

How ProductPlan helped a B2B SaaS company communicate and standardize its product management process



FOUNDED

Early 2010s

LOCATION

United States

INDUSTRY

Computer Software

COMPANY SIZE

500-1,000

FAVORITE FEATURES

Custom Views, JIRA Integration

The challenge

As a B2B SaaS company, this organization experienced rapid growth over the span of a decade. They developed multiple product lines and services to support a global target audience. The champion at the B2B SaaS company is supporting the recent effort to mature its R&D operations to meet the increasingly sophisticated needs of its global customers.

The champion and primary internal sponsor of this initiative currently helps lead the company's product operations team. This team is focused on improving the day-to-day work of the product organization by enhancing processes and the accessibility of the data they need to inform our product strategy.

The B2B SaaS company's product organization is comprised of multiple disciplines, with a dozen product teams divided to focus on specific products and features that serve the company's extensive personas.

For many years, the product team's role was nebulous and not well understood at the company. As the company grew, it became clear that the product development process is intrinsically connected to the business's overall success. In recent years, there has been an increasing need to establish a product strategy and better communicate it across the organization.

“Previously, we didn’t have a roadmapping tool or any way to really organize the operations team. We would literally update a slide every week and manually move over a little arrow or extend the arrow to show the scope of work, which was what was forwarded to everybody. Very rudimentary.”

Before ProductPlan, roadmaps and strategy were primarily documented via Google Slides using arrows to show the length and progress of initiatives at a high level. This proved overly cumbersome, and the manual updates were time sinks, as product managers would spend 5-10 hours per week updating roadmaps.

The solution

“We [needed a tool to] visualize all of the work the teams are doing, get more insight into how they were doing that work and the timelines around that so that our sales teams understood what was changing. And our marketing teams had insight into what they needed to start working on.”

A better way to communicate product management work.

As the product management team continued to grow and their work became more focused and defined, leadership realized that the product teams needed a dedicated platform to house all of the impactful work that the Product Squads were focusing on and an easy way to check if the teams were planning on working on the right products and features.

After an evaluation process with a few different platforms considered, the company recognized that ProductPlan was the ideal choice. Compared to the previous solutions the product team had been using, the champion and the entire product team realized that it was miles ahead of what they were used to using.

When Asana rolled out their Portfolio feature, Product R&D embarked on its first attempt to track and visualize work. However, the champion and the team found this solution to be limited and confusing to keep track of all work across the different product areas. The teams were also already tracking work via Jira, making this work duplicative.

The biggest pain points from the current state of the tech stack were an overall lack of visibility and the need to manually maintain roadmaps to ensure that work was properly communicated within the product and across the company. This problem area led to a lack of communication between product teams and a lack of clear understanding of what the teams were working on across product R&D.

“We’re realizing if we just spent the time invested in manual updates and put those details into ProductPlan instead, it would save our product managers a lot of effort.”

“In December of 2021, we had a fully fleshed-out product team. So I think that’s where the appetite came from. Now, we have people really focused on products and specific features and focusing on our buyer and seller journeys. I think that was the main driver.”

ProductPlan’s easy-to-use platform makes for a stress-free implementation.

Adopting a new tool can be an uphill battle. The last thing the product managers needed was a terrible first impression with their new product management platform, essentially starting them back at square one.

However, thanks to ProductPlan's ease of use and world-class implementation team, the platform was quickly adopted. The champion shared that the feedback he received from product managers who underwent the implementation process included that their implementation manager helped ensure a foundational understanding of the tool and the benefits of properly using it.

From there, the team could move toward actually focusing on better communicating and standardizing their product work across the organization.

"Long term, we're hoping to make a three to five-year roadmap plan for our product strategy in ProductPlan."



The results

Although the product is only two years into its journey with ProductPlan's product management platform, The champion and his team are already reaping the benefits. The champion shared a recent positive experience he had in a project he's currently leading in tandem with the product management team.

Only a select group of product managers went through initial onboarding with the ProductPlan team, and their team overall has grown beyond their initial count, so a lot of product managers successfully adopted ProductPlan on their own. They recently launched their new guidelines around how to roadmap. ProductPlan's features have made it incredibly easy to navigate how to tell a consistent story across roadmaps, with all of the different work our teams do.

Beyond specific examples, many product managers have welcomed the standardization so that they can invest the time up front to allow ProductPlan to work for them as a source of truth for the rest of the company. "We're really making this a self-service tool for the rest of the company, too. So instead of people getting slacks from our CEO or

from somebody that's a little bit interested in an initiative, they can really start and educate themselves there and then in ProductPlan. If they still have questions, then it can lead to deeper conversations."

The company enjoys the added benefit of powerful integrations.

The company integrated its JIRA instance with ProductPlan from the very beginning, and it's been a great experience connecting work to roadmaps. It has also helped surface inconsistencies in how their product teams create their epics/stories in Jira. This kind of visibility will further help strengthen their teams' consistency in their work.

"ProductPlan having the ability to link to Jira and Confluence has been a game changer. To be able to link back to the specific Jira boards and show the epics that the teams are working on is great."

Key results

Connecting the work happening in JIRA to the strategy allows the product organization to make more strategic decisions.

Having a product management platform serve as a single source of truth streamlines tasks so the product team can work more efficiently.

The product team has the ability to effectively communicate their strategy and plans to all stakeholders.