, Tips & Strategies For
Product Management & Product Marketing

By Brian Lawley

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- Chapter 1: Introduction
- Chapter 3: Beta Programs
- About the Author
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Introduction

There are many books and training courses on the basics of product management and product marketing. These provide an excellent foundation for new product managers, or even for those who have been around a while but want to sharpen their skills and ensure they are using best practices.

This book is designed to go one step beyond the other books and training available today. Its focus is to cover four of the most critical elements in ensuring product success, and to convey practical strategies, insights, tips and techniques that I have learned from hands-on experience defining, launching and marketing over fifty products during the last twenty years of my career. This includes best practices learned from Apple, Symantec, Adobe and dozens of startup and mid-sized firms that my company, the 280 Group, has helped with Product Management and Product Marketing consulting projects.

We'll be covering how to prioritize features and build product roadmaps, which is absolutely critical for getting your team and company on the same page and for delivering the right features in your product at the right time. We'll also cover how to run effective Beta programs, which can

oftentimes mean the difference between shipping a poor-quality product and shipping a product that you have a high degree of confidence in. From there we'll talk about how to plan and execute an effective product launch. Short of building a great product, product launches are one of the most (if not THE most) critical factors for achieving success. And finally, we'll discuss how to get phenomenal reviews for your products. Oftentimes this is an area that is an afterthought, and is not dealt with until or unless the product receives poor reviews. With a well-managed review program, you can turn press and analysts into one of your most powerful marketing weapons, further accelerating the success of your product.

In addition to these four areas there are, of course, other key things to focus on to ensure your product's success. We'll be covering these in future books as well as in our monthly newsletter, PM 2.0, which is available on our website.

Though the information in this book is based on experience with high-tech software and hardware products, in many cases it will be highly applicable to all kinds of other products. The fundamentals of good Product Management and Product Marketing remain true across different types of products, though the details of execution may vary.

All of the techniques and information outlined in this book have been used in real-world situations with great success. Virtually all of the documents and tools that are discussed in this book are available on our website (some free, others as part of our toolkit series), giving you the ability to leverage them to get more done, deliver better results and save time.

We hope the information you learn from this book will help you to ship many great new products that delight your customers, change the way they live and work and make significant profits for your company. We wish you success as you go about defining, launching and marketing your new products!

Beta Programs

After the roadmap and the market and product requirements are delivered to your engineering team, development will begin. When the product is nearing a stable point where all features are implemented, it is time to plan and run a beta program. Beta programs are often overlooked by many companies until it is too late, resulting in shipment of poor quality products, lost sales and sometimes even more significant negative consequences.

Why Beta Programs Are Critical

A well-run beta program can provide you with the external validation you need to ship a product with confidence. It can tell you whether the product is truly going to satisfy customers and meet the quality level you are seeking. It can also provide you with early learning and feedback, customer testimonials and quotes. And finally, it can help you build ongoing relationships with

your customers that you can leverage when tough feature decisions come up in the future. A beta program can help to make or break your product's success.

First, a Bad Example

Before we move on to how to succeed in your beta program, I'd like to tell you about a recent experience that I had. I was contacted by a friend who was launching a startup company. He has a very interesting new product, and wanted to know if I would participate in the beta program to make sure it was ready to launch. All I had to do was agree to the terms, download the client software and spend a few hours using the software. To incent me even further, there would be daily contests where I could win gift certificates just for beta testing the software. I was pretty excited, and not only signed up myself but recruited several other people to join in.

When the beta test began, I downloaded the software and installed it. I was ready to spend an hour or two each day for the next few weeks helping out my friend and earning some gift certificates.

Unfortunately I had a very bad experience. I logged on and couldn't figure out how to use the product. There was no documentation or help system and the UI was far from final. I decided to wait until the software was updated so that it wouldn't be a waste of my time.

