

ROADMAP

**TEMPLATE
GUIDE**

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WHY DID WE PRODUCE A TEMPLATE GUIDE?

This guide is meant to give you an idea of the types of roadmaps you can build with ProductPlan. Whether you're a product manager managing one product or several, an IT Ops manager planning a system migration, or a marketing director charting your digital strategy for next quarter, you can benefit from a high-level roadmap. Roadmaps help you plan, prioritize, and communicate your product strategy, and our templates give you a great starting point.

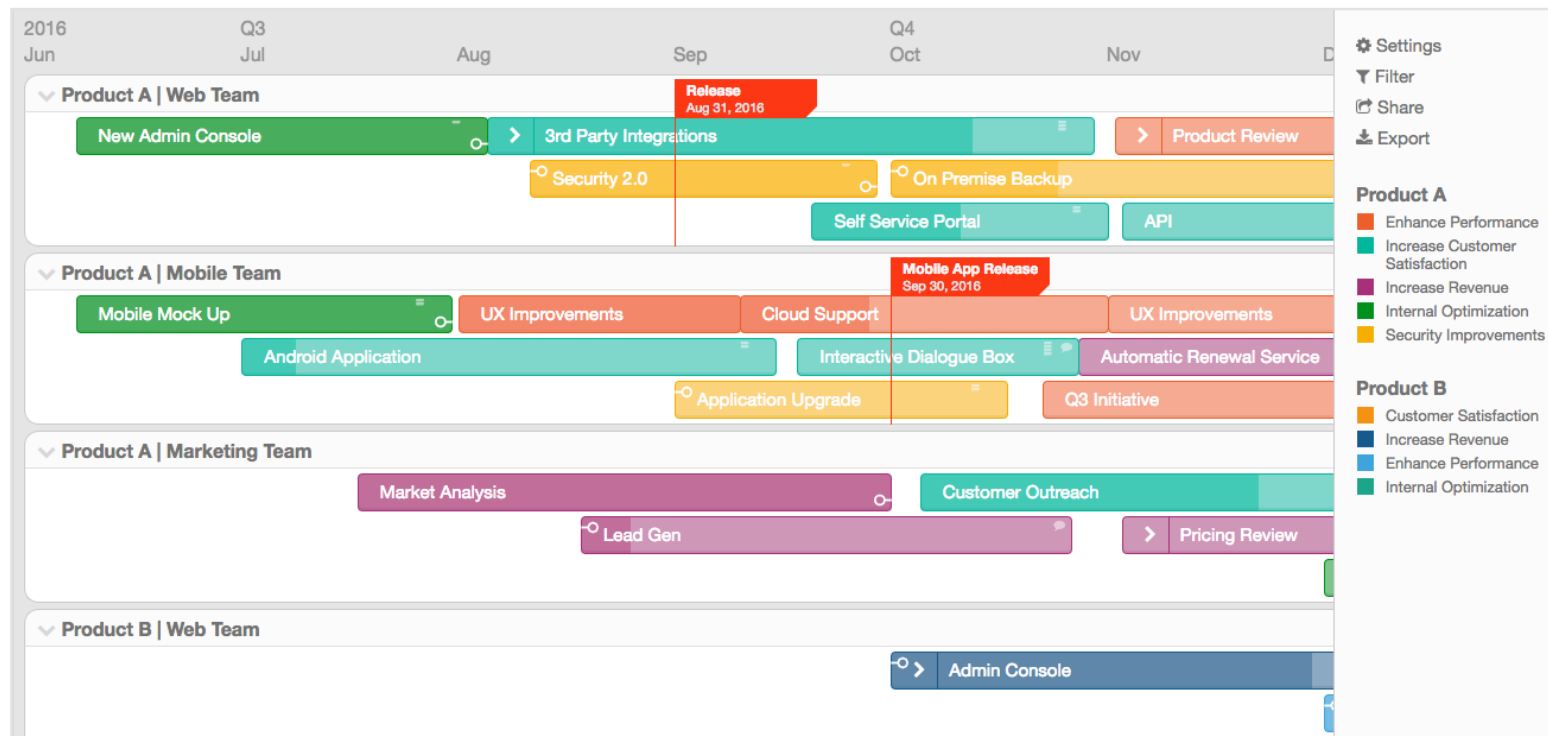
If you're already a roadmap expert, feel free to skip ahead to the templates themselves. You can also reach out to us at info@productplan.com if you'd like to add any of these templates to your ProductPlan account.

MAIN ELEMENTS OF A PRODUCT ROADMAP

It can be easy, especially for product roadmap proponents like us, to talk about roadmaps in an abstract sense—discussing how important they are to a product’s success, how useful they can be for bringing cross-functional teams together around a shared strategic goal, and how a product manager should decide which items earn a place on the roadmap.

But in discussing these high-level benefits and strategies of a product roadmap, it’s easy to forget that not everyone knows exactly what an effective roadmap is supposed to look like: what elements it contains, how those elements are displayed, and how to read the roadmap and understand what it’s telling you.

Let’s walk through a detailed view of an actual product roadmap, including each of its main elements. We will be using the roadmap below as our guide.



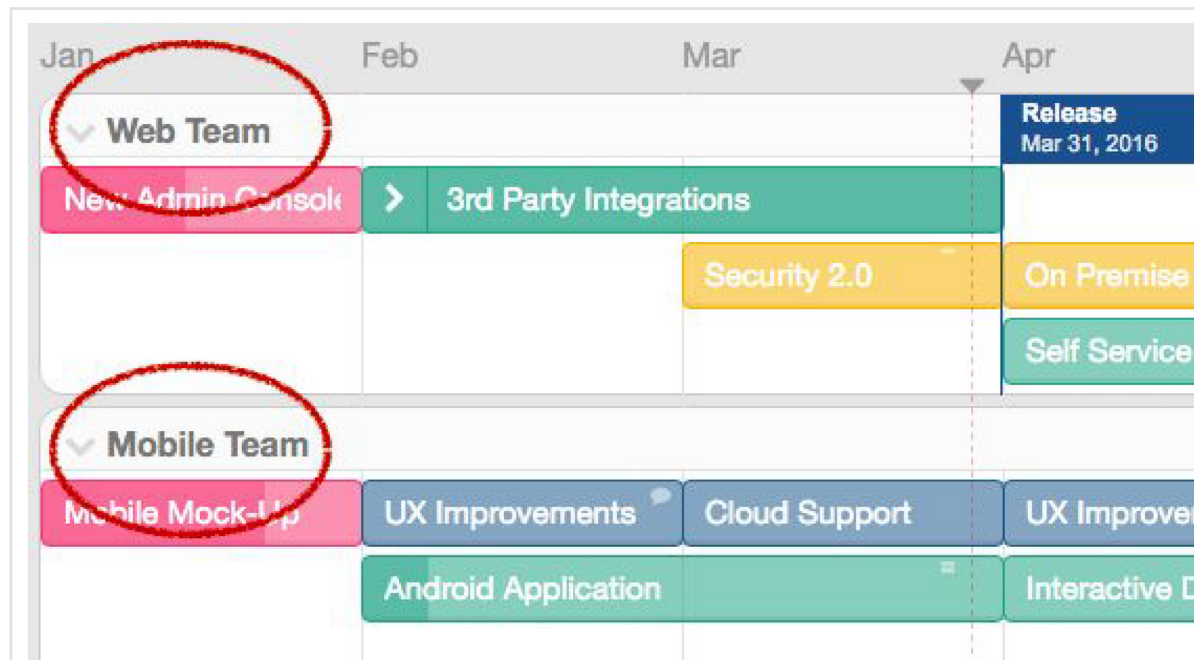
Let's assume you've decided on at least some of your main initiatives and priorities for a new product. You haven't yet determined each of the features or stories you'll want for the product's first version, but you have established a rough, high-level plan for its major strategic objectives. Now what? How do you start translating those big-picture details into a roadmap? Everyone's roadmap is going to look somewhat different, but here is a basic framework you can use as a helpful starting point.

LANES (OR "SWIMLANES")

Lanes, often referred to as swimlanes, are a useful way to divide the high-level categories of your roadmap's initiatives to clearly show divisions of responsibility.

Swimlanes can represent different teams, areas of responsibilities, geographic regions, or whatever categories make the most sense for your company or your product's division of work.

In the example here, the swimlanes divide product initiatives according to the teams responsible for them, such as the web team and the mobile team.



CONTAINERS (OR THEMES)

Containers will represent the highest level groupings of your roadmap's initiatives. You can think of containers as the major themes of your plan, the high-level categories to which all of the roadmap's other items roll up.

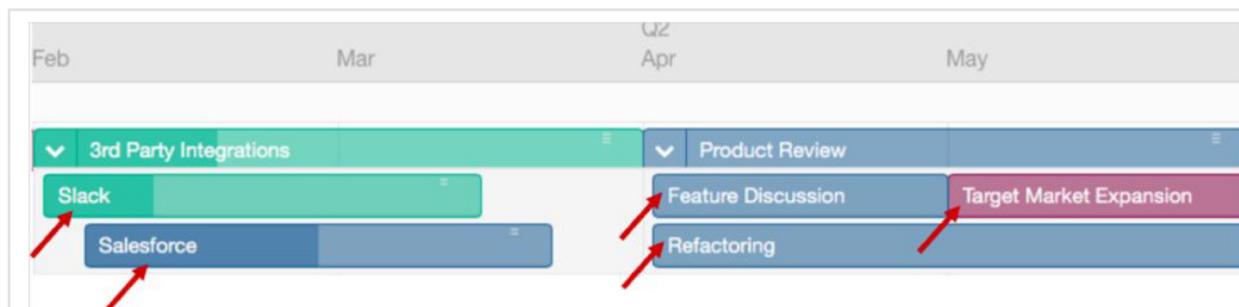
Use containers to represent your different epics, projects, themes, or any other items that you are planning. You can see here that containers are used to group strategic initiatives that themselves contain other high-level initiatives—represented by “bars,” which we will examine next.



BARS

Bars are high-level items grouped together under the appropriate containers. These items could represent anything for your product, but you can think of them as the initiatives that all roll up to a given roadmap theme.

In this example, when you expand the “3rd Party Integrations” container you can see that the product manager has included bars representing initiatives to integrate the product with Slack and with Salesforce.



TIMELINES AND DATES

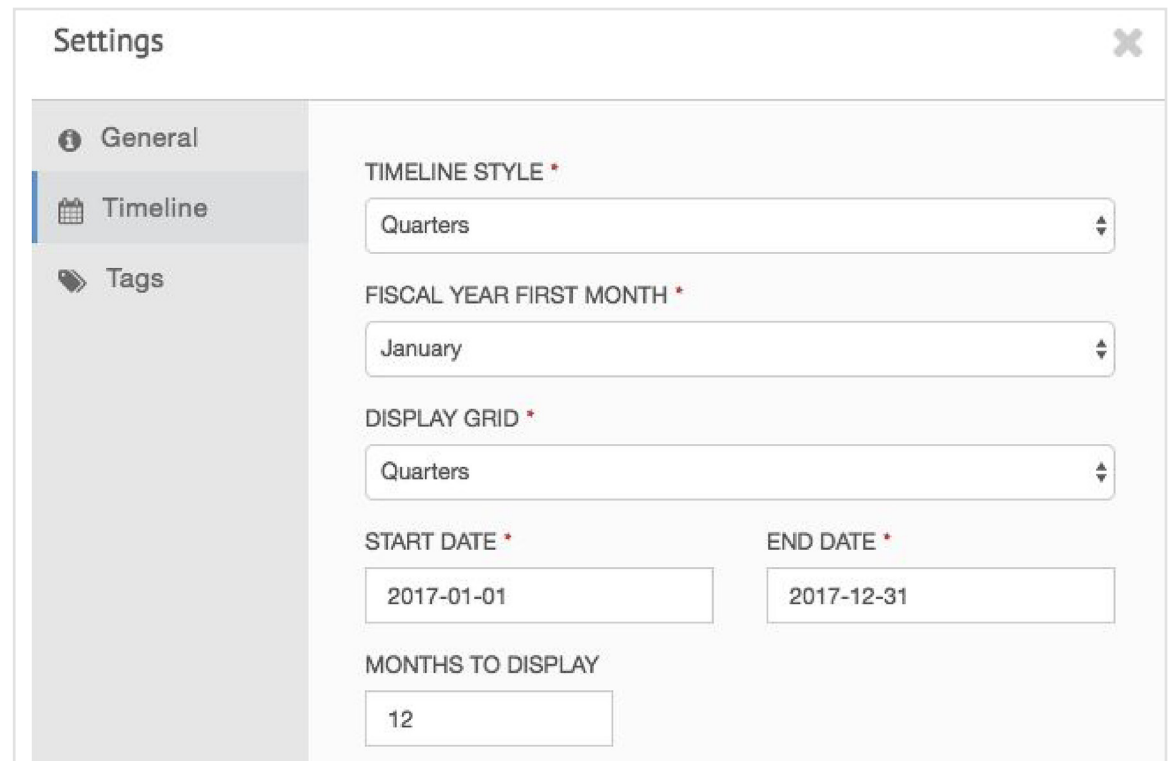
For various reasons, it is sometimes advisable for your roadmap to exclude specific dates, or to display deadlines only for specific initiatives.

As you can see from the example screenshots we've shown so far, our sample roadmap contains only high-level references to timeframes—grouping initiatives under months and quarters, as opposed to concrete dates.

The question of when to include timelines on your roadmap, and how granular those timelines should be, will depend on such factors as the roadmap's audience. When sharing a roadmap publicly, for example, you might not want to display hard deadlines and dates, because if you can't meet them you risk losing credibility with your customers.

