

Staffing a Complete and Effective Product Team

Overview:

The phases of successfully bringing a product to market require multiple functional capabilities. The size of the team is not particularly important as long as there is appropriate skill, expertise and time available to address and complete each of the functions. The charts below provide an overview of the skills/capabilities required, and what the deliverable should be to move the product forward. I have also included several sample staffing plans using both internal and outsourced options to bring the functional capabilities onto the team.

Functional Capabilities (narrative):

Phase I:

- Research and evaluate the user need for a software solution
- Define the goals of the product (what problem is being solved, what is the initial hypothesis to solve it?)
- Research the market opportunity for the product (who wants it, how badly do they need it, what will they pay for it, who else sells a comparable product, what is the timeframe to get product to market to meet the market need). Create the Market Positioning Statement
- Create a basic set of financials to validate the opportunity (is the cost/benefit worth the development effort)
- Create a clear business plan

Phase II :

- Manage the overall product plan from identification of user needs through to implementation
- Design and build the user experience of the product
- Design the navigation and UI of the product
- Design and build the back-end (core functionality) of the product
- Engage in ongoing user/customer testing with the product at significant phases, and then regularly
- Creation of logo, early marketing materials
- Identify the early adopters for the product and create a sales pipeline
- Create the go-to-market plan for the product roll out (both marketing and sales)
- Identify/Hire Customer Success personnel
- Include Customer Success personnel in the late stage user testing

Phase III:

- Identify/Hire Sales/Business Development personnel
- Identify/Hire Support personnel
- Create Legal and support documents: Terms and Conditions for use, sales agreement/license, partnership agreement
- Pre-launch, work with 1 - 3 customers to show value and success
- Execute on the marketing plan (pre-launch, launch and Q1 sales support)
- Begin sales activities for product (include Customer Success early in process)
- Implement initial sales, iterating the sales, Customer Success and Support functions
- Feed customer feedback back into development team to iterate and improve the product

	Function	Job Title/Role	Critical Deliverables	External Option?
1	Identify Need for Product	Focus Area Expert/Specialist	Product positioning statement, prototype	No
2	Market Research	Product Marketing Mngr, Business Mngr, Market Researcher	Market summary including market size, competitive landscape, proposed pricing, Market Positioning Statement	Can contract hire
3	User Research (UX)	UX Researcher/Designer	User needs and perspectives, current processes and tools,	Can contract hire
4	Product Definition	Product Manager	Product outline, critical features/capabilities, Unique Value Proposition (UVP)	No
5	Product Research	Product Manager	Project timeline, Deeper competitive analysis, pricing evaluation	No
6	Financial Model	Business Strategist/Mngr, Focus Area Expert, Product Marketing Mngr, CFO	3 year Financial Model including staffing plan, pricing model (summary with operating expenses, revenue and COGS, as	Could hire firm or use internal resource from finance dept

			well as CAGR)	(no need for dedicated financial resource on product team)
7	Business Plan	Business Strategist/Mngr, Focus Area Expert, Product Marketing Mngr, CFO	A 4 - 6 page business plan including 3 year financials, a 15 - 20 slide deck that can be used for investment, and a 30-60-90-120 project timeline for organizing actions and understanding who owns each action. Identify ideal sales/mrktg strategy for this product. Tier market opportunities.	Specific resource is best, but can hire contractor or use internal resource from revenue team
8	Logo and Design work	Graphic Designer	Product logo, color palette and typeface, website or webpage	Can contract externally
9	Manage Product	Product Manager	Manage the development of the product consistent with the UVP, positioning statement and overall goals for product. Maintain timeframes and accountability	No
10	Architect the Product	Architect, CTO, Lead Engineer/Sr Developer	Design and code the product, using an agile approach to iteration and development. Engineering team lead	Can hire external dev team, but that requires greater daily input/supervision
11	Design/Build UI	UI Developer/Designer	Design/Build UI	can be external dev team
12	Design/Build	Engineer/Developer	Design/Build Backend	can be