As the weeks progressed I got emails announcing that new builds were available. However, they never included details about what had been fixed or changed. I reinstalled at one point, only to find that I still couldn't figure out how to use the product. Eventually I lost confidence. I ignored any further emails and never ended up testing out the software. I'm not even sure when the test ended or what the results were. I'm not sure whether the company ultimately ended up shipping a quality product, but I would bet that it was not as good as they wanted it to be.

Now, a Good Example

Now I'd like to tell you about a beta program success story. Years ago, I was Director of Product Management for a startup company named Whistle Communications, which made a product called the InterJet, an Internet appliance for small businesses.

As we approached launch, we were under tremendous pressure. We had to decide when to turn on manufacturing to build the first units, which was a multi-million dollar commitment. We knew that if we made a mistake and began building the product before it was ready, the company would run out of money. We also had a very high-profile PR campaign planned, and we needed customers who were willing to tout the product's virtues.

I launched a beta program that resulted in 10 customers using the product intensively for 10 weeks. Not only did we get confirmation that the product was ready for manufacturing, we were able to test it in a variety of environments not covered in our QA plan, and we got in-depth early feedback for product planning purposes.

The result was that we had a high confidence level that we were ready to ship, had a good idea of what needed to be done next to the product, and had excellent customer references, quotes and success stories prior to our press tour.

How to Run a Beta Program

Running a successful beta program isn't rocket science, but there are several considerations to take into account. The following is a list of factors to keep in mind:

- Setting goals
- Writing the plan & getting sign off
- Deciding who will manage the program
- Determining the length of program

- Recruiting participants
- Selecting candidates
- Defining factors in response rates
- Estimating participation levels
- Obtaining agreements
- Determining incentives
- Starting the program
- Maintaining ongoing communication
- Responding to participants
- Communicating internally
- Administering exit surveys
- Writing a final report

We'll cover each of these topics in more depth in the next few pages.

Beta Program Timeline

To give you an idea for planning purposes of how much time an effective beta program takes, we've put together this rough timeline. The schedule will be highly dependent on what your goals are for the program, but you should plan on 8-12 weeks to run a very comprehensive beta program.

Beta Program Timeline

Task	Amount of Time
Set goals, write plan, sign off	1 week
Recruit & receive applications	3 weeks
Select, notify, send agreement	1 week
Run program	3-6 weeks
Exit survey, tally results, write final report	1 week
TOTAL	8-12 weeks

Figure 15: Beta Program Timeline

Setting Goals

The first step is to determine what your real goals are and get your team and executives in agreement. We suggest that you determine the goals of the beta program as early as possible in the product development process. Ideally you can even mention the goals in the Market Requirements Document (MRD) so that the team has expectations set early on. You'll want to reiterate these goals in a separate beta plan, which we'll cover later. The goals should be as concrete as possible, and you should make sure that your team and executives are in agreement up-front.

Potential Beta Program Goals

There are many reasons to run a beta program. The key is to be clear about what is important. Here are just a few of the goals you may want to include:

- Do you want to validate whether the product is ready to ship?
- Do you want to supplement your QA efforts to cover configurations that aren't being tested in-house?
- Are you looking for early customer references, or do you just want participants to find bugs for you?
- Are you trying to gather feedback to get ahead of the curve for the next version of the product?
- Do you want to make the launch smoother by finding support issues and documenting them in an FAQ?
- Do you intend to support press, analysts and influencers using the product for early reviews during the beta?

Depending on which of these you choose, your strategy for recruiting, qualifying and supporting participants will vary quite a bit.

Examples of Concrete Goals

Here are some examples of concrete goals you might want to consider:

- You might want to test the ship-readiness of the product. To do this you can set metrics around the program such as having at least 20 companies use the product for at least a month. Or you may want to use a qualitative measure such as “The product may not be deemed ready for shipment until ninety percent of the beta customers agree that it is ready to ship.”
- You may want to supplement your QA efforts. Looking at your QA test plan, are there any areas that are weak? Are there any customer configurations that are particularly difficult for you to recreate in your testing efforts?

