THE ESSENTIAL FEATURE KICKOFF CHECKLIST

From an Idea to the Kickoff Meeting

ProductPlan

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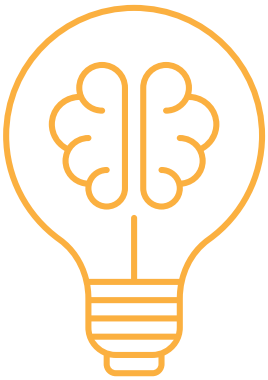
Introduction



Product managers (myself included) regularly have lightbulb moments for improving their product. But we just as commonly struggle to get our ideas from out of our head and through to a feature launch. What looms in the middle is the daunting task of efficiently running through all the steps to formalize, validate, prioritize, and eventually bring your product to life.

Oftentimes, even with the best of intentions, it's not uncommon that best practices fall to the wayside. As such, too many features fall short of optimal launch results because they don't follow a strategic kickoff meeting process. It happens to the best of us. I see a few reasons why this typically happens. We get busy and forget about the process while balancing all of our other moving pieces. Or we assume that because we covered details in another format, everyone is adequately informed. There's also the fact that we sit so close to the work that we forget that not everybody at the company has the whole perspective.

However, these oversights can be remedied. That's why we needed to write the **Essential Feature Kickoff Checklist.** We want this resource to be your guide whenever your product team takes the exciting step of adding a feature. We pulled from our own process and experiences as a SaaS-based software company. However, I believe the concepts can be applied broadly to any product manager's role.

I've outlined how you can apply your own methodical approach for a successful feature kickoff in six phases:

1. **Ideation**
2. **Communication**
3. **Interviews**
4. **Prioritization**
5. **Feature Kickoff**
6. **Outcome Assessment**

There's no secret to a successful feature kickoff meeting. It's all about formalizing a sense of what's ahead. The key is to communicate early-on with your team, stakeholders, and anyone who may be impacted by a feature launch.

At ProductPlan, we err on the side of overcommunication to guarantee a successful feature launch. No feature kickoff will be successful without methodically pursuing alignment, support, and feedback.

Enjoy!

Annie Dunham
Director of Product, ProductPlan
www.productplan.com

PHASE 1:

Ideation

PHASE 1: Ideation

Mini Brief

When you have an idea for a new feature, the first thing to do is write a mini brief. The mini brief is a basic overview of the "must-have" value of the feature. It outlines the proposed implementation phases of the feature to get value from it as soon as possible. It will be used as a reference point through all of the feature kickoff preparation.

What's in a Feature Kickoff Mini Brief?

The mini brief will outline your hypothesis. For the feature to be useful, what needs have to be met? To hone in, ask yourself, "What's the fundamental element of the problem that has to be solved?"

Most importantly, what do you believe will change with the new feature? State your hypothesis clearly. Look to any past data to see what you need to learn about the problem. You'll know your hypothesis is on the right track if the feature's success metrics are addressed in a testable way.

For example, "People will be successful if they share their roadmap with their team. We'll quantifiably measure the increase in clicks on the new proposed Share button."

Your mini brief should answer the following questions:

- What's the current state of the problem?
- What will this feature change?
- What is your hypothesis?
- What customer problem does this solve?
- What does success look like with the new feature?
- What metrics will be tracked against the feature?

We recommend:

Once armed with your mini brief, we highly recommend you talk to your customer support and sales team and bounce the feature idea off of them, informally. They'll let you know if this feature was already requested and confirm that the feature idea has legs. All feature ideas must be seeded early to get team buy-in.

PHASE 2:

Communication

PHASE 2:
Communication

Team Meeting #1

It's time to meet with your engineering and UX peers. Innovation comes from the collaboration of the three roles: product, design, and tech. Your primary objective around this meeting is to share what you know about the customer problem and build alignment around a possible solution.

The first meeting is an excellent time to share any customer quotes you have: the more anecdotal evidence, the better. Together discuss how a feature change fits into your product or vision today (or why it doesn't, but should). Collaborate with your triad to see what else you need or want to learn before you proceed.

