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## How to Fit Your Product Strategy to Small & Medium-Sized Businesses





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Opportunities abound for the small and medium-sized businesses (SMBs) market to adopt technologies that will advance their operations and expand their sales capabilities. However, one of the key problems is trying to use the "one-size fits all" offerings of many current technology products on the market. This article suggests steps to take to successfully move your product line from the enterprise to SMBs.

#### 10 Top Ten Tips for Briefing Industry Analysts

Briefing technology industry analysts is a learned art rather than a formulaic science. Each analyst and analyst group is different, as is each technology company. However, this article recommendations ten major areas to connect with the analysts so they understand the solution and the company enough to describe it accurately to others.

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#### **DAYS** 1 – 2

#### I. Strategic Role of Product Management

- What is marketing?
- Definition of the role of product management
- Contrasting product management and product marketing
- Assigning ownership of responsibilities
- Identifying the "first steps" with gap analysis

#### II. Market Analysis

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- Market problems
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#### III. Quantitative Analysis

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- Pricing
- Buy, build, or partner?
- Thought leaders
- Innovation

#### V. Product Planning

- Positioning
- Sales process

#### VI. Case Study

#### VII. Delineating Responsibilities

- Communicating market facts to Development, Marcom, and Sales
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#### **DAY 3 – Requirements That Work** (For those who write requirements)

#### VIII. Building the Market Requirements Document (MRD)

- Writing requirements
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- Programming for the "persona"
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How to Fit Your Product Strategy to

By Laurie Shufeldt Small & Medium-Sized

From President George W. Bush's proposed 2007 budget that would give the nation's 25 million small business owners the tools they need to continue to grow, to the U.S. Census Bureau's citing that 60 to 80% of net new jobs in America over the last decade came from small companies, the indicators are strong that the mid-market—small and medium-sized businesses (SMBs)will continue to drive the U.S. economy. As this market looks to take advantage of increased growth opportunities, and enterprise IT budgets dry up, product managers are in a unique position to strategize how their technology offerings can be developed and adapted to meet SMBs' needs and leverage new business opportunities for products.

Now more than ever, opportunities abound for the SMB market to adopt technologies that will advance their operations and expand their sales capabilities. From information access management to storage to security, SMBs are focused on broadening the role of technology within their organizations. However, obstacles such as affordability, high implementation time, lack of IT staff and the ripple effect of technology upgrades continue to plague this market and stall its ability to realize the full potential of technology.

One of the key problems SMBs face is trying to use the "one-size fits all" offerings of many current technology products on the market. The underlying problem being that since technology's inception on the business market, as early as Microsoft® Windows® hitting the office in the mid '80s, how products are created, marketed, packaged, priced, implemented, utilized and evaluated as successful, are based on the business

challenges that need to be solved on a corporate or enterprise level. Product managers that change that focus and respond specifically to challenges faced by SMBs will help close the technology gap between the mid-market and large enterprises.

The following suggested approaches will help product managers understand what steps to take and attribute to their own invention, manufacturing and marketing processes to successfully move their product line from the enterprise to SMBs.

#### The enterprise vs. the SMB owner: key differences

Before you can design or adapt an enterprise-level solution for the mid-market, you first need to understand the key differences in buying power between the two organizational sizes. Enterprise solutions are large in scale, budget and implementation time and require high-level expertise. Enterprise solutions are also often purchased to complement a wide, complex range of other business applications. SMBs, on the other hand, have limited IT resources and will most readily seek out the partners that can help them realize the full potential of technology investments across their entire organization, even if they start with smaller, departmental deployments for proof of concept.

Another market challenge to address is the number of differences between SMBs themselves. For some small business owners and singular departments in mid-sized organizations, hardware or software may be purchased to solve one specific business issue, such as automating accounting and financial tasks. However, the real benefits of a technology and the returnon-investment (ROI) occur when a technology can be multi-tasked across every process as a comprehensive solution to enhance all aspects of the business.

Other mid-sized organizations find an end-to-end solution by embracing software-as-a-service (SaaS) or outsourcing their needs via application service providers (ASPs). For SMBs whose leaders specialize in business matters outside IT, having a software company that provides maintenance, daily technical operation and support for the software provides a one-stopshop answer to their IT needs. According to the Yankee Group, a leader in technology research and strategic consulting, more than 60% of SMBs attribute lower expense rates and increases in productivity as driving factors for adopting SaaS.

#### Enterprises & small business: the similarities

In just as many ways as SMBs are different from enterprises, product managers can more successfully move products from enterprise to SMBs by recognizing similar ways in which business challenges can be solved in both organizational sizes and simplifying them. For example, a large corporation buys Business Process Management or BPM. There are key benefits from such a solution that could help a small business.

The conflict occurs in the two different versions of this product that are offered to SMBs. They're either upsold the expensive enterprise version by an overeager sales person who doesn't have their best interest in mind. Or, they're underserved by the bare bones version that only offers a BPM solution for SMBs as workflow. A smart product manager, however, will take the key benefits from the enterprise BPM system, evaluate it against the needs and requirements of an SMB and offer it as a sizable solution appropriate to the market—versus force-fitting the enterprise solution or offering just a watered-down version that won't produce a positive ROI for the business.

## Businesses

In a like manner, market influences impacting both enterprises and SMBs, such as globalization, increased competition, rising fuel and health care costs, far-flung workforces and telecommuters, are forcing companies to embrace technologies that will give them a competitive advantage, save time and money, and increase information accessibility and the value of their organization. While technologies have existed for some time to solve these challenges for enterprises, the same approach that led to the development of those products can be beneficial to re-sizing the solutions to solve SMBs' challenges. Product managers who can get more creative and are willing to educate SMBs' customers to take more responsibility for the implementation of new technology solutions that align with their business goals will help them stay one step ahead of an evolving curve.

#### Selling to SMBs is not just a trend

The traditional go-to-market strategy by software providers was to initially sell their technology to enterprises, and then work their way down to the middle market. It involved a long. well-thought out process of positioning analysis. This level of positioning sophistication was reserved exclusively for enterprise solutions. Until recently, the mid-market has not been regarded as tech-savvy or relevant enough to have a significant portion of the technology software market paying attention to it, much less figuring out how to market solutions specifically to their needs.

Selling to the SMB market is not a short-lived trend and should not be construed as a step down. SMBs are a considerable, marketed-to segment of the business population that's only

grown in numbers, influence and purchasing power in the last decade—and should be recognized as a legitimate, prospective segment of the business market. One factor driving the market significance of SMBs is size. There are more SMBs now than ever before. They are a major growth engine of the economy today with more than one million SMBs in North America that collectively employ 75% of the workforce.