	Backend			external dev team
13	User Testing	UX Researcher/Designer	Alpha/Beta/bootcamp or partner test site. Continuously feed user experience feedback back to product manager and dev team	Can be contracted but best to have on team
14	Sales	Sales/Business Development	Sales plan (30-60-90 day). Use and iterate Sales planning provided in business plan.	Can build channel relationship with partners or outsource sales to a 3rd party
15	Product Marketing	Product Marketing	Launch plan, website content for launch, social media strategy, advertising strategy, partner strategy, ongoing marketing plan	Can outsource to marketing firm, use contractor, leverage partners
16	Customer Success	Customer Success	Onboarding plan and materials, implementation/training for new users, feedback strategy, documentation and help	Materials creation can be outsourced, but customer success should be an internal function
17	Customer/Tech Support	Customer support/Tech Support, Engineer, Developer	Documentation and help, trouble ticketing or support process	Can be outsourced
18	Write Legal docs	Business Strategist/Mngr, Lawyer, Product Manager	Terms and Conditions, contract/user agreement, partnership agreement, maintenance/service agreement	Can outsource. Use lawyer to vet all docs even if written by non-legal resource

Organizational Structure:

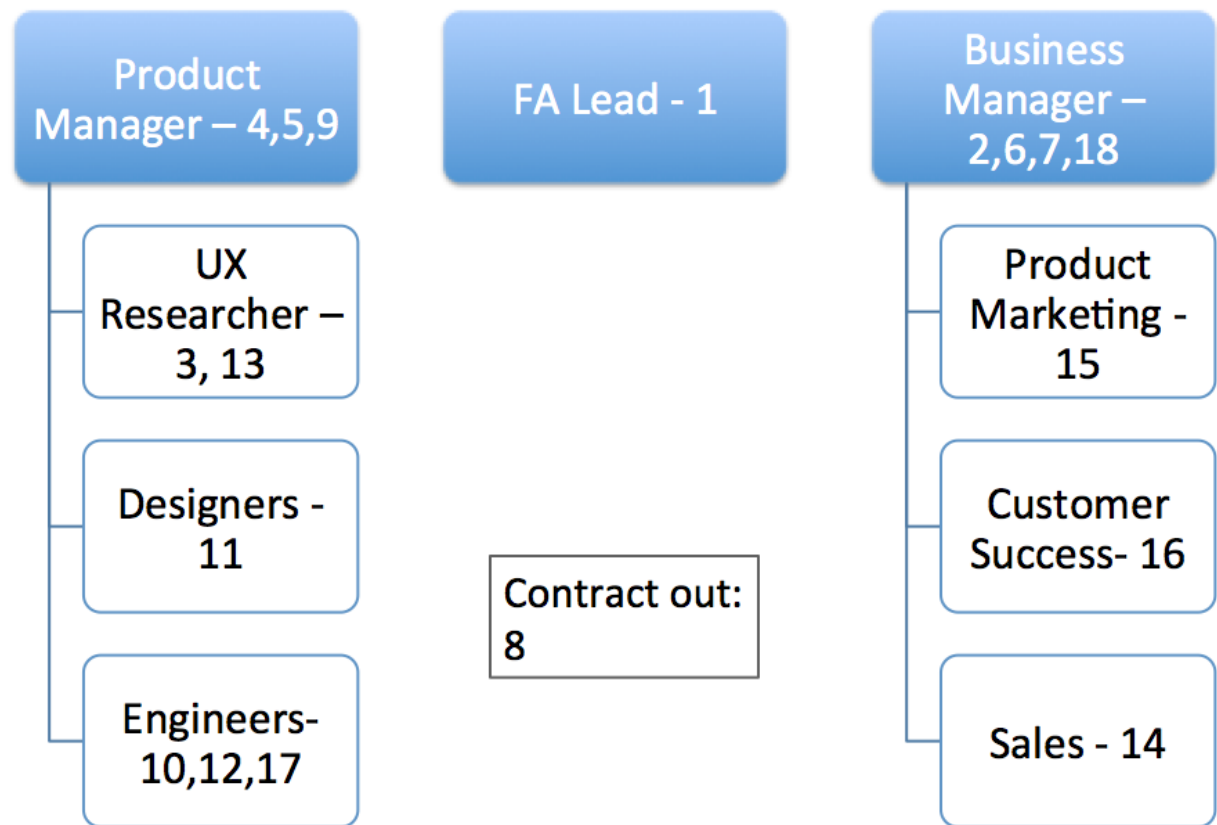
Within the current structure of CfA, new software is being developed exclusively within the Focus Areas. This may come from Fellowships working on issues relevant to a Focus Area, or from development teams associated with the Focus Area.