Another factor to consider will be whether a specific product release is tied to a larger, date-driven event. If you want a product to be launched during the week of a major trade show for your industry, for example, then including and even emphasizing specific dates on your roadmap might make strategic sense.

But in some cases, if your roadmap will be accessible to internal audiences only, and if the product's release is not tied to some other strategic date, it might be smart to de-emphasize dates on your roadmap and focus instead on other strategic aspects of the initiative.



The screenshot shows a 'Settings' dialog box with a sidebar on the left containing three options: 'General', 'Timeline', and 'Tags'. The 'Timeline' option is selected. The main content area contains the following settings:

- TIMELINE STYLE ***: A dropdown menu set to 'Quarters'.
- FISCAL YEAR FIRST MONTH ***: A dropdown menu set to 'January'.
- DISPLAY GRID ***: A dropdown menu set to 'Quarters'.
- START DATE ***: A text input field containing '2017-01-01'.
- END DATE ***: A text input field containing '2017-12-31'.
- MONTHS TO DISPLAY**: A text input field containing '12'.

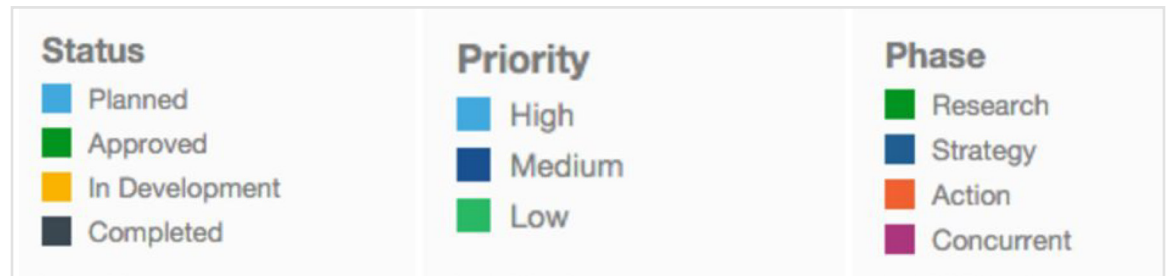
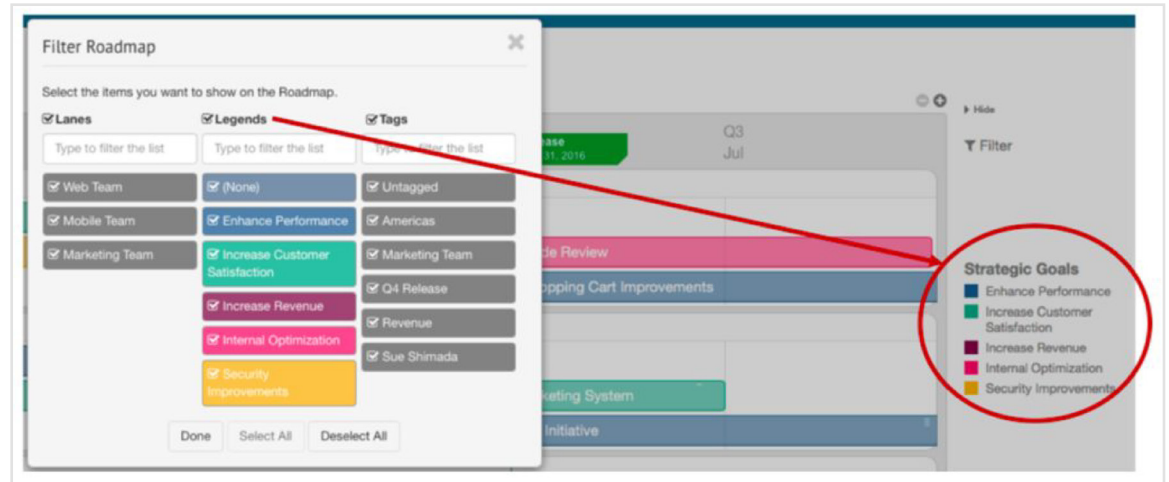
LEGENDS

Determining which legends to display is an important part of turning your roadmap into a powerful communication tool.

You want your audiences—stakeholders, developers, other members of your cross-functional teams, etc.—to be able to quickly view and understand many things about your roadmap. They should be able to see, for example, which items you’ve prioritized and why, your strategic goals behind each initiative on the roadmap, and possibly the progress of each initiative.

As you can see from the example here, this legend gives the reader an immediate and visually compelling view of what the product owner is hoping to achieve with every initiative on the roadmap. Some items have been prioritized for their ability to increase revenue, others to boost the product’s performance, etc.

And although in our sample roadmap we are displaying only a single legend—Strategic Goals—you might want to further track and depict the strategic details on your roadmap with other legends. Here are a few other examples.



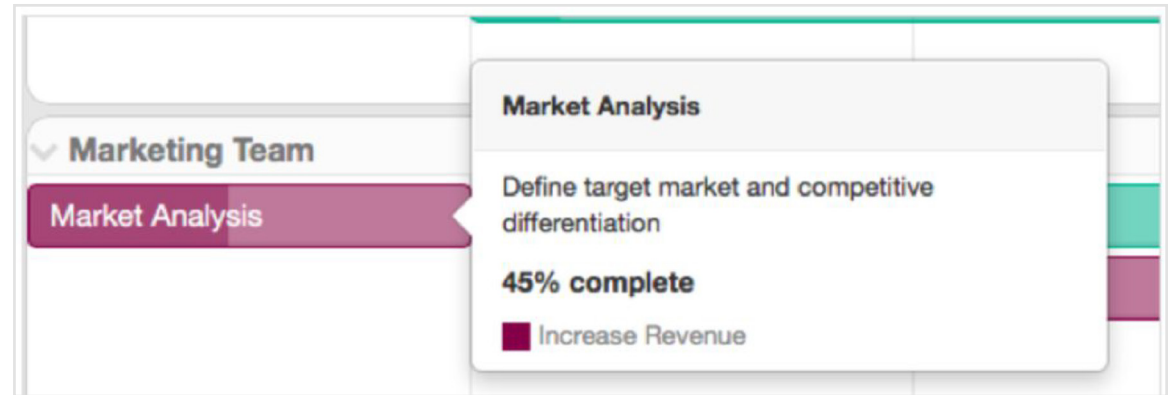
PERCENT COMPLETE

A well-developed product roadmap should also, ideally, contain up-to-date and immediately accessible information about the status of any initiative, task, or plan on the roadmap. A reader should be able to click into any item and get a current picture of that item's progress. Is it

complete? Has the team started work on it yet?

If it's underway, what percentage of the task has been completed?

In the sample above, you can see that by clicking into the "Market Analysis" bar under the Marketing Team's swimlane, the reader receives a detailed view of that bar's current completion level—which in this case is 45%.



TAGS

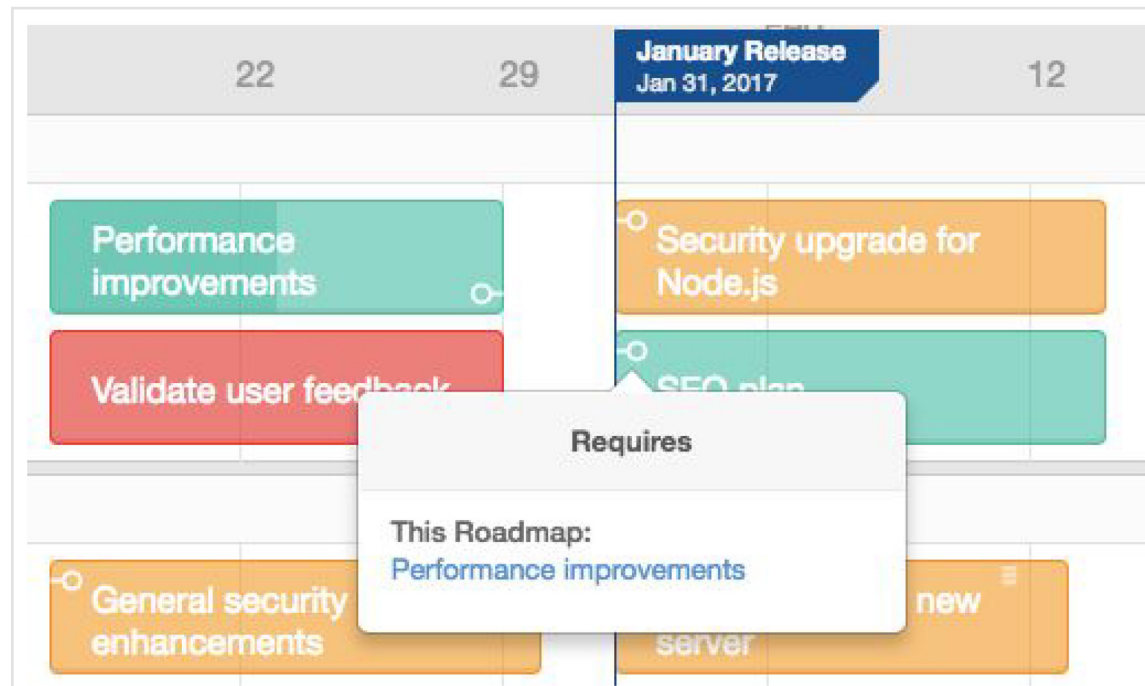
Another useful detail to include on your roadmap will be tags. Tags will help you refer back to the roadmap throughout the development process, to more easily track initiatives, goals, and areas of responsibility.

If you wanted to quickly review all roadmap items that were aimed at increasing revenue, then you could filter your roadmap by "revenue."



CONNECTIONS

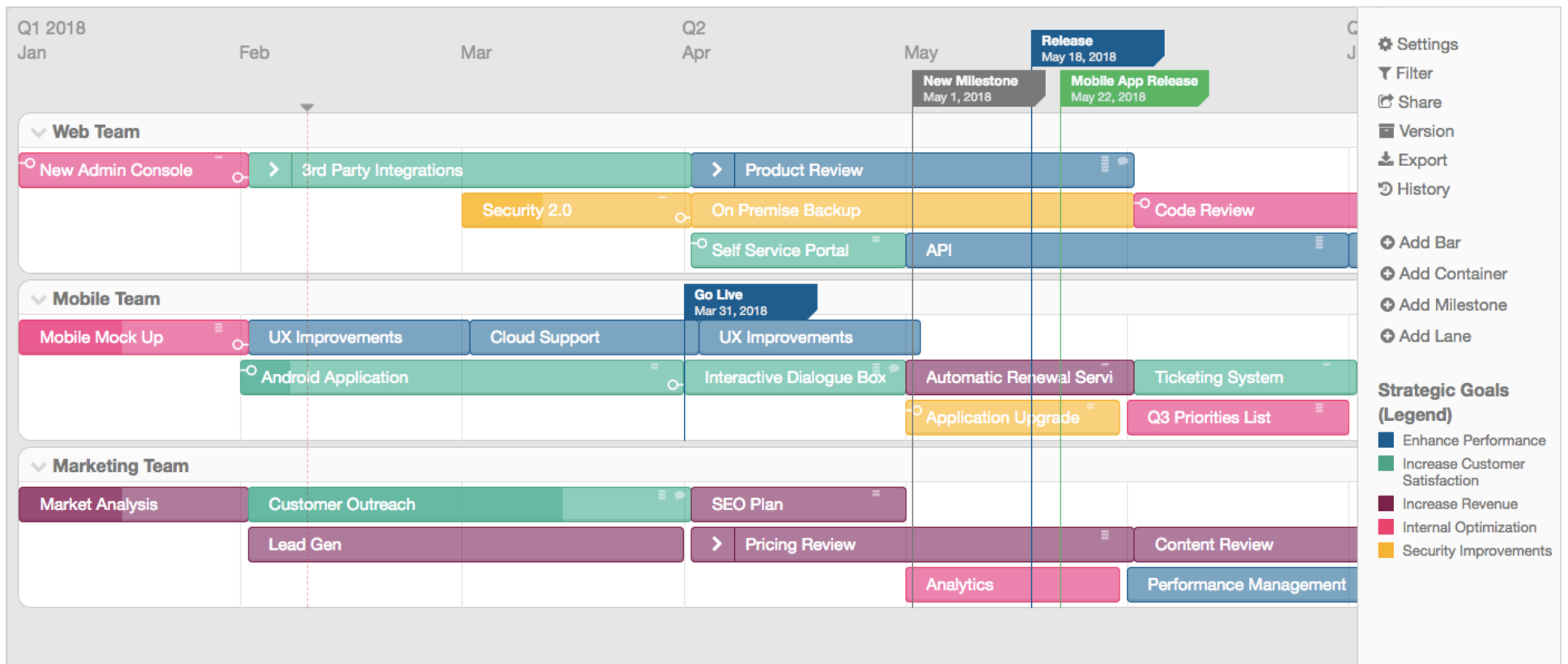
In ProductPlan, you can also add Connections to your roadmap items. Connections help illustrate relationships between bars. For example, below you can see that the bar "SEO Plan" requires the bar "Performance Improvements," helping you quickly map and identify dependencies between items on your roadmap.



There you have it: Swimlanes, containers, bars, timelines and dates, legends, percent complete, Connections, and tags. You'll find these features throughout the following templates.

PRODUCT ROADMAPS

PRODUCT ROADMAP TEMPLATE



This roadmap is for product managers responsible for a single product. The above example is a timeline-based roadmap that communicates the status of different initiatives. The swimlanes divide initiatives according to the various teams working on the product: the web, mobile, and marketing teams.

