

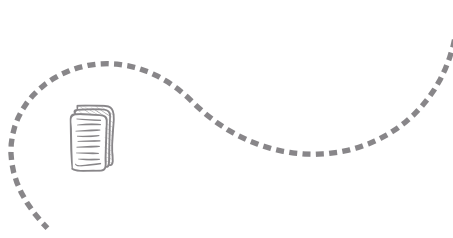


# MASTERING PROJECT ROADMAPS

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Cliff Notes





# Module 1:

## An Introduction to Roadmapping

### Why Roadmap?

#### What is roadmapping?

- Roadmapping is paid discovery & strategy.
- It's a way for you to bill your clients for the discovery work you're already doing.
- Your client engages you for a small scale, low-risk discovery project where you find out their needs, find out how to solve them, and present your findings with a detailed "roadmap" to success.

#### Why should you do it?

- You're already doing the discovery work. Roadmapping lets you get paid for it.
- It builds trust between you and your client, allowing you both to see what it's like to work with each other. Plus, once you've completed the engagement, it's almost a no-brainer for them to hire you.
- You'll create better estimates. Because you're not rushing to complete work you're not getting paid for, you'll do a better job on the discovery and strategy - and your client will get a more detailed, accurate estimate.

#### Why should your clients do it?

- It aligns incentives. It ensures that both of you are aiming to create the best estimate possible.
- It delivers value to the client. If you do discover that the project is a good idea, they come away with a detailed, actionable, step-by-step guide to achieving it. If it's not a good idea, it saves them thousands of dollars in wasted money.
- It's a small, low risk commitment.

#### Collaborative Estimation

- Roadmapping is a process through which you and your client collaborate to create an estimate.
- It aligns your incentives and ensures that you walk away with the outline of a plan that would work for both of you.





# Module 2-1:

## Sales

### Sales 1: Selling Clients on Roadmapping

#### You're Already Doing It

- On a sales call, you probably ask clients what they want and what they want to achieve - this is roadmapping

#### Educate on the Importance of Change

- Your client (likely) thinks they know it all
  - It's important to help them understand that any product or project should change.
  - Knowledge will change, requirements will change, the finished product will change. It's critical to help them understand that all of that change in the best interest of them and the project.
  - And the best way to accommodate for this necessary change is to plan ahead with a dedicated discovery phase - roadmapping.

#### Don't Just Say Yes

- Many freelancers give the "Yes-Person" treatment
  - "Yes, let's do it! We can start Monday! Check out our portfolio"
  - But what if the client original specifications are actually wrong?
- Don't always just say yes!
  - Always focus on what will move the client towards their ultimate goals

### Action Steps

Think of three past or current projects where they client "knew exactly what they wanted." Write down the ways in which they were actually mistaken, along with how it would have benefitted them to have a dedicated discovery phase.

**Tip:** *If you don't have any projects, try using potential projects or dream projects - projects you'd love to work on.*

Think of three projects where the client had a strict set of requirements they refused to budge on. How did that work out for them? Did it help or hurt them? How so?

### Sales 2: Pushing Back

#### Jonathan Kroll: Background

- Jonathan came with an existing product
  - There was a user base and user data
- Jonathan had a technical background, understood the product
- When he came to Neon Roots, he was looking for a development team
  - He just wanted to build

## The Kickoff

- Jonathan came with a set of expectations and assumptions
  - But, he didn't have specific requirements - he wanted some creative input from Ben.
- But through a series of calls and meetings with experts from multiple disciplines - UX, Development, Marketing, etc. - a lot of things changed.
  - Takeaway: Keep the project flexible. As you work and discover more information, the project itself will evolve naturally.

## Don't Just Say Yes

- Jonathan had looked at a lot of vendors
  - Many gave him the "Yes-Person" treatment
  - Neon Roots pushed back
    - Ben would ask "what are we trying to accomplish? Does this get us there?"
- **Takeaway:** Don't always just say yes. All of your competitors will, but by always focusing on what achieves the client's goals - even if that's not what the client thinks they want - you'll set yourself ahead. Clients will respect you more if they believe you're working for their benefit.

## Yes, It Is Your Place

- Your client may think they know everything, and it may seem like it isn't your place to disagree.
- **But it is.** Don't be afraid to tell them they don't need something - courteously, of course.
  - You'll deliver more value and they'll respect you more.

## Action Steps

Think of a time you've said yes to a client even if you weren't sure it was the right thing for them, then think of a time you pushed back because you thought the client didn't need what they said they did. How did those two situations go?

