

Product Roadmap Planning Workshop

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Facilitation Script

Product Roadmap Planning Workshop

Category: Strategy | Duration: 4 hours | Participants: 6-12

Workshop Overview

This accelerated workshop combines design thinking, rapid prototyping, and user validation in a time-boxed format. Teams will generate, test, and refine solutions using proven methodologies that maximize learning while minimizing risk.

Workshop Objectives

Establish strategic design thinking capabilities that align design initiatives with business objectives while maintaining user-centered focus and measurable impact on organizational goals.

Learning Outcomes

- Aligned strategic vision across stakeholders - Prioritized roadmap with clear milestones - Defined success metrics and KPIs - Apply rapid design and validation methodologies to complex challenges - Generate and test multiple solution concepts in compressed timeframes - Learn user-centered design thinking and problem-solving approaches - Develop skills in rapid prototyping and user validation techniques - Create actionable roadmaps for solution development and implementation

Materials Required

Basic Materials - Large format paper (A1 or flip chart paper) - Sticky notes (multiple colors) - Sharpie markers (black, blue, red) - Fine-tip markers for detailed work - Pens and pencils for note-taking - Dot stickers for voting exercises - Masking tape for wall mounting - Timer or stopwatch for activities
Category-Specific Materials - Strategy canvas templates - Stakeholder mapping worksheets - Roadmap planning templates - Vision statement worksheets - Success metrics templates - Alignment framework templates
Technology Requirements - Laptops/tablets for digital work - WiFi access for online collaboration tools - Digital camera for documentation - Presentation projector/screen - Power strips and extension cords - Backup printed materials
Venue Requirements - Large wall space for posting materials - Moveable tables for group work - Comfortable seating for all participants - Natural lighting or adequate artificial lighting - Quiet environment free from interruptions - Temperature control for participant comfort

Pre-Workshop Checklist

- Room setup complete with tables arranged for group work
- All materials prepared and distributed
- Technology tested (projector, slides, timer)
- Participant list and name tags ready
- Refreshments arranged (if applicable)
- Backup activities prepared in case of time adjustments
- Emergency contacts and room information noted

Workshop Agenda

Time	Duration	Activity	Facilitator Notes
9:00 AM	15 min	Activity	Encourage networking. Have refreshments ready.
9:15 AM	15 min	Activity	Encourage networking. Have refreshments ready.
9:30 AM	30 min	Activity	Align team on product direction through concise vision creation. Each participant writes one-sentenc...
10:00 AM	30 min	Activity	Define success metrics by identifying goals, signals that indicate progress, and specific measures t...
10:30 AM	30 min	Activity	A comprehensive scoring model that evaluates initiatives based on Reach, Impact, Confidence, and Eff...
11:00 AM	15 min	Activity	Encourage networking. Have refreshments ready.
11:15 AM	30 min	Activity	Create a transparent project roadmap that shows planned work, priorities, and decision-making. Share...
11:45 AM	30 min	Activity	Find your biggest assumptions and decide which ones to test first....
12:15 PM	30 min	Activity	A Playback is a session where participants present their work, key insights, and takeaways from an a...
12:45 PM	15 min	Activity	Encourage networking. Have refreshments ready.

Facilitation Script

Opening (5-10 minutes)

SAY:

"Welcome everyone to the **Product Roadmap Planning Workshop**. I'm excited to have you here today. Over the next 4 hours, we'll be working together to [main objective]."

"Before we begin, let's go around and do quick introductions - your name, role, and one thing you're hoping to take away from today."

Facilitator Tip: Arrive 15-30 minutes early to set up the space and greet early arrivers. This builds rapport and helps participants feel comfortable.

Setting Expectations

SAY:

"Let me share a few ground rules for our time together:

- Every idea is valid - there are no bad ideas in brainstorming
- Build on each other's ideas - use 'Yes, and...' thinking
- Stay present - phones away unless for an emergency
- Timebox discussions - I'll keep us on track
- Have fun - the best ideas come when we're relaxed and engaged

Any questions before we dive in?"

Core Activities

Product Roadmap Planning

180 minutes

Extended strategic planning

FACILITATION APPROACH:

1. Introduce the activity and explain the purpose
2. Demonstrate or give an example if needed
3. Set the timer and let participants work
4. Give time warnings (halfway, 2 minutes left)
5. Facilitate sharing and discussion

Service Roadmap

120 minutes

Service-focused roadmap development

FACILITATION APPROACH:

1. Introduce the activity and explain the purpose
2. Demonstrate or give an example if needed
3. Set the timer and let participants work
4. Give time warnings (halfway, 2 minutes left)
5. Facilitate sharing and discussion

Atlassian - OKRs & Key Results

120 minutes

Goal-setting methodology

FACILITATION APPROACH:

1. Introduce the activity and explain the purpose
2. Demonstrate or give an example if needed
3. Set the timer and let participants work
4. Give time warnings (halfway, 2 minutes left)
5. Facilitate sharing and discussion

Prune the Future

90 minutes

Eliminate low-value initiatives

FACILITATION APPROACH:

1. Introduce the activity and explain the purpose
2. Demonstrate or give an example if needed
3. Set the timer and let participants work
4. Give time warnings (halfway, 2 minutes left)
5. Facilitate sharing and discussion

Closing & Next Steps (10-15 minutes)

SAY:

"As we wrap up, let's take a moment to reflect on what we've accomplished today."

"I'd like each person to share one key insight or takeaway from our session."

Facilitator Tip: Capture action items on a flip chart or shared document. Assign owners and due dates for each action item before ending.

Post-Workshop Actions

- Send thank you email with workshop summary within 24 hours
- Share photos of artifacts (sticky notes, sketches, etc.)
- Distribute any promised resources or templates
- Schedule follow-up if needed
- Collect feedback via survey
- Document learnings for future workshops

Troubleshooting Guide

If Participants Are Quiet

- Use round-robin techniques to ensure everyone speaks
- Try silent writing exercises before group discussion
- Break into smaller groups of 2-3 people
- Ask specific individuals for their perspective

If Discussion Goes Off-Track

- Acknowledge the point and park it in a "Parking Lot"
- Redirect: "That's interesting - let's capture that and return to our focus area"
- Reference the agenda and time remaining

If Running Behind Schedule

- Shorten break times (but don't eliminate them)
- Combine related activities
- Move detailed discussions to follow-up sessions
- Be transparent with participants about time constraints

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This script is a guide - adapt it to your audience and context