As a result of the mid-market's force in the tech-buying landscape, product managers who may have only handled enterprise solutions in the past should not consider it a step down to sell to smaller organizations. According to a recent report by Forrester Research, an independent technology and market research company, the SMB IT spending outlook for 2006 is positive, with IT budgets expected to increase by 7.2%, up from 4.8% going into 2005<sup>1</sup>. Changes in marketing, communication and perception among product managers need to also reflect the increased significance of this market. SMBs no longer need to be spoon-fed watered-down technology terms. They understand the complexities of technology. It has become entrenched

has evolved. The market is too crowded with generic-sounding, similar solutions that demand differentiation. 
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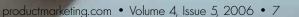
within their

organizations and

their reliance on and

comfort with technology

<sup>1</sup>"2006 IT Spending In The SMB Sector," Michael Speyer, Tom Poblmann and Katherine Brown, Business Technographics<sup>®</sup> North America, Forrester Research, April 11, 2006.





It also makes information easily

accessible to SMBs. Technology is

part of a business versus a luxury

or an expense that won't pay-off.

Additionally, compliance standards

are starting to affect smaller-sized

businesses. To effectively comply, SMBs

Technology also plays a role in keeping products and services sold by SMBs

are turning to technology solutions.

regulating larger corporations

competitively priced.

considered a necessity and an integral

Product creation: fitting mid-market business needs

> While some may say the Internet now makes the technology world go round, in the business of product management and marketing, it's still money that keeps product development going round and round. While enterprise deals discuss millions of dollars, SMBs talk dollars and cents. So how, you ask, do you make a comparable enough profit shifting from enterprises to the mid-market?

The answer can be found in how your new target audience succeeds as a business class: positioning, expertise, simplification.

Positioning. Change how your product is positioned in its marketing, as well as how its importance as a business necessity is perceived by the market. The steps you took to reach the royal-caliber enterprise IT decision-maker about your product may have involved expensive analyst expert reports, long research and development cycles, and costly marketing campaigns. Those steps and investment were necessary to break through the clutter, get past the umpteen gate keepers, close the million-dollar deals and complete the year-long implementation processes. While the sale price may have had seven digits, the cost of investment to get the sale may have had six, so the overall profit is, in scale, comparable to what can also be achieved with smaller-sized organizations.

One of the reasons product companies fight tooth and nail to compete for the enterprise dollar is because there are a limited number of enterprises. SMBs, on the other hand, are a dime a dozen, and they all need technology. And, the good news for product managers is that they are a much easier crowd to please, and while they require marketing and development to get the products that will help their businesses grow, the start-to-finish cycles are a 10-to-1 ratio from SMBs to enterprises in terms of turnaround time between product purchase and product managers moving onto the next customer.

**Expertise.** Many SMBs are successful because they focus on providing one solution, product or service, and are the best at their game and have the expertise to consult in specific communities for that resource. SMB owners will respect and seek out experts like themselves when making technology purchases that can improve their businesses. For that reason, product managers who are experts on what SMBs need as a business size and class (regardless of niche markets or verticals—from mechanics to small healthcare clinics to restaurants, etc.) will succeed in reaching this audience.

For example, across all business types, all companies have files, retain data and records and need a way to organize their information; or a way to manage their finances or meet compliance standards. A product manager aiming to succeed with SMBs should keep their specific tech-buying criteria in mind. Solutions for this market should carry all the following characteristics:

- Affordability. Solutions should be affordable based on the number of users, consultancy fees, customer service, and upgrades for that particular market. SMBs may also want to evaluate off-the-shelf software vs. costly, more expensive customized solutions.
- Flexibility. Solutions should be able to be used by a variety of industries and departments. Small businesses should also seek out technology solutions that are horizontal and are not limited to one particular industry.
- **Scalability.** A solution should work for companies of all sizes, within many departments or in just one department within an organization.
- Configurability. The software should offer SMBs the flexibility to create functions based on processes unique to each business' industry, office and employees. It should also be easy to configure overall according to the size, needs and requirements of each organization by individual users.
- Integration. The technology should integrate seamlessly with other business processes and enhance overall productivity and workflow within an organization.

**Simplification.** Enterprises may have required complex solutions for their complex problems because they were paying the high price tag. SMBs are the opposite. The simpler a solution is, in terms of not being convoluted or hard to understand how it will deliver business change or be implemented, the more cost effective it will be for the SMB budget, the more products will be sold, and the greater the ROI will result for both the vendor and the SMB customer.

For this reason, product managers should offer solutions that SMBs need to streamline their business and cut costs. This is the bottom line. Any factors that impede upon their business will result in negative buying factors, smaller deals and ultimately lost sales. Don't introduce more pain points for this market such as complicated configurations and pricey installations. SMBs don't take well to loss of time due to ramp-up and long implementation cycles. Product managers shouldn't cut corners to save time or money, but realistic goals should be kept in scope by remembering that SMB owners look for cost-effective technology that is up and running in less than a month.

Understanding the unique needs of the SMB market will help product managers appropriately and effectively tweak product strategy, ensuring this growing market will continue to embrace technology and the business world can continue to be inspired as SMBs become the new innovators.



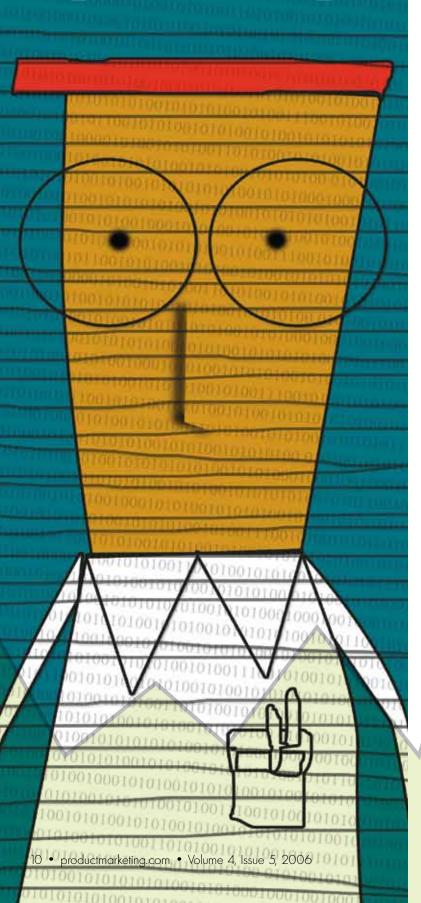




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## Top Ten Tips for Briefing



By Ron Exler

Briefing technology industry analysts is a learned art rather than a formulaic science. Each analyst and analyst group is different, as is each technology company. Regardless of the differences, however, the main objective is the same—to connect with the analysts so they understand the solution and the company enough to describe it accurately to others. While it appears straightforward, that result is an infrequent occurrence. Product managers usually have a role in analyst briefings and should do what they can to be sure the sessions are productive and valuable.

Much goes into properly briefing an analyst. However, this article groups the main recommendations into ten major areas.

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#### Know the analyst

Too many vendors jump right into their pitch too soon in the conversation. I have been on calls where vendors (or their representatives) did not even make proper introductions before diving into the slides. While the better analysts will interrupt and suggest introductions, some will not. However, proper introductions are important to both parties. The analyst needs to know the people on the call and their roles in the company, while the vendor should know something about the analyst so they can gear the conversation to their interests and coverage areas.

