the Pragmatic

SPRING 2021
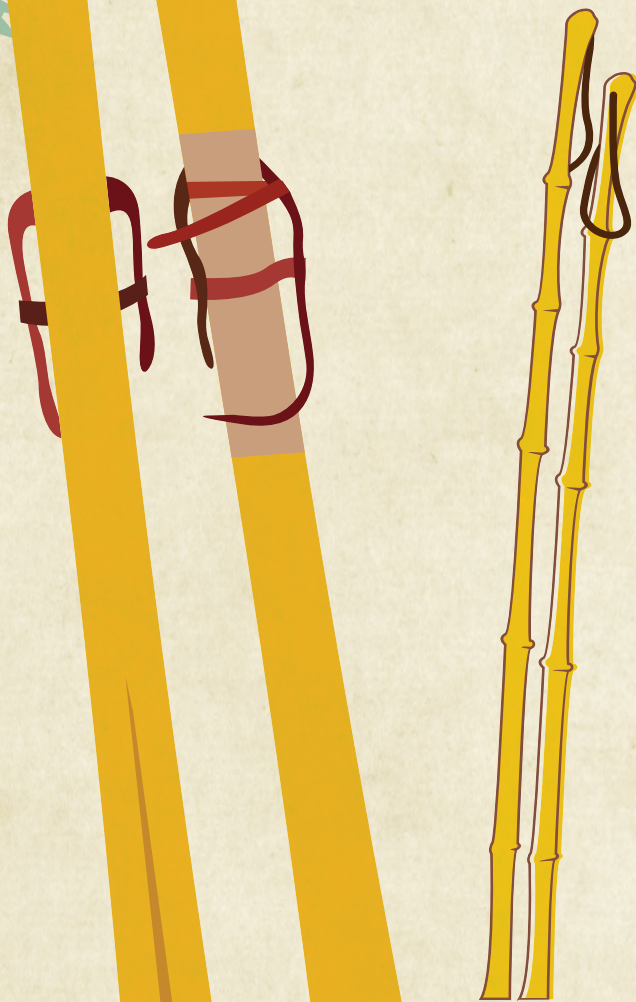
20 YEARS AGO,

ON A COLD FEBRUARY WEEKEND, AN ECLECTIC GROUP OF FORWARD-THINKING SOFTWARE ENGINEERS GATHERED AT A UTAH SKI LODGE IN SEARCH OF A SOLUTION.

WHEN THEY EMERGED FOUR DAYS LATER, THEY HAD CRAFTED ONE OF THE MOST INFLUENTIAL DOCUMENTS OF THE MODERN ERA: THE **AGILE MANIFESTO**

AGILE +20

Ten years and counting

This year marks the start of my tenth year here at Pragmatic. And, much like when I reflected back on the 20th anniversary of the Agile Manifesto, there is much that has changed—from the breadth of our offerings and delivery formats, to our name.

But, in many ways, much has also stayed the same: our passion for the product profession, our amazing alumni base and our commitment to providing resources you can immediately implement to improve your performance and your impact.

It is for the last point that I am particularly excited to welcome our new editorial director, David Gustafson.

David will be overseeing our editorial efforts across all of our practices and channels. He's got decades of experience in the editorial space, but more important, he has a natural curiosity and a passion for telling stories that I know puts our editorial efforts in the best of hands.

Happy reading!

Rebecca Kalogeris
VP, Marketing &
Product Strategy

Nothing good happens fast ...

THERE'S AN OLD SAYING that nothing good happens fast. Our friends on the West Coast saw that firsthand last year as wildfires swept through the region. From one moment to the next, erratic winds sent firefighters scrambling in every direction to save endangered homes, businesses, and wildlife. In just a few months, some 58,000 individual wildfires destroyed more than 10.3 million acres of forest lands.

Although experts say new growth will begin to take hold in the damaged area as soon as this spring, it will take decades before the forest will return to its full glory.

While destruction and devastation often happen swiftly, the opposite is often true about things that produce happiness and satisfaction.

In his best-selling 2003 book titled *Too Soon Old, Too Late Smart*, Dr. Gordon Livingston, a noted psychiatrist and author, wrote extensively about the long and winding path to happiness. From learning new things and changing old behaviors to building satisfying relationships and even raising children, things that are important often take time.

"This is why patience and determination are among life's primary virtues," he wrote.

When the 17 original authors of the Agile Manifesto gathered in February 2001 to search for some common ground in the rapidly changing software industry, they couldn't have known the enormous impact their work would ultimately have on the world of product development. There's no doubt about it. Twenty years after it was written, the four values and 12 principles that emerged that weekend continue to influence the world around us.

In this issue of *The Pragmatic*, the Agile Manifesto takes center stage as we celebrate the 20th anniversary of the document that set forth a revolution.

Photo by Danny Rawls

On Page 28, first-time contributor Joris Slob examines the document line-by-line and looks not only at what those guiding principles meant 20 years ago, but also at which of them still ring true today.

After all, being agile isn't just about responding quickly. It's also about responding deliberately and thoughtfully, with a clear goal in mind. It's something I have learned firsthand in recent weeks as I continue to settle into my new role as Pragmatic Institute's editorial director.

After spending the last 23 years leading successful newspaper and magazine operations in a number of different states, I stepped out of my comfort zone late last year to join the talented team of professionals that brings you this award-winning magazine and other Pragmatic Institute content, including our blogs, podcasts, webinars, and much more.

The experience thus far has been incredible. As a lifelong consumer, it has been eye-opening to catch a glimpse at the process used to bring so many incredible products to market. It also feels good to have a new learning curve after all of these years to keep me on my toes.

Personally, I can't think of a better way to kick off the new year.

Despite the obstacles many of us faced in 2020, big things are on the horizon in the Pragmatic universe. On behalf of our entire team, I'm looking forward to tackling the year ahead with each of you.

David Gustafson
Editorial Director

P.S. If there are specific topics you would like to see us tackle in future editions of The Pragmatic, or if you have an article that you would like to submit for consideration, please reach out via email to: dgustafson@pragmaticinstitute.com.

the**Pragmatic**

AGILE +20

CELEBRATING 20 YEARS OF THE AGILE MANIFESTO

Features

To receive a free subscription to *The Pragmatic*, published quarterly and delivered via email or in print, visit: pragmaticinstitute.com/subscribe

Departments

Product
Meets Design.

As a product professional,
you know the importance of
being market-driven. But being
the messenger of the market means
understanding the *entire* customer experience.

P PRAGMATIC
— INSTITUTE —

PragmaticInstitute.com/Design

DESIGN

Explore the product and design intersection to create products and experiences that wow in our new *Design* course. Learn how to reduce friction with your design teams, elevate communication and collaboration, and inspire innovation to create intuitive products that solve market problems and exceed user expectations.

NOW EARN UP TO LEVEL PMC–VIII

A Pragmatic Peek

2 Businesses should stay social in 2021

Social media has always been tough to keep up with, and COVID-19 pressed companies to go digital even further. Ashley Rector, founder of Laura Alexandria Marketing, is offering product marketers and businesses a few trends to watch this year:

- **Focus on video:** A human's average attention span is less than 8 seconds—less than that of a goldfish. Video is easy to digest and demands attention, which means TikTok, Facebook and Instagram Reels may be where you need to regularly publish your video content.

- **Yes, TikTok:** This platform has more than a billion users between 13 and 40 years old. Videos can go viral in a matter of minutes, and TikTok has the highest content engagement rates.

- **You need a strategy for each channel:** You don't have the same demographic on every social channel, so your strategy should be different for each.

- **Increase in in-app shopping:** Instagram, Facebook and Pinterest currently allow in-app purchases, but this option is expected to grow. Haven't dipped your toe into paid social? It's time.

- **Pinterest will make a comeback:** Consumers are turning to this platform to get inspiration for home products, wellness, clothing and information. Pinterest could be a missed opportunity to create easy, clickable content for your brand.

▶ **Pragmatic Take: Consider how you can reach new audiences in 2021, but make sure it aligns with your brand and your overarching marketing strategy.**

1 Get the most out of your Salesforce investment

If you have plans to expand your Salesforce environment this year but are unsure how to undertake the effort, you're not alone. Thirty-eight percent of respondents to a Spinnaker Support survey said they have only marginal success in implementing new Salesforce functionality, and only 8% of respondents give their companies the top mark for this work.

"Salesforce's relentless expansion provides businesses with exciting opportunities for innovation, but companies face serious challenges with routine updates and adding new features," said Chad Stewart, vice president of SaaS global support services at Spinnaker Support. The company provides Salesforce implementation and ongoing managed services.

The survey also reported that:

- 40% of respondents said their companies are "very good" at handling daily Salesforce administration and maintenance, while 60% reported delays or confusion.

- Companies have ambitious plans for 2021: Integration (30%) and optimization (29%) of existing systems are among the top Salesforce goals. 29% of respondents also cited implementation of new cloud services as a top goal.

- Organizations want to expand their Salesforce ecosystem but lack the right personnel or expertise to achieve these goals (62%).

"Companies that integrate the latest Salesforce offerings will enhance customer engagement programs, close more deals and separate themselves from those that do not," Stewart said.

▶ **Pragmatic Take: You can implement all the sales tools you want, but if they don't work for your team or aren't optimized for your organization or products, but they're probably not worth the investment.**
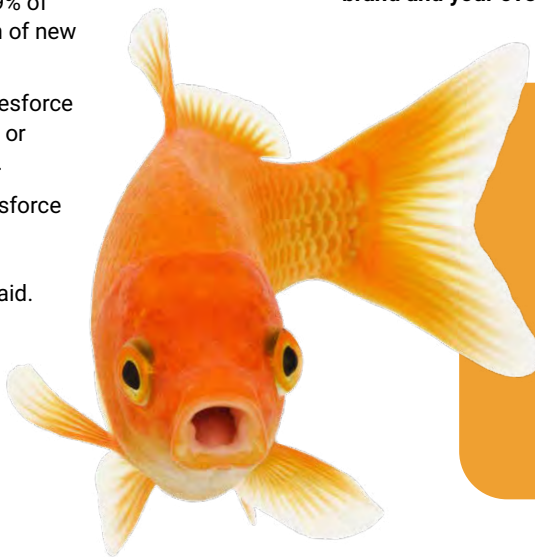
DID YOU KNOW?

A human's average attention span is less than 8 seconds—less than that of a goldfish.

3 Manufacturing companies are increasingly turning to data

Advanced analytics are considered critical for success in manufacturing and more important than they were three years ago, say three-quarters of 1,300 surveyed manufacturing executives. But only a few companies can capture the full value that data and analytics can unlock to help address their most pressing challenges.

According to the findings in a white paper, "Data Excellence: Transforming Manufacturing and Supply Systems," from The World Economic Forum and Boston Consulting Group, less than 20% of surveyed participants prioritize analytics to promote either short-term cost reductions or longer-term structural cost improvements. Only 39% have managed to scale data-driven use cases beyond the product process of a single product to achieve a clearly positive business case.

"Manufacturing is on the verge of a data-driven revolution," said Daniel Küpper, BCG managing director and partner and report co-author. "But many companies have become disillusioned because they lack the technological backbone required to effectively scale data and analytics applications. Establishing these prerequisites will be critical to success in a post-pandemic world."

With insights from more than 40 manufacturing organizations and leading academics and public-sector representatives, the report outlines six priorities to capture value from data and analytics in manufacturing:

- Define a data-to-value strategy and roadmap
- Incent internal and external ecosystem partners
- Build capability to capture and use data
- Implement an open platform to unlock data silos
- Enable connectivity for low-latency, high-bandwidth data flows
- Ensure data security and privacy

"These findings will help accelerate our journey to support companies in devising a path forward to reach the next level of data-based manufacturing excellence; build trust among manufacturing, suppliers and customers; and unlock new value through the development of new data-driven ecosystems," said Francisco Betti, head of shaping the future of advanced manufacturing and production at the World Economic Forum.

▶ **Pragmatic Take: Data and analytics support businesses in every industry, and it's in product professionals' best interests to gain an understanding of how they can apply data in their own organizations.**

"Manufacturing is on the verge of a data-driven revolution."

4 Your CEO's worries include higher taxes, increased regs

Higher corporate taxes and increased regulations are at the top of U.S. CEOs' list of worries, while global political instability and disruptions to global trade are farther down the list, according to a survey from The Conference Board, a nonprofit member-driven think tank that gives insights for the future.

"C-Suite Challenge 2021" queried more than 900 CEOs and more than 600 C-suite executives from Europe, Asia and North America to gauge their biggest challenges this year. CEOs from all regions ranked the accelerated pace of digital transformation as their No. 1 organizational challenge for 2021. These same CEOs ranked improvements in innovation as second.

"Recovery will require finding the right balance between conserving cash and investing in innovation needed to succeed in a new commercial landscape," said Chuck Mitchell, executive director of content quality at The Conference Board.

The Conference Board also asked CEOs for their thoughts about the long-term impacts of the pandemic.

"CEOs believe the need to address the resilience of global supply chains will be one of the most likely long-term legacies of COVID-19," said Ataman Ozyildirim, global research chair at The Conference Board. "During the pandemic, many policymakers and companies learned that a heavily optimized supply chain often lacked the agility to substitute alternate sources of supply. While concerns about global trade disruptions diminished recently, the global pandemic has exposed new vulnerabilities in supply chains."

▶ **Pragmatic Take: Think about how your products can meet both internal and external executives' needs. How can you and your team innovate to address problems before they land on your desk—or are solved by your competitors?**
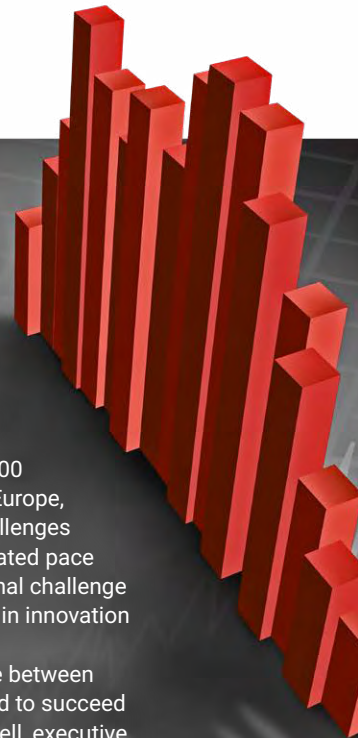
Your Kumbaya Moment Awaits.

PRAGMATIC INSTITUTE

Get your entire team on the same page with our market-driven framework.

You may not actually start holding hands and singing together after our training, but you will start working together more efficiently and effectively.

Pragmatic Institute's courses provide clarity on roles and responsibilities, as well as the skills and tools needed to execute those roles successfully. So, whether you're working with development to build the next great product, or with sales and communications to sell it, we have the course for you.

Visit pragmaticinstitute.com or call 480.515.1411 today.

EXECUTIVE BRIEFING ■ FOUNDATIONS ■ FOCUS ■ DESIGN ■ BUILD ■ MARKET ■ LAUNCH ■ PRICE ■ THE BUSINESS OF DATA SCIENCE

How to navigate the tricky (and sometimes nonexistent) relationship between

PRODUCT MANAGERS AND DESIGNERS

JIM DIBBLE, CO-DIRECTOR OF PRAGMATIC INSTITUTE'S DESIGN PRACTICE, and Product Instructor Amy Graham tackled the often tense (and sometimes nonexistent) relationship between product managers and designers in a Jan. 12 Product Chat hosted by Rebecca Kalogeris, vice president of marketing and product strategy at Pragmatic Institute.

During the webinar, Dibble and Graham talked extensively about the importance of a strong, effective partnership between product managers and designers.

"Not only do we believe it will improve the product experience that's delivered to the market," explained Dibble, but it will also lead to fewer revision cycles, better visualization of the concept during buy-in, and a greater chance of internal approval on product decisions."