The initiatives across the functional groups are color-coded to correlate with the company's overall goals. Strategic goals in this example include enhancing performance, increasing customer satisfaction, increasing revenue, internal optimization, and improving security. This method of color-coding allows stakeholders to quickly see the "why" behind each initiative and understand how various efforts fit into the bigger picture. The timeframe for this roadmap is about six months and milestones have been incorporated to mark planned release dates.

ROADMAP QUICK FACTS

USE CASE : PRODUCT TEAM

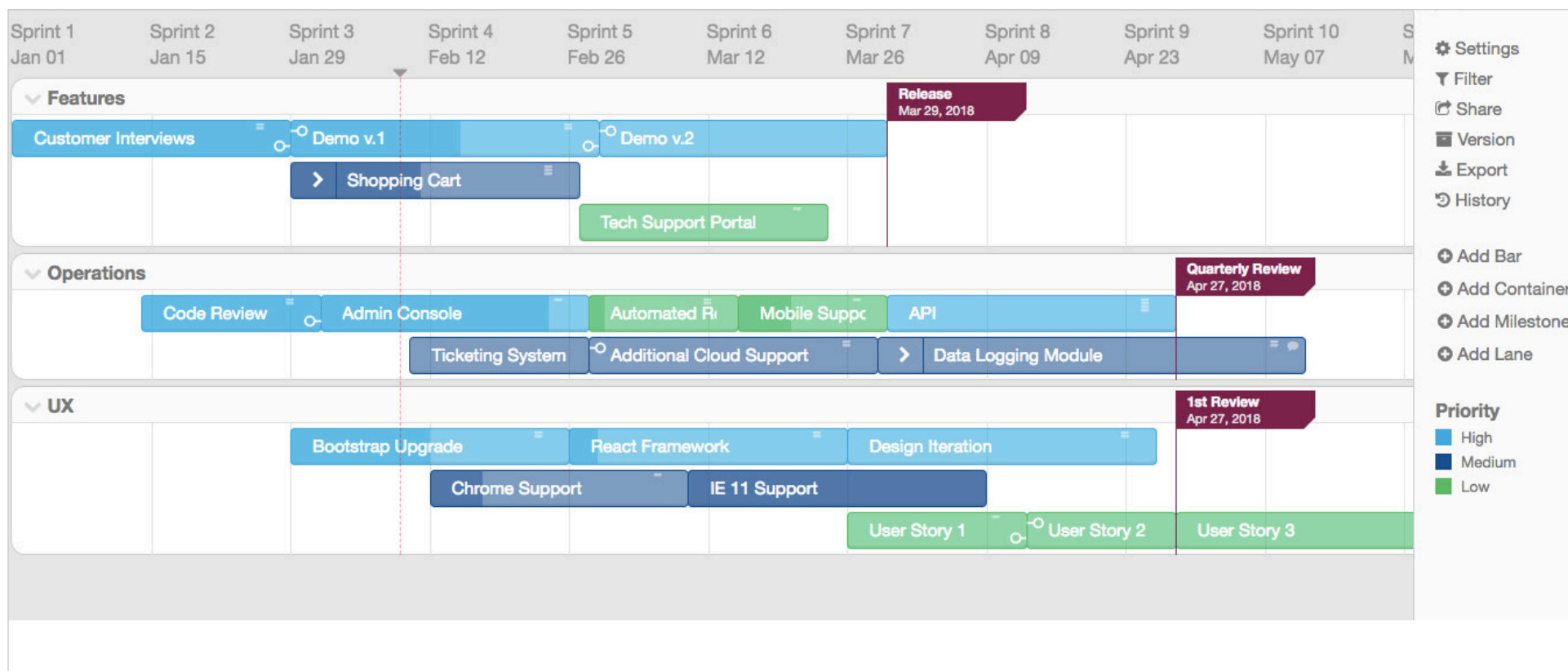
AUDIENCE : EXECUTIVE STAKEHOLDERS

TIME HORIZON : 6 MONTHS

TIME UNITS : QUARTERS

LEGEND : STRATEGIC GOALS

AGILE ROADMAP TEMPLATE



Agile development teams use project management software to track their backlogs, but they still benefit from a high-level roadmap to communicate the broader direction of the product. Agile companies need to strike the right balance between long-term vision and short-term execution in their roadmaps.

The example above is a timeline-based roadmap that spans a shorter time-horizon, with sprints for time markers. The swimlanes in this roadmap designate features, operations, and UX initiatives. The color-coding on an agile roadmap is often used to represent teams, status, or priority level. In this example, high-priority initiatives are light blue, medium-priority initiatives are dark blue, and low priority initiatives are green. When features span multiple sprints, you can use milestones to visualize each release.

ROADMAP QUICK FACTS

USE CASE : AGILE DEV TEAM

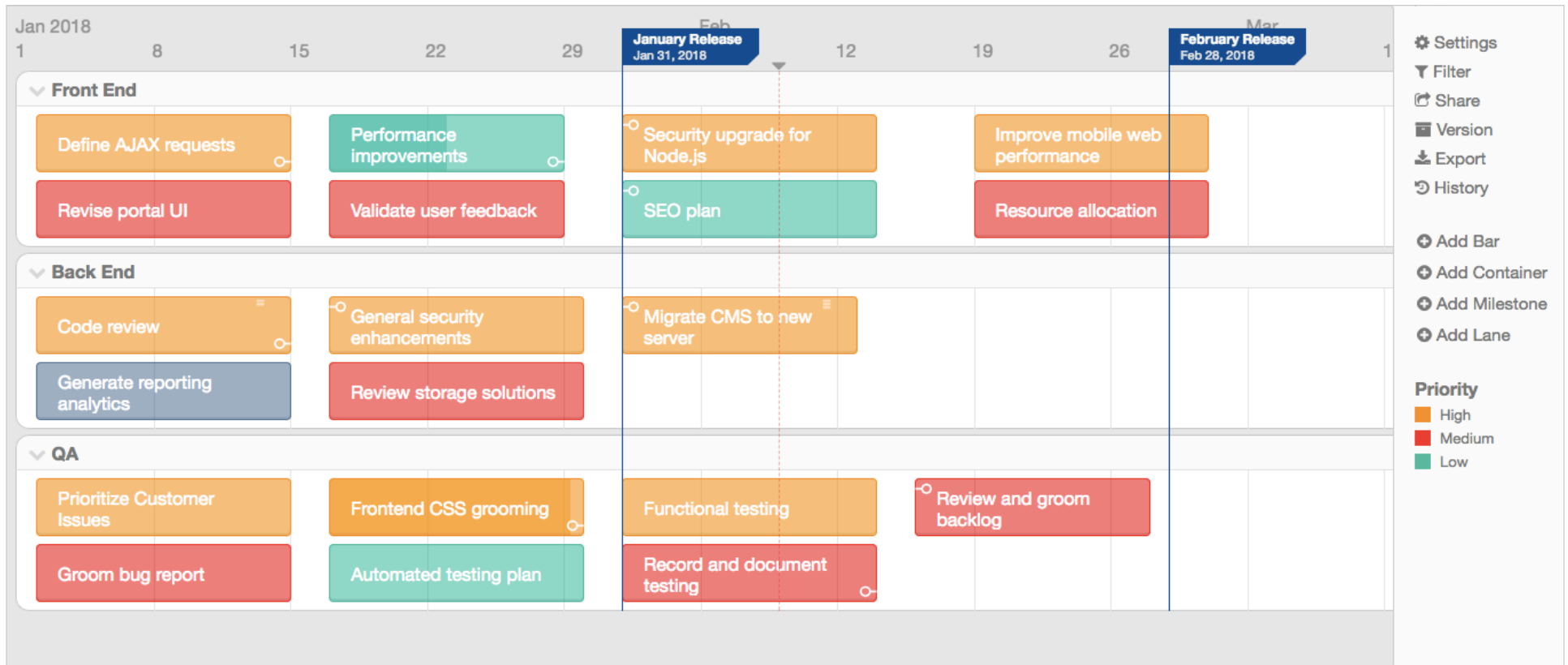
AUDIENCE : AGILE DEV TEAMS, STAKEHOLDERS

TIME HORIZON : 3 MONTHS

TIME UNITS : 2-WEEK SPRINTS

LEGEND : PRIORITY

RELEASE PLAN ROADMAP TEMPLATE



A release plan communicates the features, updates, and fixes coming in the next release or releases. Release plans often use sprints, rather than months or quarters, to break up the timeline. This example is divided into four sprints of about two weeks each, with milestones representing the expected release days. The bars represent the major initiatives involved in each sprint and they are color-coded according to priority level. The swimlanes categorize the initiatives as belonging to the front-end team, back-end team, or quality assurance team.

Release plans are usually more granular than product roadmaps, and the two can be used in conjunction to communicate product strategy in both the near-term and over the coming months, quarters, or years.

ROADMAP QUICK FACTS

USE CASE : PRODUCT TEAM

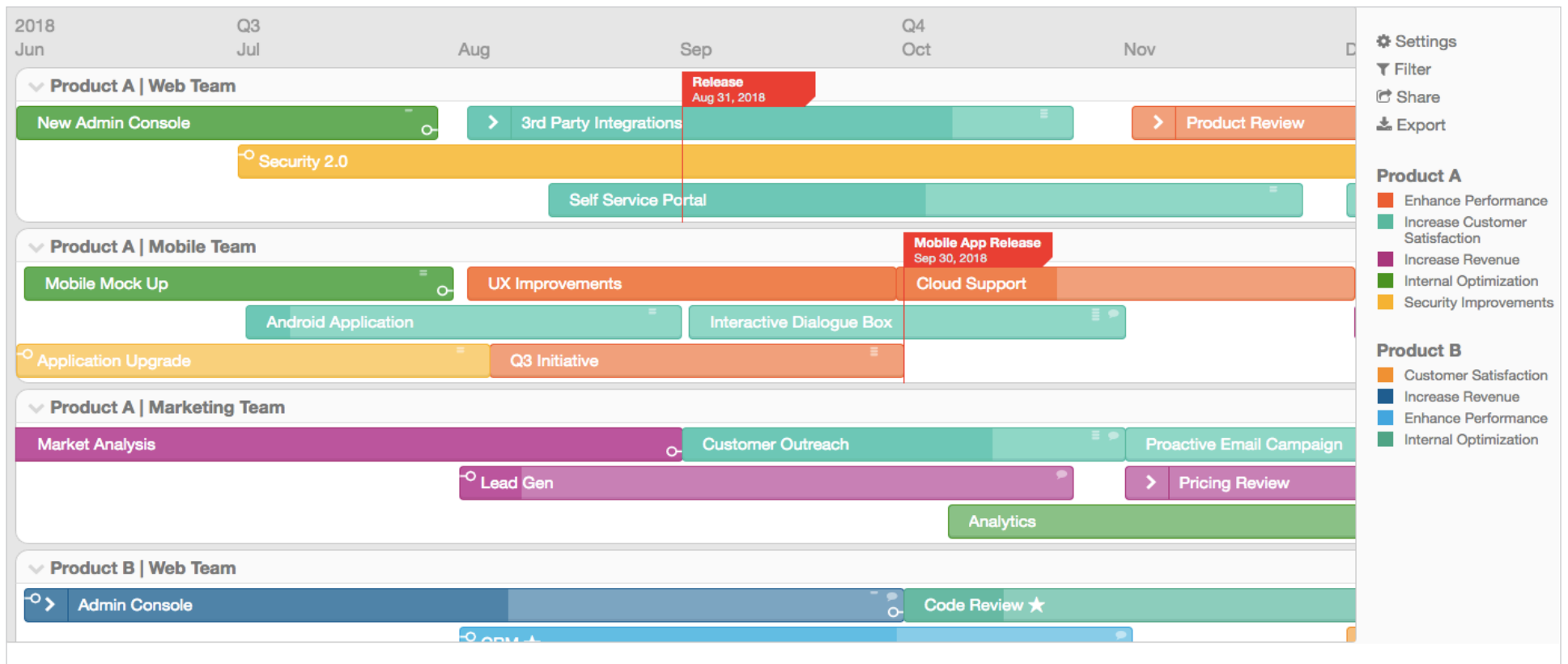
AUDIENCE : PRODUCT, DEVELOPERS

TIME HORIZON : 3 MONTHS

TIME UNITS : 2-WEEK SPRINTS

LEGEND : PRIORITY

PORTFOLIO ROADMAP TEMPLATE



This portfolio roadmap combines the roadmaps for multiple products into one view. Each product, in this case "product A" and "product B," retains its own legend with unique strategic goals. Connections are used to indicate initiatives that are dependent on one another, even across the two product lines. A portfolio roadmap like this one can be useful for product managers and executives who want a big picture view of everything going on in the organization.

The timeframe for this portfolio roadmap is about one year and the timeline is broken down by month. The swimlanes are organized by team; the web, mobile, and marketing teams for products A and B are each assigned a lane. Milestones are used to indicate important dates like releases and the launch of the new marketing website.