When everyone aligns around the problem, go wide with your brainstorming for the solution. You can propose your solution, or not. If you offer a solution, ask your team if the proposed solution can be done. Also knowing the customer problem, do they think it's the best way to solve it?

Be open to hearing if there are better ways to do it. We guarantee this meeting will spark further ideas. The more you can fire up your engineering team up about this project, the better!

We recommend:

The first meeting is your test to build excitement and alignment. Make sure to listen to questions and objections and discover your potential problems early.

Then leave some downtime before the second meeting; that way, the idea can sink in.

Team Meeting #2

Come back to the table with mockups of the new feature and have everyone (UX, engineering, and product) review the mockups. If everyone is still aligned, then it would be best if you make sure the team is aware of their assumptions and questions. Once you address those questions and assumptions, it's essential to predefine how many customers and how much engagement you will need to validate the feature idea.

Before conducting Phase 3, customer validation interviews, there should be rigidity and takeaways around the answers to the questions. Decide which target audience needs to validate when the feature will be useful and the value it has to the user. Also, ask your engineering and UX team, "What else do we need to learn from these interviews or data to feel comfortable about moving forward?" You don't want to miss the mark.

All of this is working towards building a great foundation that you will validate with your customer interviews. You want to walk away from this meeting with a developed point of view that can be validated.

We recommend:

After the second meeting, you might learn that the mini-brief is wrong or that your designs aren't solving the problem. It's better to get that answered early. At this point in the process, iteration is still cheap. The cost of change is still low for business and efforts—it's better to redesign or iterate now before talking with customers.

PHASE 3:

Interviews

PHASE 3: Interviews

Customer Validation

You have your mini-brief, you have the support of your team, and you have your mockups. Now you need the validation of the people that matter most, your customers. A common (and accurate) expression we hear regarding customer validation interviews is, "get out of the office," or "get out of your head."

Our biases naturally slip in when we look at our own product and features. We're connected to the product differently than our users. Keep that in mind as you speak with your customers.

The rule of thumb is you need to conduct ten customer interviews to see the general trends. However, if there's a significant disparity in feedback, you will need to hone in your target audience.

In preparation for your ten customer validation interview, make sure to do the following:

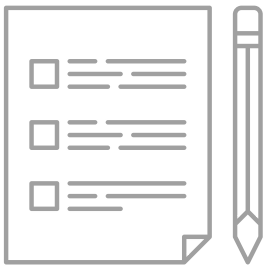
1. Have the list of assumptions and questions from Phase 2.
2. Save them in your collaboration tool of choice, where you can annotate and share your customer answers broadly back with your team.
3. Schedule interviews. Brace yourself; this is time-consuming. Schedules can be challenging. A tool like Calendly can make this easier or suggest two times that work for you.
4. Be conscientious of time zones.
5. Mention what's in it for the customer. For instance, the customer can exclusively preview of your roadmap, have Beta access, or influence the direction of the feature.
6. Invite a UX and engineering peer to the call, the more the merrier! With them on the line, you will hear things differently among your team. It's invaluable to have a second pair of ears hearing from the root source.

Now that your interviews are scheduled, here are some tips to effectively run the conversation:

1. If you can, record the conversation. But, always ask first. All the recorded learnings and quotes are great to share in the feature kickoff.
2. Sometimes, you'll be 2-3 interviews in and notice there's a theme in usability challenges. Before continuing your interviews, update your mocks! Then, show two mock options for all of the future interviewees.
3. Go back to the initial interviewee via email with the updated mocks.

After you've completed your interviews, encapsulate the interview in one sentence. The sentence will be a significant part of the overview doc and works great for your feature kickoff and value communication.

Finally, evaluate your results. Do you have enough data to move forward confidently, or do you need to rethink your audience, the problem, or the proposed solution? The cost of change is still relatively cheap at this phase as you're still building the foundation.



We recommend:

You're looking to validate your interview, so don't assume you've got it right. What your customers think is the most important. At the end of this phase, you will have a customer-centric perspective and data to support your value proposition. This information will be invaluable in the next stages.