Here are two of several questions they tackled during the hour-long discussion:

Amy Graham,
Instructor,
Pragmatic Institute

How can product managers leverage design resources to create a successful product?

Product managers looking to better leverage their company's design function should be aware of two issues at play.

- On a corporate level, where does product management and design fall on the organizational chart?
- On a project level, what is the resourcing model for designers?

CORPORATE LEVEL:

If you're a VP or director of product, this is a concern for you. Sometimes design reports to product, sometimes it stands on its own, and sometimes it reports to engineering or marketing. As a product leader, you should build an alliance with the head of design, who can be your trusted partner in maintaining an outside-in approach.

PROJECT LEVEL:

If you're an individual product manager, how design is resourced on your project will tee up how you might collaborate.

While conducting research for Pragmatic Institute's new course for product managers, Design, Dibble said he, and Design Practice Co-Chair Shannon McGarity, saw two main ways in which design is structured within an

Jim Dibble,
Director of
Design Practice,
Pragmatic Institute

See LEVERAGE, next page..

What's the best way to proceed if you don't have access to any design resources within your organization?

Organizations tend to be understaffed in design, and some don't invest in it at all. As a result, it's not uncommon for product managers to be without any true design resources at their disposal.

In her days working as a product manager, Graham said she included three main points when making the case for bringing on design resources:

- Provide visibility and transparency into bandwidth issues: "I can't be everything to everyone."
- Share challenges around skill set: "I'm not a designer…If you want me doing design just be aware I'm 'practicing my flair.'"
- Demonstrate how critical it is to have a separation of duties.

"I also started to gather data," said Graham. "I looked at our support tickets, our win/loss data, any sort of input that would speak to

See ACCESS, next page..

organization.

Embedded Model: Design resources are embedded within product teams. If you're a product manager who's leading a product or a portion of a product, you have a dedicated designer or set of designers.

Agency Model: There is a centralized pool of designers, which you can draw from if you make the case that your particular project needs these resources. It's as if you have an internal design agency.

In each model, there are unique responsibilities for product managers.

If you have an embedded model, work on establishing a strong partnership with your designer. You could lean on them to help with user research, persona creation, product concept testing, product storytelling, etc. And they can see you as a partner in ideation, solution visioning, etc. Discuss who will lead and who will participate at different stages.

If you have an agency model, chances are you have access to a designer for a limited amount of time and that you might get a different designer each time you request one. That's a challenge, because you'll have to explain your product context each time. Be crisp when sharing the context designers need to do great work (who they're designing for, what their goals are, how they currently approach the market problem, how you want the users to feel). ⁑P

To watch the entire webinar featuring Dibble and Graham, click here.

usability, adoption, complaints that a product is not intuitive, or if somebody used our mobile app one time and never came back. I pulled that data together and used it to build a business case to get design resources either contracted from a consultant or get them in-house."

In the webinar, Dibble explained how, without a dedicated design resource, a product team is putting quality and customer satisfaction at risk.

"Engineers will often talk about 'technical debt,' these things they need to fix in the infrastructure but haven't had time to because they're turning the crank so quickly," he said. "If you don't have a designer, you're building up 'design debt' and your product is becoming more and more inconsistent visually and in the way it works. It ends up looking like a Frankenstein collection of features because you didn't have a designer."

Dibble said an unwillingness to spend resources to get it right from the beginning often means an investment will be required at a later date to correct your product.

You can also focus on business outcomes you want to achieve when advocating for resources, said Dibble. For example, designers have techniques for both innovating and gathering user feedback on ideas and work in progress.

If your organization prioritizes product innovation or wants to mitigate the risk of spending resources on developing products that aren't embraced by users, design is a great investment.

Dibble suggests doing an analysis of what design capabilities are needed before hiring new designers to make sure to apply the right skill set to the project. ⁑P

> "If you don't have a designer, you're building up 'design debt' and your product is becoming more and more inconsistent visually and in the way it works."

Pragmatic Product Chats

Join us every month for live discussions with the best minds in product, design and data. We explore the most intriguing and urgent challenges facing industry professionals.

UPCOMING WEBINARS:

DESIGNING FOR CHANGE WITH THE KNOSTER MODEL: UX EDITION	B2B MARKETING CAMPAIGNS THAT DELIVERED A 20+ ROI
MARCH 9 1:30 ET	**MARCH 23** 1:30 ET

Pragmatic Office Hours

We're Open!

Learning doesn't stop after class. Ask our instructors anything during our open office hours. Real answers by real Pragmatic instructors. Your toughest questions addressed live every Friday.

⁑P PRAGMATIC INSTITUTE

To register or learn more about Pragmatic Product Chats or Office Hours, go to **pragmaticinstitute.com/events**

90%

OF ALL THE WORLD'S DATA WAS GENERATED IN THE PAST TWO YEARS.

Every two days, we generate as much data as all of humanity did up to 2003. What is your company doing with that information? Leverage all of your available data and improve your business decision-making with real, hard data. Our two-day course, *The Business of Data Science,* will show you how to harness the power of data science and machine learning to drive your products and your organization into the future.

The Business of Data Science

- Learn the fundamentals of data science and machine learning.

- Identify and define data science projects that drive business value.

- Successfully deploy data projects and build data science teams.

Meet Flower Pledger

VP OF PRODUCT OPERATIONS, Quorum Software

BY DAVID GUSTAFSON

BEING THE FIRST PERSON to take on a newly created role in an organization is nothing new for Flower Pledger. In fact, it's a challenge she has faced head-on.

As a result, she frequently found herself having to adopt a "learn as you go" mind set—often, without the benefit of insight or advice from other professionals in similar roles.

"I can't tell you how many times in my career I wished that I had a mentor to provide guidance as I navigated new challenges," she said.

Pledger still thinks about those challenging opportunities often, which is one of the many reasons she has chosen to be such an active member of the Pragmatic Alumni Community (PAC), the online community through which product professionals are given the chance to work together to exchange tools, examples, and tactics for success.

Now the vice president of product operations for Quorum Software, Pledger serves as the link between the various Quorum groups that develop and coordinate software releases, including Product Management, Engineering, Support, Customer Success and others.

"We work to align communication and procedures across the organization by developing standard processes, templates and documentation for customer engagement, product planning, kickoffs, release readiness, launch and more," she said. "We serve as the right hand to product leadership, overseeing operational tasks, managing strategic initiatives, continuously improving product team efficiency and evangelizing Agile methodologies."

Recently, Pledger and her team introduced six new customer advisory boards (CABs) to help keep them on

> "By offering advice and submitting requests to shape our business and product roadmaps, these boards have clear charter, schedule, and roles and responsibilities for Quorum employees and customers."

PRAGMATIC ALUMNI COMMUNITY

Each issue of The Pragmatic features a member of the Pragmatic Alumni Community (PAC) who goes above and beyond to share their knowledge, connect with their peers and find innovative ways to apply Pragmatic Institute's best practices in their work.

the path of building the best oil and gas software for their customers and prioritizing their efforts to meet customer needs.

"Each CAB is a panel of trusted advisors made up of Quorum customers and is an extension of a product team," she explained. "By offering advice and submitting requests to shape our business and product roadmaps, these boards have clear charter, schedule, and roles and responsibilities for Quorum employees and customers."

As part of a CAB, Pledger said customers actively engage on a strategic level to influence the product roadmap, share opinions and collaborate with peers.

It's the same type of interaction and collaboration found with the CABs that Pledger finds so rewarding about being an active member of the PAC.

"It has all the benefits that come with participating in a professional organization, including networking opportunities and professional development," she said. "It has also allowed me to engage with industry leaders and likeminded professionals with varying experience and unique perspectives."

Pledger said being part of the community means she can reach out for assistance any time she experiences new challenges.

"I've been working on developing standard practices for release cycle planning, including outlining expected inputs and outputs needed by the teams, ultimately providing the business with the data points they need while still aligning with Agile methodologies. The PAC has been a great resource for me during this process. Everyone has a unique way of approaching and addressing challenges; learning about these different perspectives as I map out what will work for me and my organization has been invaluable."

Being able to provide that same support to others has been equally rewarding for Pledger.

"I'm fortunate because my experience has helped me learn how to optimize business processes, streamline product development, create and oversee customer advisory boards, improve cross-departmental collaboration and communication, and create an effective user experience," she said. "I feel like I have something to offer just about anyone faced with establishing a product management department for their organization or even someone beginning a career in product management. The PAC is a great place to share those resources with others." **≡P**

TRAINING
BEYOND
THE FRAMEWORK

TAKE YOUR SKILLS TO THE NEXT LEVEL WITH HELP FROM THE EXPERTS

We've combed the world for the best minds in product and business to curate the **Pragmatic Learning Network,** a place where you can expand your skills with additional training from our partners.

Get hands-on, world-tested best practices on the topics you care about most from the experts you trust. Learn the skills you need to become the best product person in your field, and the best leader in your organization.

DEMYSTIFYING FINANCE FOR PRODUCT TEAMS

Arm yourself with tools to make key financial decisions about your product and communicate that information to stakeholders.

LEARN MORE

LEVEL-UP POWER SKILLS:
INFLUENCE, LEAD AND DEVELOP YOURSELF

Develop the skills you need to command respect as a product professional with this course from leadership expert Art Petty.

LEARN MORE

ACCELERATE YOUR SUBSCRIPTION BUSINESS

Pricing guru Mark Stiving provides the clarity you need on the essentials of managing and growing a subscription product.

LEARN MORE

PRAGMATIC INSTITUTE

Learn more about the Pragmatic Learning Network or register for a course at **portal.pragmaticinstitute.com/pln**

IT'S YOUR MOVE

TWELVE EXPERTS OFFER ADVICE TO ADVANCE YOUR PRODUCT CAREER

BY ORION SUYDAM

EARLY ON IN MY SOFTWARE CAREER, CAREER, A MANAGER OFFERED ME SOME VALUABLE CAREER ADVICE:

"If you want the keys to the kingdom, then walk around with the keys to the kingdom."

Taken literally, this advice could have emboldened a young engineer to take some serious missteps while alienating the team around him. But I understood the underlying message to be one of empowerment: "Take initiative and seize opportunities to help the business."

After years of following his advice, this same manager would enthusiastically orchestrate my transition into product management.

Advancement typically doesn't happen simply as a reward for doing good work, so how should early- and mid-career product managers think about career progression?

I interviewed a panel of 12 accomplished product leaders and executives to gain insights into how they successfully navigated their product careers.

This article presents the synthesized findings of their experiences and offers specific strategies and tactics you can use as you think about your own career arc.

STARTING OUT

Product managers are naturally wired for advancement. Most started out in a different role, so they have already demonstrated a willingness and ability to take on a demanding new job. And, after some time in the role, product managers naturally start looking for what's next. Getting clarity on what you want to do next (and why) is an important first step.

Advancement takes various forms, and it certainly means more than the blind pursuit of bigger titles. Advancement can simply refer to new assignments that offer exposure to different parts of the business, or it can mean getting involved with a more desirable product line.

In a multi-product company, for example, product lines differ by strategic importance, customer footprint, financials, resourcing levels and the pace of innovation. This offers you many opportunities to experience new market dynamics and different phases of the product lifecycle while learning from new peers and managers.

Several of the panelists opted to go after new and risky product lines. This route can offer a wide array of experiences, from business case development to planning and executing launches.

Other leaders opted to follow their curiosity into new markets, technologies and problems to solve. Any approach that is motivated by a genuine pursuit of skills growth and knowledge will serve an early-career product manager well.

WHAT THE EXPERTS SAY:

FOCUS, LEARN, ADD VALUE

In the beginning, focus first and foremost on the job you've got and don't worry about advancement. Learn the trade, gain experience and add as much value to the business as possible. Develop a reputation as a problem-solver and key player while taking the initiative to learn the market and business from those around you. By building this initial base of experience, you'll develop a good sense of where you'd like to go next.

BE INTENTIONAL

Everyone has different approaches to career management, ranging from the highly passive (simply floating down the stream) to highly active. A passive approach can serve you well in the beginning, and some panelists took that approach early on, letting their interests guide them.

However, most of these product leaders and executives took a more intentional approach early on.

Regardless of how you've defined it, the advancement you seek usually comes about because you've been intentional.

Active career management relies on a certain degree of ambition—a trait that can carry a negative connotation. But a healthy degree of ambition likely comes naturally for those drawn to the responsibilities and stresses that come with product management roles.

MOBILIZE YOUR TEAM

Once you have a clear vision of what you'd like to do next, you must create the conditions for that vision to materialize. While your career path may feel like a very personal thing, your advancement depends in part on those around you. There are three kinds of allies who should compose the team that will help you along the way.

WHAT THE EXPERTS SAY:

MAINTAIN CLEAR GOALS

Career progression comes when you have clear goals and a vision of what you want to achieve. Compare it to product planning: The more clearly you set and verbalize your next target or milestone, the more likely you are to achieve it. Some examples:

- I would like to manage a new product introduction so that I can get the experience of defining and launching a product from scratch.

- I would like to manage a product line with many decisions to be made and for which I'd have significant decision-making authority.

- I would like to manage a small team of product managers so that I can develop my leadership and managerial skills.

Your Manager

The most important ally in your career is your manager, but it would be a mistake to assume that they are there to drive your career growth. One product management leader advised, "The big thing to remember is that your manager is your advocate, not your adversary. They are there to partner with you."

If your manager isn't actively driving the conversation about your career advancement, then the responsibility of initiating the conversation falls to you.

How you have these conversations is important. "Advancement is absolutely part of the ongoing conversation, but it needs to be the second part," one panelist said. "The first part has to be about how you're performing in your current role. The question has to be, 'Am I crushing it in my current responsibilities? And if not, what do I need to do to crush it?'"

Skipping this vital step before broaching the subject of advancement shows that you're not serious about your assigned work and the entire conversation can convey an air of entitlement.

Advancement and promotions go to people who are already demonstrating many of the abilities needed to do the job, so your goal is to get a good understanding of what's needed, and then agree on an action plan that allows you to develop and practice those skills.

Then, once you're executing on that plan, regularly share your progress and build a body of evidence for your manager.

> "Remember is that your manager is your advocate, not your adversary."

WHAT THE EXPERTS SAY:

SHOW, SHARE INTEREST

Assuming you're performing well in your current role, it's appropriate to describe the kinds of projects that interest you and why. Ask about the charter and responsibilities that would come with your desired assignment. What activities does your manager need to see you take on to give them the confidence to advocate for you?

"You want to provide a steady diet of messages to your manager along the way and actively encourage them to talk with others who can provide feedback on your work," agreed several panelists. Because you developed the action plan together, you're simply providing status updates—just as you would for any other work assignments.

By providing these updates, you're showing that you're taking what your manager said seriously, and you want feedback on how you're progressing.

Your Product's Internal Stakeholders

It also is wise to form productive relationships with key stakeholders for your product, along with their managers. As a matter of course, you have a built-in hall pass to reach out to almost anyone in the company as needed to execute your product mission.

Mentors

Trusted mentors serve two important functions: They share how they handled situations and problems like yours, and they provide candid feedback on your solutions to the challenges you face. It's never too early or too late to find one or two mentors to guide you on your path.

A mentor can be especially helpful if you're working in a small company with few product management peers. And larger companies have no shortage of leaders who enjoy mentorship and can provide valuable guidance.

One product leader advised that you be choosy in picking your mentor: "While it can be good for the ego to have a 'hype man' as a mentor, it's more useful to choose someone who will tell it to you straight."

OF LUCK, PREPARATION AND OPPORTUNITY

To think that luck plays a role in career advancement can be disempowering. However, the Roman stoic Seneca is credited with the saying that "Luck is what happens when preparation meets opportunity." This is a useful definition because it gives you control over both halves of the equation; you can make your own luck.

To a large extent, preparation is a byproduct of the daily work you do as a product manager. But it's handy to think about preparation relative to your long-term career aspirations.