ROADMAP QUICK FACTS

USE CASE : PRODUCT TEAM

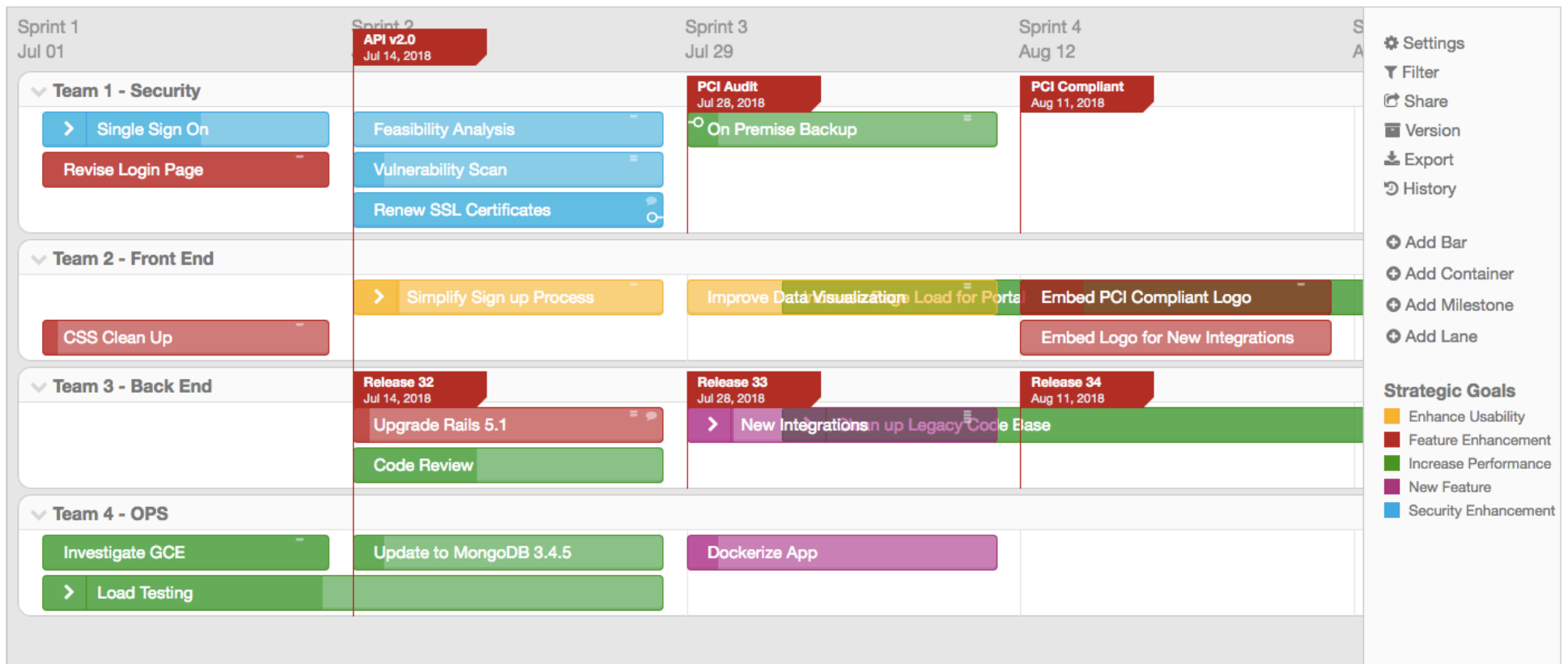
AUDIENCE : EXECUTIVE STAKEHOLDERS

TIME HORIZON : 6 MONTHS

TIME UNITS : QUARTERS

LEGEND : STRATEGIC GOALS BY PRODUCT

PRODUCT DEVELOPMENT ROADMAP TEMPLATE



A product development roadmap can help you plan your product initiatives and map your release schedule. In this example, the timeline is organized into two week sprints and the swimlanes represent four different teams working on various areas of the product. The initiatives are color-coded according to strategic goals such as enhancing usability and increasing performance.

The value of a product development roadmap like this one is that it communicates the “why” behind your product decisions and gives stakeholders a visual overview of what’s coming next

ROADMAP QUICK FACTS

USE CASE : PRODUCT TEAM

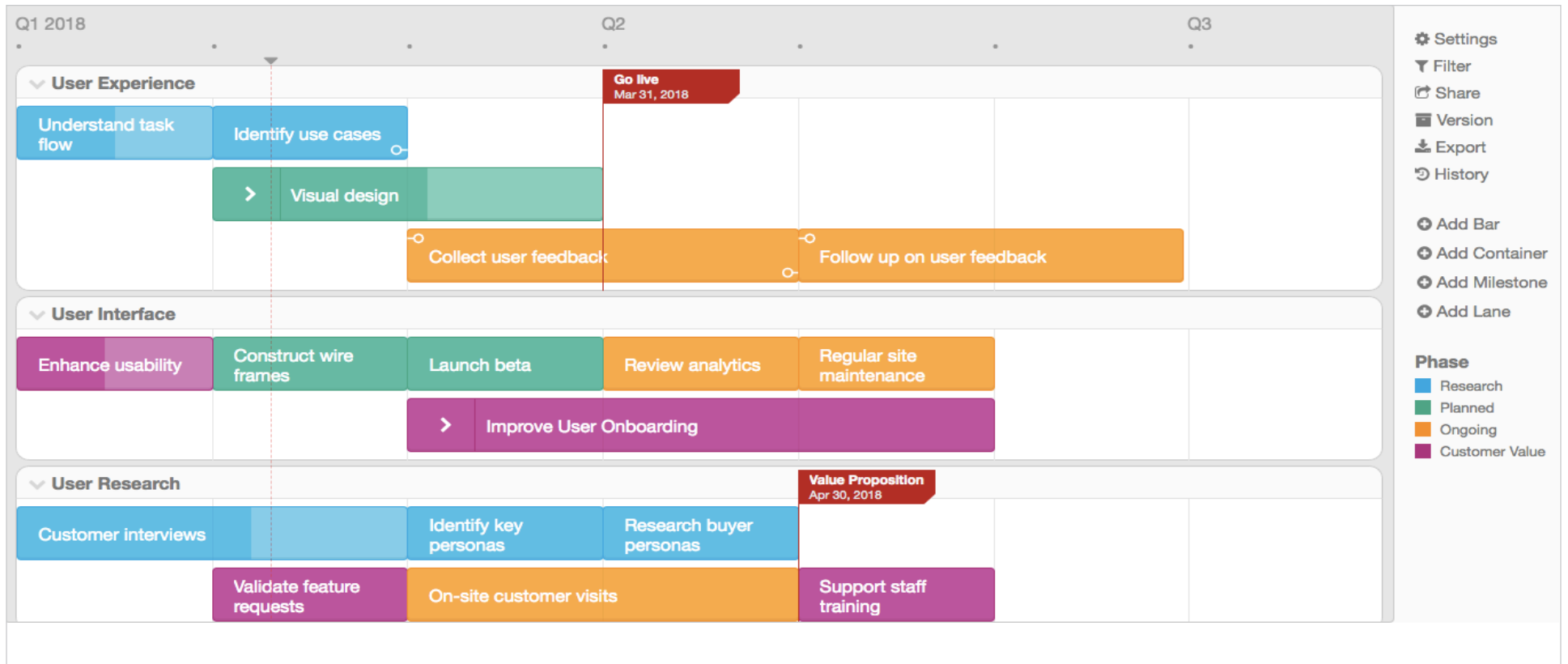
AUDIENCE : EXECUTIVE STAKEHOLDERS

TIME HORIZON : 8 WEEKS

TIME UNITS : SPRINTS

LEGEND : STRATEGIC GOALS

UX/UI ROADMAP TEMPLATE



This UX/UI roadmap includes initiatives related to user experience, user interface, and user research. Usability and design are key components of any product, and a dedicated UX/UI roadmap can help teams organize and prioritize design-related projects. Some example UX/UI initiatives—shown as containers on the roadmap above—are updating an app’s visual design and improving the user onboarding experience.

This example roadmap is fairly high-level—it covers a timeframe of a little over 6 months and the timeline is broken down into quarters. The initiatives do not include granular dates, and the roadmap is not intended to communicate specific deadlines but rather to give a general overview of the what to expect from the design team over the coming months.

ROADMAP QUICK FACTS

USE CASE : PRODUCT TEAM

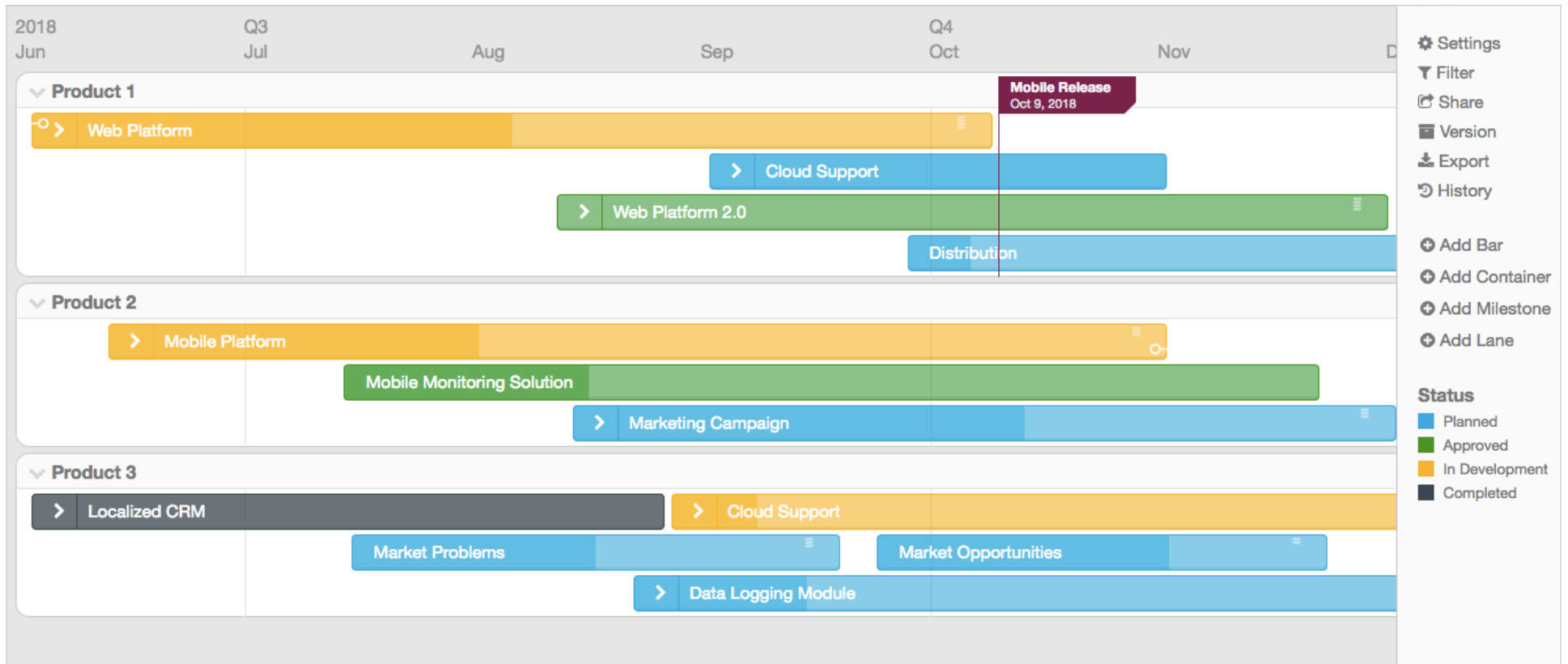
AUDIENCE : PRODUCT, UX/UI, DEVELOPERS

TIME HORIZON : 6 MONTHS

TIME UNITS : QUARTERS

LEGEND : PHASES

MULTIPLE PRODUCT ROADMAP TEMPLATE



You can use a multiple product roadmap to coordinate efforts among the different products or initiatives in your company's portfolio. A roadmap that visualizes multiple products is a great communication tool for organizations with a single product manager responsible for multiple products or product categories. This single roadmap is easy to share and allows for simpler communication with stakeholders since it rolls up various initiatives into one overarching plan.

In the example roadmap above, each product has its own swimlane. Within each swimlane, containers are used to further categorize web, mobile, and marketing initiatives for each product. The color-coding is used to symbolize the status of each initiative — whether it is planned, approved, in development, or completed. The time horizon in this example is one year.

