

Product Management Document Definitions

A Guide for Product Managers

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Document Definitions and Purpose: Business Case

Document	Purpose	Description
BUSINESS CASE:	Overall Purpose is to Evaluate Market & Business Opportunity, validate any assumptions made: to ensure board buy & comfort	Includes: P&L, Market Opportunity, Competitor Analysis, Market Size, Pricing, Product Definition, Project Plan, Rollout Plan, Marketing Strategy.
Market Opportunity	Considers incumbent providers, as well as client and prospect need & potential Competitors	Description of the market opportunity, analysis of where there is a gap and defining the resulting market need
Competitor Analysis	To highlight where there are gaps in current providers offerings, and identity your USPs	Word Doc descriptive approach is appropriate but a crib sheet/competitor comparison spreadsheet is required as well.
Market Size	To put sales forecasts into context, and enable us to identify what % of the market we are aiming for. Needs updating for any new product not yet considered	Using a pre defined framework listing all hypotheses and data points this will be a global analysis across all verticals: Legal, Financial, Property and Consulting.
Pricing	To enable product and sales to align all knowledge on both market/client and costs to ensure pricing of product is spot on	Pricing Sheet in word that could be sent to a client/prospect and where necessary a calculator in excel where numerous choices/volume mean a variety of pricing outcomes.
Product Definition	To quickly explain the context/background and journey a product, it's market potential and target user base, as well as any future roadmap considerations	Word Doc with easily digestible content meant for exec summary viewership
Project Plan	As part of business case a thought through delivery schedule enables resource and cost impact to be evaluated	In Project or online: Smartsheet detailed list items with resource, start date and length as well as dependencies to enable updating and keep fresh (Excel is not able to do this)
Roll Out Plan*	To ensure thought is given to how we will approach this product with clients/ prospects: i.e. trial free or otherwise or a Proof of Concept phase is required	Memo style or slide deck to list out options if required to enable collaborative analysis and agreement of approach between sales/product/business
Marketing Strategy	Determine how to take product to market	Market strategy and long term objectives, positioning and how to sell and who to.

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High Level Architecture	Outline overall technical approach and integration requirements	Analysis of functional spec/business requirements – outlining high level tech approach and alignment to existing systems and processes
Functional Spec	Expands on the full requirements on what needs to be built and enables TPM and Dev to create HLA and Platform approach etc	A feature level description of the entire deliverable, its intended use and purpose
NFR	List of all required elements of product that are not functional such as performance and reliability.	Often part of Functional Spec the Non Functional Requirements are a high level requirements description of what and how the product should be delivered outside of features and functionality.
Prioritised Feature List	Lifted directly from Requirements document: Listing all features/functionality required and then prioritised to feed into Sprint planning	Headline feature list of all functionality required, Prioritised and weighted per delivery/phase.
Product/Module Impact Analysis	TPM and Tech Architect analysis of all Products/Modules and their components to ensure early thought is given to expedite delivery and future proof all work	Detailed overview and planning upfront (before dev) for all upcoming Product/Module development to ensure best approach for dev is used in the correct order
Platform Definition	To ensure internal education on platform approach is always up to date and external buy is made easier with all USPs derived from this understood and sold effectively	Non Technical description of all products and modules with their component for a non technical audience: Internal – Slide deck with descriptions and interrelations between elements with diagrams where helpful. External: Platform Sheet with FAB bullets and diagrams
Test Scripts	To ensure testing covers off all aspects of a product leaving little to no room for manual error and ensuring a release candidate is as robust and market ready as it can be. To include: functional testing, destructive testing, cross platform testing and UAT testing.	Ideally written by QA but in conjunction with Product Manager a detailed approach to testing to indicate all expected outcomes and areas to focus and analyse (list all potential points of failure)

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Acceptance Criteria	To elevate the essential elements of a product that are both required and need full validated testing against to ensure a valid release candidate is taken to market	All elements of a product that need to be completed and fully tested before a release candidate is approved.
Launch BAU Support plan	To ensure all resource impacts and in life support elements are in place before go Live – that all User Guides are written, all user guides and training approaches are agreed as well as any new or updated SLAs are written	Detailed list of items to be created/updated with resource allocated, timings for each – can be a project plan or a spreadsheet – ideally at this stage the timelines will be fixed...
Business Impact analysis	To identify the impact of a new product on existing resource both in Product/Dev/Support and in sales – and identify if additional resource is required to ensure the success of the product	Each line item should list through all elements of a product that need to be managed in life and the job role this needs to be done by with an indicator if that role/department is already at or over capacity
Internal Comms plan	To ensure all internal staff are made aware of the upcoming release/impact and knowledge base they are required to make	
Client Training packs: User Guides/Admin Guides	To ensure all new users of the product/system have a step by step guide they can dip into or read through to better understand all the features available to them.	A Word document for User Guides/Admin Guides and a training plan for how to do online and F2F training with clients where necessary
Business Intelligence Report	To ensure all aspects of a product in life are analysed and understood to better know when a product is running as expected but also to give insight to end user experience/points of failure and better monitor and plan for potential downtime/issues or fixes to be made	Daily, Weekly or Monthly analytics to detail data gathered on usage of product and issues with product and to be able to compare these Month on Month, Year on Year to analyse common themes, seasonal issues, adoption curves etc

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