As one product leader observed, "This requires self-awareness of your strengths and weaknesses, which can help you realize your value to other people and the kinds of projects where you'll be successful." If you dream of becoming a product executive, then think about the skills and experiences you'll need to build your résumé for that role—and then plan.

If your company has a training budget or offers tuition reimbursement, use them. As you advance in your product career, the balance of hard and soft skills shifts to rely more heavily on the latter, and it's never too late to work on them.

For example, the most adept product managers can unwittingly handicap their careers with subpar communication skills.

So, if you know that your communication skills could be improved, seek out a business communications class.

It may not seem like it, but opportunity is all around; you simply

WHAT THE EXPERTS SAY:
DIVERSIFY

Building relationships with internal stakeholders gives you an opportunity to learn other areas of the business and be curious and empathic about your stakeholders' challenges and needs. Not only will you raise the odds of bringing a whole product experience to the market, but you'll also raise your profile across various areas of the business.

WHAT THE EXPERTS SAY:
GO INSIDE/OUT

Consider finding one mentor inside your company and one who is external. An internal mentor provides context-specific guidance but can get anchored on product or company matters. An external mentor can be highly objective without injecting their own biases.

It may take a while to find the right mentors, so start your search sooner rather than later.

WHAT THE EXPERTS SAY:
STEP OUTSIDE COMFORT ZONE

Avoid becoming so consumed with your daily job that it's impossible to take on a temporary project or stretch assignment. When an opportunity comes along, you want to have enough capacity to take it on. Also, get out of your comfort zone—this is literally how growth happens. Over time, you'll find that what was once uncomfortable becomes easier.

have to tap into it and recognize good opportunities when they surface.

And opportunities are likelier to come when you've shared your project interests with your manager, invested in relationships with internal stakeholders and taken steps to raise your profile. It's simple human nature for people to reach out to those whom they like and trust. Those relationships that you've been developing will yield opportunities, and that can create a snowball effect.

Regardless of how the opportunity was sourced, it pays to be a little selective; otherwise, you run the danger of overextending yourself.

When an opportunity comes along, evaluate the skills you're likely to learn. Will it be a useful training ground for skills you'd like to acquire? Is it worth your time?

Product managers are masters of saying, "No," but remember that you don't want to develop a reputation for refusing invitations to task forces and committees.

GETTING THAT PROMOTION

The first promotion to senior product manager is straightforward if you're executing well, adding value, maintaining good relationships and getting out of your comfort zone. But things can get tricky when the next step is managerial but that's not where your interests lie.

In many organizations, people-management responsibilities are tied with the increased product authority that many product managers otherwise want.

As a people manager, you're expected to train, mentor and develop junior employees, oftentimes in organizations where HR doesn't do much to equip first-time managers.

It's worth a brutally honest assessment of your interest in team leadership before moving into this kind of role, as an insincere move into people management can create an avoidable and sour experience for you, your direct reports and your leadership team.

But it's also important to understand that, in the product management field, your prospects for promotion will be capped at some point if people management is not in the cards for you.

Lastly, your manager's decision to promote usually isn't made in isolation. Managers usually look for consensus with leadership and peers when planning to promote an employee— they don't want to be met with skepticism (or worse) when announcing their intent to promote you.

Your positive working relationships across the organization help your manager build that consensus.

Despite the importance of nurturing strategic relationships, there are only so many hours in the day. You must be choosy about the relationships you'll invest in, but the effort is worth it; leaders want to include those people they value and like, even when they're remote.

WHAT THE EXPERTS SAY:
ACT, DON'T WAIT

You don't have to wait for opportunities. Take the initiative to start a project that fills an unmet internal need and adds value without distracting you from your core duties.

Whether it's a solution to a persistent problem or an incremental process innovation, people will notice.

Building bridges with other product teams can advance shared knowledge—and even motivate valuable product integration projects. And if one of those integration projects is funded, you're in a good position to be tapped as the product manager for it.

WHAT THE EXPERTS SAY:
BE READY FOR CHANGE

Other factors can complicate your promotion. Advancement begins to pull you away from the very thing that got you into product management in the first place.

When you move out of daily product operations, you may start losing some control over the product you used to have. And even if you're at peace with that, is your manager? Are you still too essential to be given different or expanded responsibilities?

If you haven't been empowering the people below and beside you, or establishing processes to ensure resilience if you leave, you may end up a victim of your own importance.

WHAT THE EXPERTS SAY:
HAVE THICK SKIN

When you're away from your R&D team and you're not in the decision-making process, you can feel more like an outbound product manager than an inbound product manager.

Make sure you're in the discussions that matter; the big product decisions are how a product manager creates impact. Also, you need to have a thick skin—you may make a decision, go to sleep and then wake up to find that your decision was overruled.

MBA OK?

An MBA isn't a prerequisite for a successful career, and it certainly doesn't guarantee advancement, but it can be rewarding if it's done with the right expectations and under the right circumstances.

An MBA program won't teach you to be a good product manager, but it can enhance your ability to work effectively and strategically across the business, especially as you naturally progress in your career. It's also a great complement to a technical background, particularly in the software industry.

However, being aware of how an MBA might help isn't a good enough reason to pursue one. Consider whether the subject matter is inherently interesting to you and if you enjoy the process of intense learning.

The costs are too high to undertake it without a genuine interest in the material and without a supportive family and employer.

If you're on the fence, take the most compelling part-time MBA class you can find before jumping into a full-time program.

> "
> Managers usually look for consensus with leadership and peers when planning to promote an employee."

LANDMINES TO AVOID

While there's no wrong definition of advancement, the panel members all agreed that there is little long-term good that can come from chasing titles for the sake of titles.

At a minimum, it's a fool's errand because product management titles are so inconsistent across companies.

Reaching for a higher title before you're ready can lead to some bad situations. We've all run across people who were underqualified for their roles, and it can be hard to recover from a period of poor performance.

Perhaps even worse, the pursuit of a higher title can cause you to ignore the red flags that surface during the interview process: you can land in a dysfunctional or toxic environment, get paired with an uncooperative engineering leader, or find yourself struggling in a culture that is inherently unreceptive to the discipline of product management. It's generally not worth a higher title (or even higher pay) if the work environment is a constant struggle and isn't helping you with your desired goal to advance your career.

WALKING AROUND WITH THE KEYS TO THE KINGDOM

Following your curiosity and focusing on expanding your knowledge and experience can lead to a gratifying and rewarding career. But if your goals include advancement, then you need to be intentional. As a product manager, you're well-suited to the task; just treat your career like another product to manage.

Think about your career strategically, first by establishing a vision and then a roadmap of milestones to achieve that vision. With your next milestone in mind, assemble your team and work through the activities required to accomplish it.

And just maybe, with a bit of luck, those keys to the kingdom will be yours. ◳P

WHAT THE EXPERTS SAY:
DON'T BE A 'JOB HOPPER'

Sometimes advancement comes by changing employers. This is typical in the software industry, but take care to not build the résumé of a chronic job hopper. Don't let a lower job title dissuade you from considering what could otherwise become the catalyst for the next stages of your career progression. Focus on the quality of your new boss and peers, as well as the kinds of experiences you'll gain. If you optimize working with and learning from excellent people, the rewards will come.

About the Author:
Orion Suydam is chief product officer at RiskLens. Email him at orion.suydam@gmail.com or connect with him on LinkedIn at: linkedin.com/in/orionsuydam.

PRAGMATIC LABS

BRING YOUR TRAINING TO

LIFE

At Pragmatic Institute, we believe that some of the best learning happens *while* doing.

Pragmatic Labs are designed to deliver the market-driven vision your organization needs to succeed.

Turn what you've learned in class into action at your office with 1-day Pragmatic Labs. Get the outcomes you need while gaining repeatable skills you can use over and over again.

PRAGMATIC LABS OFFERED:

Action Planning

Positioning

Product Prioritization & Planning

Product Marketing Prioritization

Market Discovery

Pricing

PRAGMATIC INSTITUTE

Visit **PragmaticInstitute.com/Labs** to learn more.

DESIGN THINKING ISN'T JUST FOR THE PRIVILEGED

Don't let tools of the trade lead to solutionism

BY JOHN B. JOHNSON

THE QUESTION OF WHETHER DESIGN THINKING IS SOLEY IN THE DOMAIN OF THE "PRIVILEGED," hadn't crossed my mind until a trip to Madagascar in March 2019. I was scheduled to lead a workshop on branding and had planned to use design thinking principles as the foundation for brand development.

However, it quickly became clear that my audience had little, if any, access to design education.

The concepts I wanted to focus on wouldn't resonate. I had taken for granted learning fundamental design principles through my architecture studies—fundamental principles that had also taught me how to think and problem-solve.

LACK OF ACCESS TO DESIGN EDUCATION

Most of us learn design thinking in post-graduate education or gain on-the-job experience working for brands that employ this methodology. But not everyone has access to those opportunities and without a learned balance of empathy, iteration, creative confidence, strategy and so on, it can be difficult for some individuals to break into the various fields of design.

But it's not just individuals living in impoverished countries who lack training in this skill set, and the experience I had with a small group of Malagasy community leaders wasn't unique. It happens everywhere. Creative fields have become increasingly exclusive and privileged for many reasons.

For example, poor communities often are disconnected from the arts, let alone creative agencies. From a young age, children

in low-income families are provided less access to arts education, according to the nonprofit Americans for the Arts.

Without that experience, the types of individuals who are funneled into design programs and career paths are siphoned off, effectively leading to an absence of cognitive diversity among design teams.

If we're aiming for a human-centered approach to solving customers' problems but we bring limited perspectives and worldviews to the table, do we run the risk of solutionism?
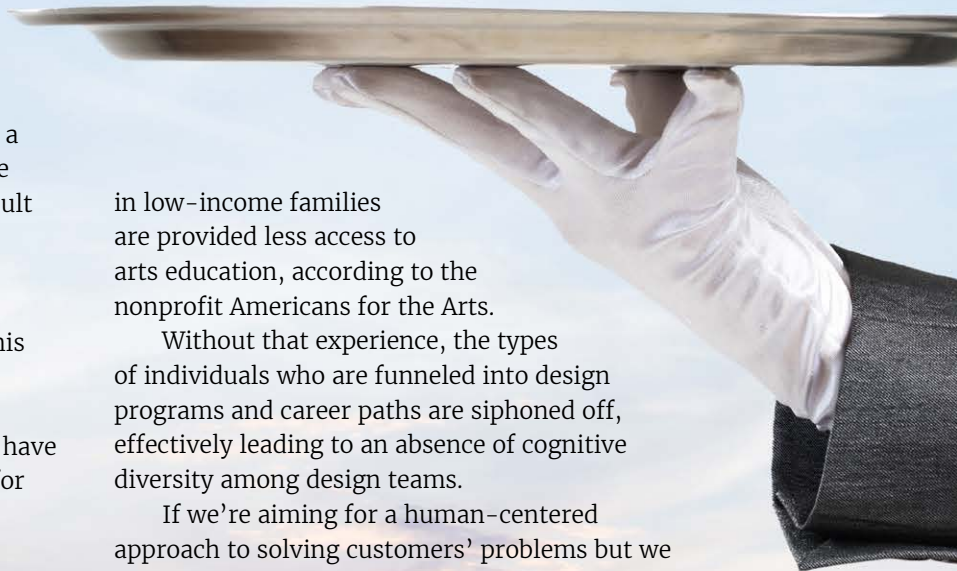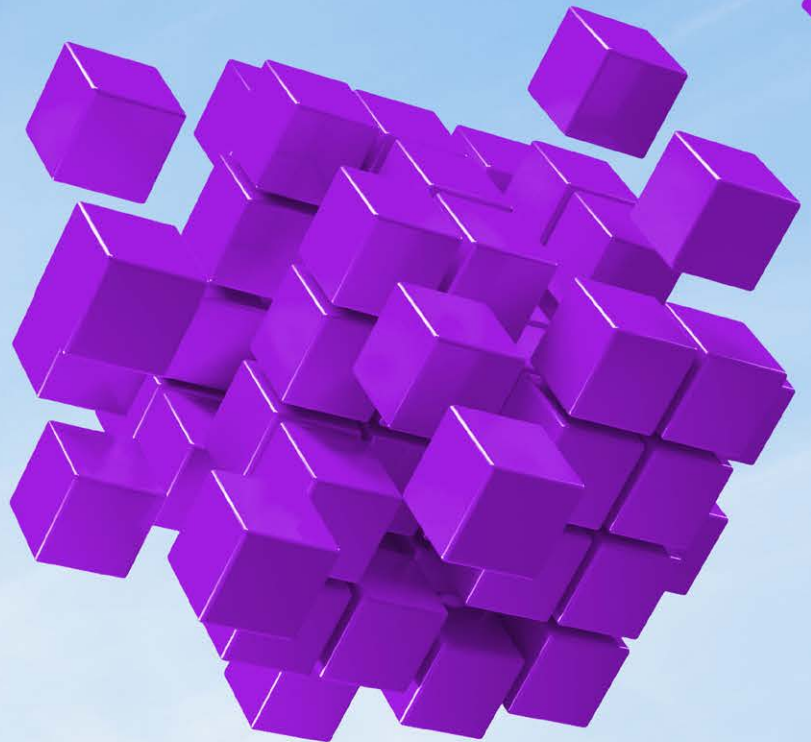
SOLUTIONISM VS. REAL SOLUTIONS

There is no denying that design thinking has its place in product development and marketing. It provides a method for solving problems intuitively and has stimulated the creation of many life-changing products and services.

However, design thinking in product development and delivery also can lead to solutionism rather than solving for real human and societal problems—especially if we're not intentional about getting diverse mindsets around the design table.

This can lead product managers and designers to solve for problems that may not truly be problems or hypothesize solutions that don't really get to the root of the problem.

Product management starts with the best intentions—conducting market research and talking to customers—but those intentions often start and end there. See, at that point, we've already theorized a problem from a somewhat limited perspective and that becomes the basis for our research.

That data is then used to architect a solution, which can lead to a flawed and biased solution right off the bat.

DESIGNING FOR AND WITH THE PEOPLE

To avoid the risk of solutionism, we must hypothesize and architect alongside people with diverse experiences and backgrounds. We must take a critical look at who we're involving in the process and, more important, who we're excluding.

For instance, if the goal is to solve the education issue and make advanced education more accessible to all, solutions can't only be based on inputs from existing student populations.

What about those who never made it into the system? How do we meet those individuals' needs? We must increase access within our design teams as well as to the individuals we're interviewing and sourcing for feedback.

TEARING DOWN THE WALLED GARDEN OF DESIGN

Product professionals—designers, managers, marketers—have a responsibility to integrate more diverse perspectives in the product development and design process, especially considering the tremendous power we have in shaping human and societal habits and behaviors. And "diversity" doesn't only equate to race, gender or socioeconomic status—though those are great starting points.

The focus on diversity should include experiences, too. It's only through a wide swath of experiences that we can see the world through various lenses and overcome the risk of developing solutions based on a myopic view.

To include more diverse perspectives, organizations and product teams must think about how to make product design and development more accessible.

This could mean:

- **Hiring outside of traditional paths:** Provide individuals who have been walled off from access an opportunity to learn and grow with your company or team.

- **Work within the community:** Introduce and offer design training to underserved communities.

- **Make diversity and inclusion a priority:** Again, this doesn't mean simply race or gender, but also look for diverse experiences and perspectives.

These seemingly small but collective efforts will make a massive impact and begin to tear down the wall of privilege in design.

This will better equip product leaders to solve real-world issues with greater accuracy and build better, more sustainable products. More importantly, however, the more access people have to the incredible tools, skills and methodologies that an education in design and design affords, the better equipped they will be to solve for some of the most pervasive and critical problems in their own communities. ◾P

> " To avoid the risk of solutionism, we must hypothesize and architect alongside people with diverse experiences and backgrounds."