**Tip:** *If you haven't pushed back with clients, think of a time you thought you should have pushed back. How could it have gone?*

## Sales 3: Best Practices

### Business Consulting

- When you're selling a roadmap, you aren't just a freelance specialist - you're a business consultant

### Maintain Control

- You're the specialist - so ask like it!
  - Whatever the deliverables, whatever the output, make sure that you are maintaining control of the engagement
- Come in with a plan
  - In your first contact with the client, come in with a concrete plan
  - Even if that plan is just strategic discovery!
- Don't second guess yourself
  - If you come off confident, your clients will respond to that.
  - If you come off unsure of yourself, your clients go into interview mode because they don't believe you know what you're doing

## De-Commodify Yourself

- Don't position yourself as just a specialist
  - If your only value proposition to your clients is that you can provide some product or service for some fee, you've made yourself a commodity
  - This is a race to the bottom and means your only competitive advantage is price point - a recipe for failure
- Instead, show that while you are a specialist, your expertise goes beyond that.
  - You don't just know *how* to do your skill (be it development, design, writing, etc.) - you know *why* to do it.
    - You understand the benefits it offers, so you know how it can help the client.
  - This differentiates you, positions you as a consultant, and builds rapport with clients.

## Identify Key Stakeholders

- Who's who?
  - Product Owner
    - This is the person who either owns, has majority responsibility over, or directly manages the product or project.
  - Stakeholders
    - These are people who have a vested interest in the product or project - monetarily or otherwise - but aren't involved in the actual work of managing the product.
- For more on this, check out "The Chicken and the Pig" fable

## Redundant Communication

- Assume your clients aren't listening half the time
  - *Don't worry about repeating yourself.*
  - Consistently stating the objectives and action steps keeps everyone honest, keeps expectations clear, and leaves a paper trail.

## Identify Previous Pain Points and Use Them

- If clients are unsure on roadmapping, ask if they've done it before. Likely, they haven't.
  - How'd that go for them?
  - Use this to reinforce that by following your process, they'll succeed.

## Action Steps

Think of a few past communications with clients, both those that hired you and those that didn't. In those conversations, did you position yourself as a specialist who could perform a function - i.e. a commodity - or a consultant who understood how that function delivered value to the client? What happened? How did that positioning work?

Think about your communications with clients towards the beginning of a past project. How clear were you about the objectives, expectations, and deliverables of the project? How often did you repeat yourself? What happened? Were you too redundant, or not clear enough?

Pick a past or current project and draw a mindmap of all the people involved. What relationship do they all have to the project? How is each person involved with the project? What does each person want from the project? How can that knowledge help you better serve the client?

## Sales 4: Do's and Don'ts

### Do: Initial Qualifications

- This can be a template email
- You can look for a few things:
  - Who is the stakeholder? Is it one person or a committee?
  - Have they done this before?
  - Is their budget a minimum of \$X?
  - What are the high level business requirements & objectives?
- This isn't actually about using the information - yet.
  - Right now, you're separating yourself from your competitors.
    - They're all talking about feature sets from day one.
  - You'll dig deep into this information later, but asking it upfront shows that you know what you're doing.

### Do: Know Your Buckets

- It's likely that different clients you work with will fit some kind of archetype.
- Identify your different "buckets," then tailor a unique archetypal offering to each one.

### What About the Know It All?

- Inevitably, a client will come to you thinking they know everything. How do you deal with it?
- Ask a lot of questions
  - Where did you get those ideas?
  - Why does the project need those requirements?
  - Why should that be the design?
  - And the most important question of all: how did you test that?
    - More often than not, these questions will make it obvious why the client needs roadmapping.

### Don't: Give Away the Number

- No matter what. Even if they promise not to hold you to it, don't give away a number - because right now, you don't know the number.
- Answer by saying that this is why you do roadmapping - to answer the question of "how long, how much?"
- Use the Car Analogy
  - Do you want a Camry, or a Lamborghini? We can get you either one - but we need to discover which is right for the project.

### Do: Collaborative Estimation

- When estimating as part of the roadmapping process, involve your clients
  - Let them see and contribute to the process of how you create the estimation
- This not only builds rapport, but helps your client buy in to the estimate
  - If they helped you make it, you didn't give you a number - they gave it to you!
- If things do go over the estimate down the road, your client will be much more understanding if they were part of the process.

## Action Steps

Write down a brief outline of your different "buckets" and what they usually ask you for. Sketch out a quick overview of a unique blueprint offering for each bucket.

Think of the last time you encountered a "know it all" client. How did you handle the situation? How did it go? Write down some things you could have done differently that would have led to a better outcome for both of you.

Think of a time you "gave away the number." When they asked, did they say they'd hold you to it? What happened once you gave it away?

## Sales 5: More Sales Strategies

### Give the first 20 minutes free - but only that

- When you have the very first call, frame it as a free 20-minute phone call with them to see if there's a mutual fit
  - This immediately positions you as a consultant and prevents you wasting 4 hours on a call that goes nowhere

### Give them homework before the main call

- Make them come with something
  - Key information, market segments, customer profiles, whatever
- This signals that there's a funnel they're moving through and makes you look more professional
  - At the end of the day, people want to feel safe - and being a part of a process makes them feel safe
- It doesn't have to be big - even just asking them to read a few blog articles can work

### Use Turnkey Documents

- These can be professionally printed pamphlets or good-looking PDFs
- They answer questions, demonstrate that you're a good communicator, and build trust with the client

### Sell trust

- During the call, you're setting expectations on what the life cycle looks like, requirements, etc.