## **Industry Analysts**

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#### Know the analyst firm

There are now hundreds of analyst firms, large and small. Most people in the technology business know the profiles of the largest advisory firms. However, the others have their own unique clientele, competencies, focus, and histories. Just as vendors need to know the analyst before the briefing, it is essential to know the analyst firm. Since it significantly affects their perceptions, vendors should find out what the analyst firm does to make money. Many only do work for vendors. Others sell research reports. Some focus on quantitative research, some focus on qualitative analysis, and some do both. Analysts often serve specific vertical industry segments. Only a few focus on and talk regularly with end users who actually have the responsibility to take the technology and make it address the enterprise mission.

Vendors should learn about, be aware of these important variances of the analyst groups, and not discount the smaller firms *a priori*. In addition, proactive product managers can ensure the briefings reflect that understanding with, for example, proper customer stories.

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#### Get the right analyst

While it seems obvious, analysts sometimes are pulled into briefings when they do not belong there. It could be because the vendor's PR people contact the analyst group's schedulers to line up appointments. Neither of these parties is likely well-versed regarding the technologies and could easily schedule the wrong analyst. Therefore, the product manager on the briefing should always check early on to determine whether the analyst is the right one to brief. Vendors can learn about most analysts by looking at their biography on the analyst Web site and reading their quotes in the trade press. Not doing so shows a lack of preparation. Everyone's time is too valuable to have the wrong analysts on the call when a quick check can avoid a problem.

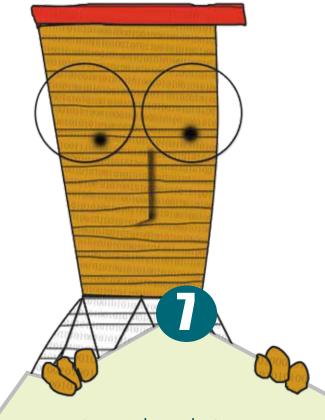
## Get the right people from your company

Once a vendor knows the analyst and its company, it is important to select the right briefing people. Issues to consider when deciding whom to have on a call are the analyst's seniority, level of technical expertise, client industry, and their coverage areas. However, too many vendor representatives are not necessary and can be counterproductive. Vendors should limit the group to two or three at the most and offer follow-up communications with others should an analyst ask something no one on the call can answer. The product manager often has the best perspective to select the right people for the call.



#### Prepare the analyst

Do not assume an analyst knows about your company or product. A briefing always goes better when the analyst has time before the discussion to learn about the vendor. This gives the analyst a chance to think through what the vendor does, perhaps by looking at the Web site or reading something about the vendor. Vendors or their public relations agencies need to provide analysts information ahead of time including links to recent media releases of significance. Also essential are the names and titles of people that will be in the briefing. If the first discussion the analyst has with a vendor lacks these prior information exchanges, the call is more awkward, more time goes toward background discussion, and the analyst is less likely to be prepared to add much value.



#### Let the analyst talk

While the purpose of a vendor briefing is by definition for vendors to tell analysts about their wares, good analysts have something to say and deserve a listen. Too many vendors plow through dozens of slides with their scripts and end a call without the analyst having said much. Again, the better analysts will not let this happen; they interrupt if they have questions or comments. However, vendors should pause often and ask whether the analyst has something to say. As an independent outsider that often interacts with many end users, service providers, and other vendors, the better analysts provide valuable insights. Contrary to common perception, analysts try to add value on their calls whether or not the vendor is a paying client. Through listening, vendors can determine potential analyst value that might result from a more extensive relationship.

#### Respect the analyst's time

Like product managers, analysts receive and answer many e-mails and attend many meetings. If you run across an analyst that is not busy, do not waste your time; the best analysts are very busy. In addition to tracking hundreds of vendors like you, they are answering client inquiries, doing research, giving presentations/webinars, working on consulting projects, and writing reports.

Many analysts spend a lot of time on vendor briefings but might prefer to be doing the other work. This is because there are so many vendors to know, and analysts and vendors believe they need briefings to understand each other completely. Paying vendor clients expect analysts to attend regular briefings and announcements, which for the largest vendors can total one a week for one analyst. In addition, analysts often schedule calls back-to-back. Therefore, it is essential to schedule only the amount of time needed and abide by the schedule by starting and ending on time. Make sure technology works; delays around incorrect Web conferencing logins, for example, are avoidable.



### Ease up on the PowerPoint® slides

Nothing makes an analyst groan louder than when they become aware that the briefing presentation contains more slides than there are minutes in the briefing appointment. Vendors need to focus on conveying a message. Too many slides leave the analyst confused and not completely sure what in the massive deck is important. The best briefings supplement the presenters, not vice versa. Delete slides down to only those essential and where possible, work in product screens or even short demos. Good analysts want to see the product in action; of course, vendors should keep demonstrations under control. Product managers also want to be sure that there is time for questions and discussion to learn what the analyst thinks about what you are saying.

Edward R. Tufte, the respected communications expert, wrote, "The practical conclusions are clear. PowerPoint is a competent slide manager and projector. But rather than supplementing a presentation, it has become a substitute for it. Such misuse ignores the most important rule of speaking: Respect your audience."

#### Follow up with the analyst

It is amazing that after a vendor expends extensive effort to find and brief an analyst, nothing happens after the call. Vendors should build the relationship by keeping analysts aware of news and asking for their opinions or ideas. It is a fallacy that analysts will only give ideas to paying clients. While paying vendor clients receive more involved interactions, most analysts are willing to have meaningful discussions with non-paying vendors after a briefing. While the experience is fresh, product managers should communicate with the analyst, as it will make the vendor more memorable, and improve the connection—which is the overall objective of the briefing in the first place.

#### **Summary**

Product managers have a lot at stake in analyst briefings. Analysts influence people in the business and it is important to be sure they have accurate perspective on your company and solutions. Even when not directly responsible for briefings, product managers should ensure they go well. By following these ten tips, vendors can make briefings much more valuable and turn time spent into time well spent.