About the Author:
John B. Johnson is principal and identity architect at a small studio. He can be reached at john@asmallstudio.com. Follow him on Twitter @johnbcreating or connect with him on LinkedIn at linkedin.com/in/johnbcreating.
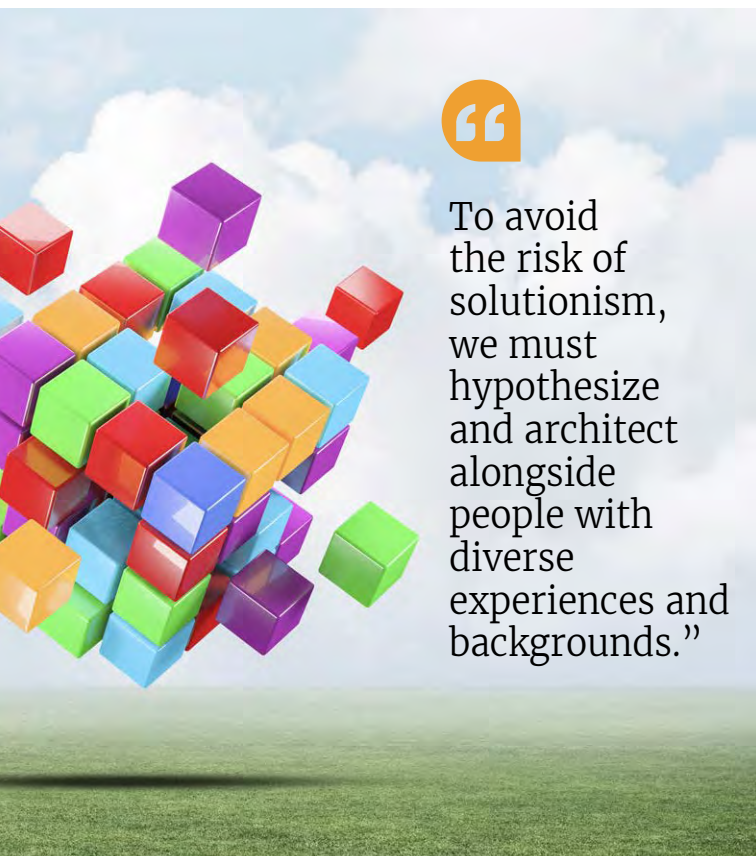
The Career-Building Power of

INTEGRATIVE THINKING

BY ART PETTY

IN THE WORLD OF BUSINESS, it's common to face seemingly opposed, bad choices. But, instead of choosing the least-bad option, it might help to think differently. Roger L. Martin offers two fabulous books, *The Opposable Mind* and *Creating Great Choices* (co-authored with Jennifer Riel), in which he suggests using an integrative thinking approach to resolve the least-bad option dilemma. Integrative-thinking emphasizes harnessing the constructive tension between two ideas to generate a unique, more attractive option.

For product professionals who regularly face a series of conflicting choices, developing your critical and integrative thinking skills and learning to think differently might save your organization and make your career.

INTEGRATIVE THINKING IN ACTION: A CASE STUDY

A product leader in a global electronics manufacturer unit supplying retail point-of-sale systems pondered her business unit's next steps. After four years of a tug-of-war battle with an unrelenting competitor on price cuts and new-product rollouts, neither organization had gained ground. To this longtime product professional, the situation was one of mutually assured destruction, as both organizations were navigating declining margins and incurring resource strains.

As she stared at the latest ideas for pricing promotions proposed by her sales and marketing team, along with the most recent product investment ideas from her product management team, she realized it was past time to tackle this conundrum by taking a different approach. Pricing cutting was addictive and self-destructive. And innovating your way out of a pitched battle with a tenacious competitor was an exercise in futility. It was time to get outside of the organization's four walls. After all, the truth is always in the market, and nothing important happens in the office (NIHITO).

Fast-forward several months, and our product leader found herself in front of her organization's management team explaining her product team's findings. Management was confused and initially resistant to the ideas she was suggesting.

"I was talking about something foreign to them, and I knew this would be challenging to sell," she said. "Yet, what we learned was so important that I needed to gain at least grudging support to prototype our idea."

WHAT THE PRODUCT TEAM OBSERVED

During a series of client visits, product team members deliberately focused on studying the bigger picture of client operations beyond their unit's immediate products. What they saw pointed to some creative new ideas.

"It's hard to go into client visits and not focus only on our products. This time, we elevated our altitude and observed the broader client operations," she said. "We saw a series of store-level technologies that didn't play nice with each other, generating many inefficiencies when it came to analyzing and leveraging data to make quick decisions at the store level. And while there were the typical price, feature and reliability comments about our systems, you could tell by observing and listening that we weren't the problem keeping these business owners awake at night."

The proposal to leadership suggested that the organization explore playing a systems integrator role for this community of clients. The effort included startup costs to acquire new talent and facilitate systems integration with outside companies. Additionally, our product leader proposed forming a customer council for this group and hosting their initial meeting at company headquarters.

"We saw an opportunity to help a focused group of customers solve a big problem. While I couldn't tie revenue to my ideas initially, this initiative—when successful—would effectively reduce the competitor to an afterthought," she said.

The top marketing and sales executives were intrigued by the customer intimacy approach. The management team gave grudging approval for the project for the balance of the year, with the expectation that a tighter business case would be produced before investing additional time and effort. The results were eye-opening for everyone.

Initially, customers were surprised at the offer to be involved in their more extensive store-level systems activities, but theyrecognized the sincerity of the offer. Before long, our product leader's organization helped its clients create specifications for new systems and outline operational changes that eliminated bottlenecks and improved information flow speed.

To the outside observer, these efforts were incongruous with the organization's mission to sell more systems and licenses. However, what happened next carried the day for this new approach.

The customer community was so impressed with the investment and results to automate that they began almost reflexively purchasing systems. Price negotiation disappeared and the competitor was more often not even considered in the process. Jump ahead by a few years and this strategy was so successful that the formerly pesky competitor exited the market, unable to gain ground with typical price or product development approaches.

Score one for thinking differently!

> " The most critical opportunity is recognizing the need to think differently about a situation."

INTEGRATIVE THINKING AS A HABIT FOR SUCCESSFUL LEADERS

The most successful organizational leaders I have encountered are relentless about seeking counter-intuitive approaches to business challenges.

They resist the rush to choose between traditional tactics and instead strive to reframe challenging situations as "what if?"-type opportunities.

In every circumstance in which I've observed the application of integrative thinking, it didn't happen without the individual or group silencing the reflexive, pattern-matching portion of their brains and creating opportunities for new ideas to flood the system.

In the case study, the product leader never would have conceived of the new idea without breaking the habit of asking customers about their satisfaction with her unit's products.

Instead, she and her team members stepped back and just observed. And what they saw convinced them that their customers had much bigger fish to fry than worrying about her unit's offerings.

While her unit was focused on creating the next version, running the latest price promotion or building a new, low-cost product, their customers were barely treading water trying to tie systems together to run their operations more efficiently.

This concept of stepping away from the perceived visible choices—whether to cut costs or innovate faster or both—and striving to understand the real burdens or issues in the situation is a hallmark of integrative thinkers.

FIVE TOOLS TO PROMOTE INTEGRATIVE THINKING IN YOUR ORGANIZATION

The dicey issue for integrative thinking is teaching people to break their pattern-matching approach to solving problems. Our brains love patterns, and they create deep grooves. But there are five tactics that I've seen yield remarkable results for those striving to jump-start individual and group integrative thinking.

1. Hit 'Pause' on Common Responses to Problems

Organizations run in cycles. From annual strategic planning efforts (anachronistic in this era) to the routine of quarterly promotions and new product launches timed with industry events, the pattern repeats while the world changes. As a leader, learn to recognize and challenge this pattern. Use "why?" coupled with, "How might we change and do something unique and valuable with that money/effort?"

2. Apply Multiple Framing Techniques to Problems

How you frame a situation determines the type and aggressiveness of the proposed solutions. Groups will almost invariably offer a different set of solutions for a situation framed as a problem rather than framing it as an opportunity.

The next time you encounter a problem that seems to point to two less-than-great choices, reframe the issue and develop alternative solutions. What if you framed the situation as an opportunity? How would you respond to create the best outcomes for both your company and your stakeholders? What problem are you trying to solve?

3. Conduct Association Exercises

This technique is a personal favorite for breaking the back of traditional thinking. For example, if you are trying to respond to low or declining customer service ratings, identify an unlike company in an industry far away and ask, "How would X company strengthen our customer service?" Challenge a cross-functional team to explore how this far-removed company does such a great job and then look for ideas to apply to your environment. The goal isn't emulation, but idea-prompting.

4. Observe. More.

As outlined in our case study, cultivating the ability to observe situations objectively offers a potential treasure trove of ideas and insights.

Designers are experts at studying individuals in their environments. Design firm IDEO famously studied the use of shopping carts in grocery stores in a made-for-TV example of how an item many of us use every day—the shopping cart—might be reconceived.

While the "Deep Dive" feature on the "ABC News Nightline" broadcast is dated, the approaches employed to think differently and apply integrative thinking are timeless. In another example, a company specializing in data management software observed "a day in the life of data" and quickly discovered costly bottlenecks and manual processes that, when fixed through added technology and professional services, saved significant time and manual labor.

5. Employ Parallel Thinking Techniques

I love Edward deBono's '<u>Six Thinking Hats</u>' approach to parallel thinking. The approach emphasizes harnessing the collective brain power of groups by helping them focus on a single issue or topic instead of the usual conflux of opinions, facts, political agendas and emotions that overpower most group discussions.

THE BOTTOM LINE

While there are many tools to promote creative thinking and problem-solving, the most critical opportunity is recognizing the need to think differently about a situation. Seemingly common sense, it's challenging in practice to pause and then make the effort to explore alternatives. Know that your pattern-grooved brain and the dominant logic in your organization are significant obstacles standing in the way of innovation and success. But in a world undergoing systemic change, it pays to put in the effort to think differently. ᴘ

About the Author:
Art Petty is a former software industry executive and now an executive and emerging leader coach, author and graduate management educator. He is creator of Pragmatic Institute's Partner Learning Network online course, "Level-Up Power Skills: Influence, Lead and Develop Yourself." Email him at art.petty@artpetty.com or connect with him on LinkedIn at: linkedin.com/in/artpetty.

CHOICES, CHOICES

Selecting the right sales tools can make or break an organization

BY JENN HASKELL

WHEN I TELL PEOPLE THAT I'm a director of sales enablement, the typical response I get is, "Oh, so you're a sales trainer?" While true to an extent, sales training is only one responsibility of sales enablement professionals.

If I broke down my typical daily activities and weekly operating cadence, I probably spend more time on strategic sales enablement. Those responsibilities include building thoughtful and scalable enablement and readiness programs that not only address the foundational and continuous learning needs of the sales organization, but also directly tie to sales rep performance, results and revenue achievement.

But one of the most important skill sets a sales enablement professional can master is the art of effective communication (because we communicate all the time). Whether we're channeling all the communications that go to the sales team, collaborating with multiple departments or presenting to senior leadership and executives, being able to efficiently communicate value and positive business outcomes is essential, and how we communicate externally is equally important.

UNDERSTANDING SALES ENABLEMENT'S ROLE

In an article titled "The Sales Enablement Doctor Is In" that appeared in the Winter 2020 issue of *The Pragmatic*, I wrote that sales enablement is the "ultimate sales psychologist." One reason is, it's literally our job to gain credibility from the get-go and become a trusted advisor for sales leaders, sales reps and many other peers. When we achieve the coveted status of "trusted advisor," we become a true advocate.

As we build out the scalable programs our sales organization needs, we also must consider which tools will enhance these programs and allow our sales reps to succeed. Many times, as a trusted adviser, sales reps will come directly to enablement to request these tools.

However, full ownership of sales tools might not fall under sales enablement's list of responsibilities—I often see sales tools directly under sales or business operations. But even in these cases, sales enablement should work closely with these teams to ensure that the right tools are selected and implemented internally, and that they're launched in a way that ensures adoption, use and return on investment.

Enablement's biggest stake in the game is building sales tools training into a formal launch plan for the existing sales team as well as into the strategic onboarding program for new hires.

Enablement is also the best representative for sales reps' experience. We understand when a sales tool will be used in the sales process, the person who's using the tool and how the tool fits into their overall operating rhythm.

While sales operations may focus on business intelligence and integrations with processes or other systems, sales enablement focuses on selecting a tool that has a simple user interface and provides upfront value to the rep.

Sales reps face two potential problems: Either they don't have the right sales tools, or they have too many. The sales tools we select must address sales reps' pains and frustrations, and no one understands those pains and frustrations better than sales enablement.

Because enablement has this "insider" understanding of sales and
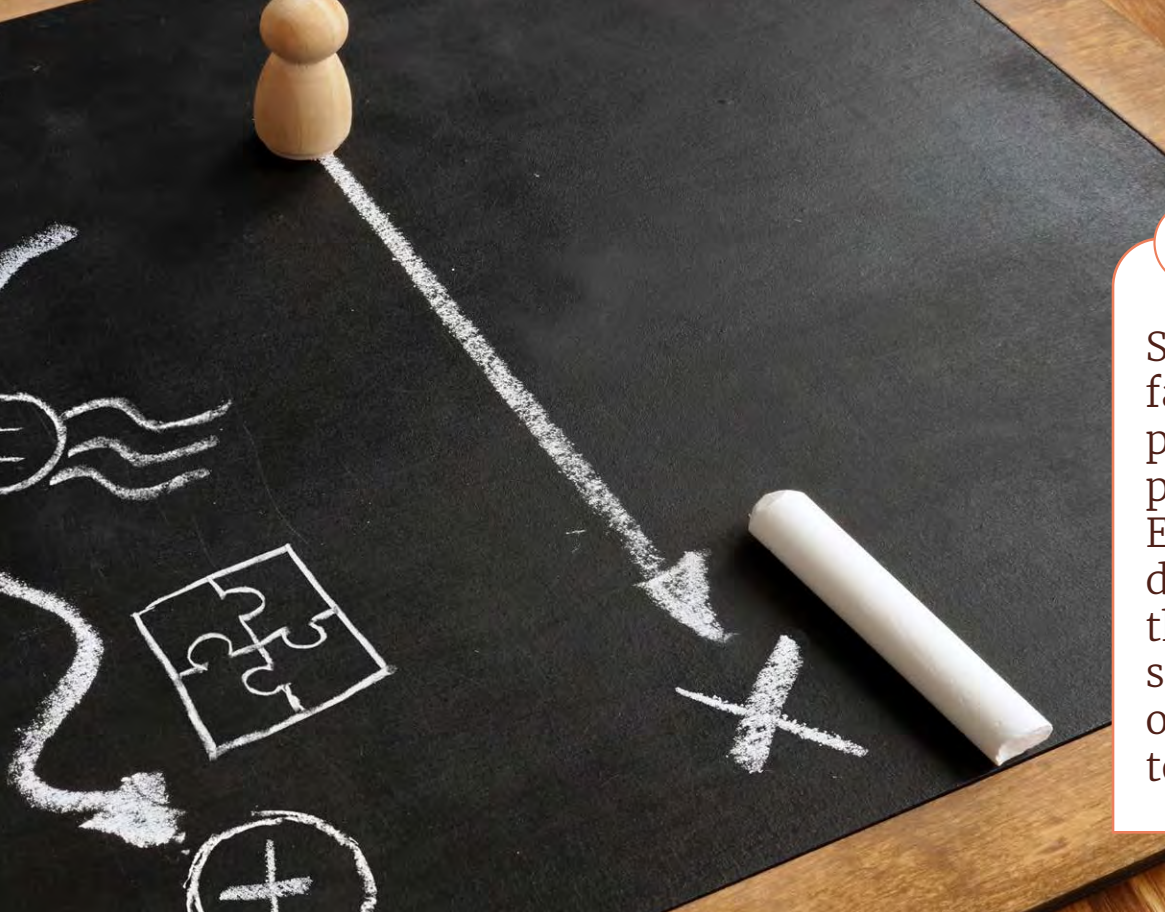
> **Sales reps face two potential problems: Either they don't have the right sales tools, or they have too many.**

the challenges reps face using sales tools, we're the perfect candidate for establishing vendor relationships and defining the sales team's needs.