### Give them an out

- After the roadmapping, there's no commitment - they can take it anywhere
- This eliminates one of your clients' main objections

### Consider adding a credit

- For doing the roadmapping engagement, you'll discount the actual project

### Timebox it

- The worst thing you can do is let the client hijack the roadmapping session
- Whether it's Arbor, iCal, or a Google Doc, create a structure to keep everyone on track

### Setting Rules

- Don't be afraid to set your own rules
  - Are they going out of town during the sessions? Are they the decision maker and key contact? How will they communicate progress to their stakeholders?

## Action Steps

Write down three "homework assignments" you can give your clients at the beginning of the sales process. Are there any materials (PDFs, pamphlets, etc.) you could create to help with this?

Write down three rules you can set with your clients. Why do you need these rules? In what ways do they benefit both you and the client?

Think of a few tools you can use to help structure your sales and roadmapping process. How would you use them? How would they benefit you?

## Sales 6: Closing the Deal

How do we move from the initial consult to an official roadmapping engagement?

### Strategies

- You can't start tomorrow
  - Tell them you can't start immediately and need to do some amount of research and due diligence
    - Even if you can!
  - This shows (or implies) that you're in high demand
- Give them a call to action
  - This will change depending on your business or industry
  - This may be reserving a spot, putting down a deposit, or purchasing the roadmapping engagement
- Use a tripwire
  - Make the roadmapping budget a small portion of their overall budget
  - Once a client has purchased something from you - even something miniscule - it's incredibly likely they'll continue doing business with you

### The Problem with the 3 Stage Method

- Many agencies have a 3 stage model
  - They start with discovery, move to design, then proceed to development
    - But they package it as one product
  - This misaligns incentives
    - Because the agency is estimating a project they'll be doing, they're inherently incentivized to push the budget bigger and bigger

## Action Steps

Sketch out your call to action. What does it entail? Why will clients respond to it?

How will you design your "tripwire?"



## Sales 7: Don't Fear No

### No Free Quotes

- Remove any language that suggests a free estimate or a free quote
  - You simply can't do it!
  - You'll rush the estimate
    - And if you get it wrong, you stand to lose a lot of money

### Like it or not, it's sales

- But in the end, sales is just two humans communicating
- It's a negotiation, and you're both trying to find the best solution for both of you

### Don't be afraid of no

- One of the most important parts of roadmapping is ensuring a good fit on both sides
- If they aren't willing to follow your process, they're probably not a good client
- Even if it looks like a great opportunity, don't be afraid to walk away

### Saying No Isn't the End

- When you say no, you're not slamming the door
  - If you can't help them, give them references of people who could
- Down the road, you still might engage with them one way or another

## Action Steps

Think of a time you thought you should have said no to a project, but took it on anyways. For both you and the client, how did that go?





## Module 2-2: Pricing

### Pricing 1: What Do I Charge?

#### What Do I Charge?

- Well, it depends
  - Ultimately, this is based on the value you're delivering

#### The Two-Pronged Approach

- Have one option be just roadmapping at \$X
- The other option is roadmapping that's a little more expensive, but provides a credit should they engage you for the project
  - For example, if you're selling roadmapping for \$1500 standalone, you might also sell it for \$2000 with a \$750 credit towards the actual project
  - Whatever you do, be sure this credit doesn't expire - they always might come back

#### It doesn't have to be exorbitant

- Roadmapping isn't about making tons of money - it's about giving yourself an exit strategy and helping you and your client understand each other

#### So, what do I charge?

- Base it on the size of the project
  - If you charge \$5000 for a typical project, charge \$300-\$400 for roadmapping. If you charge \$100,000, make it \$3000 or \$4000

#### Roadmapping should be a no-brainer

- That means pricing can't be exorbitant - it needs to obviously be worth the value you're delivering
- It's prerequisite that you can justify ROI
  - They need to leave the session thinking "I got more out of this than I put into it"

#### Why keep the price low?

- It makes no possible.
  - Because they're not investing much, neither of you are restricted from deciding that pursuing it isn't a good idea
    - Even if this means you don't get hired, it builds trust and reputation
- They're not exposing much
  - This limits their hesitancy to buy-in - and once they've bought in, they're likely to come to you for the full project

### Action Steps

Come up with a possible price based on the cost of a normal project for you. Does this cost generate ROI for your clients through the roadmapping alone? How so?

Map out your Tiered approach. What will your pricing on each option be? What's the discount?

## Pricing 2: Other Considerations

### Make it easy to commit

- Keeping pricing low makes it easier for clients to engage you
  - If it's under \$1000, it often doesn't need corporate approval
- Don't forget collection methods
  - The easier you can make it for them to pay you, the better
  - Credit cards, Paypal, and Stripe are better than invoices because the client can buy now

### I'm not a developer - how do I show the value in my deliverable?

- Think back to what the client ultimately wants
  - If you're a marketer, this is about conversions and new business; if you're a designer, it's about branding and corporate status; etc.
  - Use this ultimate business goal to determine your value and pricing structure

### What if I don't have a standard process?

- Do everything as a one-off
- If you don't have stability in your project or client types, tailor each roadmapping session to that individual customer
  - This is more work upfront, but each new session becomes a template for a future engagement

## Action Steps

How can you make it easy for potential roadmapping clients to convert?