ROADMAP QUICK FACTS

USE CASE : PRODUCT TEAM

AUDIENCE : EXECUTIVE STAKEHOLDERS

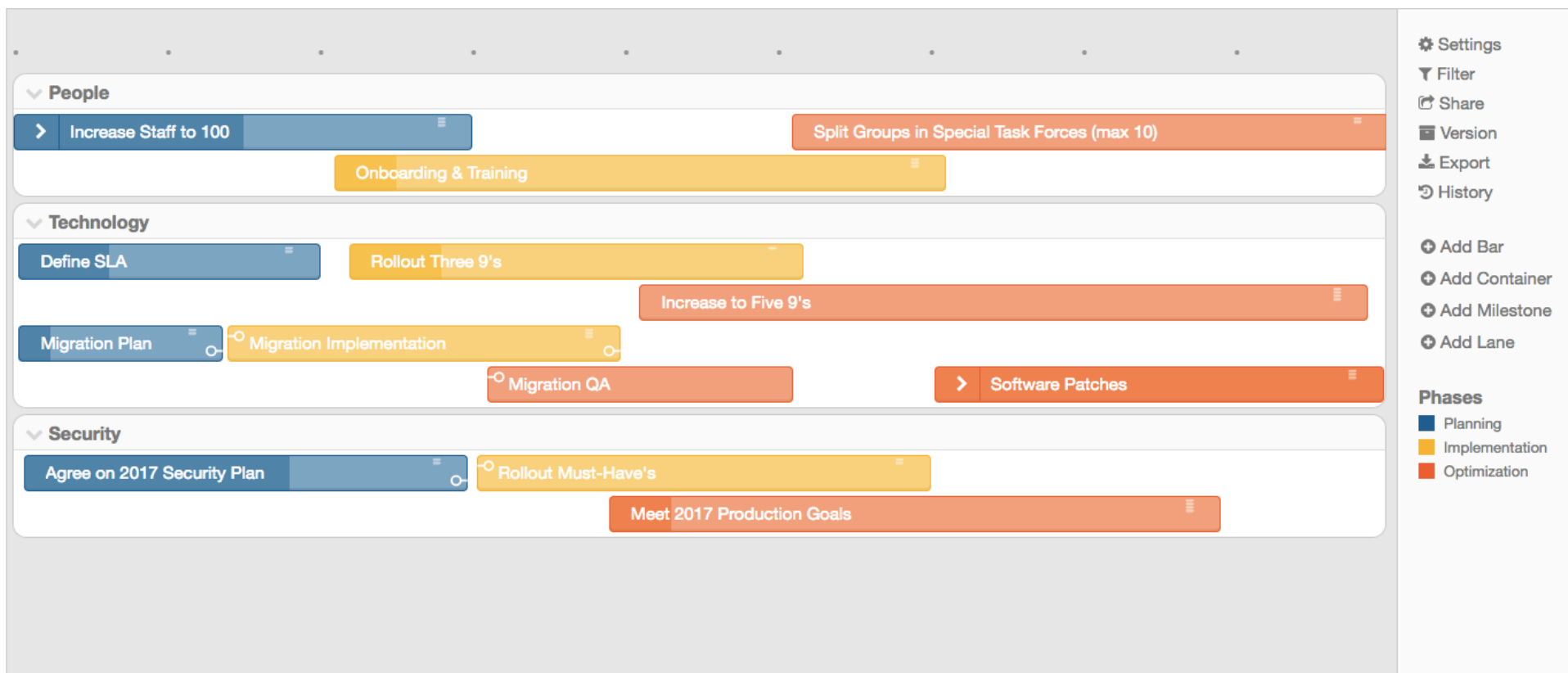
TIME HORIZON : 6 MONTHS

TIME UNITS : QUARTERS

LEGEND : STATUS

TECHNOLOGY ROADMAPS

TECHNOLOGY ROADMAP TEMPLATE



You can use a technology roadmap to plan out strategic initiatives such as migrating different software systems or rolling out updates. The audience for a technology roadmap will often be stakeholders looking to the IT team for internal-facing systems and solutions. The technology roadmap may also be shared with partners and vendors who rely on integrations and other technology from the organization.

In the example above, the roadmap is divided into three categories: people, technology, and security. The color-coding indicates the phase that each initiative falls into, from planning to implementation to optimization. These roadmaps often have longer time horizons or exclude dates altogether. The technology roadmap above is an example of a roadmap without dates.

ROADMAP QUICK FACTS

USE CASE : IT OPS

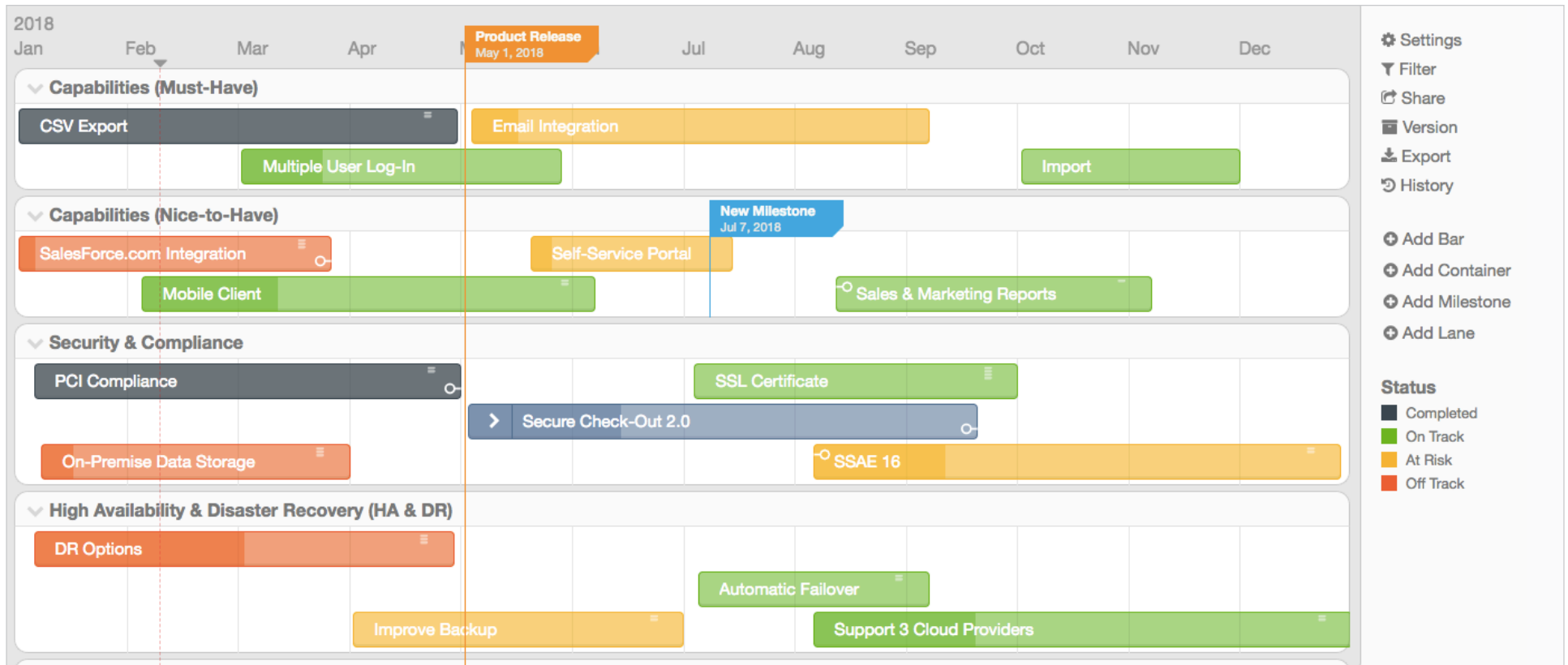
AUDIENCE : INTERNAL STAKEHOLDERS

TIME HORIZON : NONE

TIME UNITS : NONE

LEGEND : PHASES

ENTERPRISE IT ROADMAP TEMPLATE



The audience for enterprise IT roadmaps will often be internal stakeholders looking to the IT team for info about internal-facing systems, security, and other solutions.

In the example above, the roadmap outlines capabilities based on their strategic importance (i.e. must-have, nice-to-have). This example also designates swimlanes for security and compliance initiatives, High Availability & Disaster Recovery (HA & DR), as well as operational support tasks. The status of each initiative is communicated with color-coding, with completed initiatives in dark purple, on track initiatives in green, at risk initiatives in yellow, and off track initiatives in orange. The timeframe for strategic enterprise IT roadmaps is longer, often 12-18 months.

ROADMAP QUICK FACTS

USE CASE : IT OPS/INTERNAL SYSTEMS TEAM

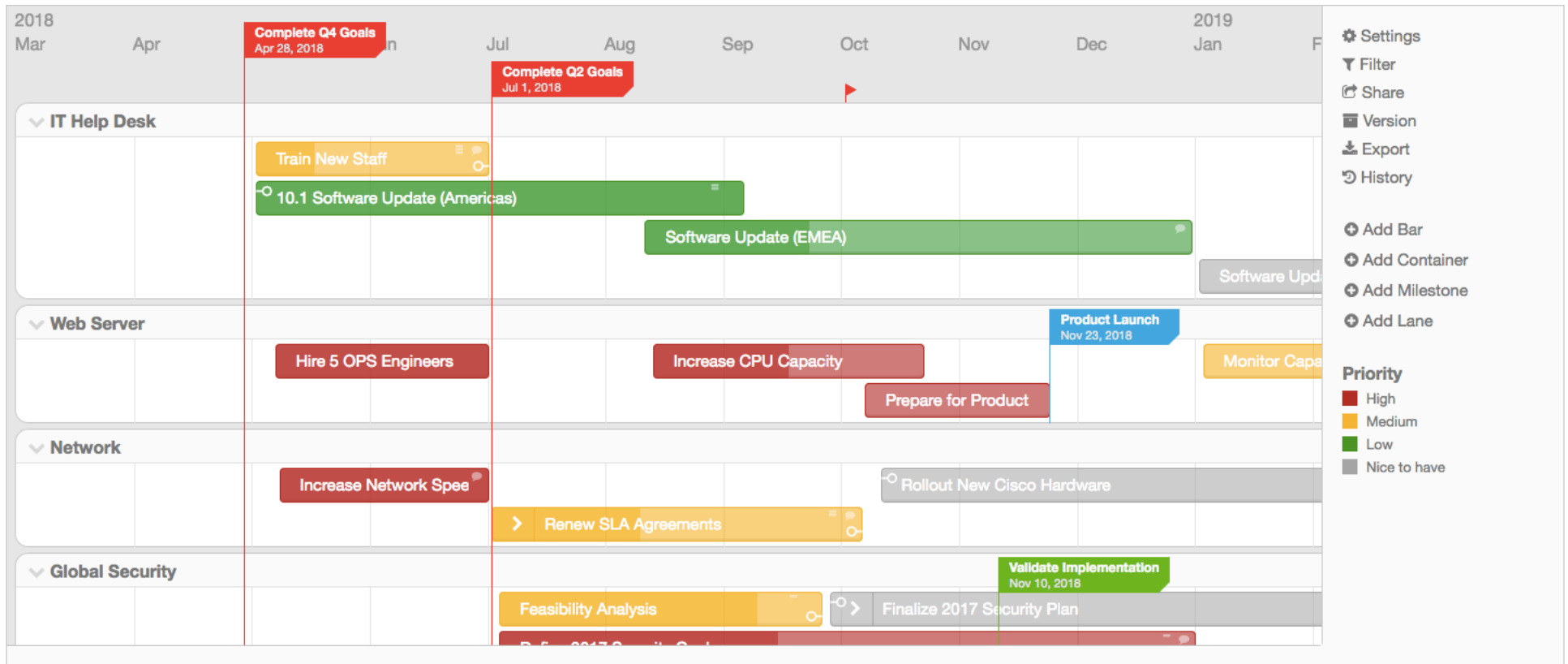
AUDIENCE : INTERNAL STAKEHOLDERS

TIME HORIZON : 1 YEAR

TIME UNITS : MONTHS

LEGEND : STATUS

IT PROJECT ROADMAP TEMPLATE



This IT project roadmap shows the initiatives involved in projects like creating an IT help desk and improving global security. The timeline is displayed in months and milestones mark deadlines for completing quarterly goals. Other milestones over individual lanes mark important dates like a product launch and implementation validation. The initiatives on the roadmap are color coded according to priority—either high, medium, low, or “nice to have”.

IT roadmaps provide a simple, visual way to track all of the complex pieces of a technology project. They may be used to coordinate large initiatives and to communicate plans to external teams.

ROADMAP QUICK FACTS

USE CASE : IT OPS

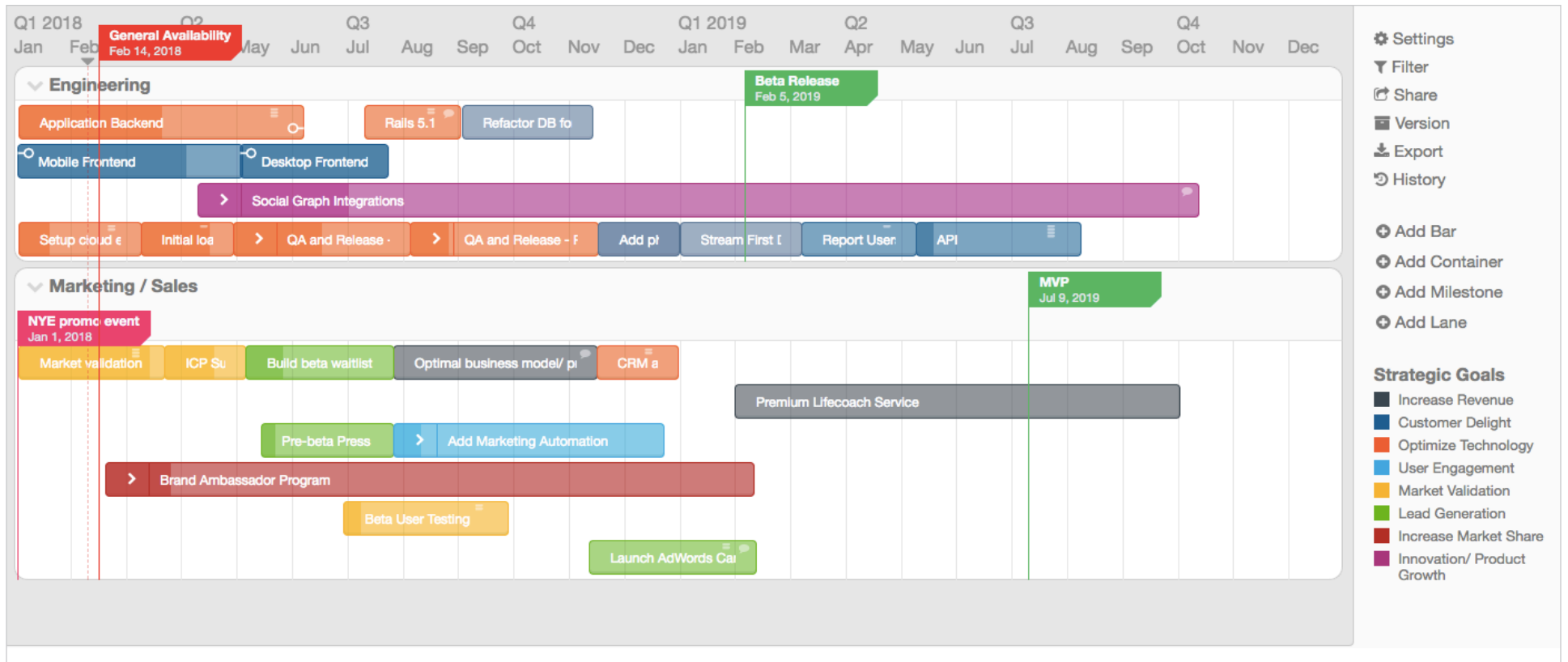
AUDIENCE : OTHER INTERNAL TEAMS

TIME HORIZON : 1 YEAR

TIME UNITS : MONTHS

LEGEND : PRIORITY

SOFTWARE ROADMAP TEMPLATE



This software roadmap shows the initiatives involved in launching a new software product. The timeline is long term, about two years, and the swimlanes divide initiatives by functional area, either engineering or sales/marketing. Milestones mark major events such as the beta release and general availability release. The legend shows strategic goals, and initiatives are color-coded to communicate how each one ties back to the larger company strategy.