### Prepare a proper agenda and follow it

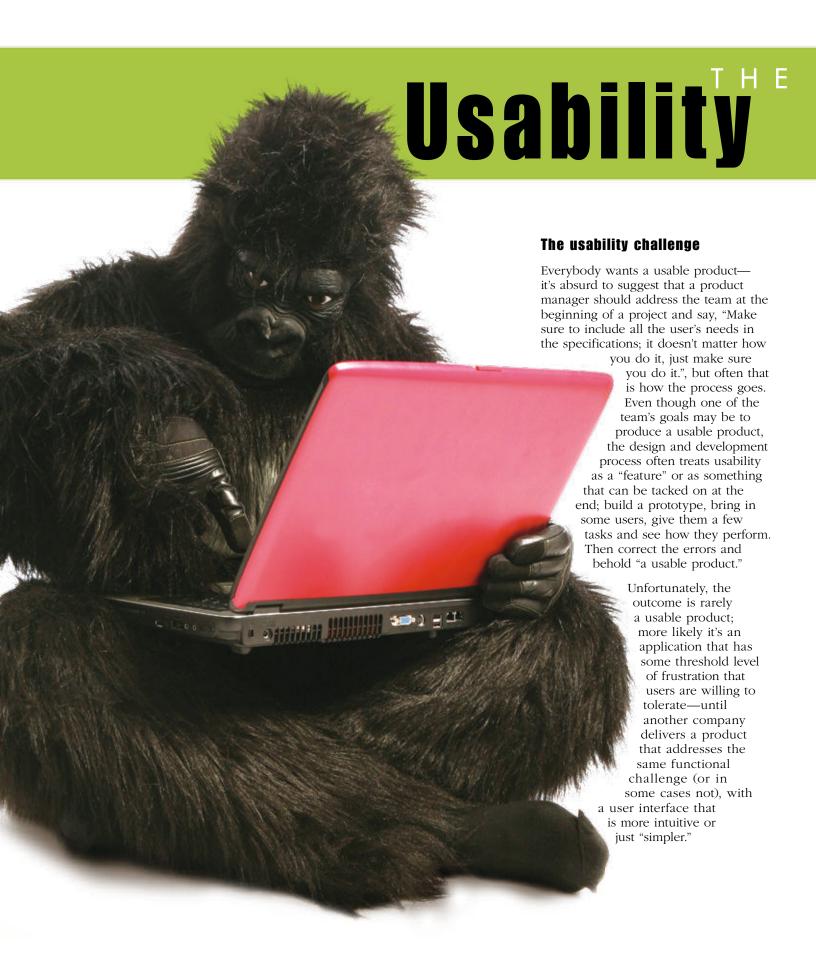
After accomplishing the above preparation, the product manager can help prepare the meeting agenda. When possible, the agenda should go to the analyst ahead of time for approval. While vendors do this infrequently, the agenda provides a tool for vendors and analysts to keep the briefings under control and help ensure they discuss the important topics.

Too many vendors focus exclusively on the technology. This limited view leaves analysts without proper perspective. It does not take a lot of time to provide the valuable backdrop of non-technology subjects. Product managers can help ensure the briefing also covers the company, customers, financials, investors, and management.



Over the past 20 years, Ron Exler has set up and participated in hundreds of vendor analyst briefings on both sides of the table. Ron is Service Director, Robert Frances Group, an executive advisory service. He has been an industry analyst with RFG for the past seven and one-half years. Before that, he worked in several software companies in analyst relations, marketing, and product management. E-mail Ron at rexler@rfgonline.com

The opinions expressed in this article are solely those of the author and do not necessarily represent the opinions of Robert Frances Group.



#### KEY TO A PRODUCT'S SUCCESS

By Kipp Lynch and Simon Gillmore

This "usability challenge" is faced by many companies that are heavily reliant on their software products to attract new customers, build loyal communities of users, improve their client's effectiveness, and generally help a business be better at what it does. In each case, the launch of a product that has not considered the "usability factor" poses a significant risk to the business, and provides an opportunity for competitors to gain an upper hand.

#### I spent time researching what the user wanted, so why isn't my product scoring high in user experience/usability?

Customers are rarely quiet and, if given the chance, have a lot to tell a company that is willing to listen. Amidst all that chatter—the help desk logs, focus groups, and site visits—a product manager might find some gems that point to features for the next generation product. What will be missing is how to make the product more usable. Undoubtedly the customer will often say, "it would be nice if this were a dropdown instead of a textbox" or "vou really need to add more keyboard shortcuts" but those incremental changes only turn an unusable application into a tolerable one. In other words, all customer data is not equal-work practice and improved usability is not gathered in the same manner that one captures the details within a functional specification.

Usability is not an end product; rather it should be thought of as an emergent property. Good usability does not come from knowing where to place buttons, or even how to display complex information. It arises by innovating on current work practices and integrating that with potential product requirements. In other words, usability starts from the beginning, and in the beginning there is the customer.

Current approaches to user interface design are a combination of guidelines and seat-of-the-pants decision-making. Design decisions are usually made on an ad hoc basis with problem analysis performed on the fly and from wildly varying empirical bases. What we generally have is TLAR, or That Looks All Right to me. We ask our co-workers, the marketing department, defer to the boss, the client, and fiddle around on a trial-and-error basis until the results meet some, usually unspecified, criteria. Various goals often compete. Technology and time constraints determine much of the decision making, and there is usually very little real information to guide decision-making. Many of the changes take place in the design and iterate phase, with scant empirical support for changes.

This is very apparent during design reviews. In a typical review, especially during expert evaluations, team members argue their points based on what is more logical. But often logic is not the proper measure for determining how an application should behave. Real people rely on rapid categorization and pattern recognition not "if A then B." Though the intent, again, is to create a usable product, the end result is often one that makes sense to the development team, but not to the actual end-users.

In the design of complex applications, an in-depth understanding of the user population is critical. Unfortunately, the majority of projects find ways to circumvent the process. Knowing others is hard work—even in our everyday life, we have ways of cutting corners. We jump to rapid conclusions about the behaviors and motivations of others, which is an efficient tool for decreasing our cognitive load, but not a good method for creating a usable product.

During the product development lifecycle there are two major obstacles to creating a usable product; information degradation and responsibility transfer. As information is translated into various forms; from customer workflows and needs, to product requirements, use cases, technical and User Interface (UI) prototypes, to the final product, it undergoes both information loss and translation. Some of the changes are positive and are the result of refining the product, but many changes result from the need to simplify the design process and get the product to market.

Similarly, responsibility transfer comes as each department within a company has their own specific goals/milestones that need to occur during product development. Though lip service may be given to the idea that the product must solve the user's problems, immediate department needs often supersede this. Marketing wants a usable product, and the UI team starts off with that goal, but as time-pressure mounts, the UI design suffers and responsibility still sits with Marketing, who, as the development process continues, takes on less and less of a role. By the time coding begins, the developers are concerned with creating innovative error-free code, not necessarily a usable product.

#### Addressing the usability challenge

Contemporary usability practices include augmenting the standard marketing approach with a specialized contextual method of understanding the user and their needs.

This approach begins with observation and contextual analysis of the user wherein the user is interviewed in their natural environment and asked to share day-to-day activities as they relate to the product being designed. This observation/interview method provides a clear understanding of the user and their needs as well as key areas where a user is struggling to effectively do their job. The output from this process is provided to a User Experience (UX) analyst who uses their expertise to synthesize this information, develop user model(s) and produce design recommendations.

The output from the observation and analysis phase is then applied as an input to the software design and development phase. This input is provided in the form of user requirements, an approved interaction model and high-level conceptual design(s). The ability to carry responsibility for the user between the analysis and design phases is a significant step in determining a successful product outcome.

During the design phase, it is critical that proposed concepts are validated with users. This validation is used to ensure that the direction for the product UI is meeting the needs of the user and triggers the commencement of detailed design and development.

Toward the end of the development phase, evaluation of the (almost) completed product begins. This process involves the usability testing of the beta product, during which any task-focused issues can be addressed and overall usability improvement can be determined prior to release.