PHASE 4:

Prioritization

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PHASE 4: Prioritization

Prioritize the Feature

It's time to put your strategy hat on. From your team meetings in Phase 2, you now have a perspective on the effort, investment, and customer value. Based on your product vision and existing scoring methodology, it's time to evaluate where the feature fits within your backlog.

Use your scoring methodology. For example, value vs. complexity, weighted scoring, kano model, affinity grouping, story mapping, and so on. Evaluate how your idea fits in among all the other feature updates in your backlog.

Before the new feature has a spot on your product roadmap, review everything you know so far, and identify any gaps.

To get a sense of your roadmap, ask:

- Do we have the necessary resources?
- How does this feature fit into our backlog?
- Have we fully refined the persona?
- What's the data that validates this feature to move it forward?

We recommend:

The key mindset of Phase 4, is you must have a perspective before moving onto Phase 5. It's on you as the product manager to decide when and where a feature fits in the backlog. Go through your existing prioritization process to find the right place on your roadmap.

PHASE 5:

Feature Kickoff

PHASE 5:
Feature Kickoff

Get Everyone in the Room

Now's the time to build alignment and excitement! You already know that engineering resources are committed. However, before a single line of code is written, or the designs are finalized, get everyone else up to speed. The feature kickoff is all about getting the right people in the room to make sure everyone is informed early on. Invite stakeholders and representatives from each department to the feature kickoff; typically this is sales, support, and marketing.

Once everyone gathers, review the mini brief you outlined in Phase 1 (make sure to update it over the course of the phases). Present the general problem and what the feature is meant to accomplish. This communication is the iterative part of your actual launch. Most importantly, share a proposal on how you may solve the problem.

During the kickoff, you don't have to present any timelines but should show the planned next steps and the feature's milestones. Explain your expectations around the milestones with built-in flexibility. Share some rough drafts (mocks, examples). Be clear that the final product will vary based on learnings in the feature launch process.

The kickoff should happen early enough that your team can prepare properly. You don't want the new feature to be a surprise to the customer success team. Give them enough time to plan out their documentation and training needs. Will you be able to get sales excited to sell it? With enough hype, sales will have time to seed active conversations and develop target contact lists. Give marketing plenty of time to hone their messaging and launch plans. Their ears will perk up when you present the value statement. Why will customers care? Which customers will care?

It would help if you assumed that the feature kickoff meeting will spark other conversations. Then along the course of feature development share updates with the team.

We recommend:

Don't let the fact that you don't have a delivery date keep you from communicating with your team. The goal of this meeting is to align everyone on the customer's problem and present a high-level view of your plan to solve it—earlier rather than later.

Feature Kickoff Feedback

Go into your kickoff with an open mind and collect feedback. Communication and feedback are so important early on— not right when the feature is going to be released. That collaboration will help you avoid unsupportive surprises from your team during the Feature Kickoff.

When you're in front of the company for your pre-launch kickoff presentation, the last thing you want is for someone to say, "That doesn't make sense. Why are you doing that?" in front of the company. Push-back shortly before the feature work takes place can derail your project.

Stay sympathetic. Remember, your team also needs to prepare themselves for the feature launch, and alignment is critical for them to succeed.

There may be discord, but now is the time to tackle it. It's significantly easier to address questions or details now, and you may find that their feedback informs some of the feature plans.

We recommend:

Ultimately, the best way to ensure a successful feature launch is to inspire the feeling that the feature launch is a company effort and not a handoff. Bring your team into the fold. Stakeholders should leave feeling invested and partially responsible for the feature's success.

PHASE 6:

Outcome Assessment

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PHASE 6:
Outcome Assessment

Develop a Sense of Needs and Challenges from Your Team

Take the feedback and all the information you've collected during these five phases. Doing so will allow you to develop a sense of the needs and challenges across other departments in your company. It will also question your assumptions. For instance, if you thought your feature was an excellent Enterprise feature, but then the Enterprise sales team isn't excited, take the time to learn why. Their reasoning could vary. Maybe they don't feel prepared, or they don't like the price. It will help you understand the ecosystem around your feature launch. Just because you have been through the feature kickoff doesn't mean things won't change.