And remember that sales enablement is one of the top personas that sales tool vendors regularly prospect. It makes perfect sense for enablement to be engaged in the dialogue.

LOOKING AT THE BIG PICTURE

I always remind my sales reps that customers complete a good portion of the buying process through their own research—before they even speak to a rep about a product or service. This same concept applies when I'm the buyer who is considering potential sales tools.

I start by conducting an internal review of all existing sales tools and outlining details like:

- **How each tool is used**
- **How the tool affects the business**
- **Who will access the tool**
- **At what stage of the sales cycle the tool is most likely to be most effective.**

It's also important to identify which department owns and/or maintains the tool, including the primary point of contact, any system administrators and when the last contract was signed with the vendor.

Looking at the copy of the most recent contract will help identify key players and influencers—both internally and with the vendor. This review also helps clarify the technical requirements, integrations and any customized functionality associated with the tool. All of this helps you proactively prepare for upcoming renewal conversations and avoid potential surprises that may negatively affect the sales team's productivity and access to the tool.

This initial exercise also provides the foundation needed to create content for new hires to educate them and set the right expectations for sales tools. Plus, if tool ownership or key influencers change or leave the company, transferring ownership of the tool is easier because everything is documented.

EDUCATING YOURSELF

Once I have a good handle on the existing tool stack, I then look at the current efficacy of each tool and how it's used to drive business. In this phase of the review, focus on the adoption and usage of each tool and whether there is a correlation back to top sales rep performance.

This also is a good time to engage the vendor (usually a dedicated customer success manager) and ask for deep analytics and quantifiable metrics that show a return on investment. This allows you to define what "good" looks like with the current tool stack as well as uncover any gaps or areas where additional tools are needed to meet business requirements and help sales reps succeed.

Gauging efficacy begins the transition into the research and education phase of the tool-selection process, and a good portion can be handled online before ever speaking with a vendor rep. A simple Google search returns pages of information on every tool available, plus company reports and recent business news.

Navigating to different vendors' websites can deliver datasheets, blogs, articles, analyst reviews, testimonials and product demonstrations. And peer-to-peer review sites like G2 Crowd and Capterra provide real-time consumer insights. Just make sure the site you use has high ratings and a reputation for reliability and accuracy.

I use the qualitative details these sites provide, as well as feedback from other reviewers with a similar professional background as mine. Finding feedback from companies in the same industry with a comparable size to my sales team is a bonus.

For example, I have more than 200 sellers worldwide. If a different company with a U.S.-based 50-person sales team provides insight that their implementation of a tool was seamless and the cost was relatively low, I can't assume my company will have the same experience. Being in a larger, global organization with varying seller roles and a more complex sales process could mean higher costs because of the need for more licenses and a more intricate and customized implementation.

Peer-to-peer review sites also provide side-by-side comparisons of like vendors with competing products. In looking at these comparisons, remember to:

- **Look at the most recent feedback. Feedback from two years ago may not be helpful if a company has updated and enhanced its product.**

- **Ignore one-sided feedback that only focuses on the negative—unless you see the same feedback multiple times from different reviewers.**

- **Look for honest and authentic reviews that highlight the best features of the product or company and provide constructive feedback about functionalities or service that could be improved. These are the most effective and useful reviews.**

NARROWING THE FIELD

After the education and review phase, it's time to select the top contenders that may address your organization's needs and start engaging with vendors directly.

It's also time to form an internal buying committee to assist in the selection and buying process. In recent buying scenarios, I've had between four and 12 internal colleagues involved in the vendor selection and buying process.

Democratized buying and multiple levels of internal approval needed has made decision-making more challenging than ever.

Oftentimes, ensuring budget for a solution depends on having several departments contribute.

Collaborating with a dedicated buying committee that includes cross-functional groups and departments eliminates the risk of missing important details. It also helps ease a solo purchaser's anxieties. Ensuring every group's interest is represented is a great way to create additional champions who will help build a solid business case.

For example, along with benefitting sales reps, sales tools also need to provide insights for sales managers to drive the business, coach reps to better performance and make informed decisions.

No sales tool should be chosen without first obtaining buy-in and support from sales managers. Think of it this way: If sales leadership isn't brought in on the value of a tool, they won't require and enforce its use.

When you're evaluating vendors and tools, there are a few helpful questions to ask:

- **What are the most inefficient processes in our business and how will sales tool address them?**

> **"Look at the current efficacy of each tool and how it's used to drive business."**

- **Are there any internal operational processes or workflows that the tool will optimize?**

- **Can this tool be used globally?**

- **Who in our company will use the tool? How many user licenses are required? (Remember to include licenses for new hires.)**

- **How does this tool fit into the overall systems and tools landscape? Are integrations with other applications required?**

- **What is the budget?**

- **Will customers benefit from this sales tool?**

BUILDING THE BUSINESS CASE

Next, create a sales-tool matrix that defines technical and business requirements. This will help you track each requirement against vendor features and functionalities—and it's the foundation for building a business case that will eventually be presented to the economic buyer before final sign-off. When possible, have the economic buyer meet the vendor you prefer.

It's also wise to proactively ensure that you understand your organization's and your vendor's paperwork processes. Companies commonly require things like legal and security reviews or IT risk assessments.

Finding out about these checks at the last minute could delay the close of the deal and the implementation date. If you're working with a vendor that's new to your company, you'll likely have to complete a new vendor process, too.

As you build the business case, demonstrate why the sales tool is needed, its benefits and the risks of not having it.

You can ask the vendor to help you create the business case, too (and if they're unwilling to help, it's a good indication of the type of partner they'll be). Some organizations may have in-house experts who can

help you prepare your case. For larger projects, you may need to use an independent consultant.

A strong business case makes a compelling recommendation for implementation and will resonate with what the economic buyer cares about most. Remember to include:

- **Project scope**
- **Financial benefits**
- **Productivity or performance benefits**
- **Alignment with sales strategy**
- **Overall fit with the existing tool stack**
- **Proposed implementation plan**
- **Risk**

Include screenshots of key capabilities and tie them back to the business need.

For added "wow," create a future vision of how things will improve and provide examples of the positive impact to the business.

Also, show a thoughtfully developed launch and training rollout plan for the new tool. This shouldn't be an afterthought! Use it to get your "yes."

Create a pilot test group representing different roles and geographies and define initial measures of success. This will ease concerns sales leaders may have around rolling out a new tool to the sales organization that hasn't been tested or proven.

The pilot period should be a set duration that allows enough time for testing and fine-tuning as needed. Sales leaders want to know you're doing everything in your power to make a great first impression when the tool is formally launched.

Work with your vendor to deliver sales tool training—after all, they're the subject-matter experts who can answer technical questions.

After the initial training, remember to bring them back for reinforcement or new feature training.

Record these sessions and build them into your new-hire onboarding program.

Also, ask if the vendor has a regular newsletter that shares tips and tricks with your team.

Finally, schedule monthly or quarterly recurring meetings with your account manager and/or customer success manager. This is when you can address any open items you have with the tool or focus on a usage discussion.

Tool administrators typically have access to reports, but the vendor usually can obtain deeper analytics and compare them to industry trends.

This is the best way to correlate the impact of the tool to increased productivity or performance. Make sure you're getting the tools and support you need to achieve your goals.

TAKING THE PLUNGE

Choosing the right sales tools can be a daunting task that requires a lot of effort. But when it's done right, the result is a sales team that outsells the competition and succeeds—and that makes the time upfront worth it. ⬛P

About the Author
Jenn Haskell is director of sales enablement at Everbridge. Email her at jennifer.haskell@everbridge.com or connect with her on LinkedIn at linkedin.com/in/jennhaskellmba.

(FR)AGILE LANDSCAPE — 20 YEARS LATER

BY JORIS SLOB

I N THE 20 YEARS SINCE THE CREATION of the Agile Manifesto, much has been written and said about the concept of being agile.

Although to many it seems elusive and continuously changes, no business leader can hope to be successful in the current market without using "agile."

To understand the current confusion surrounding agile, the consulting firm, Deloitte, went so far as to create an overview for people trying to find their way in "The Agile Landscape."

The result?

A "simple" 100-plus-step plan to help you become agile. Of course, there are many consultancy firms that are very happy to help you navigate this difficult terrain, because, as you can see, agile is a complicated subject matter.

Is this truly what agile is about? How did we get here?

To understand the context, let's dive into the historical context and revisit how the authors of the Agile Manifesto thought it should be applied to projects and organizations.

Most of the Manifesto's authors worked on various lightweight software development methodologies: Extreme Programming, Scrum, DSDM, Crystal,

> " The Agile Manifesto gets its credibility through experience, not dogmatic theoretical models."

Adaptive Software Development, and Feature-Driven Development, and with certain concepts like design-driven development, refactoring, pragmatic programming and modeling languages.

Why were all these methodologies popping up around that time?

To better understand, it is good to be familiar with the Cynefin model. In that framework, problems or work are categorized into four domains: Simple, Complicated, Complex, and Chaos.

These domains are characterized by how easy it is to determine the relationship between cause and effect.

With simple problems, actions have a direct, predictable effect (if a lightbulb is broken, you can replace the bulb to restore light). Because this relationship is known, it is easy to set up best practices for dealing with problems in this domain, which are solved by picking the best-practice solution.

With complicated problems, actions have a predictable but separated effect (when the light doesn't work, but the lightbulb isn't broken, there might be a problem in the wire or the switch).

These problems are solved by domain experts who know how to analyze the problem.

With complex problems, it's easier to explain specific actions caused specific effects, but repeating the same action might yield different results. For example, selling a specific type of lightbulb might generate more profit one year than the other, based on external factors that are not under your control.

M A N I F E S T O

FOR AGILE SOFTWARE DEVELOPMENT

We are uncovering better ways of developing software by doing it and helping others do it. Through this work we have come to value:

4 VALUES

▸ **INDIVIDUALS AND INTERACTIONS** over processes and tools
▸ **WORKING SOFTWARE** over comprehensive documentation
▸ **CUSTOMER COLLABORATION** over contract negotiation
▸ **RESPONDING TO CHANGE** over following a plan

That is, while there is value in the items on the right, we value the items on the left more.

12 PRINCIPLES

Our highest priority is to satisfy the customer through early and continuous delivery of valuable software.

Welcome changing requirements, even late in development. Agile processes harness change for the customer's competitive advantage.

Deliver working software frequently, from a couple of weeks to a couple of months, with a preference to the shorter timescale.

Business people and developers must work together daily throughout the project.

Build projects around motivated individuals. Give them the environment and support they need, and trust them to get the job done.

The most efficient and effective method of conveying information to and within a development team is face-to-face conversation.

Working software is the primary measure of progress.

Agile processes promote sustainable development. The sponsors, developers, and users should be able to maintain a constant pace indefinitely.

Continuous attention to technical excellence and good design enhances agility.

Simplicity—the art of maximizing the amount of work not done—s essential.

The best architectures, requirements, and designs emerge from self-organizing teams.

At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behavior accordingly.

THE AUTHORS, ALSO KNOWN AS 'THE SNOWBIRD 17'

Kent Beck .... computer programmer
Mike Beedle (1962-2018).........software engineer
Alistair Cockburn..............computer scientist
Ward Cunningham ..... computer programmer
Martin Flower .... software engineer
James Grenning .... writer/author

Jim Highsmith.................... software engineer
Andrew Hun............... computer programmer
Ron Jeffries .... software developer
Jon Kern .... writer/author
Brian Marick .... software testing
Robert C. Martin .... software engineer

Steve Mellor .... computer scientist
Ken Schwaber .... software developer
Jeff Sutherland .... software developer
Dave Thomas .... computer programmer
Arie van Bennekum .... coach/strategist

These types of problems are usually solved by probing the system and acting on the findings.

With chaotic problems such as emergencies and disasters, there's no idea how some actions will turn out. These problems require transparent decision-making processes and setting up boundaries to de-escalate.

The Cynefin model further defines the disordered domain when you encounter

> **"Software creators need to have humans in mind when designing systems, instead of rigorous formal specifications."**

a problem and don't know what kind of domain it belongs to. Understanding that information is essential to determining your strategy to tackle the issue.

Using this framework, we can classify software development as a work domain.

When computers were minimal and not connected to networks, the problem of software development was mainly complicated. You needed trained experts that could analyze and predict fairly well how much work is required to make a particular system.

Over time, computers became more complex, and expectations of what software could do became higher. It became unfeasible for one person to create the software that was requested. Single programmers were replaced by teams, which created additional communication and coordination complexity.

Suddenly, the estimates that the experts were giving didn't reflect the truth anymore.

As projects took longer to complete, the computer environments changed around them, and the requirements of the project changed. Traditional methodologies of software engineering were no longer working.

To celebrate the 20th anniversary of the Agile Manifesto, let's go through it value by value, principle by principle, and see what it meant 20 years ago and what is still true today.

Let's start at the beginning.

'Manifesto for Agile Software Development'

In the title, we see that the original scope of the Agile Manifesto was software development only. While the Manifesto has exciting insights that translate to other domains, the original document should be seen in this context.

'We are uncovering better ways of developing software by doing it and helping others do it. Through this work, we have come to value:'

The first line already shows humility by recognizing that the Manifesto is open to improvement. Uncovering better ways is an ongoing process and is never finished. The way to find better ways is through real experience. It doesn't make sense to start telling people they have to do their work differently if you have never done this type of work.

The Agile Manifesto gets its credibility through experience, not dogmatic theoretical models. Out of this experience come some values that are central to what the signatories call "agile."

This stands in contrast to what is happening in some companies selling agile. There is a substantial market selling agile certifications. Especially the lower tier of certifications is geared toward book knowledge. This is a real contrast to the spirit of the Manifesto, where gaining knowledge comes from actually practicing the art.

An apprentice-mentor model would be a better fit with the Agile Manifesto, but

it's a more costly approach for companies. Buying training with presentations given to groups of people is cheaper and quicker but doesn't yield a deep understanding of agile.

'Individuals and interactions over processes and tools'

Software is written for people by people. The quality of the result depends on the quality of your communication with your customers and within your teams. Although it is tempting to solve problems with processes and tools, carefully looking at individuals and their interactions is far more critical.

Some larger companies have difficulty putting the focus on individuals. The easier route for some of them is to take one of the "agile" frameworks and implement that instead. However, that often leads to process- and tools-driven transformation, which also goes against the original intent of the Agile Manifesto.

'Working software over comprehensive documentation'

This value has maybe been the most successful. In the past, enormous volumes of system requirements were written and binders full of documentation. Because of the ubiquity of software systems, usability became a much more significant factor than it used to be. In the past, you could expect that only highly trained individuals would use the system, but now every individual in the Western world interacts with software hundreds of times a day.

Software should just work, it should adapt itself to human behavior, and that means that software creators need to have humans in mind when designing systems, instead of rigorous formal specifications.

'Customer collaboration over contract negotiation'

Contracts are a form of risk management. Contracts are documents that, because of the costs to compose them, usually deal with agreements of enormous impact. In the agile mindset, the risk is better mitigated by delivering in small parts and interacting with the customer early and often.

In a changing world, the wishes of the customer also change, so sticking to past agreements might be a bad option for both parties. This practice is still tricky in markets that are regulated, although there are now new ways to specify in tenders a more general goal, instead of a checklist of specifications.