- You may want to set some goals around your launch activities, such as getting at least three companies to be success stories and getting five customer quotes or referenceable customers for the press to contact.

There are almost an infinite number of goals you could choose. The key is to choose the ones that are meaningful based on your project, make them as quantitative as possible, and stick to them.

Beta Program Plan

A beta program plan is critical so that all responsible parties understand and agree up front to their commitments. It needn't be a long document - in fact it is better if it is short, so that there is a higher likelihood that team members will read it. Make sure it includes the key points listed below, and that it is as specific as possible.

- Goals
- Recruiting
- Criteria for starting
- Costs
- Timeline
- Responsibilities
- Criteria for success
- Signoff

Who Manages It?

Who manages your beta program will be a critical decision. Oftentimes it ends up being the Product Manager, Project Manager or QA manager. Many times it is delegated to an Admin or junior person. Or you may choose to bring in a contractor who specializes in beta programs.

The two most important criteria for choosing this person are that they are reliable and that they are able to respond to the customer appropriately. If you have press and analysts in your beta program or customers that are critical accounts for your company, you don't want to put a junior person in charge who doesn't have good people and communications skills to handle difficult questions and issues. Who you choose to be in charge will depend on what your stated goals are. The other critical factor is that the person **MUST** have enough time to dedicate to doing the job - likely to be at least 10-20 hours per week for the duration of the program. If you assign someone who is overloaded already, your program will suffer.

When Do You Start?

Deciding when to actually start the program and deploy the product should be determined early on in the process. Some possible criteria could be to begin when:

1. There are no crashing bugs
2. The bug count has stabilized
3. The internal team has been using the product successfully for a specified number of weeks

You may choose one or a combination of these. Once that first customer is successfully running and stabilized, then you can deploy more widely, having gotten any issues out of the way.

How Long?

The most common reason that beta programs fail is that the team underestimates the time needed for the program or they decide very late in the process to cut the beta program down significantly. By default it will often end up being assumed that a program be run in two weeks. This is incredibly optimistic, and doesn't take into account the fact that beta users may have other priorities that may deter them from even installing the product for a week or two after they receive it.

On the flip side, a longer program is very difficult to keep going. customer interest in helping you out drops off and the last few weeks become virtually worthless. This is dependent on the type of product you have and the incentives - if it's an exciting product and you have a contest for finding bugs you might be able to sustain a longer beta program

The ideal length for most products is 4-6 weeks. This gives you enough time to ramp up the customers, get good feedback and get some sustained usage. Murphy's Law also applies here - if you plan for 6 weeks you'll likely end up doing a 3-4 week program because inevitably the schedule will slip or other factors will come into play.

Recruiting Participants

There are many different potential sources and approaches for recruiting participants:

- Current customers
- Prospects who didn't purchase
- VCs/Investors
- Personal networks
- Sales force and leads
- Advertisements (Craigslist, local newspaper)

Depending on how many participants you want and how much time you have, you can recruit via email, phone or your website. Much of this will be dependent on what your goals are and what your expected participation levels will be.

Recruiting

When you begin recruiting participants, you'll want to make sure that you have all of the program details in place. Tell them the basics of the program, what you are asking them to do and why it will be worth their time. Also gather the information about their environment so that you can decide whether they qualify to be in the program.

In your communications make sure you convey the benefits of participation very strongly, so you get a high response. You might also want to come up with a clever name. For example, one beta program that my company, the 280 Group ran for a client was called *The Great Bug Hunt Contest*, and we had a large number of people apply.

Factors in Responses

So what kind of response can you expect? There are a variety of factors that will influence this:

- How popular is your product?
- Are you completely new or unproven?
- Will it require testers to risk interrupting their business?
- Are you an established company, or one they have never heard of?
- Is your marketing pitch compelling, and will you deliver it in a personal way rather than simply as a mass email blast?