#### **Justifying usability**

Contemporary approaches to good usability can help produce a better product; however, it also makes good business sense. Implementing a product development process that includes usability tasks and deliverables will develop an enhanced appreciation of the user, address the challenges posed in this article and deliver the following business benefits.

#### Reduced time to market

Methods of product development that do not adopt a pre-emptive approach to usability rely on a laborious process of gathering market feedback to refine the prototyping of a product. Even when some form of usability testing (e.g. expert evaluation or scenario-based usability assessment, with real users) is included in the development process, the tendency is still to use a prototype approach and iterate until user feedback is deemed positive enough to launch.

Establishing usability as an impartial advocate that supports every phase of the product development cycle ensures that users' needs and expectations are understood.

Translation of user needs, so that appropriate solutions are implemented and validated prior to a product being released to market reduces the number of delivery cycles to bring a product to market.

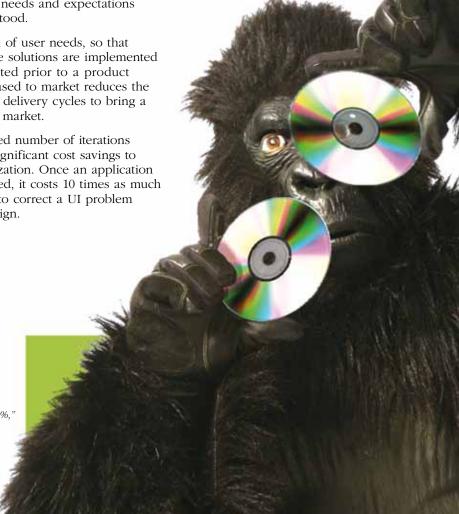
The reduced number of iterations provides significant cost savings to the organization. Once an application is developed, it costs 10 times as much as it does to correct a UI problem during design.

#### Reduced support

One of the largest cost savings can be realized by a significant reduction in the support the product requires when it reaches the market. In 2004, McAfee® reported a 90% reduction in the expected support of their product by implementing an innovative method of user interaction (i.e. a dashboard-type management console).\* The company attributed this improvement to the enhanced product design and the significant role that usability played in the need for user help requests.

#### **Brand value**

Increasingly, the impression of a company's brand is linked to the usability of its products. Some companies differentiate themselves by improving usability of existing products, and others base their entire brand on product usability. Whichever the path, when an organization finds an innovative way to solve a problem, the result positions them as an innovator and brings value to the brand.



\* "Clean, cutting-edge UI design cuts McAfee's support calls by 90%," article located at www.softwareceo.com/com070604.php

Apple® demonstrated their UI innovation skills back in the early Apple vs. PC days with a graphical user interface—a whole new approach that set the "tone" for Mac® advocates today, "Mac's are simply more easy to use."

It is not only innovative design that can help a company enhance its brand value; a usable product should also strive to provide more relevant or useful output based on a user's need. Google™ demonstrated how this can be done by entering an otherwise commoditized market with a product that was more user-centric. Its success comes from taking the same input as its competitors and producing a more desirable output. The resultant brand is an unquestionable success.

In each of the cases above, concern for the user is key, whether it produces a smarter or easier to use interface, the result is a great user-centric design.

#### Competitive advantage

In a competitive and commoditized market, companies need to be able to differentiate their products. Usability provides a tangible way of addressing this differentiation in a variety of ways, some of which include; bringing a more usable product to market first, patenting a user-centric design, or simply producing an easier-to-use product to which customers will gravitate.

Smaller, more agile firms in rapid growth industries (e.g. Biotech) are placing a greater emphasis on usability, allowing them to reduce time-to-market with products that address existing problems in established markets.

For example, FlowJo™ is a software product that is having a disruptive effect on the flowcytometry market. It was developed by a company that doesn't make Biotech instrumentation, but it has gained significant market share due to its usability. Incumbent organizations that struggle to incorporate usability into their software products lose a key differentiator for their combined instrumentation/software products. The result; competitors instrumentation (in a commoditized industry) when partnered with the FlowJo product are not only competing, but are taking market share.

#### **Usability support**

There isn't a simple magic potion that can be applied to a product to ensure good usability, but there are some key pointers that will go a long way in helping to build a usable product.

- Engage usability expertise if you are serious about improving your product and need support to deliver enhancements in design or greater value to your evolving user community.
- Employ actual/real users. Complex applications require domain-specific knowledge. Though it might be easier to enlist someone from another department to run through a quick user test, the results are likely to be questionable.
- Include representatives from all critical departments. Too often, testing and user-research limits the participants to UI designers and Marketing. Developers, business analysts, and technical leads should play an active role in the usability process.
- Test early and test often. Usability testing should continue throughout the design and development cycle.
   The most common mistake is to test an application when it is near completion—at a time when changes are most costly.

Consideration for good usability is not required to deliver a product to market, but it is required to bring a good product to market. It also helps you manage the process of delivering users' needs and is cost effective. A good usability consultancy will help you balance the prioritization of usability vs. the cost of delivery. They will also manage the entire process for you. The only thing missing is the desire to provide your user with what they will inevitably want.

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## for **Scheduli** Softwar **Delivery**

By Scott Sehlhorst

#### Product or project management?

When we hear scheduling, we immediately think project management. But when someone says planning, we hear product management. If you've heard of timeboxes, you're probably thinking of project management—so why have an article in productmarketing.com™?

Product management is strategic. Project management is tactical. Both disciplines deal with schedules, plans and releases. As product managers, we need to communicate a release schedule to our stakeholders. We need to build return-on-investment (ROI) forecasts based upon what we deliver and when we deliver it.

Timeboxing is a technique for organizing software delivery—and it can be used for planning or scheduling. In this article, we talk about applying timeboxing as a planning tool, but the techniques also apply to scheduling.

Planning belongs to the product manager, but creating a plan requires collaboration between the product manager and the project manager. Stakeholders have inputs in the form of prioritization.

#### Benefits of incremental development

Incremental development is rapidly becoming the standard way to deliver software. Incremental "development" is not the same as incremental "delivery."

Incremental delivery is, by definition, making partial deliveries of the software throughout the development process (as opposed to waiting until the end of the project to deliver the complete solution).

Incremental development is the process of breaking down the delivery of the complete solution into manageable chunks. A team could use incremental development to "build" the software repeatedly throughout the process, without ever delivering the software to the customers.

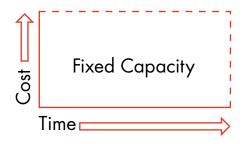
Agilists and barrel-riders (over the waterfall) are still debating about the benefits of incremental delivery. Barrel-riders may say "not for this project" about incremental delivery, while agilists are likely to say "not for any project" about waterfall delivery.

Incremental delivery requires incremental development. A waterfall process can still benefit from incremental development. While an incremental delivery process is required to get the massive benefits of early customer feedback, either approach will get the following benefits from incremental development:

- · Earlier insight into delays and problems—allowing adaptation of the plan and schedule
- Better risk identification and mitigation—early knowledge allows for more effective solutions
- Greater clarity about project status—at each delivery milestone we know the status of that delivery, instead of compounding delays until the end

#### What is a timebox?

A timebox is a fixed unit of development capacity. An easy way to visualize a timebox is as a two-dimensional graph. Along the vertical axis is the cost of the development team (per unit time). Along the horizontal axis is time. The longer the iteration is, the wider the timebox becomes.