'Responding to change over following a plan'

Plans are worthless, but planning is everything. Change is inevitable, and because we are terrible at predicting the future, the value of projects decreases over time. Plans give a false sense of control where we should be investing in a self-correcting system.

METHOD
—OR—
MADNESS?

Celebrating 20 years of the Agile Manifesto

BY DAVID GUSTAFSON

On a cold, snowy weekend in February 2001, a group of 17 software developers, scientists, programmers and authors gathered at a ski lodge southeast of Salt Lake City, Utah, in search of a solution to mounting concerns about the software development industry.

Nicknamed "the Snowbird 17," they gathered to see if representatives of their different disciplines could agree on a path forward. And much to their surprise, they did.

In a 2006 interview, Robert "Uncle Bob" Martin, one of the visionaries in attendance that weekend,

The Lodge at Snowbird

said the biggest disagreement of the weekend was about what it should be called.

"The formal name of the weekend retreat was 'Lightweight Methods Summit,' but no one liked the term 'lightweight'," he explained.

After proposing and discussing a number of alternative names, they used a show of hands to adopt one of the other attendee's suggestions of using the word "agile." It was unanimous. And it was also the only actual vote held during the weekend meeting.

By the time the weekend was over, the document officially known as 'The Manifesto for Agile Software Development,' emerged and outlined a detailed path

'That is, while there is value in the items on the right, we value the items on the left more.'

Agile is pragmatic, not dogmatic. There certainly are circumstances where contracts, plans, documentation, or tools are essential. That is why agile is value-based and not rule-based. Being agile requires adaptability, but these values help you to see certain things with a different lens. It combats some of the human biases that drive us to make less effective choices.

'Our highest priority is to satisfy the customer through early and continuous delivery of valuable software.'

This principle is trivial when your company creates value for single clients at a time. The difficulty arises when a company seeks to deliver value through a product. It is crucial that the end-user of the product is the person to satisfy and not the shareholders. This principle holds that software is only valuable if it meets customer demand; only then can you have a sustainable product.

> It is crucial that the end-user of the product is the person to satisfy and not the shareholders."

'Welcome changing requirements, even late in development. Agile processes harness change for the customer's competitive advantage.'

This principle shows that not only our world is changing, but also that of our customers. Our software is helping them to get a competitive advantage. If our software doesn't change to the new realities of our customers, it is bringing them less value.

'Deliver working software frequently, from a couple of weeks to a couple of months, with a preference to the shorter timescale.'

This principle was the most controversial of the principles amongst the original authors. It is also the one that doesn't stand the test of time that well. With the rise of continuous delivery, companies can deliver working software multiple times a day. If it takes a couple of weeks to deliver working software, it is now seen as slow.

'Business people and developers must work together daily throughout the project.'

To avoid miscommunication and to understand the needs of the business, it is okay if developers and people from the business work together daily. This prevents promises being made to customers based on misunderstandings and makes sure the latest information is available for developing the software.

'Build projects around motivated individuals. Give them the environment and support they need and trust them to get the job done.'

According to internal research at Google, psychological safety was the most critical factor in team success. While the world focusses on agile tips and tricks, the central message of people over process is still challenging to get right.

'The most efficient and effective method of conveying information to and within a development team is face-to-face conversation.'

This is still valid, although modern communication techniques like video-conferencing and shared environments have made it easier to work remotely.

'Working software is the primary measure of progress.'

Any other proxy of the result is harmful. Measuring velocity, lines of code written, or any other derived metric will promote unwanted behavior. In my opinion, this principle can be even stronger if the value that customers perceive is the primary measure of progress.

'Agile processes promote sustainable development. The sponsors, developers, and users should be able to maintain a constant pace indefinitely.'

Doing death marches to finish projects in time is extremely expensive. Employers will run into burnout issues, and the negative impact on software quality will also need to be paid later on in the lifecycle of the product.

'Continuous attention to technical excellence and good design enhances agility.'

Without constant attention to technical practices, the software will accrue technical debt, which will slow down development output to unsustainable levels.

'Simplicity—the art of maximizing the amount of work not done—is essential.'

Every functionality put into the software incurs maintenance costs and reduces the possibilities for later development.

'The best architectures, requirements, and designs emerge from self-organizing teams.'

Software structure reflects the organizational structure of the company building it. If we want to have

for software developers to improve methodologies and respond to inefficiencies of traditional development processes.

According to Martin, the Manifesto itself came into being in the first day of the meeting guided by four simple values. On the second day, the group expanded the scope to include a set of 12 principles, which Martin said were negotiated by email afterward—a process that apparently took several months.

Although the original document specifically focused on helping software developers work faster and more efficiently, the signers couldn't have imagined how quickly their ideas would spread beyond the software industry to have an enormous impact on the wider development industry and beyond.

At the time the Manifesto was written, various agile-like principles had been around for nearly 30 years, but it was frustration with the traditional—and often cumbersome—development processes of the 1990s that led to the retreat.

> **THE SIGNERS COULDN'T HAVE IMAGINED HOW QUICKLY THEIR IDEAS WOULD SPREAD BEYOND THE SOFTWARE INDUSTRY**

As personal computing gained in popularity, it required product and software development to undergo significant changes, and the general consensus was that the status quo was no longer working. The lag time between business needs and developed solutions was averaging three years, and the existing processes were considered by many to be "unwieldy, unsatisfactory and overburdened with documentation and oversight."

According to Jim Hightower, another one of the Manifesto's original authors, the document was designed to help speed up the process by encouraging work practices that focus more directly on the user.

"The values and principles allow teams to be adaptive, to respond quickly and effectively to change, and to be in a state of constant reimagination underpinned by frequent customer feedback," he said.

In a historical narrative archived at agilemanifesto.org, Hightower said some corporate bureaucrats tend to be scared of agile approaches—specifically those "that are happy pushing process for process' sake versus trying to do the best for customers while de-

robust software with components that are not strongly coupled, it is good to aim for self-organizing teams that have the mandate to change the part for which they are responsible.
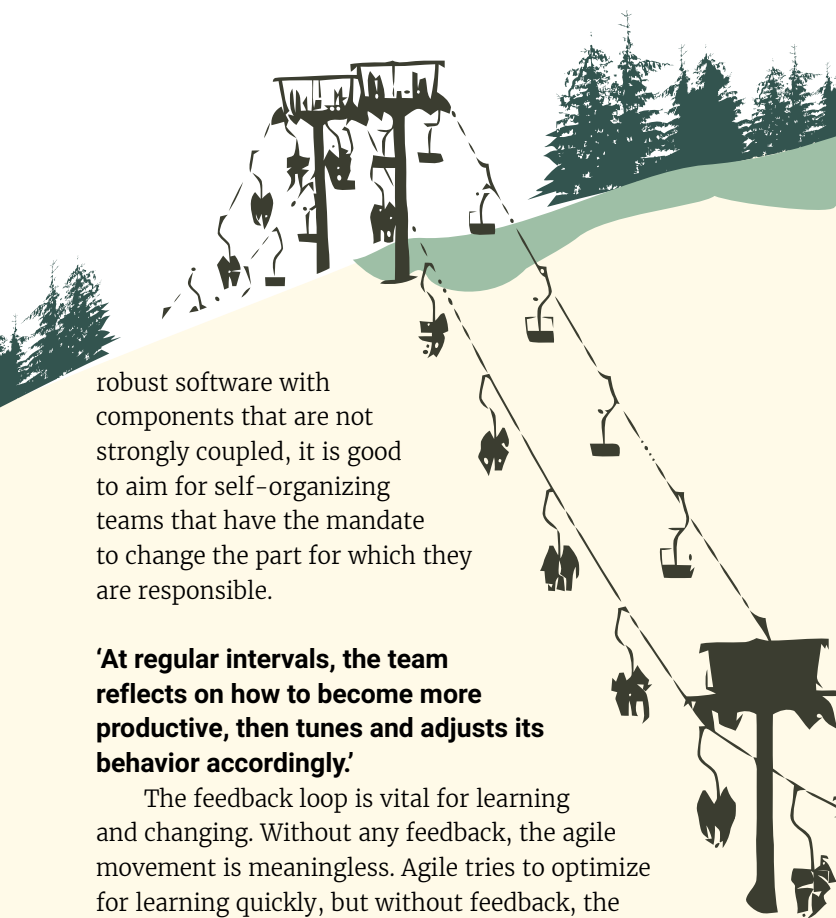
'At regular intervals, the team reflects on how to become more productive, then tunes and adjusts its behavior accordingly.'

The feedback loop is vital for learning and changing. Without any feedback, the agile movement is meaningless. Agile tries to optimize for learning quickly, but without feedback, the learning will be suboptimal at best and very likely only an inefficient way of working.

On the whole, this document has aged better than most of the software we have written. This document was written in the time that Windows XP, Myspace.com, and Napster came to be. While a few of the principles of the Manifesto show their age, their intention is still clear today.

It is an extraordinary document that, although created by very technical-oriented people, stays away from technical solutions and is more values-driven.

With the increase of development speed, new movements like the DevOps movement have added to these values to create a better way to look at software development in a broader context.

At the same time, with the success of agile, we have seen companies try to market agile as a product. I hope that the product "agile" will not supplant the agile mindset. Agile is something to be discovered by teams that need it, not something to be bought and implemented as a new operating system. **⌐P**

About the Author
Joris Slob is a scrum master who works with development teams at TOPdesk, to help facilitate their path to better outcomes. He believes that technical excellence leads to faster results, and he has worked with six different teams and started the Agile guild at TOPdesk. Slob holds a master's degree in media technology from Leiden University in the Netherlands. Portions of this article first appeared on ITProPortal.com in August 2020.

livering something timely and tangible as promised."

"We wanted to restore a balance," he wrote. "We embraced modeling, but not in order to file some diagram in a dusty corporate repository. We embraced documentation, but not hundreds of pages of never-maintained and rarely used tomes. We planned, but recognized the limits of planning in a turbulent environment."

When used correctly, many believe the Manifesto remains as relevant today as it was when first written 20 years ago and can be a valuable tool not only for developers, but also for diverse groups such as PR and marketing teams, product managers, software coders, and others.

But that hasn't stopped some critics from voicing their concerns.

In an article published five years ago on Tech-Beacon.com celebrating the 15th anniversary of the Manifesto, Malcolm Isaacs, a senior researcher at Micro Focus, described the irony of a document that embraces change but is reluctant to change itself.

> **WHEN USED CORRECTLY, MANY BELIEVE THE MANIFESTO REMAINS AS RELEVANT TODAY AS IT WAS WHEN FIRST WRITTEN 20 YEARS AGO**

Isaacs wrote, "In fact, the Agile Manifesto seems to be the only thing in the software development industry that has not changed at all since the time of its inception."

Philippe Kruchten, a prominent Canadian software engineer, has likened the agile movement to an awkward teenager: "very self-conscious, checking constantly its appearance in a mirror, accepting few criticisms, only interested in being with its peers, rejecting en bloc all wisdom from the past, just because it is from the past, adopting fads and new jargon, at times cocky and arrogant."

But despite his criticism, Kruchten said he also sees great potential in the timeless document.

"I have no doubts that it will mature further, become more open to the outside world, more reflective, and therefore, more effective." **⌐P**

About the Author
David Gustafson, PMC-I, was named editorial director at Pragmatic Institute in December 2020. Connect with him on LinkedIn at linkedin.com/in/davidgus or via email at: dgustafson@pragmaticinstitute.com.

"We are a global group. We all speak different native languages and different business languages. The Pragmatic Framework has been one of the most powerful tools in uniting us. It's added a layer of rigor and evidence on top of our smart people having really great ideas."

Rob Shea
Sr. Director, Portfolio Management

"Pragmatic training has allowed us to align much more quickly and not waste a lot of time in meetings where nothing gets accomplished. Because we're aligned, because we're talking the same language, we're able to work more effectively and increase our ramp time so that we're able to meet the objectives of the business faster."

Brina Kaiser
Product Marketing Manager, Infusionsoft

"Pragmatic brought to us a framework, an approach and a set of best practices that are truly world class. We took the training and then made it part of our DNA, as it was applicable day one. Pragmatic Institute really has become the de facto industry standard for world class product management training."

Jonah Paransky
Executive Vice President

Don't listen to us.

Listen to our customers.

"I think the most unique thing about Pragmatic Institute is that it understands the different disciplines and areas of marketing and how they should work together to achieve the type of goals we want to achieve. It's integrated and orchestrated so that you do bring the best products to market and do listen to your customers."

Ellen Derrico
Senior Director of Product Marketing
RES Software

"We executed on our three-year corporate plan in 12 months. Without Pragmatic there's no way that happens."

Frank Tait
Vice President of Product, Frontline Technologies

pragmaticinstitute.com/customers

Product Development Blooms through
ARTIFICIAL INTELLIGENCE

BY SHASHI KIRAN

IN THE PAST DECADE, artificial intelligence has dramatically affected humankind, and experts say this is just the beginning. We may not realize it, but AI makes things easier and better in all facets of daily life, whether through innovation or consumption.

There is a reason why AI is called the fourth industrial revolution: AI startup funding worldwide grew a staggering 30 times, from $800 million in 2012 to $24 billion in 2019, according to Statista, and product management professionals are leveraging this technology to its full extent. Find that hard to believe?

Well, there are winning and inspiring stories of AI in each phase of product management, from idea generation to prototyping/concept development, through product development and, finally, in commercialization. Read on to see examples of each.

IDEA GENERATION

Product managers can leverage AI to collect and analyze big data to learn more about the market.

For example, product managers at Spotify or Netflix start their days with data-enabled recommendations on what customers have been watching and listening to—and what they haven't been watching or listening to. In turn, this reveals what customers will want next, informing decisions about what the services' next offerings will be.

The Internet of Things (IoT) brings a whole new paradigm of product ideation. Consider smart cities, which are generating whole new ideas of product development.

For example, Idaho-based Solar Roadways uses solar panels to provide power to electric vehicles as well as digital driving assistance for drivers. These same panels can be used to defrost ice electronically, too. Imagine the same concept used across the United States: It could fulfill the demand for all electricity across the nation.

More simply, IoT has already demonstrated that your refrigerator can basically be used as an ordering management system by checking its inventory and sending an order to a grocery outlet (Instacart/Amazon delivery) for delivery and restock of your fridge. It can also integrate with your calendar and re-adjust your stock based on the next house guest to arrive. From smart cities to smart homes, IoT brings new concepts of idea generation.

PROTOTYPING/CONCEPT DEVELOPMENT

A basic premise of prototyping and concept development is to fail fast: If we're going to fail, let's fail fast and adapt and adjust based on feedback and learnings.

AI comes in handy here, as it helps product

developers make the product lifecycle more transparent and nimble, which eventually makes it more valuable.

For example, a product is a cohesive bond of various subcomponents that can be developed in parallel, but without machine learning and AI, it is impossible to also manage the chaos of ingesting all subcomponent learning in parallel.

Also, AI in the form of tools like 3D printing, Computer Numerical Control (CNC) and rapid tooling help you assess how a conceptualized product is coming along.

You save both time and money by using AI this way, and your product ideas are validated. For example, 3D printing showed how to create hospital-grade personal protective equipment (PPE) when the world was facing a severe PPE shortage during the pandemic. In fact, at a time when the world is fighting to control COVID-19, almost all medical procedures depend on AI.

PRODUCT DEVELOPMENT

The pandemic brought the global scientific community together in a race to develop a vaccine—and this product development was heavily based on AI. An AI model trained on a specific molecule offered a very cost-effective and rapid implementation method for drug (product) development.

It also offered various changes as the product moved from ideation to concept. Trained on enough data, AI was able to home in on specific biomolecules that helped design the vaccine in record time. What used to take years or decades was accomplished in months.

Another inspiring example comes from the online personal styling service Stitch Fix, a pioneer in AI-based product development.

Powered by data at every aspect of the business, this company helps consumers find the right clothing in minimal time. Data helps the company offer the right style and the right price—and it helps them scale.