What - in terms of the ultimate business goal - does your client actually want from you? How can that determine your pricing structure?

## Pricing 3: More Approaches

### Tiered Pricing

- Benefits
  - Tiered pricing gives them Option A or Option B instead of Buy or Not Buy
  - It allows you to serve a more diverse range of clients
- How?
  - By Scope
    - Low tier is a lower number of deliverables/steps; high tier is a more robust roadmapping process
  - By Discount
    - Both tiers are the same service
    - One tier is for the standalone roadmapping itself, the other is more money up front but a discount on the actual engagement should they choose to work with you
      - If you charge \$1000 for a Tier 1, you might charge \$1500 for Tier 2 with a \$750 credit on the whole project

### Use Feedback

- Keep in touch with your past roadmapping clients and constantly look for feedback
  - You can use this feedback to structure your pricing as well as the roadmapping itself

### **The Quick-N-Dirty Pricing Method**

- If you have no idea how to price and just want to get started, make your roadmapping price 10% of your average project
  - Later on, you can tweak this - but right now it's important to get moving and gain experience
- Keep in mind that roadmapping is about increasing your lead to client conversion ratio. Don't worry too much about the price.

### **What's Important: Just Start**

- You have the materials from the course - now use them. Take your next lead through the entire roadmapping funnel
- Make it as easy as possible for the client and don't worry too much about the pricing - just start with the baseline funnel, start getting paid from your time, and iterate your process based on your what you learn.

### **Action Steps**

Think about what it would look like if you offered tiered pricing based on scope. What would your tiers be? What benefits would they offer? What would the price difference be?

Now it's time for the ultimate action step - set up your roadmapping funnel. Either by customizing the materials in this course to fit your business or designing your own, build out everything you need to take a new lead through your entire roadmapping funnel.





## Module 3: The Process

### The Swag Box

While it can take many forms, this is a package of resources and information that tells your clients what they need to know about working with you.

- This informs them on your company, culture, and process, and it helps to set the tone of structure for the rest of the process.
- Even if they just skim through it 10 minutes before meeting you, it provides an air of professionalism and adds credibility to your positioning as a consultant.

Keep it physical

- Whether it's 3x5 notecards, a book, or a pamphlet, people respond to physical objects
  - But if you're just starting out, this can just be a nicely-done PDF or a few blog articles

Sweat the small stuff

- Even if it's just a small hand-written thank you note, little things will separate you from the competition

### Action Steps

Sketch out your swagbox. This may be big or small depending on where you are in your freelancing career, but outline what you'd put in it, the format it would come in, and the design elements that would brand it as yours. What do you need to do to turn it into a reality?

### The Live Meeting

**Be confident!**

- Even if this is your first roadmapping session, act like you've done it before - because you have
  - You've always done estimation work, now you're just getting paid for it

**There is no one size fits all**

- You'll need to customize the actual contents of your roadmapping process based on your specialty and industry

**The meeting is a discovery process**

The meeting isn't necessarily where you solve the problem - it's where you find out about:

- The client
  - Their history
  - Their current business
  - Their goals

- The problem
  - What caused it
  - What's keeping it from being solved
  - What they've tried in the past
  - The risks
- What they want
  - Need to haves
  - Want to haves
  - Nice to haves
- Key Stakeholders
  - Who owns the project?
  - Who has a stake in the project?

Take copious notes, ask questions, and find out everything you can about the situation

### **Test, test, test**

- If you're not sure what's the best thing to do, test it
- Take different clients through slightly different processes and see which work better

### **Provide a Takeaway**

- Ultimately, your goal is to prepare someone to answer the question: yes or no?
- After the meeting, take everything you learned and use it to create a proposal
  - Yes or no? Go or don't go? And, most importantly, why?

### **Just getting started?**

- When you're just getting started, roadmapping is just a more formalized, process-focused proposal
- There's more of a process, but this is the same thing you already do - and now you're getting paid

## **Action Steps**

Write down three questions you'll ask in your initial roadmapping meetings.

What about your roadmapping process are you unsure of? Design a test you can run to find out the best way to go about it.

# Case Studies

## Marc Friedland



### Intro

#### Marc Friedland

- Professional in Event Branding & Event Experiences
  - Has worked with everyone from Steve Wynn to creating the red envelope cards at the Oscars
- When Marc starts a project, he thinks about the overall experience he wants to create
  - Before diving into the nitty gritty or fonts and materials, he does the concepting work - the roadmapping - of understanding the experience he's creating for guests

#### Remember: you're never just providing a service

- Yes, you're a specialist - but you need to think about your specialized function in the larger context of your client's business.
- You need to have a specific opinion on why you're offering something different from the other commodity specialists.
- This not only positions you as a consultant and builds rapport, it also helps justify why you can command a fee for the roadmapping process.