A software roadmap can help you organize the many different components that go into launching a new product. High-level roadmaps like this one are useful for keeping your eye on the big picture amidst many tactical initiatives.

ROADMAP QUICK FACTS

USE CASE : PRODUCT TEAMS

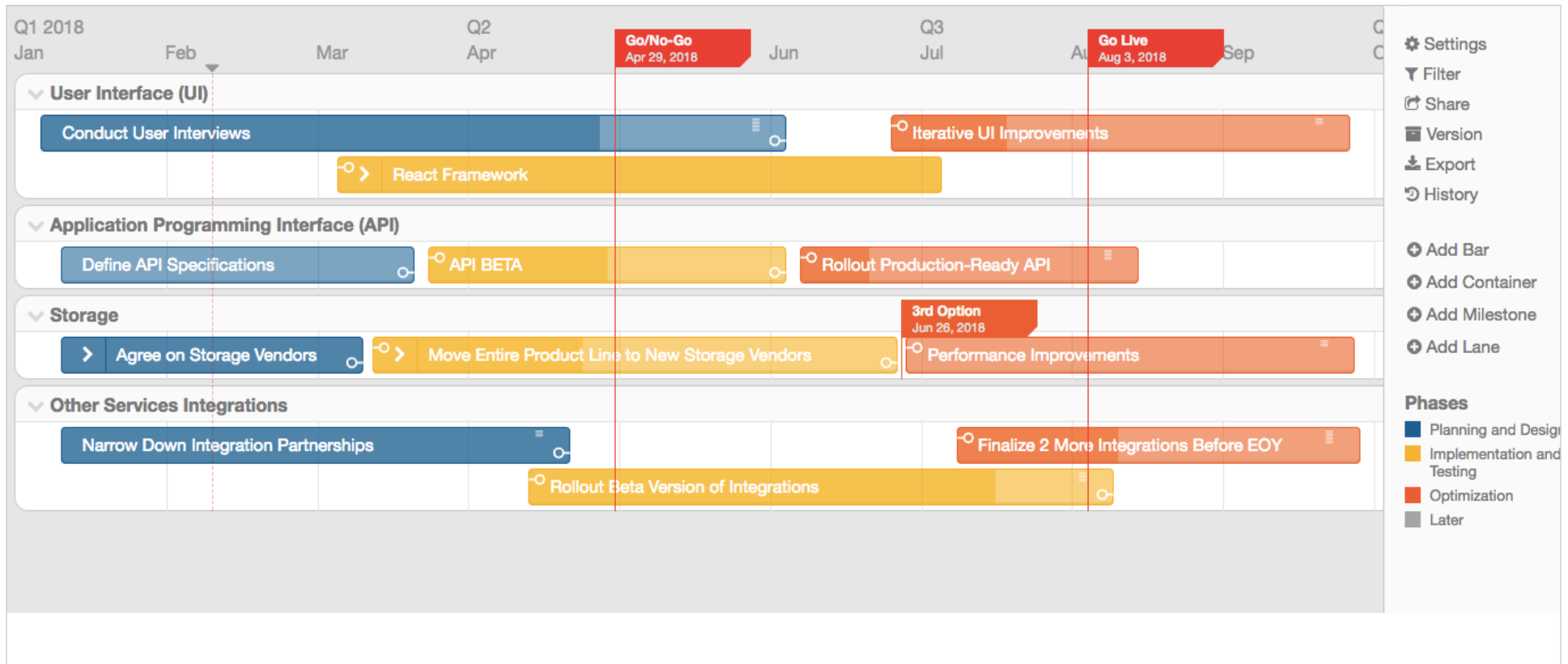
AUDIENCE : OTHER FUNCTIONAL TEAMS

TIME HORIZON : 2 YEARS

TIME UNITS : QUARTERS

LEGEND : STRATEGIC GOALS

IT ARCHITECTURE ROADMAP TEMPLATE



In many software companies, the software architect is tasked with building a solid foundation that becomes the backbone of the company's products. Common architectural roadmap components are the Application Programming Interface (API), User Interface (UI), storage, and third-party services integrations. These platform components are often part of other product roadmaps in the organization because features may rely on them. However, many companies also find it helpful to maintain a dedicated IT architecture roadmap to keep track of various improvements in a central location.

In the example above, the roadmap is color-coded based on project phase: planning and design, implementation and testing, and optimization. Long-term timeframes are common for architecture roadmaps, and in this particular example specific dates have been left off entirely.

ROADMAP QUICK FACTS

USE CASE : IT OPS, SYSTEM ARCHITECTS

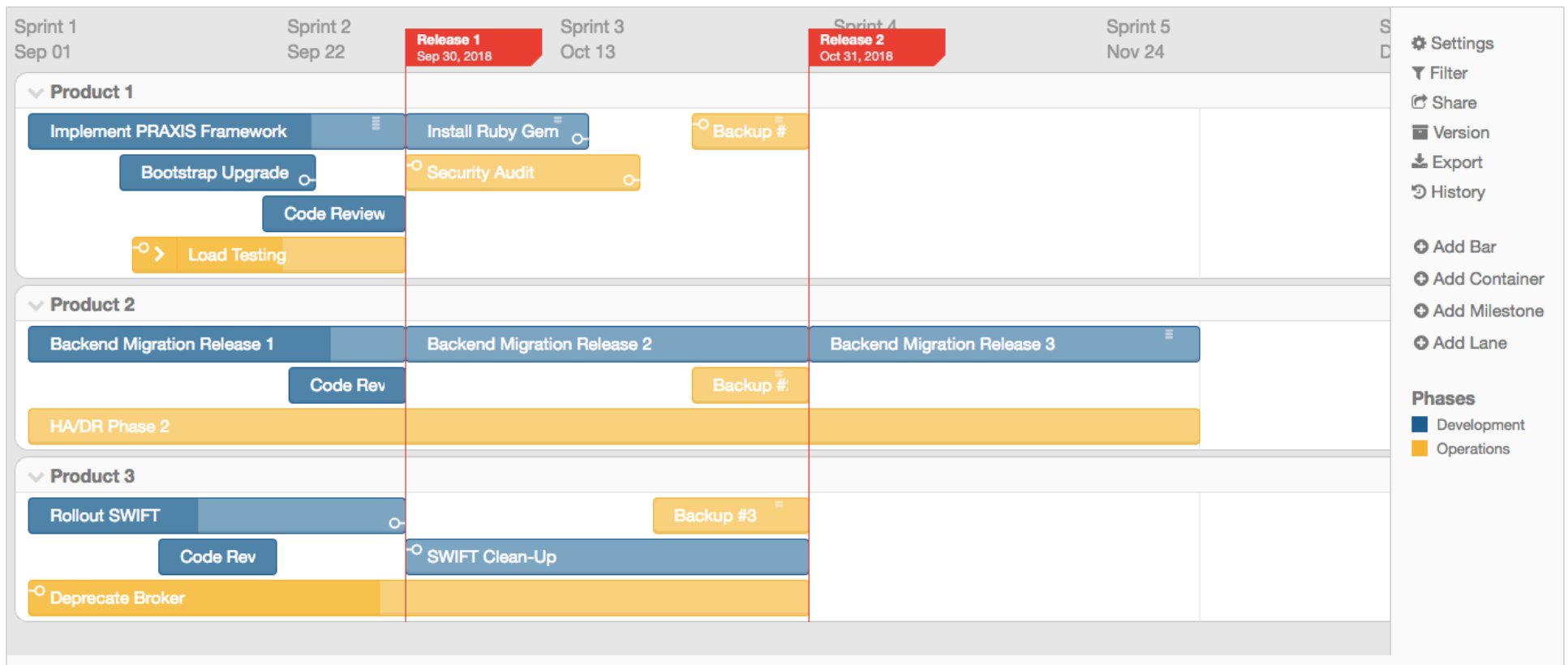
AUDIENCE : EXECUTIVE STAKEHOLDERS

TIME HORIZON : 7 MONTHS

TIME UNITS : QUARTERS

LEGEND : PHASES

DEVOPS ROADMAP TEMPLATE



This DevOps roadmap shows development and operations initiatives for three different products. It's fairly short term, covering about a three month timeframe, and it's divided into sprints. Milestones mark release dates and connections show initiatives that are dependent on one another. The legend is used to communicate which initiatives are part of the development phase and which are part of the operations phase.

A DevOps roadmap like this one provides a more granular view of the product development process and can be used in conjunction with high-level product roadmaps to provide a full picture of the organization's product strategy and supporting activities.

ROADMAP QUICK FACTS

USE CASE : PRODUCT TEAM

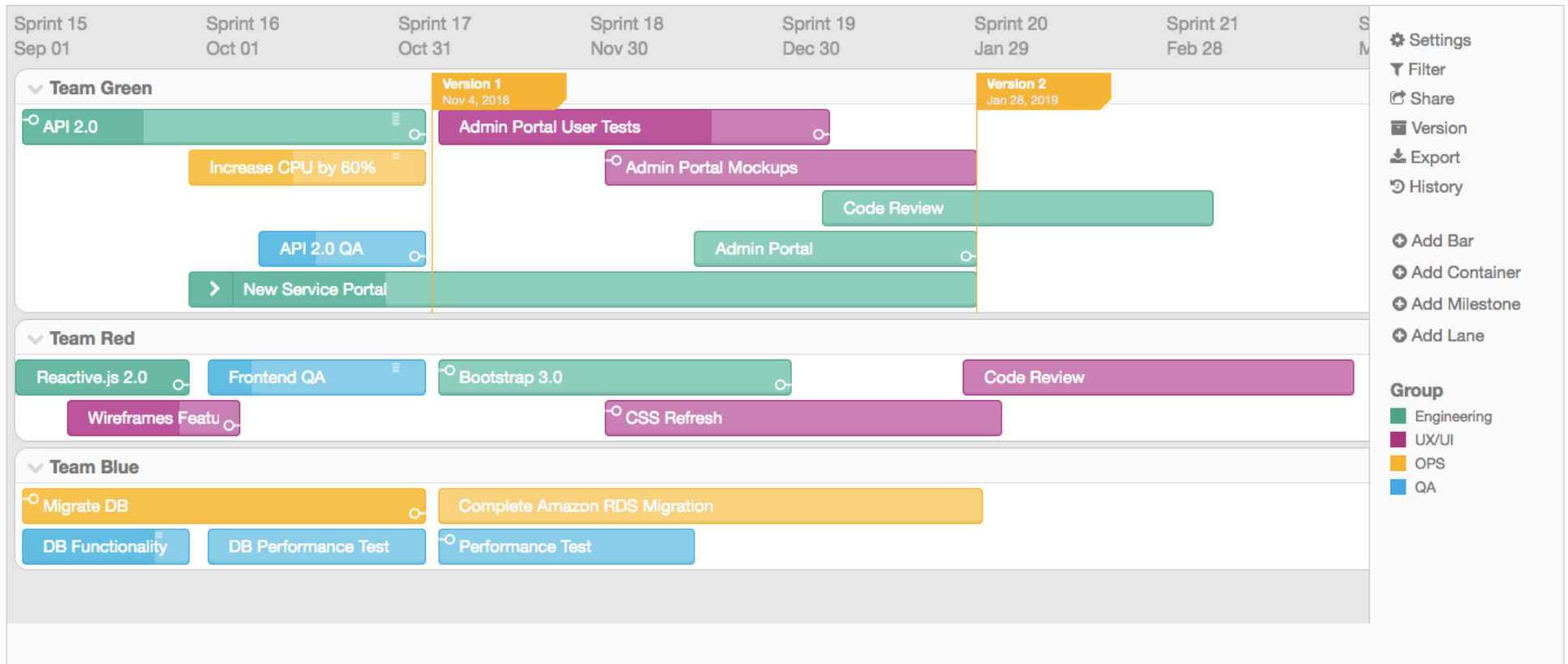
AUDIENCE : PRODUCT, DEV, IT OPS

TIME HORIZON : 3 MONTHS

TIME UNITS : SPRINTS

LEGEND : PHASES

ENGINEERING ROADMAP TEMPLATE



Engineering roadmaps are valuable tools to guide cross-functional agile teams through the development process. This example roadmap is broken down into sprints of approximately one month in length, with milestones marking expected release dates. The swimlanes represent three different cross-functional teams—the green team, red team, and blue team—and initiatives are color-coded to indicate whether they fall under the jurisdiction of engineering, UX, Ops, or QA.

A product manager may use this roadmap to communicate the plan directly to engineering teams. ProductPlan roadmaps also easily integrate with project management tools like Jira and Pivotal Tracker so that product managers can track the progress of individual stories and tasks that make up the initiatives on the roadmap.