For example, if you have a wildly popular and proven product like the Apple iPod, which is from a well-known company and comes with very little risk, you will likely be able to recruit many willing participants. On the other hand, if you have an enterprise software product from an

unknown startup that requires test participants to install it in their day-to-day infrastructure and risk crashing, you may not be able to find more than one or two participants.

Incentives

If the factors in getting a good response are working against you, then you should probably provide incentives. For some participants, simply improving the product will be enough. For others, offer a free or reduced price copy of the final product. Or you may want to run a contest, though you need to be careful regarding contest rules in the states in which you do business.

Participation Levels

Figure 16 gives you an idea of how many participants you might expect based on whether the product is brand-new or an existing, well-known product and what kind of recruiting approach you use. One important thing to note is that the percentage of active users is always much smaller than the number that signs up and commits to be part of the program, so always shoot for having a large number of signups.

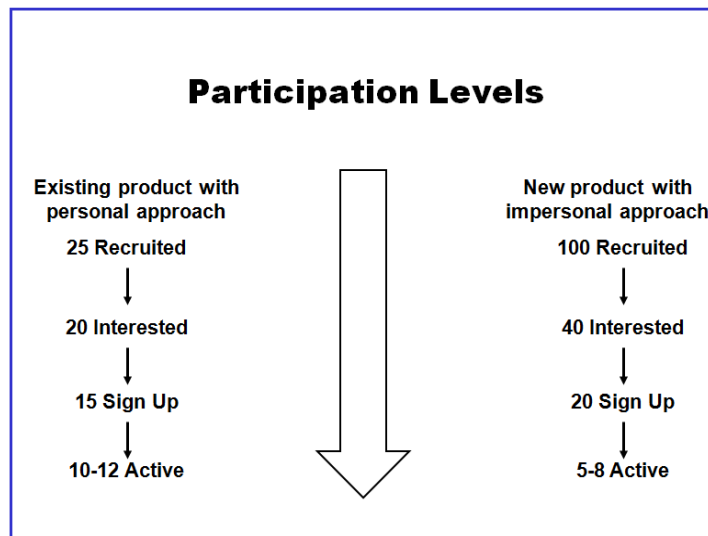


Figure 16: Beta Program Participation Levels

Selection of Candidates

As customers respond indicating they wish to participate in the beta program, capture their details in a recruiting database. Once you have the recruiting database populated with enough responses, you can choose your candidates. Make sure they represent your target customer. Pay particular attention to getting some lower and mid-level users in the mix so that your feature requests and data aren't skewed towards power users (who are usually the ones most likely to participate in beta programs). And finally, make sure the mix supplements your existing QA efforts.

Agreements

Always use beta program agreements because it helps to weed out the participants that aren't serious up-front. A good agreement sets expectations on both sides and includes an NDA (Non-Disclosure Agreement). It doesn't need to be complicated, but it should include the program length, incentives, what you expect them to do and what support you will provide.

For the participants you have chosen, send out the beta agreement and give them a hard deadline to return the materials. Once the deadline passes, you'll then be able to evaluate whether you have a large enough and diverse enough pool of participants to accomplish your goals.

Kicking Off the Program

When you are ready to start the beta program, make sure that you do everything possible to avoid a false start. Double-check the installer and software download sites. Make sure the interface and documentation are ready for customers to use in a meaningful way. And build a FAQ that you can include to help customers from hitting bumps in the road.

Nothing will stall the participation of your beta testers more than having them sit down to get started and then get frustrated if things don't work right. If you don't give them confidence in your product early on, they will be far more likely to drop out of the beta program.

Ongoing Communication

As the program progresses, make sure that you keep the communication going. Use the phone or email to provide participants with status updates from your side and to check in on whether they are staying on top of their commitments to install and use the product. This will give them an increased sense of confidence that it is worth their time to continue using the product.