By incorporating millions of customers' feedback and precisely measuring every aspect of the clothes it offers, Stitch Fix offers highly personalized clothing at the right price. By churning big data and customer preferences, the company knows that the most popular attribute for clothing is fit, not price. Its customers are willing to spend more money for a great fit that looks good.

COMMERCIALIZATION

One of the most critical levers for all product managers is digital transformation, another core piece of machine learning and AI. Billions of data points are processed to outline consumer behavior about what they have previously purchased.

Perhaps more important, though, is data about what consumers are likely to buy, their preferred purchase channel and the timing of when they are likely to buy. AI builds a complete customer journey that is further strengthened by product managers through the right go-to-market strategy.

For example, one customer has many faces across a variety of social media platforms. AI helps product managers demystify these complex data points and provide a 360-degree view of the consumer. Tools like Datorama, SprigHub and Segment process billions of data points and provide harmonized insights about the market. They also define the next best course of action for any given product.

Still using the social media example, AI helps product managers control their go-to-market strategies by influencing what's being discussed in any given platform. Big data from social script can be brought into an organizational data lake and, with the use of a machine-learning algorithm, can identify which topics are being discussed, and their sentiment and net promoter scores.

> "Product managers can leverage AI to collect and analyze big data to learn more about the market."

Amazon is the best example of product commercialization using AI. The leader in tapping big data, Amazon's product managers track not just campaign ROI but also the upsell/cross-sell opportunities that exist within their products. They track what customers really like or really dislike, and that feedback goes straight to product improvements.

LEVERAGE THE TOOLS YOU HAVE

Successful new product introductions are critical for all product managers. Yet, launching products is one of the most ambiguous processes, as it deals with a great degree of uncertainty.

Taking a machine learning/AI-driven approach leverages a neural network approach to predict the chance of success in new products—and keep existing products thriving. It's all a matter of using the information that's all around you. **:P**

About the Author
Shashi Kiran is head of business planning and analytics for the consumer business unit at Western Digital Corporation. He can be reached at Shashi.kiran@wdc.com. Follow him on Twitter @kiran_shashi or connect with him on LinkedIn at linkedin.com/in/kiranshashi.

ZOOMUS INTERRUPTUS

Rethinking Sales Tools in an Era of Change

BY ROD GRIFFITH

OUR CLIENT CARL, THE COO OF A MEDICAL TECHNOLOGY company, brought home a new puppy named Darby two months ago. Darby absolutely loves to chew the stuffing out of his toys. We know this because Darby is now a regular member of the marketing planning team's weekly Zoom meetings. While the rest of us try to discuss business, Darby is in the background writhing on the living room floor, wrestling with his toy duck like a vicious hyena that's just captured its dinner on the African savannah.

Carl's daughter, Stella, steps over the ferocious battle and asks her dad for the car keys. Carl apologizes and explains that his daughter is picking up an allergy medicine prescription at the pharmacy. As he gets up to fetch his keys, we see Carl is wearing bright orange biking shorts with the logo for Berlotti's Bread Market, his mother-in-law's bakery she started out of a small shed in 1978.

In just one meeting, we learn more about Carl than we probably would have in a normal year. But 2020 was not a normal year.

THE ACCELERATION OF CHANGE

The pace of change in the business world started its acceleration years before the COVID-19 pandemic. The rapid introduction of technology innovations such as e-commerce, cloud computing and virtualization, social media, interactive video, marketing automation, and mobile solutions (among many others) has continually altered how our customers research, evaluate, compare and purchase our products and services.

This is all part of a transformational change in business that has been accelerating for years. A 2016 KPMG study found that 96% of organizations were undergoing business transformations. And in 2018, Gartner found that 37% of top senior executives believed their organizations would need a deep cultural change by 2020.
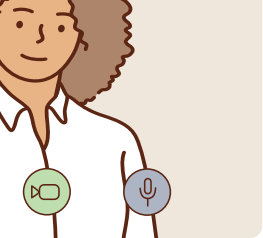
How right they were.

The transformation reported in the past several years was catapulted by the 2020 pandemic and the almost immediate shift to remote working.

WITNESSING THE ACCELERATION OF CHANGE

The acceleration of change is most apparent in the rapid adoption and growth of new technology innovations through the years. In 2018, VentureCapitalist.com published a list of various important technology innovations and how long each took to **reach 50 million users:**

62 YEARS Automobile	**50** YEARS Telephone	**28** YEARS Credit Card	**22** YEARS Television	**12** YEARS Mobile Phone	**7** YEARS Internet	**4** YEARS Facebook	**1** YEARS WeChat	**19** DAYS Pokémon GO

When the Pokémon GO app reached 50 million users in just 19 days, one might have thought it would be years before such a record would be topped. But then COVID-19 happened, and all bets were off. In late spring of 2020, India released a COVID identification and tracking app called Aarogya Setu (translation: "Healthcare Bridge"). It reached 50 million users in just 13 days.

customers has accelerated dramatically. Beyond the adjustments we have made for the remote sales and communications environments, we also must re-evaluate our messaging and content to ensure they fit the way customers expect to learn and communicate today.

Here are six useful suggestions to help you make these adjustments.

1. Understand the New, Acceptable Informality

An interesting side effect of this rapid shift to virtual meetings is what we deem "acceptable informality." The sudden shift to remote work environments has required us to allow customers, employees, vendors and partners to peer into our home lives through the window of daily video meetings. Many people did not have private offices at home, so we regularly found ourselves staring into people's home lives—their kitchens, basements, bedrooms and family rooms.

As we learned with Carl and Darby, these video meetings inevitably resulted in conversations about the details of our lives on a more intimate social level than we would have previously been comfortable with. We must understand and acknowledge this acceptable informality to strengthen the appeal and impact of our sales tools.

2. Evaluate the Mix and Effectiveness of Your Current Sales Tools

Are you still using sales collateral meant to be a leave-behind piece for sales calls? Are you using PowerPoint presentations written and designed to be projected in a small conference room during in-person sales calls? Were your product briefs produced to be given out at trade shows and conferences?

With our accelerated pace of change and the evolving ways in which we now interact with prospects and customers, it is more important than ever to regularly audit your current portfolio of sales tools. In doing so, you may find that many of your current tools simply no longer align well with the way customers are educating themselves and evaluating your solutions. Perhaps some sales tools

ADAPTING SALES TOOLS TO EVOLVING CUSTOMER RELATIONSHIPS

In response to the COVID pandemic, we scurried to adapt to the new remote-work situation. With customer visits no longer possible, video meetings became the norm. Salespeople have had to learn to keep their customer relationships moving without the benefit of in-person meetings. Industry conferences and trade shows were quickly replaced with virtual conferences, webinars and virtual exhibit halls.

By now you've likely managed to shift marketing tactics from live to virtual events, from in-person to virtual sales presentations, and your sales materials are digital and readily downloadable. Oh, and you're likely posting more videos online, too. You've made many of the necessary adjustments to move your sales communications and tools to an online environment, but you must also consider whether those sales tools themselves need adjustments.

The rate at which we are becoming more personally acquainted with our

MAKING THE MOST OF TODAY'S ACCEPTABLE INFORMALITY

Prior to the COVID-19 pandemic, the process for creating effective customer testimonial videos would have required a videography crew to travel to customer sites (or to trade events) to conduct interviews with customers.

But, with such in-person visits restricted during the pandemic, we have been using virtual video conference technology to record customer testimonial videos, to which we add supporting animation.

While these videos don't have the professional quality of an on-site video shoot, customers have been completely accepting of this level of video quality. They clearly understand these videos had to be captured remotely.

The result is no reduction in the impact or effectiveness of the videos. Once again, today's acceptable informality allows us to adjust for the way we communicate today.

need to be rewritten and redesigned, while others may no longer be needed or should be replaced with something more effective.

To perform this audit of your sales tools, start by examining each stage of the complete customer journey and determine where you need the most help in accelerating your customers through to the next stage. (See Figure 1.)

Do you have the right sales tools to help you generate awareness? How effective are they in helping prospective customers become educated and informed about the challenges and problems your products address? Are your sales tools accelerating the customer's ability to better assess and evaluate your products against alternative solutions?

These are just some of the many questions you'll want to ask about your current portfolio of sales tools. For a more detailed guide, read "Mapping Your Sales Tools to the Customer Journey" in the Summer 2018 issue of this magazine (then called *The Pragmatic Marketer*).

3. Warm Up Your Content Tone

Most B2B marketers (especially those in technology companies) write sales content that is formal in tone. To be professional, accurate and comprehensive, they create content that lacks warmth and fails to shed light on the company's personality.

In a new era of turmoil and constant change, a little empathy can go a long way. Just as our customer relationships are becoming more personal, so should our content and the tone of our writing. Help prospective customers understand that you recognize their stress

and apprehension and are here to help. Use a warm, friendly tone to emphasize that you aren't just a product or solution—you are a trustworthy partner with the expertise to help them navigate through their issues with greater confidence and certainty.

4. Humanize Your Value

As we boost the warmth of our content to reflect the acceptable informality of our changing customer relationships, so too should we humanize and personalize the value that our company and solutions offer.

B2B marketers typically focus on the business value of their company and products, often overlooking the importance of the personal value they offer. This is partly because of a common belief that personal emotion has little involvement in B2B purchase decisions, especially when compared to consumer purchases. After all, B2B decisions are based on careful research, consideration, analysis and clear metrics.

But this is simply not true. In fact, a 2013 CEB/Motista study found the opposite: Emotion typically plays a stronger role in B2B purchase decisions than in most B2C purchases. You can better drive customers to action by communicating the personal value of your company and products, not just the business value.

And this is especially true at a time when prolonged remote working and isolation have combined with the acceleration of change to leave many people feeling uncertain, disconnected and unsure. Showing how your products not only help achieve business goals but also improve their personal situations (e.g., improved job stability, confidence, social connection) can help tip the purchase decision your way.

Infusing your product messaging with personal value can boost your differentiation because, often, business value is not a strong differentiator. After all, in most cases your competitors are communicating similar business value propositions. Adding personal value to your messaging can be a competitive advantage.

The CEB/Motista study supports this, as it found that buyers who see the personal value of products are three times likelier to purchase those products than those who only see the business value of products. And besides being three times likelier to purchase your products,

Figure 1: The Complete Customer Journey
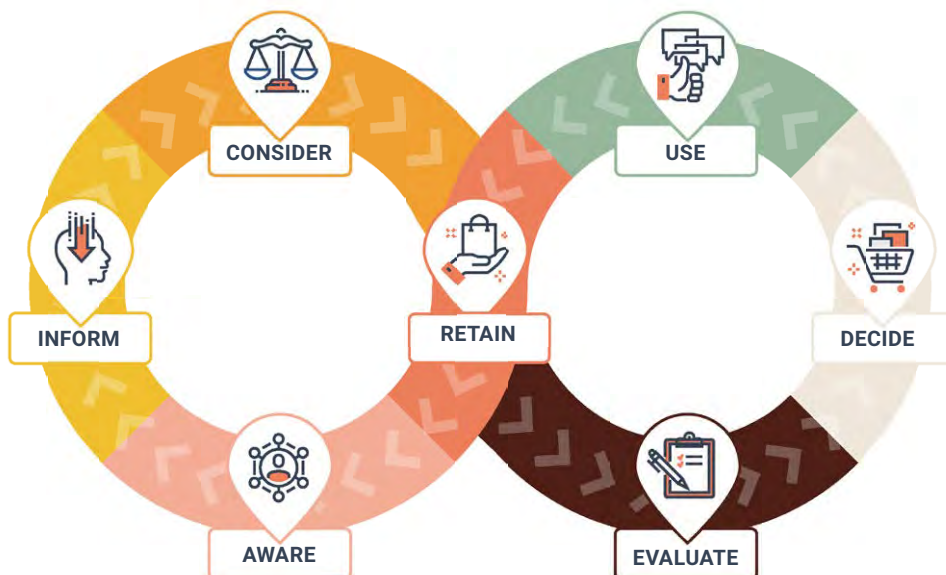
those same B2B buyers who see the products' personal value were also eight times more willing to pay more for those products!

Here are a few examples of personal value that your product(s) may offer:

- **Alleviates job stress, making the job easier and more enjoyable**
- **Builds important skills or experiences that increase your value to the company**
- **Provides personal success that is visible across the organization, thus boosting career advancement opportunities**
- **Allows you to spend less time working late, providing more time with your family**
- **Frees up time and attention so you can focus on higher priorities or more rewarding tasks**
- **Boosts your confidence while helping you build new valuable relationships**

To learn more about the importance of interjecting personal value into your B2B marketing messaging, listen to the Pragmatic Live podcast, "It's Not Just Business—It's Personal."

5. Revamp, Reformat, Reduce

Along with changes in content and tone, you also must look at the tactical designs and format of your sales tools to ensure they are best matched for your customers' changing communications channels. Your traditional product presentations—designed to be given in person by your direct or channel salespeople—may not work as well in today's virtual-meeting environment. You may need to revamp length, design and layout (even font sizes).

Everyone is bombarded with vast amounts of information daily, without enough time to absorb more than a fraction of it. (We've been warned about Information Fatigue Syndrome since 1996.)

To get customers to focus on your messaging, your sales tools need to tell a compelling story while also getting to your critical points quickly. Evaluate each sales tool and ask whether the intended audience has the time to view and absorb it effectively. Is there a way to communicate your critical points more concisely? Consider adding an executive summary to the beginning of longer sales tools to give customers the most salient points quickly.

6. Get Animated and Interactive

In today's remote selling environment, digital animation has proven to be a highly compelling and effective way to tell product stories. With technology improvements and lower costs, the use of digital

In a new era of turmoil and constant change, a little empathy can go a long way."

animation video has rapidly increased in the past decade. And live customer testimonial videos can be effectively captured via virtual video conference technology at far less cost than on-site shoots.

To further adapt to remote selling, many companies are creating interactive, web-based product demonstrations and tutorials, allowing customers to tour products online—whether on-demand, in self-guided mode (with the customer choosing how deeply they want to dive into the product technology) or through virtual meetings with a remote salesperson.

LACK OF NORMALCY IS THE NEW NORMAL

The average life span of a company was 61 years in 1958, according to a McKinsey study of that year's S&P 500 companies. By 2016, that average had dropped to less than 18 years, and McKinsey predicted that 75% of the companies on the S&P 500 would disappear by 2027. That was four years before the pandemic.

The acceleration of change does not allow us to simply assume that we will return to a "new normal" that will once again be predictable. It is highly possible that the only assured element of any new normal is the sheer lack of normalcy.

Change will be further assisted by the burst in new technologies and innovations that will continually reshape the way marketers attract, inform and engage with new customers. As such, savvy marketers must be prepared to regularly monitor and review their strategies, messaging and tactics—including their sales tools—to adjust to ever-changing innovations, market conditions and environments. **⌷P**

About the Author
Rod Griffith is founder and chief client officer for MarketReach Inc. He can be reached at rgriffith@mreach.com. Connect with him on LinkedIn at linkedin.com/in/rod-griffith-b851651.

"Ahem."

PRAGMATIC LIVE
IS ON THE AIR.

Our monthly webinar and podcast series will help you conquer your greatest product management and marketing challenges. It offers best practices and tips, as well as an inside look at how they're being implemented in some of today's most successful companies.

So, if you're looking to stay tuned in to the latest in technology, look no further than

pragmaticinstitute.com/podcast

Find us on **Spotify**

PRAGMATIC | live))

is the MAGIC NUMBER

Ask Yourself These Key Questions to Help Mitigate Risk and Ensure a Successful Launch

BY JOY LEVIN

AS A PRODUCT MARKETER, YOU SHOULDER MUCH OF THE RISK when a new product launches—after all, you're ultimately held responsible for the launch's outcome. It's not surprising, then, that you frequently are preoccupied with minimizing the risks inherent in a launch.