ROADMAP QUICK FACTS

USE CASE : PRODUCT TEAM

AUDIENCE : ENGINEERING TEAM

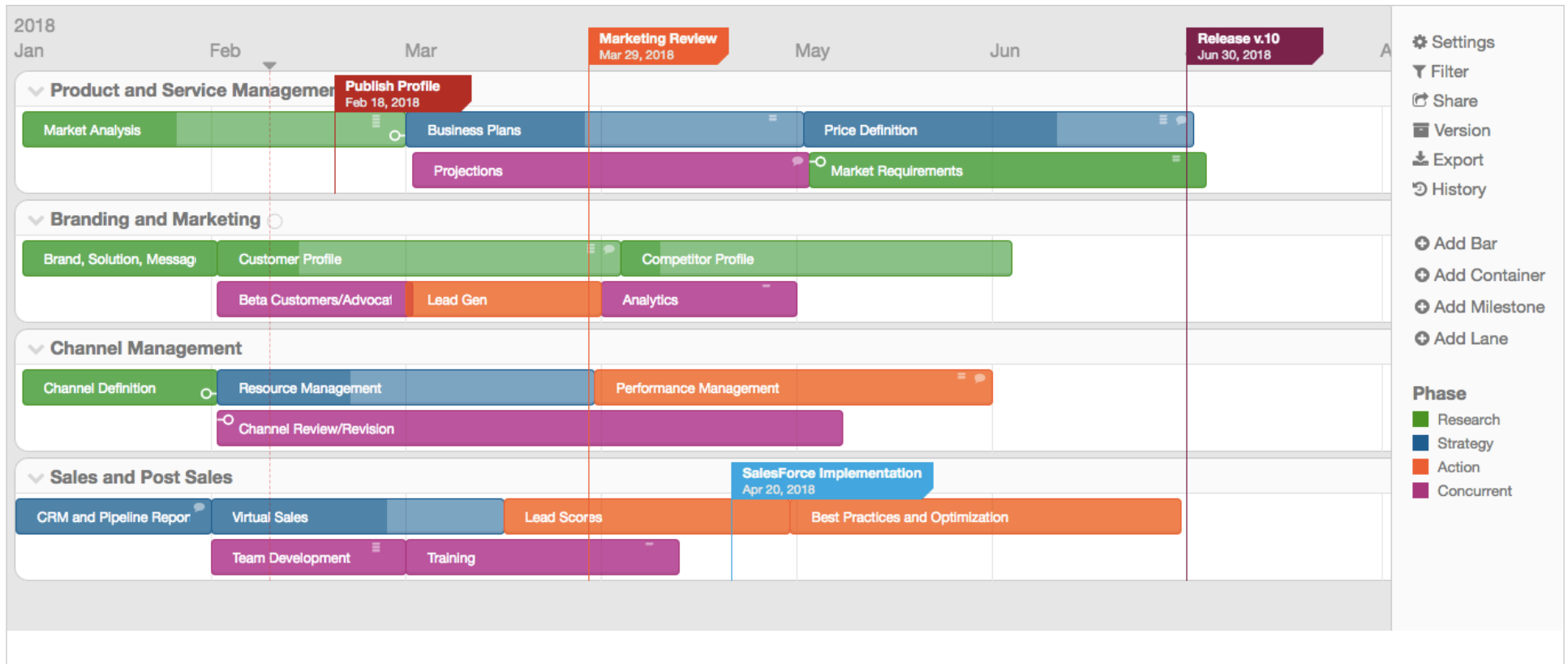
TIME HORIZON : 7 MONTHS

TIME UNITS : 1 MONTH SPRINTS

LEGEND : GROUP/TEAM

MARKETING ROADMAPS

MARKETING ROADMAP TEMPLATE



A marketing plan is a blueprint that outlines your marketing strategy and efforts. It is a high-level roadmap that provides your stakeholders with a general overview of marketing initiatives across different categories. In the example above, the roadmap is organized by the type of initiative and color-coded by the phase of the initiative. You could also categorize initiatives by their owners or by strategic goals, such as increasing revenue, expanding to new markets, or reducing churn.

This example roadmap is divided into four swimlanes. The first contains product and service management efforts, and subsequent swimlanes focus on branding, channel management, and sales initiatives. Milestones intersect the roadmap to indicate specific goals or deadlines, such as the date of a marketing review and when Salesforce is being implemented.

ROADMAP QUICK FACTS

USE CASE : MARKETING

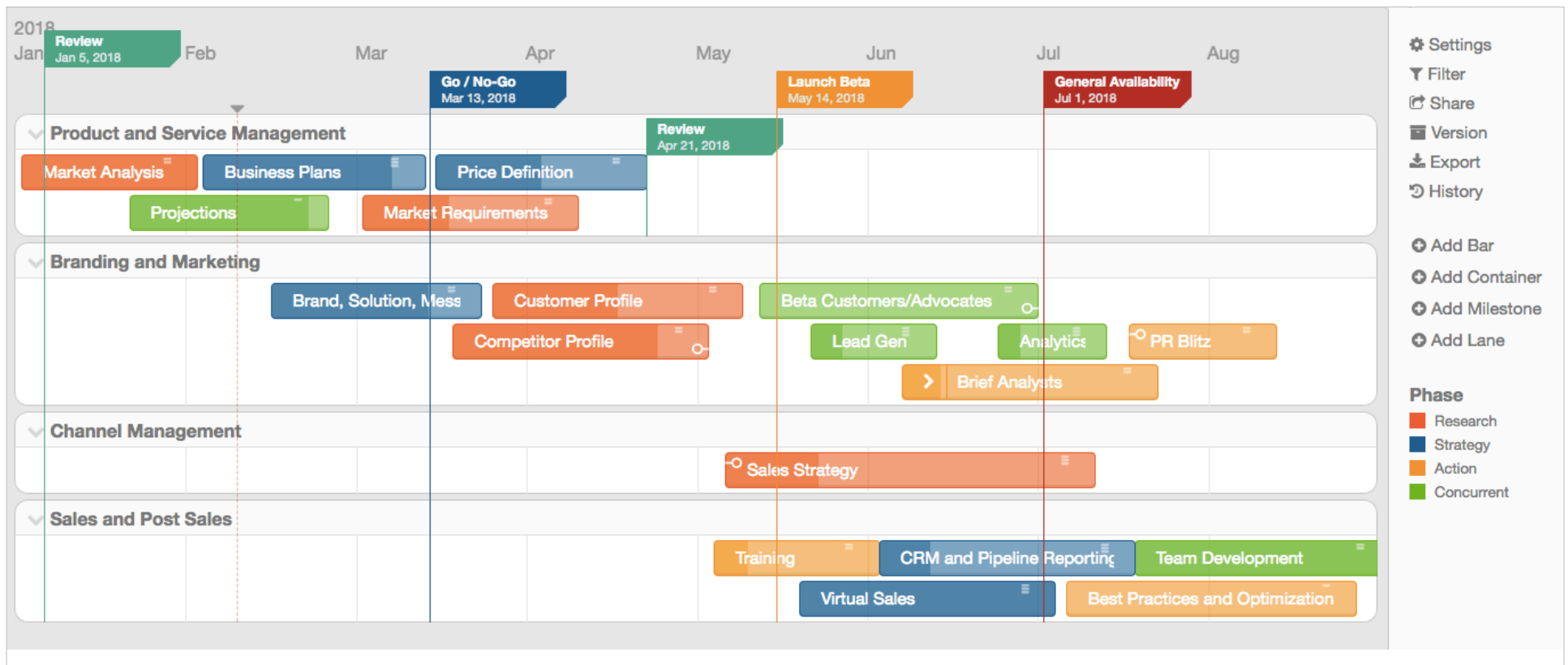
AUDIENCE : EXECUTIVE STAKEHOLDERS

TIME HORIZON : 8 MONTHS

TIME UNITS : MONTHS

LEGEND : PHASE

PRODUCT LAUNCH ROADMAP TEMPLATE



The product launch roadmap is typically managed by the product marketing team to coordinate efforts across different teams.

A product launch plan is usually a timeline-based roadmap that clearly communicates the deliverables in relation to time. This example roadmap is organized by the type of initiative. The four categories, represented by swimlanes, are product/service management, branding/marketing, channel management, and sales/post sales. The time horizon for this product launch plan is six months, and the colors represent the phase of each initiative, from research to strategy to action. Milestones designate the deadlines for go/no-go testing, launching the beta version, and making the product generally available.

ROADMAP QUICK FACTS

USE CASE : PRODUCT MARKETING

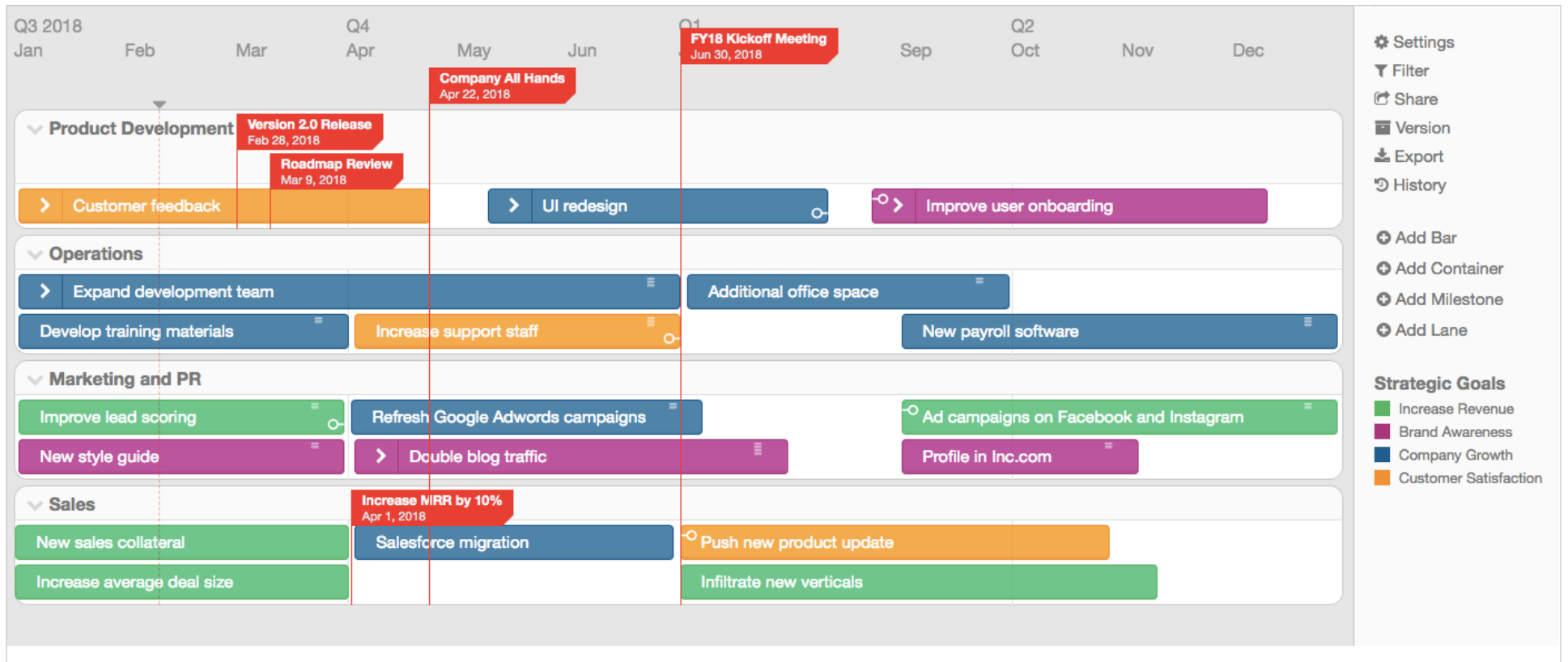
AUDIENCE : EXECUTIVES/TEAM LEADERS

TIME HORIZON : 6 MONTHS

TIME UNITS : MONTHS

LEGEND : PHASE

BUSINESS ROADMAP TEMPLATE



Business roadmaps are valuable tools for communicating company vision and facilitating growth. In this business roadmap template, the swimlanes represent different functional areas of the company, such as operations, marketing, product development, and PR. The legend encodes strategic goals like increasing revenue and building brand awareness.

A business roadmap like this one can be used to keep stakeholders aligned on the strategic direction of the company and to track the progress of initiatives across various departments.