You'll want to include the following in your communications:

- Start date
- End date
- How to submit bugs/feedback
- Ongoing status
- New build/installation info
- Contest details/additional incentives

Responding To Participants

In your beta agreement and ongoing communications, set an expectation for what kind of response time participants will receive if they encounter problems or have questions. Also, when they submit bug reports or feature requests, acknowledge that you have received them so that they know you are listening.

You can capture information through the Web and into a database, or use email. Email is likely to be much easier and faster and give you a better response, since the participants don't have to log in with a username and password, etc.

Communicating Internally

As the program progresses, make sure you send weekly status reports to everyone involved inside your company. This will add credibility to the program and will decrease the number of people who contact you to ask where the program stands. Include the number of bugs, their priorities and whether the program is meeting the stated goals. Also include the feature requests coming from customers so that the team can see them firsthand.

Exit Surveys

Always end your beta programs with a short exit survey, and make sure that participants **MUST** fill it out to get any of the incentives. Ask them how much they used the product, their overall impressions, whether they believe it is ready to ship, etc. Also ask them to rank the features in terms of importance and what other suggestions they have for improvement.

You can conduct the survey through email or you can use Zoomerang, Survey Monkey or one of the other online tools. You may also want to visit a few of the most important customers to get more in-depth answers.

Beta Program Exit Survey

- 1.) What types of tasks did you attempt with the product?
- 2.) Were you able to save time as a result of using the product?
- 3.) What did you like best about using the product?
- 4.) What did you like least about using the product?
- 5.) Was there anything that confused you about using the product?
- 6.) Do you believe that the product is ready to ship?
- 7.) What are the 3 highest priority things that need to be changed?
- 8.) Rank the value of each of the following features:

1= not compelling
5= very compelling

- 1.) Feature #1
1 2 3 4 5
- 2.) Feature #2
1 2 3 4 5

Figure 17: Beta Program Exit Survey

Final Report

As you prepare to ship the product, deliver a final report with recommendations. Include the bug trend info to show that bugs have stabilized, as well as any open issues that customers brought up that aren't resolved. State whether you met the overall goals, and include a summary of customer opinions and feedback from the final survey.

Deliver this report to the team prior to the sign off on the Golden Master or First Customer Ship decision - it will help immensely in making sure that everyone who is signing off has a realistic picture of whether the product is ready to ship.

Follow Up

You've spent a lot of time recruiting the program participants, so don't let your hard work go to waste. At a minimum consider sending "Thank You" letters to them, and you might even want to send them a nice gift so that they are more inclined to participate in your next beta program. Also, leverage the relationships you've started to build. You can ask beta customers if they are willing to be on a customer council or participate in other beta programs in the future. And finally, ask them if you may call them in the future if there are specific features your team wants advice on. Having a few customers you can quickly call to get opinions can be invaluable when your team isn't sure about how to implement a feature or what might be important from a customer point of view.

Best Practices

Make sure to circle back and circulate a brief summary to the team about the program, including what worked and what didn't. This will help your company get increasingly better with each beta program you run. Also, make sure to give thanks and praise to each of your team members - it takes a lot of hard work to execute a beta program.

About the Author



Brian Lawley is the President and Founder of the 280 Group, a Product Management services firm that provides consulting, contractors, training and templates. He is also President of the Silicon Valley Product Management Association, the world's largest Product Management Association. During his twenty year career in Product Management he has defined, launched and marketed over fifty successful products for companies such as Apple, Symantec, Adobe, Palm and dozens of startup and mid-sized companies.

Mr. Lawley was nominated for the Product Management Excellence Award for Thought Leadership by the Association of International Product Marketing & Management in 2006 and 2007. He is the editor of Product Management

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Mr. Lawley is a Certified Product Manager (CPM) and Certified Product Marketing Manager (CPMM). He earned an MBA with honors from San Jose State University and a Bachelors Degree in Management Science from the University of California at San Diego with a Minor in Music Technology.

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