#### The process is a deliverable

- Part of the value to your clients is the roadmapping process
  - This creative process, in itself, is a deliverable

#### Initial Phases of the Roadmapping Process

- You do have to do some form of discovery
  - It shouldn't be extensive, and you shouldn't be making a proposal or providing an estimate
  - But you'll need to do a little homework before charging for time
- When do you start the clock?
  - There's an intuitive element to this
  - But once you've got the client hooked and excited, it's probably a good indicator that it's time to start the clock

#### The importance of an end goal

- It's critical to have a concrete vision of the end goal before going into the engagement
  - This is what the roadmapping session aims to provide
  - Michaelangelo: "I saw the angel in the stone, and carved to set it free"

### Action Steps

Think about how your specialist function fits into the larger business picture of your clients. How are you adding value? What exactly are they looking for from you? How does understanding these things affect what you can deliver to your clients?

Think of a time you started a project without having a clear understanding of the end goal - without seeing "the angel in the stone." How did that project turn out?

## Marc Friedland: Strategies for Starting Out

Marc, how would you have done things differently 30 years ago?

- Have a right-hand person in those initial meetings
  - Having a colleague helps you look more professional and helps to create structure and context
- Understand the value of your process
  - The engagement and the completed roadmap aren't the only deliverables - the process of roadmapping itself is a deliverable
    - The structure helps to direct the creativity
  - The fact that you have a process also signifies that you're a low risk for clients
    - It shows them that you're approaching the project intelligently and intentionally
    - If they don't understand the nature of the work you're doing (e.g. for a developer or designer), this helps them to buy into the "black magic" without anxiety
- Sell the brain trust, not the commodity
  - Understand what your value is - not just as a creative or specialist, but also in the ideas and solutions you're providing
- Think from the client's perspective
  - It's not just about getting the gig - it's about providing value and a solution to their problems
  - Always think about it from the stance of what value you're adding to them
- Own the process
  - Your process may be different from everyone else
    - It's important to test, iterate, and work to identify and understand your own process
  - Once you have your process, stick with it
    - Don't allow clients to hijack it - even if they want to
- Don't work for your clients
  - Collaborate with them!
  - You're bringing a level of expertise, and your job is to work with your client to understand how that expertise can solve their problems

## Action Steps

Who will be your right-hand person at your initial meetings?

Thinking from your client's perspective, how do your services solve problems for them in the larger context of their business? How can you customize your offerings to maximize that value?

## Marc Friedland: Thoughts on Process

What advice would you give to freelancers who can smell a rotten client and need to say no - but they're afraid of losing the opportunity?

Two answers

- For the most part, through creativity there is a solution
- Having a teammate can be a huge help
  - Everyone relates differently to people
  - Having that other personality can help manage the flow of relationships

**Keep in mind that nothing is set in stone**

- Until you've had years of experience, you should constantly iterate your roadmapping process
  - And even then, it still isn't one size fits all
  - But the process itself is something valuable



## Generosity of Spirit

- While it's critical to charge for your time, it's also important not to come off as trying to squeeze your clients for all they're worth
- Charge enough such that you build in margins, but don't come off as moneygrubbing
  - You can use the roadmapping process to nail down definitions and avoid "seeming stingy" later on for increasing the budget because you didn't anticipate certain problems or miscommunications
  - E.g. never assume you and the client have the same definitions

## What if clients try to circumvent the process?

- For example, if they offer to fulfill some part of the process themselves or find someone else to do it
  - Deal with this by setting disclaimers
  - Tell them that they can choose to use another vendor, but there's no way for you to guarantee the quality or the timeline
- If they do choose to go somewhere else, never sacrifice the relationship - never "close the door"
  - Simply say "ok that's great, keep me posted and feel free to call me back if you have more questions"
    - Then schedule a reminder to call them in a few weeks
  - If they're unsatisfied with the new vendor, they'll likely come back to you
  - If they end up going with a different vendor, you can find out what they liked more about the other vendor and use that information to hone your process

## Your creativity is a currency

- Think of your brains, time, and creativity as a currency
  - Something that has inherent value
- This is critical for weathering the natural highs and lows of business
  - Even the worst of low times can't take away your creativity, ingenuity, and though leadership - your creative currency

## Action Steps

Write down a few disclaimers will you set with clients who decide to work with other vendors or compromise your process in some way. How will you set these disclaimers in a healthy way that preserves the relationship?

In what ways is your creativity and thought leadership a currency - how does it have inherent value?

## Marc Friedland: Picking Projects and Protecting Value

### Is it a +1, 0, or -1?

- +1 projects
  - These are great - they move your business forward, are a great portfolio item, and could lead to great future business
- 0 projects
  - Stagnant
  - They generate value, but don't move you forward
- -1 projects
  - Move you backwards
  - Not a big enough budget, too much aggravation, toxic client
- You can use your process to screen projects and decide which category they fall under

### Doing work on spec

- Spec work should be compensated
  - Even if it's just an ideation fee
  - This communicates that your time is valuable
- When you charge clients for ideation, they'll take it more seriously

### At the end of the roadmapping process, there needs to be a deliverable that adds value

- Even if this is just a recap that summarizes what was discussed and what the next steps are
- Having a tangible takeaway helps them see the value they got from roadmapping
- It also clarifies how they can move forward on the project

## Action Steps

Write down your three most recent projects. Were they +1s, 0s, or -1s? Why? If there weren't enough +1s, how can you get more?