ROADMAP QUICK FACTS

USE CASE : PRODUCT/OTHER TEAMS

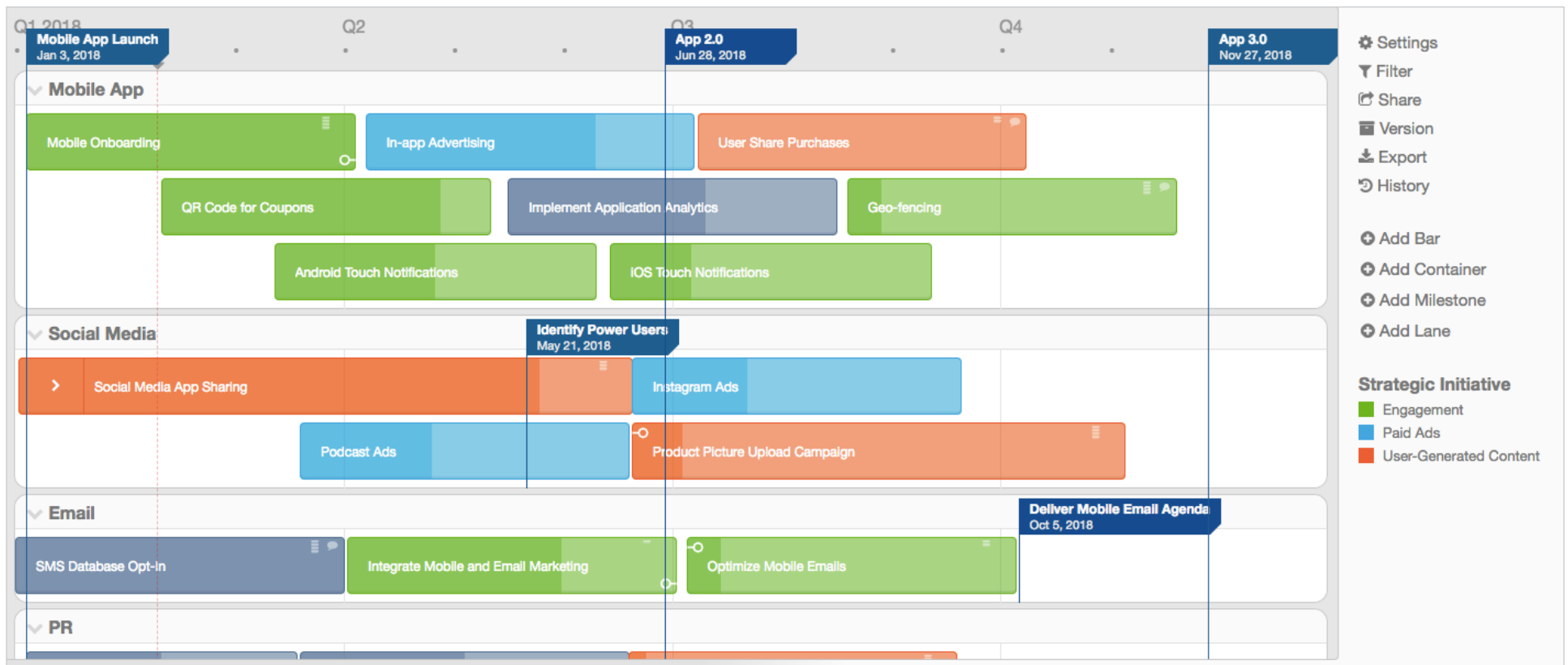
AUDIENCE : MULTIPLE FUNCTIONAL TEAMS

TIME HORIZON : 1 YEAR

TIME UNITS : QUARTERS

LEGEND : STRATEGIC GOALS

MOBILE MARKETING ROADMAP TEMPLATE



This mobile marketing roadmap plots out the marketing initiatives involved in launching a new mobile application. The bars are divided into four swim lanes depending on the category that they fall under: in-app marketing initiatives, social media initiatives, email initiatives, and PR initiatives. Milestones are used to mark the initial release date of the app and planned release dates for subsequent versions.

The timeline for this roadmap is broken down into quarters, and it gives a fairly high-level overview of mobile marketing projects over the course of a year. A marketing manager might use this roadmap to guide the marketing team's strategy or to show executives and other stakeholders what the team is working on.

ROADMAP QUICK FACTS

USE CASE : MARKETING

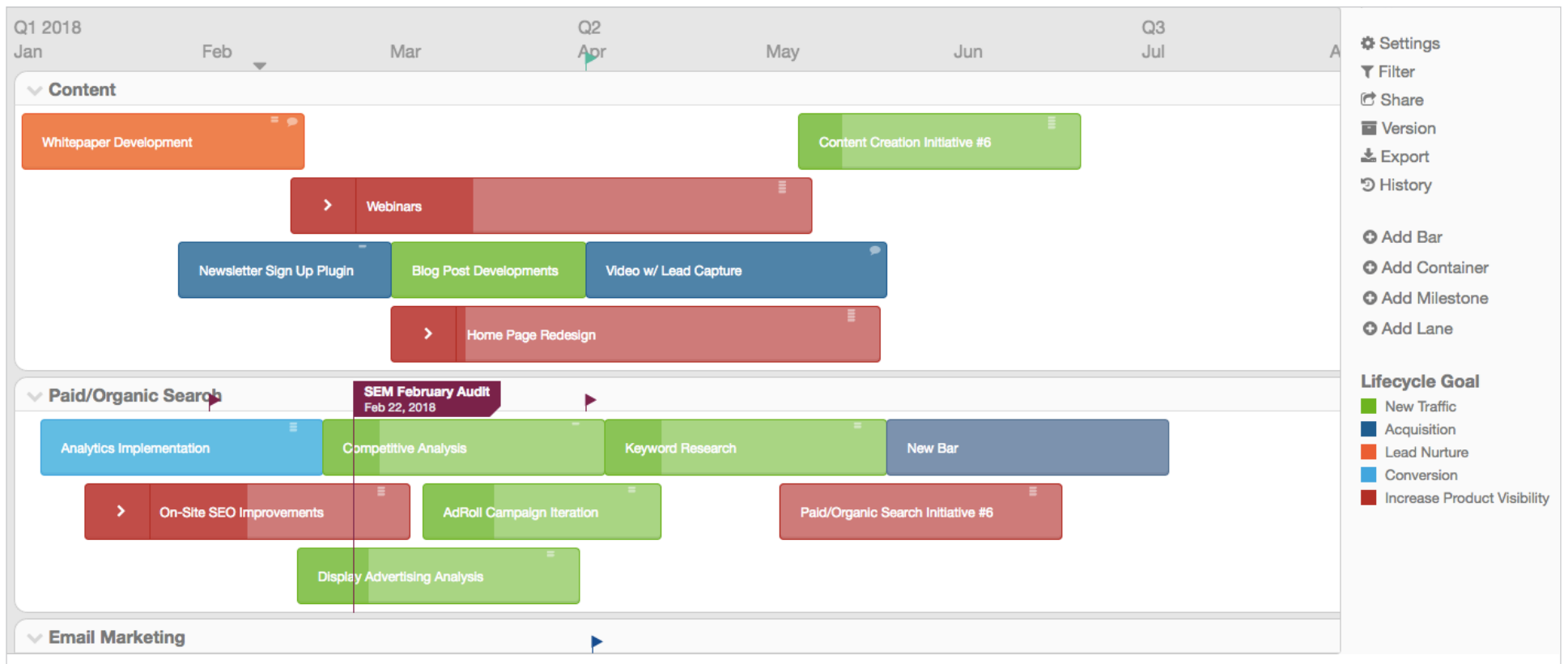
AUDIENCE : MARKETING/OTHER STAKEHOLDERS

TIME HORIZON : 5 QUARTERS

TIME UNITS : QUARTERS

LEGEND : STRATEGIC INITIATIVE

DIGITAL MARKETING ROADMAP TEMPLATE



A digital marketing roadmap allows your marketing team better coordinate their efforts across different marketing channels. The digital marketing roadmap above visualizes your content marketing initiatives, paid and organic search efforts, email marketing campaigns, and social media strategy. Each of the efforts are categorized based on their stage in the marketing funnel. In this example, initiatives color-coded green are aimed at bringing in new traffic, dark blue initiatives are focused on acquisition, orange initiatives are focused on lead nurture, light blue initiatives target conversion, and red initiatives aim to increase product visibility.

The time horizon for this digital marketing roadmap is about six months, and milestones are added to showcase the dates of an SEM audit, drip campaign overview, and a general marketing review.

ROADMAP QUICK FACTS

USE CASE : MARKETING

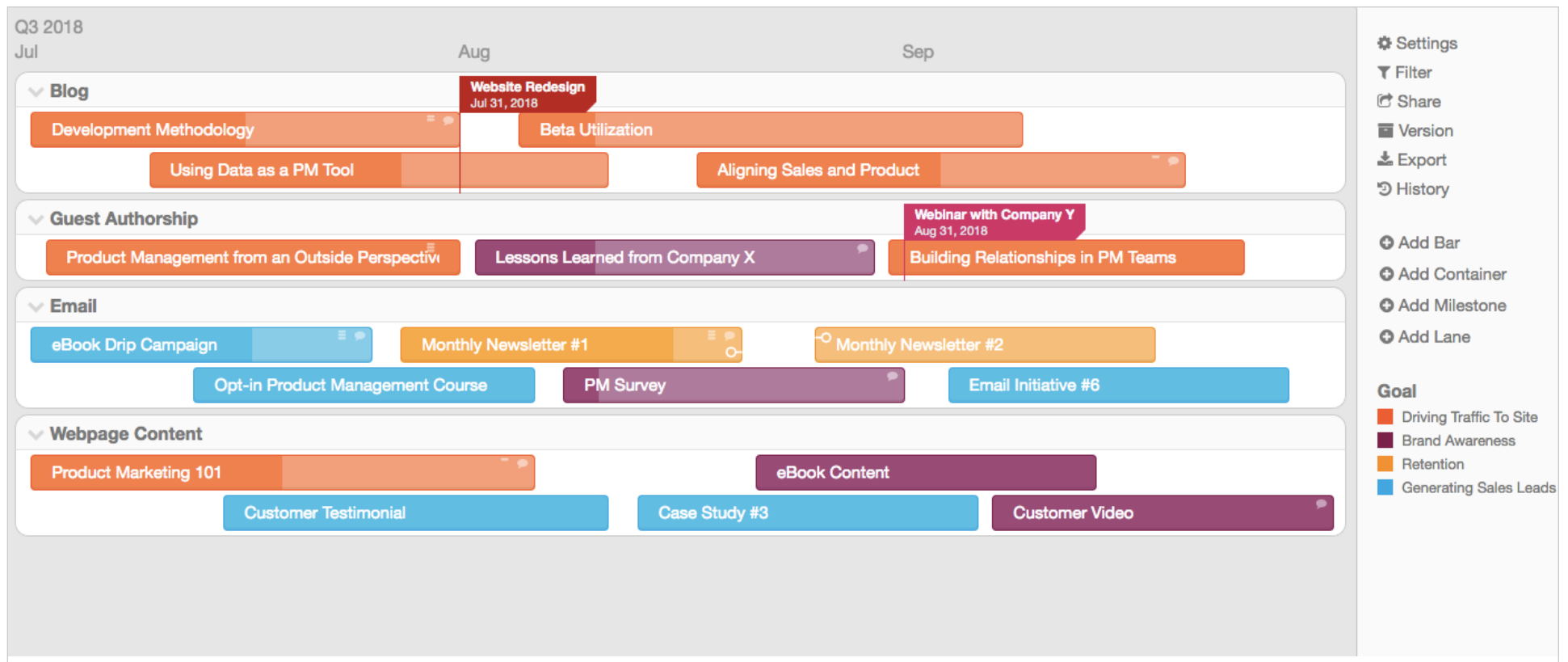
AUDIENCE : MARKETING

TIME HORIZON : 8 MONTHS

TIME UNITS : QUARTERS

LEGEND : LIFECYCLE GOAL

CONTENT CALENDAR ROADMAP TEMPLATE



Content calendars help marketing teams manage their publishing schedules and coordinate content marketing initiatives. This example content calendar maps out a company's blog posts, email campaigns, and web page content over a three month period. The bars on the roadmap provide a general overview of when the team is working on each project without committing to specific publishing dates.

Each item on this content calendar is tied back to a strategic goal like driving traffic to the website or generating new sales leads. The goals are clearly displayed in the legend and the roadmap initiatives are color-coded accordingly. A content marketing team might choose to use this roadmap to easily communicate their strategic plan to executives or other department heads.

ROADMAP QUICK FACTS

USE CASE : MARKETING

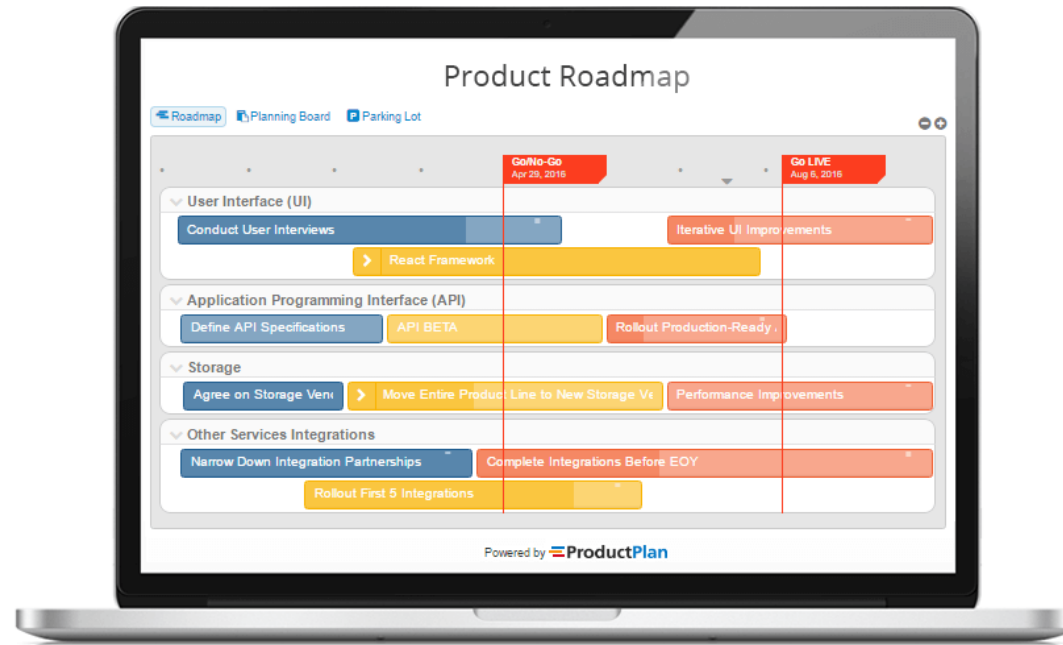
AUDIENCE : EXECUTIVES/TEAM LEADERS

TIME HORIZON : 4 MONTHS

TIME UNITS : QUARTERS

LEGEND : STRATEGIC GOALS

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