The important thing to notice is that with Cost and Time fixed, the capacity of the timebox is fixed. There is only so much that can be accomplished with a given team and a given amount of time.

Note the similarities between this representation and the venerable iron triangle.

The classical way to visualize project constraints is by visualizing a triangle, where cost, time, and scope represent the three sides of the triangle. Any request to replace one of the sides requires at least one other side to be lengthened, or quality will suffer. For example, adding scope requires us to add resources in order to achieve the previous schedule.

While the triangle metaphor is clear, it doesn't completely ring true.

The visualization of the timebox more intuitively represents the relationship between cost, time and capacity (scope). Further, it allows us to more explicitly demonstrate the impact of scope changes on quality, cost, and time.

To use our timebox visualization, we have to define the units of work that fill up the timebox.

#### A unit of work

A unit of work represents both the functionality that is delivered and the quality of the functionality. This is the concept that many managers struggle to grasp. People often think of "function" as the deliverable and "quality" as a characterization of the deliverable. This representation can lead to dysfunctional decision making. Any effective approach to managing projects must recognize that quality and functionality both consume capacity.



To deliver the functionality that supports any particular requirement, we can think of the unit of work as having two tightly-linked components: implementing the functionality and implementing the functionality with good quality. Poorly written code, for an isolated requirement, can take less time than well written code. The *extra* time spent doing it right is part of the *quality* component. Writing tests and documentation (when appropriate) are also part of the *quality* component.

Investments in quality in the early stages of a project will have a positive impact on the time it takes to deliver future units of work. With an incremental development paradigm, we are assuming that those benefits, when realized, will be implicitly represented by the time estimates for future work. We won't depend upon those benefits to impact deliverables within the current timebox.

When planning for incremental delivery, each unit should represent something that the customer can use as soon as it is delivered. At a minimum, a work unit would represent all of the functionality to support a single use case. By delivering in use-case-sized units, we enable our users to provide us with feedback about the software.

The largest scope that should be represented in a single unit is a market requirement. We've defined our requirements to be both atomic and complete. Therefore, nothing less than or more than a single requirement can be delivered and achieve value. Delivery of a requirement allows our stakeholders to provide us with feedback about the ROI.

#### How big should a timebox be?

A timebox should be anywhere from two to six weeks, but there are some exceptions. Smaller, more tightly knit teams can operate with shorter timeboxes. Teams with less releaseprocess overhead can operate costeffectively with smaller timeboxes. There's a good post and discussion about how long it takes to make timeboxes at The Pragmatic Architect (www.thepragmaticarchitect.com/). Mishkin Berteig also has a good post, with some differing opinions of identifying the pros and cons of short iterations (www.agileadvice.com/ archives/2006/01/the pros and co.html).

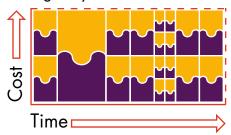
One very effective approach to minimizing release overhead is to apply continuous integration techniques to the build/test/release cycle for the project. An introduction to continuous integration can be found at Tyner Blain (http://tynerblain.com/blog/2006/05/08/foundation-series-continuous-integration/).

We think a good way to approach it is to start with a four-week cycle and extend or shorten it based on stakeholder preference balanced with the reality of our development environment. For larger teams, we usually end up with a four-week cycle. The length of the cycle can be changed as we get feedback on our process efficiency.

#### Filling a timebox

We can fill up a timebox with the work-units representing several requirements. Ideally, they are the highest priority requirements. Different requirements will take different amounts of time to implement. The timebox below shows the "original" schedule.

#### Originally Scheduled Timebox



We see that every work unit has both *functionality* and *quality* components. We don't want to intentionally plan to deliver functionality without quality. Also note that some units are larger than others. This represents requirements with varying implementation estimates.

Interdependence between tasks is where the project manager helps the product manager select requirements to include in a particular timebox. We treat interdependence (such as user-access-controls being dependent on an authentication system like LDAP) as a constraint, and do not explicitly represent them within the timebox.

There are obvious benefits to using timeboxes in order to orchestrate incremental development. Where the timebox really shines is when the requirements change during the course of a project.

#### Dealing with new requirements

When we receive new requirements, they are represented as changes—adding, removing, or modifying existing requirements. When the changes have no impact on the implementation estimate (or on other requirements) we don't have to make any changes to the schedule. When requirements are removed, we have an easy problem to solve—which, if any, requirements can be "pulled forward" into the timebox?

When new requirements are added, or changes cause the implementation estimates to grow, we have to adjust our plan/schedule to make room for the new requirements.

There is a two-part article at Tyner Blain about scheduling requirements changes (http://tynerblain.com/blog/2006/04/10/scheduling-requirements-changes-part-1/). Check it out to improve your ability to manage those changes while staying sane.

For this article, however, assume that changes are being requested for the next timebox—one that has already been planned, but has not yet begun.

Adapting the plan to these changes requires one of four approaches. We can present these approaches as alternatives during the change-request approval process. Or, when change is inevitable, we can use any of these four approaches to make it happen.

- **Sacrifice quality** to increase functionality
- **Increase cost** to increase functionality
- **Increase time** to increase functionality
- Delay some functionality to deliver other functionality

## Sacrifice quality to increase functionality

We can, and too many development teams do, sacrifice quality to deliver extra functionality without impacting costs or delivery dates. While not generally advisable, it would be naïve to pretend that this option doesn't exist. Only by understanding it can we choose not to use it.

When we choose the sacrifice quality approach, we incur a code-debt. A code-debt is our project taking a loan against our code-base in the short term to resolve otherwise impossible constraints (no extra budget, can't miss the deadline, can't delay anything). Poor quality code comes with a long-term cost. It introduces risk into the delivery. This risk manifests as a negative expected value (think of it as the interest on the loan). In layman's terms, the expected value is a calculation that serves as the best prediction of a future value. In financial gobbledygook, it is the probability-weighted average value of all possible outcomes.

Poorly written code also makes it more expensive to write new code in the future (think of this as the principal on the loan). Until we invest time to fix the quality of the code (refactor, test, etc.), we will continue to incur costs.

The following diagram shows what this would look like. We have "removed" quality from four previously scheduled requirements, in order to add two "new" requirements—also with poor quality.



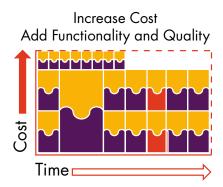
We have sacrificed quality on some requirements (work components) including the new (red) requirements in order to squeeze them into our timebox. This allows us to deliver previously committed *functionality* with previously established costs and scheduling. It does not allow us to deliver previously committed quality levels. One reason that many managers perceive this as a loophole is that quality levels are often not committed for projects in advance.