What tangible deliverables can you give your clients at the end of a roadmapping session? How will it add value? What will the next steps be?

## Marc Friedland: Cash Cache, & Not Giving It Away

When Marc first approached the Oscars about designing the envelope, they thought he was essentially a glorified printer

- He had to say no, that's not what he does - he captures a moment
- But when he finished presenting, he offered to do the envelopes completely free
  - Why? "Bragging rights"
    - For some projects - projects that are at the top of the +1 class - it can make sense to do work for little or no money
    - If your gut says it's worth it, it might well be
  - As time went on, though, he started charging them

### Cash vs. Cache

- Cash generates revenue, cache generates future business
- Sometimes, cache is more valuable than cash
  - And cache projects may turn into cash projects in the future, as with Marc and the Oscars

### Procurement Departments

- For larger clients, you may have to go through a Procurement Departments
  - These do not care about your process, creativity, or anything else - they have an objective and a budget
  - But, you may have to go through them before you can reach the people who make the decisions

### Don't give away the roadmap deliverable until you're compensated

- Structure the agreement such that you own the Intellectual Property until you're paid
- This is why it's important to frame your roadmapping as a product
  - A standard fee and a standard deliverable
  - This structure means you can collect up front

### Doing work on spec

- Spec work should be compensated
  - Even if it's just an ideation fee
  - This communicates that your time is valuable
- When you charge clients for ideation, they'll take it more seriously

### At the end of the roadmapping process, there needs to be a deliverable that adds value

- Even if this is just a recap that summarizes what was discussed and what the next steps are
- Having a tangible takeaway helps them see the value they got from roadmapping
- It also clarifies how they can move forward on the project

## Action Steps

Write down your three most recent projects. Were they +1s, 0s, or -1s? Why? If there weren't enough +1s, how can you get more?

What tangible deliverables can you give your clients at the end of a roadmapping session? How will it add value? What will the next steps be?

## Marc Friedland: Cash Cache, & Not Giving It Away

When Marc first approached the Oscars about designing the envelope, they thought he was essentially a glorified printer

- He had to say no, that's not what he does - he captures a moment
- But when he finished presenting, he offered to do the envelopes completely free
  - Why? "Bragging rights"
    - For some projects - projects that are at the top of the +1 class - it can make sense to do work for little or no money
    - If your gut says it's worth it, it might well be
  - As time went on, though, he started charging them

### Cash vs. Cache

- Cash generates revenue, cache generates future business
- Sometimes, cache is more valuable than cash
  - And cache projects may turn into cash projects in the future, as with Marc and the Oscars

### Procurement Departments

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### **Kill Fees**

- Don't be afraid to charge the full cost - or at least a discounted cost - of the session if your client cancels after agreeing to the engagement

### **Action Steps**

Think of some of your past projects. Were they cash or cache? How did they impact your business, both when the project was completed and down the road?

What is your kill fee? How can you ensure you're always paid for your time?

## **Marc Friedland: Roadmapping Deliverables**

These were for a non-profit environmental organization

- Marc was brought on as a creative director

### **He started with overall mood and look**

- Taking the vision he had for them as a client and getting it down on paper
  - This serves as the basis for the event producer, talent, décor
- Critically, Marc was already paid for this deliverable
  - Whether or not they put on the event, he has already been compensated
- The concept was distinct
  - This not only generates value inherently, but it also makes it more natural that Marc's company be hired for the full engagement

### **Gave it a name**

- This is part of his creative process
- Even if it's a wedding, he gives it a name

### **Visual Vocabulary**

- This encompasses color, typeface, logomarks, taglines
- While still part of the roadmapping, this is part of the next phase

### **Keep in mind: presentation is key**

- Presentation and packaging should always be as reflective of the work that you do as the information you're communicating
- Your presentation is a sales tool
- Don't be the shoemaker's son
  - It's always the shoemaker's son who goes without shoes
    - Marketers who fail to market their own service, designers who don't put effort into designing their professional materials, etc.
- The fact that there's a methodology to the presentation adds value to the roadmapping process

**As part of his roadmapping fee, the client gets access to Marc**

- This accomplishes a few things
  - It adds value to his roadmapping process
  - It elevates his role beyond that of a vendor
    - It de-commoditizes him
    - He's no longer just a 'vendor' - he's a creative thinker
  - It elevates him into a different role in the organization
    - Makes him more of a peer than a business associate

## Action Steps

What deliverables can you offer your clients? Write down a few examples, then arrange them into a sequential timeline - one that also acts as a conversion funnel for the full engagement.

How can you raise the presentation value of your roadmapping?