One primary outcome of the feature kickoff should be the next steps. Assess the findings of the feature kickoff meeting. Then collectively decide how much time you'd like to commit to the feature change. For longer tail projects, you may find monthly meetings are good until the month before launch, and then weekly meetings after that. For the shorter term, you may need more frequent, targeted meetings.

The feature kickoff is yet another way to validate your feature plan.

We recommend:

Keep in mind that all of your teams are the voices of your customers in different ways. Your intent is not to make sure everyone is happy. Your objective is to make sure you understand the varying points of view and make adjustments where necessary.

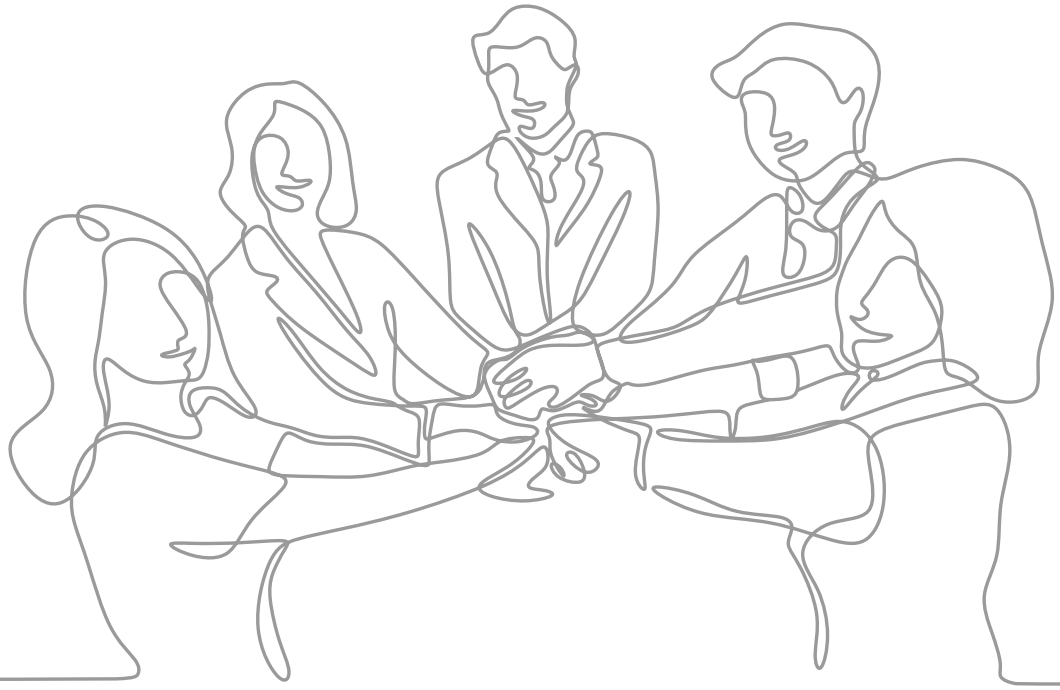
The ultimate goal is to have a stress free, successful feature product launch where everyone feels prepared and excited when launch day arrives!

Final Thoughts

If you're responsible for the features that make it into your product, then it's essential that you have a feature kickoff strategy in place. Even if that feature kickoff strategy is this **Essential Feature Kickoff Checklist** that we've shared on the following pages. Eventually, you'll get the best results if you modify the checklist to make it unique to you and your product.

Your feature ideas may have fallen short in the past because they didn't follow a strategic process before the kickoff meeting. That ends today.

Now go forth and successfully run an aligned, communicative, and useful feature kickoff.



Essential Feature Kickoff Checklist

Phase 1: **Ideation**

Mini brief

- [ ] Write down the problem your feature will solve
- [ ] Write down your hypothesis
- [ ] Write down the success metrics
- [ ] Share the idea with sales and customer success

Phase 2: **Communication**

Meeting #1

- [ ] Host first team meeting with UX and engineers
- [ ] Share what you know about the customer problem
- [ ] Ask, "Is this the best way to fix the customer problem?"
- [ ] Discuss how the feature change fits in your product vision

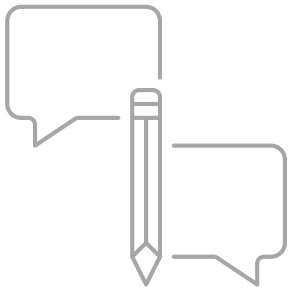
Meeting #2

- [ ] Bring mock-ups
- [ ] Decide the target audience
- [ ] Determine how much customer engagement is needed to validate the idea and move forward
- [ ] Address one another assumption around the feature
- [ ] Ask, "What do we need to learn from data to feel comfortable moving?"