While many product marketers do what they can to optimize product quality, ensure efficient distribution, monitor financial performance and oversee the development of market collateral, they sometimes overlook the answers to some key questions that would increase the chances of an optimal product launch. In fact, many decisions made around the development and launch of a new product can be greatly facilitated by a few critical insights.

In my 25 years of experience as a market research consultant, I've learned three key questions to ask that will de-risk many of the marketing decisions necessary for a successful launch. I've also learned why they're important, and how to find their answers.

QUESTION 1: WHO IS THE IDEAL CUSTOMER?

Clearly defining the target market for your product is a first step that leads to confident and accurate marketing decisions for several reasons.

Leads to Cost-Effective Marketing and Business Operations

By focusing on characteristics that define their ideal customer, product marketers can pursue these individuals efficiently because they avoid spreading their resources among too large of a target. By concisely defining the lowest-hanging fruit, these marketers get a specific sense of the:

- **Media their target market consumes**
- **Issues that are important to the target market**
- **Buying triggers**
- **Others who play influential roles in consumers' decisions**
- **Purchasing frequency of consumers**

With these answers in hand, you increase the likelihood of spending time and money on developing marketing materials and making media purchases that your audience is most likely to consume.

Directs the Development of Key Marketing Messages

Product marketers who develop a comprehensive understanding of their ideal customer have a much better chance of using the language and tone that resonates best with customers. Achieving this resonance increases the likelihood that you will make a product idea sticky—something the consumer recalls when it's time to buy.

Supports Your Product's Unique Selling Proposition

Your product, market and branding all are distinctive, and this unique combination is what makes the product compelling to buyers. To ensure that the brand's unique selling proposition is an appropriate fit for the ideal customer, have a clear understanding about:

- **The target market makeup**
- **The product aspects that are compelling to the market**
- **How the product is positioned to meet the target market's needs**

Now that you understand why the question about who the ideal customer is, it's time to find the answer. There are many strategies you can use, but one technique is particularly useful in providing sufficient depth to target market information: the expert forum.

By assembling and listening to a group of industry experts, you will hear key information about the ideal customer—much of which you likely hadn't considered—actively and comprehensively discussed by these insiders. These experts have the experience, background and knowledge that can deliver a complete and multi-perspective picture about the target market and how you can reach these individuals.

Even if you have industry experience and inside knowledge yourself, an expert forum frequently can fill in the gaps that may be missing from your knowledge. Then, you can use this information to inform the many marketing decisions you need to make with greater precision and to address your prospective customers effectively.

There also are two other positive consequences of expert forums. One is the ability to segment the target audience into clearly developed personas. Personas effectively humanize the members of your target market and help you bring them to life for various internal stakeholders (e.g., finance, product development, leadership).

> "Marketers who develop a comprehensive understanding of their ideal customer have a much better chance of using the language and tone that resonates best with customers."

Specific areas of your target audience you will want to identify in personas include education level, industry and external pressures their industry is facing, concerns they have, and social media channels they use. The resulting personas can act as a bridge between capturing and conveying, to both internal and external stakeholders, all the factors about your target audience that need to be addressed when developing products.

The other upside to working with an expert forum is that these individuals can become long-term strategic advisers for your organization. They can provide valuable input into future directions for the product and the company because they frequently are heavily invested in the industry and tend to stay on top of trends that will affect your customers in the future.

QUESTION 2: HOW DO I OVERCOME PURCHASE BARRIERS AND MOTIVATE MY TARGET AUDIENCE TO BUY?

There are many factors that motivate your ideal customer to buy your products as well as concerns that deter them from purchasing. It is critical for you as a product marketer to have a clear picture of these factors so that your marketing strategies overcome barriers while also framing messages to efficiently move prospects along the journey to becoming buyers.

Identifying the factors at play in determining both motivators and barriers can seem overwhelming. However, these issues usually fall into one of seven buckets. Table 1 summarizes these issues and how they may exert influence on the purchase decision. Use this table as a starting point to understand the influences at play for your product and

Table 1: Seven Categories of Motivators and Barriers

FACTOR	AS A MOTIVATOR	AS A BARRIER
Value	I get more out of this than any effort I need to invest (in terms of time, cost, other resources and so on). –OR– This is more/less than I would expect to pay, but the benefits outweigh the cost.	Whatever I receive in return for the costs involved in acquiring or using this product is not sufficient to justify what I would spend on it.
Innovation	This addresses my problem in a unique way—different from anything I've seen before –OR– This product will demonstrate to others that I am current on the latest technology or trends.	New solutions are expensive/ not sufficiently tested/unproven/risky. Let someone else try it first. –OR– I am not interested in solutions that are a departure from what I already know/have.
Convenience	This service or product will save me time. –OR– This is an easier way of achieving a goal that I have set for myself than other methods known to me.	This is a shortcut to something I need, but there are too many tradeoffs (e.g., doesn't adequately solve the problem, seems ineffective, has negative consequences) for me to invest in it.
Fear	If I buy this, I will avoid something unpleasant or destructive.	I will potentially lose something of greater importance to me than I could gain from this purchase.
Competency	I will appear as an expert to others. –OR– This product will elevate my intellectual status.	I will feel stupid/dumb/uninformed if I purchase this or will appear that way to others.
Anxiety	This purchase will reduce fears I have about the future.	This purchase will increase fears I have about the future.
Pleasure	This product tastes good, reduces pain, distracts me from something unpleasant.	This product will introduce something distasteful in my life. –OR– I will feel guilty about having this pleasure.

target market, and how you can begin addressing them. Still every situation is unique, so how do you specifically identify how these factors are relevant to your product and how to address them?

An especially useful technique in exploring purchase motivators and barriers is the in-depth interview. Though most often conducted in a one-on-one setting, it is not uncommon to interview two people if the decision to buy or object is heavily influenced by another stakeholder. In any case, develop an interview guide that steers the discussion so that you cover the main points to be addressed. While there are several types of questions you can ask, three particularly popular types are:

Relationship-building:

These questions may be only tangentially related to the topic at hand (e.g., what they like best about their job) or may be highly relevant (e.g., how often they shop for your product category).

Regardless, relationship-building questions give you the chance to warm up the respondent and demonstrate your interest in them as a person. When the respondent views you as a trustworthy partner in the discussion, they are more likely to provide you with accurate and valuable insights.

Process-oriented:

To understand where they are in their customer journey, what led to this point, their concerns and what may inspire them to move forward, include some questions that help you understand the various milestones that your prospects have met and what they want to achieve.

This line of questioning is invaluable in telling the customer story—a narrative that supports the communication of customer issues to internal stakeholders as well as to direct the development of various marketing assets (e.g., white papers, blogs, videos) for your target audience.
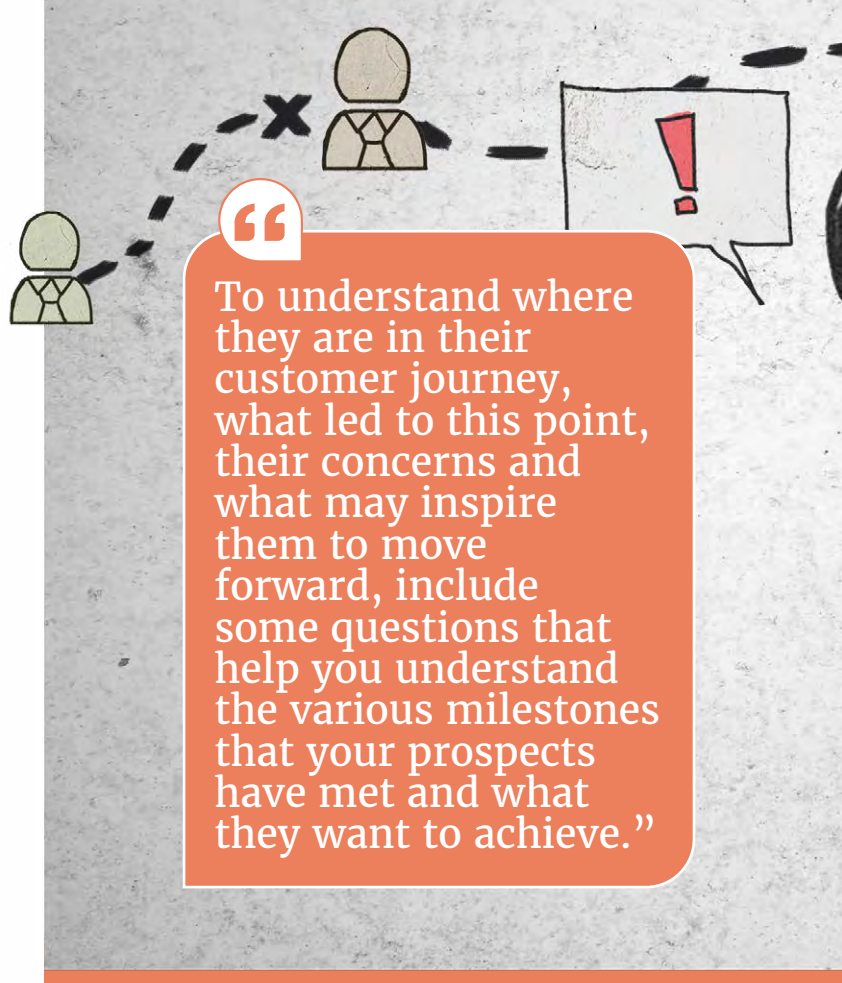
Probing:

It is tempting to follow up interview responses with "why?" While it is important to get at the underlying reasons for decisions and attitudes, interviewees tend to find it much easier to answer probing questions when they are framed as, "What are some of the reasons that led to this decision?" or "Tell me more about what that experience was like."

QUESTION 3: WHAT ARE MY CUSTOMERS' PAIN POINTS AND HOW DO I EFFECTIVELY ADDRESS THEM?

Pain points are the issues or concerns that your customers are experiencing. Your product's job is to address these issues and concerns.

For product marketers, pain-point research should trigger ideas for product development as well as shape the

> **"To understand where they are in their customer journey, what led to this point, their concerns and what may inspire them to move forward, include some questions that help you understand the various milestones that your prospects have met and what they want to achieve."**

design of your products so you can offer your prospects real, achievable solutions.

Marketers who know the pain points their customers face can more quickly build relationships with customers, even if they are targeting a large market. Specifically, if a brand's marketing feels disconnected from the customer's life and experience, a target audience is far less likely to feel heard and understood—and develop a sense of trust in the brand. Further, marketers who are empowered with pain-point knowledge can elevate their own reputation both internally and with their customers and, therefore, frequently are able to position themselves as an expert in the industry.

Focus groups often expose insights into pain-point discovery. By assembling a group of customers or prospects for a moderated discussion, you can learn about the pain points they face and how they imagine solving these problems. Oftentimes, some group members will reveal ideas of solution that others in the group had not considered. This can generate a discussion about whether they think these solutions would be applicable to them and how they would want them delivered.

When conducting a focus group, it can be extremely helpful to catch clues and suggestions that the pain points are oriented around four possible issues:

Financial:

Prospects will be concerned about what's in their wallets when they are faced with something that is either limiting their financial gains or when they expect to experience a momentary loss. When individuals think they are being overcharged, or when the value of a solution is not worth the cost, they are concerned about a financial pain point.

Productivity:

When people feel a situation exceeds the time that they want to spend dealing with it, they are experiencing a productivity pain point. Companies address this type of problem by creating solutions that either allow people to multi-task or addresses the task completely.

Process:

When something is getting in the way of a desired outcome, individuals experience a process-oriented pain point. For example, banks have used ATMs or mobile apps to make money available when their customers are unable to access their money outside of normal banking business hours.

Support:

Support-oriented pain points occur when people need assistance to accomplish something, but help is unavailable or hard to find.

This pain point inspires many companies to offer solutions such as expanded hours or channels. Or perhaps the customer is overwhelmed by all the options available and worries about making the wrong choice. The retirement coaching and consulting industry is an example of a solution tailored to this type of problem.

Safety:

This pain point often is associated with products that address concerns around health or physical wellbeing. Many of the innovations developed during the COVID-19 pandemic were created in response to the need to guard against health risks.

A FEW INSIGHTS CAN MAKE ALL THE DIFFERENCE

There may be other questions that you as a product marketer needs to address when launching a product, but make sure to include the three highlighted here.

Insights into these issues can make the difference in propelling a successful launch and empower you to make marketing decisions with less risk and more confidence. **◖P**

About the Author

Joy Levin is president of Allium Research and Analytics. She can be reached at joy.levin@alliumresearch.com. Connect with her on LinkedIn at linkedin.com/in/joyatallium.

A PRAGMATIC APPROACH

Put this issue's ideas into action.

Apply Multiple Framing Techniques to Problems

How you frame a situation determines the type of aggressiveness of the proposed solutions. Groups will almost invariably offer a different set of solutions framed as a problem rather than an opportunity. The next time you encounter a problem that seems to point to two less-than-great choices, reframe the issue and develop alternative solutions.

PAGE
21

–Art Petty
from *The Career Building Power of Integrative Thinking*

Ask Questions to Understand your Customer's Journey

Ask questions to understand the milestones your prospects have met and what they want to achieve. Determine what led to this point and what inspires them to move forward. This helps tell a story that supports communication of customer issues to internal stakeholders and directs development of marketing assets for your target audience.

PAGE
43

–Joy Levin
from *Key Questions to Help Mitigate Risk and Ensure a Successful Launch*

Hit 'Pause' on Common Response to problems

From annual strategic planning efforts to the routine of quarterly promotions and new product launches that are timed with industry events, organizations run in cycles while the world changes. As a leader, learn to recognize and challenge this pattern. Use "why?" coupled with, "How might we change and do something unique and valuable with that money/effort?"

PAGE
21

–Art Petty
from *The Career Building Power of Integrative Thinking*

Humanize Your Value

Infusing your product messaging with personal value boosts your differentiation because, often, business value is not a strong differentiator. In most cases your competitors are communicating similar business value propositions. Adding personal value to your messaging can be a competitive advantage.

PAGE
38

–Rod Griffith
from *ZoomusInterruptus: Rethinking Sales Tools in an Era of Change*

Get in Front of the Issue

Even with the introduction of modern communication techniques like video-conferencing and shared environments which make it easier than ever to work remotely, the Agile Manifesto reminds us 'the most efficient and effective method of conveying information to and within a development team is face-to-face conversation.'

PAGE
28

–Joris Slob
from *Finding Your Way in a (fr)AGILE Landscape –Twenty Years Later …*

Revamp. Reformat, Reduce.

To get customers to focus on messaging, your sales tools need to tell a compelling story while getting to your critical points quickly. Evaluate each tool and ask whether the intended audience has time to view and absorb it effectively. Consider adding an executive summary to the beginning of longer sales tools to give customers the most salient points quickly.

PAGE
38

–Rod Griffith
from *ZoomusInterruptus: Rethinking Sales Tools in Era of Change*

AGILE +20

READY YOUR BUSINESS FOR THE FUTURE.

Pragmatic Institute offers comprehensive learning for product leaders, business heads and data scientists. From product management, marketing skills and pricing to data science, machine learning and beyond, we are the partner you need to elevate your product, your business and your career.

FOUNDATIONS
Implement a proven, practical blueprint for being market driven.

MARKET
Focus your team on the marketing strategies that deliver results.

FOCUS
Use market data to identify and present the right product strategies.

LAUNCH
Elevate your team's product and marketing launches.

DESIGN
Create intuitive product experiences that exceed user expectations.

PRICE
Set the right price for each product in each market.

BUILD
Align product and development teams to build remarkable products.

THE BUSINESS OF DATA SCIENCE
Harness the power of data to impact business decisions and accelerate growth.

PRAGMATIC INSTITUTE

For more information about these courses or our executive offerings, visit **pragmaticinstitute.com** or call **480.515.1411**