## Marc Friedland: Single Package vs. Multi-Stage Roadmapping

Marc sells his roadmapping in multiple stages - how is that different from selling the entire package upfront?

He did try to package it altogether at first

- But his clients said "thanks, but no thanks"
  - Too big of a commitment

So he tried a different model

- What his clients wanted was Marc on the team
  - This is a much smaller bite for the client
  - But, once they do engage him, it's much harder for them to disengage
- This helps with the "upsell" - but, it's not an upsell
  - When you upsell, position is as doing them a favor
  - "You're all so stressed out, you have so much to do - let us take care of this for you"
    - "We'll do this more efficiently, and it'll free you up to do the more important and pressing work"
  - By this point, they know you well enough that they trust you

A small point on pricing

- When Marc prices, he looks for compensation that's great enough that he doesn't have to start counting hours
- It ensures that he never starts feeling a sense of bitterness

## Action Steps

Do you think roadmapping for your clients will work better as a single package, or as multiple stages?

If it's in stages, how can you break up and divide the stages? If a package, what deliverables does your client walk away with at the end, and why do they justify the cost of the package?



# Case Studies

## Dave Waldman

### Dave Waldman: Roadmapping from the Client's Perspective

#### From the client's perspective, why is roadmapping valuable?

- Sitting at a table and going through a structured process with people who have an independent and unbiased approach is hugely important
  - It helps protect against feature creep, stay on objective, and discover all the possibilities
- It ensures that incentives are aligned
  - It's a smaller commitment
  - It enables questioning the scope
  - Why do we need this particular part of the engagement? Just because it's there doesn't mean it's necessary
- It turns off the yes-person
  - Most agencies take the client's word as law
  - Roadmapping allows the client to be wrong

#### Psychologically, why did you like roadmapping?

- Instead of being confronted with "let's build this thing, here's how we can do it," he was greeted with "let's see if we can understand what you want, then let's see what the best way is to get there"

#### What about the knee-jerk reaction to paying for something that has historically been part of the sales process?

- That may be the historical precedent, but it's also littered with cautionary tales
  - By not paying for it upfront, you may pay 10x over in a misguided project

#### For the client, what's the real takeaway?

- There's certainly no finished project - they're not getting an app
- But, they vet their product with a team of experts
- In a sense, you do come away with the product
  - You already know everything you need to know to create the product
  - The rest is effectively mechanical work
  - Cutting the scope of the project to the bare minimum can generate thousands in savings
- Part of the reason projects fail is that agencies try to implement ideas that are too high level
  - Roadmapping maps everything out to the details

### Action Steps

Of the client benefits discussed in the video, which are the most relevant to your clients?

How can you customize your roadmapping process to maximize those benefits?

### Dave Waldman: Getting to a Higher Level

#### The Devil is in the Definitions

- What the client may think will take a few days may actually take a few weeks
  - This can easily derail a project

- Roadmapping helps put everyone on the same page, using the same definitions
  - It minimizes risk
    - If that goal is important to your clients, then roadmapping is important to your clients

### **Beware of imposter syndrome**

- Many creatives or specialists feel weary of questioning their clients' wishes - after all, they were hired to do a job, not question the business
  - The problem with this is that it doesn't focus on creating value for your clients. By not speaking out about something you think is wrong, you are actively subverting your clients' success - a recipe for failure in the long-term

### **How can freelancers involve themselves in the higher level discussions about the business goals of the process?**

- A good question to ask is "What is the goal that you're trying to achieve with this? What are the hypotheses you're trying to prove?"
  - This forces the business owner to be clear
  - If they can't answer it, there's research to be done
  - When they do answer, it allows the freelancer to understand what they're trying to achieve and offer solutions or alternatives
- With the goal above in mind, another good question is "how will this project, feature, or element help us move closer to that goal?"
  - This helps you create real value for the client

## **Action Steps**

What questions can you ask your clients that will reveal the ultimate objective they have with the project?

How can you tailor those questions to your industry or to particular clients?

## **Dave Waldman: Countering the Waterfall Objection**

Doesn't doing all this upfront planning defeat the purpose of Agile?

- It's the 80/20 rule
  - You can't account for every feature - new information will come up that changes your plan
  - The best you can do is make a plan that's flexible enough to move forward
- It's about finding the middle ground
  - Failing to plan is planning to fail
  - But these aren't exhaustive planning sessions
    - They're focused discovery sessions to create a roadmap to development
    - Timeboxing the roadmapping is critical

Dave, what would you have done differently if you could start the roadmapping session again?

- More research into the vertical he was working in
  - Customer interviews, market research, gathering as much intel as possible
  - The more research and knowledge he could have come in with, the faster the process could have gone

## **Action Steps**

How can you tailor your response to the Waterfall objection to fit the clients in your industry? Write down a few different approaches you might take with clients.