## Increase cost to increase functionality

Another approach is to increase the capacity of the implementation team to meet increased demands. This can mean extra hours for the current team, re-tasking people from other projects to join the team, or bringing in contractors to temporarily increase capacity.

Brooks' law (http://en.wikipedia.org/wiki/Brooks'\_law) states that adding people to a project that is running late only increases the delays. However, we are looking at the schedule for a timebox that has not yet begun—we are not trying to recover a delayed project. Therefore, Brooks' law does not apply in this case.

The following diagram shows that by increasing the cost (and shuffling requirements around visually) we can deliver more functionality without sacrificing quality.

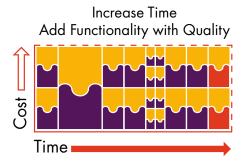


We have increased the height of the timebox visually, allowing more room to make space for the new requirements.

There are always inefficiencies when adding capacity. If we add hours to existing workloads, people get burned out. If we add people, there is overhead in helping them get up to speed. The benefit of this approach is that we don't sacrifice quality or timing to be able to deliver the new requirements. The downside is that we don't get 100% efficient use of people.

## Increase time to increase functionality

When we have the ability to do so, extending a particular release may make sense. We can extend the period of a single timebox; say from four weeks to five weeks, to incorporate additional functionality. The following diagram shows how a time extension creates more *capacity* for implementing the requirements.



Deadlines are often arbitrary. We should always explore the possibility of delaying the end of the timebox. But don't extend the timebox more than 50%, or you lose the benefits of having incremental delivery.

"Incremental delivery is a key component of most software projects today—it allows us to deliver the most valuable elements of a system first, which allows our customers to start getting benefit from the system earlier. As additional features are developed, and additional use cases are enabled, they are delivered to the customers, who get incremental value from those features. This can have a significant impact on ROI projections for a project—and can be the difference between getting the deal and losing it."

Why Incremental Delivery is Good, Tyner Blain

This strategy is most often used when changes to requirements increase the implementation effort, but re-organizing the delivery plan is too complex. This approach also makes a lot of sense when the anticipated value of the requirements in the current timebox is too high to delay.

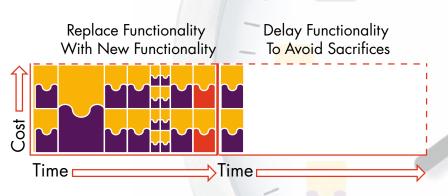
## Delay some functionality to deliver other functionality

Many times, there are political ramifications to delaying the release. Unfortunately, politics trumps process. Budget constraints are more common than they were 10 years ago when the dot-com boom was starting. When faced with no ability to extend the time or increase the cost, we must make a decision. Either sacrifice quality, or delay other functionality. Since we've prioritized our requirements based on the value they provide to the business, it is usually easy to determine what to delay.

First, we identify which previously scheduled requirements are lower priority than the new requirements. Then we understand which of those requirements has the lowest cost of delay. After confirming with our stakeholders, we delay those requirements to the next iteration as shown in the following diagram.

#### Summary

We've never had a project where we didn't have to address scope creep (and other changes to requirements for an ongoing project). Timeboxing gives us the ability to easily manage those changes. It also presents us with a very clear way to visualize and communicate the alternatives represented in the four methods.



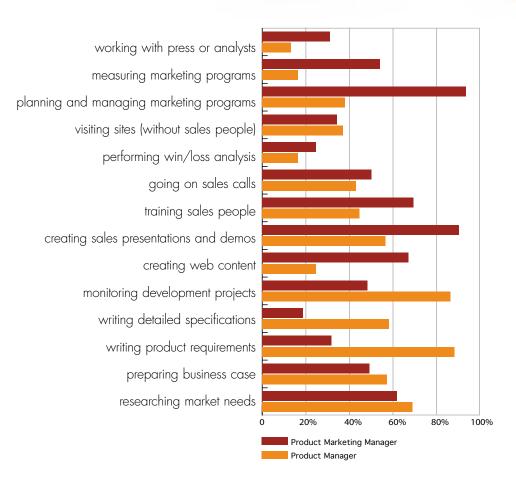


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## Coming Soon. 2006 Product Manager and Marketer Survey

## What is the difference between product management and product marketing?



There's an on-going discussion in virtually every company about titles and responsibilities in product management. This graph from our 2005 survey (www.productmarketing.com/survey/2005) shows that, in practice, these titles have much overlap.

Each year, Pragmatic Marketing® conducts a survey with product managers and marketing professionals. Our objective is to provide information about compensation as well as the most common responsibilities for product managers and other marketing professionals.

We'll be conducting the survey in November so watch for an announcement at www.PragmaticMarketing.com. This is your chance to have your say!

# Case Studies Top Eight Ways to Get them Done

By Steve Hoffman

Most enterprises realize the value of effective case studies (also known as success stories). As Mark Twain once said, "Few things are harder to put up with than the annoyance of a good example." Yet many product managers struggle with the task of actually developing them. This article describes eight proven techniques for successfully developing case studies.

#### How to convince the customer

In many enterprises, the number one factor that limits development of case studies is the customer. To help convince a customer to agree to sign their name to a case study, explain the benefits they will realize. For example, remind the customer that they can show the completed case study to their senior management or board of directors—demonstrating that they are innovative, solution-oriented. and focused on business benefits. Most customers strive to find positive developments to report to higher management. Case studies are one of these positive developments. Because of this benefit alone, many customers actually are pleased with the opportunity to document their use of an enterprise solution that solves a business problem.

Another way to help convince the customer is to summarize the approach that will be used to develop the case study. Emphasize the following aspects: 1) they will be able to review the document and change or remove any text before it is published, 2) they can change their mind and rescind permission to publish the story at any time prior to publication, 3) the process will not require a major time commitment on their part. Another compelling part of the approach occurs at the end of the process: Tell the customer that they will receive a pdf file, printed copies, and a framed hard copy of the final case study as a form of thanks. This framed copy, hanging on the wall of the customer's office, will become a symbol of the successful relationship between the customer and the solution provider. Over the years, colleagues, co-workers, visitors, and others will admire the achievement.

#### How to work with customers to ensure success

Customer involvement is much more than just the initial "ok" to proceed. Follow these tips to ensure a positive customer experience and help ensure successful completion of the case study:

 Involve the customer throughout the process. Involving the customer throughout the case study development process helps ensure customer cooperation and approval, and results in an improved case study. Obtain customer permission before writing the document, solicit input during the development, and secure approval after drafting the document.



- Write all customer quotes for their review. Rather than asking the customer to draft their quotes, writing them for their review usually results in more compelling material.
- Request high-level customer involvement. Early in the process, recommend that a high-level manager or executive sign their name to the document. Including such a name and title on the case study increases its credibility, and can benefit the manager as well, in the form of recognition for a job well done.

• Use customer photos. Ask the customer if they can provide photos of personnel, ideally using the solution. They need not be professionally done; in fact, "homegrown" digital photos sometimes lead to surprisingly good results and often appear more genuine. Photos further personalize the story and help form a connection to readers.