Essential Feature Kickoff Checklist

Phase 3: **Interviews with Customers**

Customer validation



- [ ] Schedule interviews with customers and ideally include your UX and engineering
- [ ] Get out of your head and speak with 10+ customers
- [ ] Track feedback trends, if there's a large disparity then hone your target audience
- [ ] Save your assumptions and customer questions somewhere you can annotate and share with the team
- [ ] Ask if you can record the conversation

Phase 4: **Prioritization**

- [ ] Evaluate where the feature fits within your backlog
- [ ] Use your scoring methodology
- [ ] Establish a perspective on the future of this feature before moving forward

Phase 5: **Feature Kickoff**

Get everyone in the room

- [ ] Get stakeholders in a room and present your mini brief
- [ ] Share your solution
- [ ] Hype up your sales, marketing, and support team around the feature

Essential Feature Kickoff Checklist

Feature kickoff feedback

- [ ] Hear your teams feedback and tackle discord
- [ ] Make them feel prepared for the role they'll play in the feature's eventual launch

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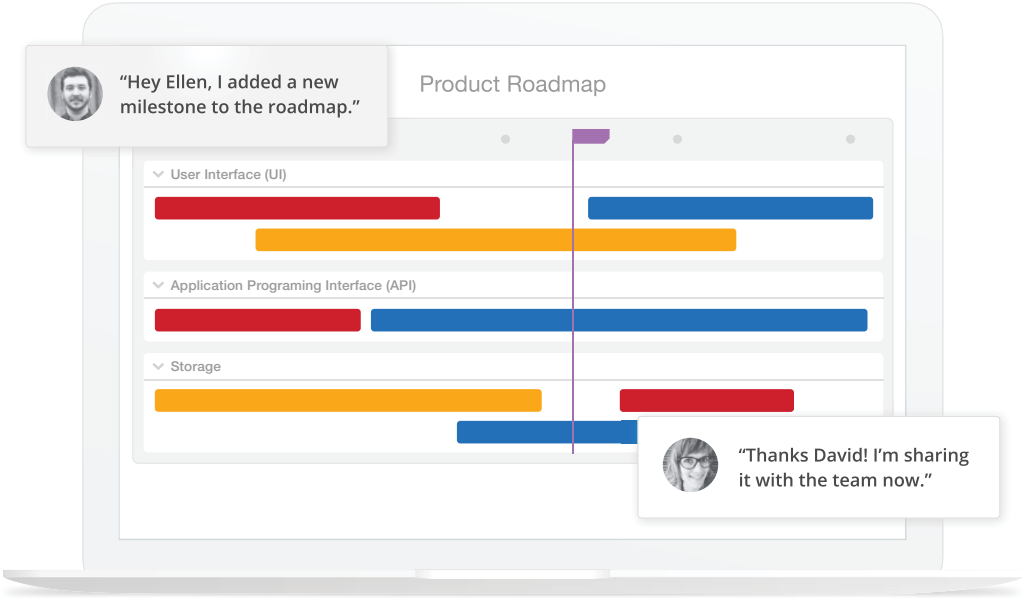
Phase 6: **Outcome Assessment**

Develop a sense of needs and challenges from your team

- [ ] Let the kickoff feedback question your assumptions
- [ ] Decide on the features next steps
- [ ] Validate your plan
- [ ] Understand the various points of view and make adjustments where necessary

About ProductPlan

ProductPlan makes it easy for teams of all sizes to build beautiful roadmaps. Thousands of product managers worldwide–including teams from Nike, Microsoft and Spotify–trust ProductPlan to help them visualize and share their strategies across their entire organization. With our intuitive features, product managers spend less time building roadmaps and more time shipping products.



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