# Case Studies

## Mattan Danino

### Mattan Danino: Roadmapping in Paid Search

#### Mattan Danino, WebIt MD

- Mattan does PPC and has successfully implemented roadmapping in his business

#### For Mattan, it's partly about qualifying the person

- This might be an audit, looking at the prior account history, or diving in to understand who the business owner is, their goals, and their key metrics
  - One of the key benefits of this is understanding if the client is serious enough to engage his company
  - Because he works in one or two year agreements, he needs to understand that there's a good fit
- He also has another roadmapping product that's based on building out a strategy proposal
  - One way or another, he tries to drive leads to one of these two products

#### What about pushback from clients who don't see the value in paying to be told what they're doing wrong?

- Typically, this isn't the case
- They see the value in being told where they have weaknesses

#### Do you try to sell them on the full engagement during the audit?

- No. He doesn't discuss that at all
- The selling comes over the next three days
  - They're already warm, so over the next day or two they're in contact, and within a few days Mattan delivers an official proposal

#### So how has this improved lead conversion rates?

- 50%
  - Clients who go through his roadmapping process are twice as likely to engage him for the full contract
- Why?
  - He's already shown them what they're doing wrong
  - This means they're itching to get things fixed

#### This is a big part of his competitive advantage

- Most agencies have a systematic, mechanical sales process
- Mattan can beat them because his sales process is roadmapping - it's customized and curated
  - It starts with a qualifying questionnaire
    - Something that ensures the lead is someone Mattan might be interested in working with
  - This is followed by the audit



## Action Steps

Write down a few things you might ask your clients to qualify them - even before the initial consultation.

Mattan takes a hands-off approach to upselling his clients by not including a call to action in his audits. Do you think this approach would work well for you? Why or why not?

## Mattan Danino: Steps for Starting

### One thing that's evolved for Mattan is the packaging around his reporting

- The packaging is important
  - It's proving value
  - A 20 page excel document is worthless to clients
    - You need to tell a story about what you're doing - show your clients how you're adding value in a way that's easy for them to understand
- It also demonstrates that you're willing to put in the time
  - This goes a long way to moving through the client's funnels

### Reporting isn't just reporting: it's strategy

- It's critical to take the data you collect and formulate a plan
- You need to interpret data for your clients

### What's the first step to creating roadmapping?

- The barrier to entry is incredibly important
  - The roadmap allows the client to take a small step with you, which prepares them for the bigger step
  - So it's critical that your roadmapping product not be difficult for the client to swallow
- Often, roadmapping isn't just about getting compensated for your discovery time - it's about having the initial qualifications for your clients
  - It helps you by weeding out bad clients, and it makes it easier for clients to take a small initial step with you

## Action Steps

Write down a few key metrics or data points you might measure and analyze for clients.

How can you turn these data into actionable steps and takeaways?

Keep in mind - this can also be qualitative data, not just hard metrics.



# Case Studies

## Kellan O'Connor

### **Kellan O'Connor: Roadmapping with a Large Company**

#### **Kellan O'Connor**

- Was a product head for Epson

#### **Epson was a large corporate client that was not used to the idea of roadmapping**

- It's out of place in the big corporate culture
- This meant there was pushback to the idea of roadmapping
  - Because Epson thought of development as a commodity
  - Framing the engagement as a roadmapping session helped to position Neon Roots as more than a commodity

#### **How did Neon Roots approach Epson?**

- They essentially said they wouldn't submit an RFP - but they would provide a roadmap
- This was a new concept for Kellan
  - It took a lot of convincing - both for Kellan and the company
  - Neon Roots instilled trust by talking them through other projects they had worked on
    - And in particular, how projects change from the initial plan
    - This helped convince Epson that roadmapping was a valuable investment upfront

#### **Roadmapping really starts to make sense at the later phases**

- It allows for more flexibility
  - Features and priorities can adapt and change based on new information and realities
  - While it may seem extraneous at first, it proves its value down the road

#### **Education is vital**

- You need to show your clients that you have a process and you use it because it works

#### **What sold Kellan on Neon Roots?**

- The offering was less of a commitment
  - Week by week, Epson could find the best direction, while with other companies the project would go one direction from the outset
  - There's a much stronger feedback loop

#### **A Great Way to Deal with RFPs**

- Instead of submitting a proposal, simply say "by going through a roadmapping session, we might be able to get you this even cheaper than you're asking for"
  - "Let's explore how you came up with these numbers - by questioning the assumptions, we might be able to get the same functionality for a lower cost"
  - NO other company or freelancer will do that

### What advice do you have for selling a roadmapping session?

- Working with larger companies means you'll probably have to introduce a brand new paradigm
  - RFPs are the law of the land, and you're introducing a new model
  - It's critical to instill trust and transparency
    - You need to communicate that you're looking out for their best interests
      - Saying that you can reduce the scope and cost is a huge benefit here

### Action Steps

Write down a few large companies you might want to pursue a roadmapping engagement with.

- How could you customize the package to deliver the maximum value?
- How would you communicate with them to sell them on the idea of roadmapping instead of an RFP?

Regarding the large companies you listed, write down a few other projects you could cite as case studies.

- How do they apply to the large companies?
- How did roadmapping help in those case studies?
- Why does that translate?