#### How to agree on a common organization

Agreeing on a common organization for the case studies—a format that is workable across all case studies to be developed—poses challenges. Using a consistent organization is highly recommended, but different product managers may suggest various approaches. Regardless of length, the time-tested, most effective organization for a case study follows the problem-solution-benefits flow. First, describe the business and/or technical problem or issue; next, describe the solution to this problem or resolution of this issue; finally, describe how the customer benefited from the particular solution. This natural storytelling sequence resonates with readers.

In most client engagements, a problem, challenge, or at least an unrealized opportunity exists; without one, the client probably would not have adopted the "solution." And of course, all successful client engagements or sales of products or solutions result in at least qualitativeand in many cases, quantitative benefits.

#### template is also recommended. A template serves as a roadmap for the case study process, and ensures that the document looks, feels, and reads consistently. Visually, the template

Establishment of a document

helps build the brand; procedurally, it simplifies the actual writing. Before beginning work, define 4-6 specific elements (e.g. title, subtitle, quotation, problem, solution, benefits) to include in every case study, formalize those

productmarketing nems, alklumack, issume m2006 •

#### How to get started

The most prominent parts of a case study (e.g. the title, subtitle, and benefits bullets) are often the most difficult parts to write (or get right). The best advice is to start with a bang. Use action verbs and emphasize benefits in the case study title and subtitle. Include a short (less than 20-word) customer quote in larger text. Then, summarize the key points of the case study in 2-3 succinct bullet points. The goal should be to tease the reader into wanting to read more.

#### How to quantify benefits

No single element in a case study is more compelling than the ability to tie quantitative benefits to the solution. For example, "Using Solution X saved Customer Y over \$ZZZ,ZZZ after just six months of implementation;" or, "Thanks to Solution X, employees at Customer Y have realized a ZZ% increase in productivity as measured by standard performance indicators." Quantifying benefits can be challenging, but not impossible. The key is to present imaginative ideas to the customer for ways to quantify the benefits, and remain flexible during this discussion. If benefits cannot be quantified, attempt to develop a range of qualitative benefits; the latter can be quite compelling to readers as well.

## How to handle highly tailored solutions

Even highly tailored solutions and services can be described in an effective case study. This can be accomplished by writing first about a more general problem in the industry, then transitioning to the specific problem

that the customer faced. In fact, this approach is recommended for all case studies.

In the problem section, begin with a general discussion of the issue that faces the relevant industry. Then, describe the specific problem or issue that the customer faced. In the solution section, use the opposite sequence: describe how the solution solved this specific problem; then indicate how it can also help resolve this issue more broadly within the industry. Using this approach, beginning more generally draws the reader into the story. Then, offering a specific example demonstrates, in a concrete way, how the solution resolves a commonly faced issue. And concluding more generally allows the reader to understand how the solution can also address their problem.

## How to find the time (and the right writer) to do it

A common logistical limitation is finding adequate staff time to make the case studies happen. And even with the best plan, a case study is doomed to failure if the case study writer lacks the exceptional writing skills, technical savvy, and marketing experience that these documents require. In many cases, a talented writer can mean the difference between an ineffective case study and one that provides the greatest benefit.

When marketing staff time is limited, many enterprises outsource case study writing. Some qualified case study writers can also interview the customer to gather information for the case study. Because case study writing is a discrete, highly outsourced task, consider hiring a professional to quickly develop effective case studies.

#### How to afford them

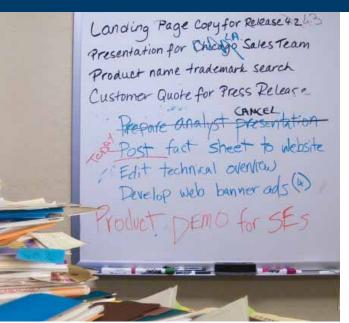
Enterprises usually can't afford *not* to develop case studies. Their competitors may be using the power of example effectively, thus gaining an advantage. Moreover, case studies are generally not expensive to write. Four two-page case studies cost about as much to write as an average-length white paper. Further, in some instances, a set of effective case studies can pay for themselves even if they only lead to a small number of sales.

#### Conclusion

Managing the process of developing a case study is not easy. On the other hand, well-planned, well-written case studies can provide prospects valuable descriptive insights that can impact their decision making. Rather than presenting a business-case scenario, case studies present real-world examples, and include important information on why a customer chose a product or service, how it was implemented or integrated into their business, and the results or benefits the customer obtained. For prospects needing verification that a vendor's solution can successfully address the types of business challenges they are faced with in their particular industry, case studies can provide them this proof. om.c



Steve Hoffman is President and CEO of Hoffman Marketing Communications, a business and technology writing company specializing in strategic white papers, sales guides, and marketing collateral. Hoffman writers offer a unique combination of technical savvy, marketing skills, and writing talent to translate the most complex technologies into accessible prose that bolsters your sales and marketing efforts. Contact Steve at steve@boffmanmarcom.com. Claim your Hoffman-authored free best practice articles on optimizing the effectiveness of case studies by visiting www.boffmanmarcom.com/seeourwork/casestudies.php





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March 12 - 13 (14)* Research Triangle Park, NC
March 19 - 20 (21)* San Jose, CA
March 26 - 27 (28)* Bedford, MA

<sup>\*</sup>Day 3 is Requirements That Work

#### **Requirements That Work™**

Provides a repeatable method for product planning resulting in a Market Requirements Document that others read and use. Establishes clear roles for product planning team members and teaches a process that creates an executable plan that delivers solutions that sell.

November 10 Atlanta, GA
November 15 Burlington, MA
November 15 San Francisco, CA
December 6 Reston, VA
December 13 Boston, MA
December 13 San Francisco, CA
January 12Bedford, MA
January 18San Francisco, CA
February 8San Francisco, CA
February 16Vancouver, BC Canada
February 23 Bedford, MA
February 28San Francisco, CA
March 9Toronto, ON, Canada
March 14Research Triangle Park, No
March 21San Jose, CA
March 28 Bedford, MA

#### **Effective Product Marketing**

Delivers practical tools and processes for product marketing, industry marketing and marketing communication managers who want to improve their strategic contribution and align with the sales organization. Learn how to build a repeatable process to develop, execute and measure go-to-market strategies that ensure product success.

November 9 - 10 ...... Boston, MA

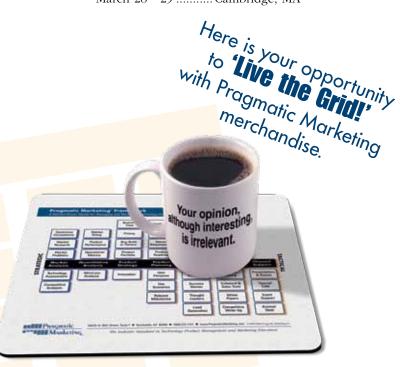
December 13 - 14.... San Francisco, CA

January 18 - 19 ....... Cambridge, MA

February 8 - 9 ...... San Francisco, CA

February 20 - 21 ...... Toronto, ON, Canada

March 28 - 29 ....... Cambridge, MA



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