To develop software beyond a single application, city or use case, there needs to be a team that is able to execute and produce the deliverables indicated in the chart above. The organizational charts produced below are suggestions of how these tasks could be delivered. The headcount in each area can vary based on the number of products being brought to market and the success of each product. On each chart the correlating functions are indicated after the title. Similarly, there can be external hires or contractors providing specific deliverables, but clearly managed by someone on the team who understands the deliverable needed and can manage the process with the external resource. This is a flexible way to address the need to productize software and successfully bring it out as a CfA product. The only requirement is that CfA pay attention to each function and critical deliverable, and make a plan that clearly articulates how each will be accomplished.

The first org chart acknowledges that within the unique environment of CfA, a strong Product Manager with an engineering background could conceivably manage the product direction AND the engineering team, while a Business Manager could manage all go-to-market functions. Engineers reporting into a Product Manager is a bit unusual, but could be effective in CfA because the Product Manager functions ostensibly as a Project Manager as well. Engineers would need to have access to the CTO for engineering/professional development support.

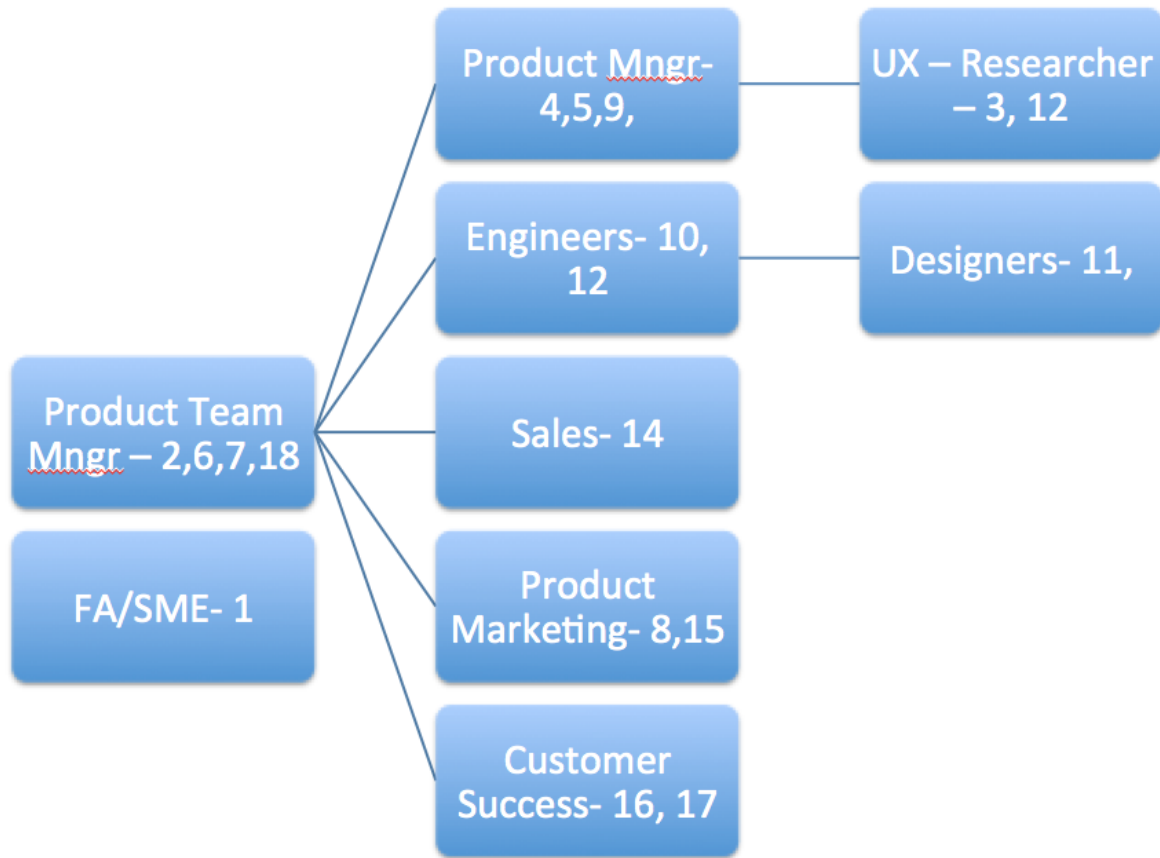
Org Chart Sample 1

(Note: Numbers listed correlate to functions required, not to the number of headcount)



Org Chart Sample 2

A more traditional software company org structure, where engineering, product management, sales, marketing and customer success/account management are all individual contributors reporting into a Team Lead (not each other).



Org Chart Sample 3

This is an alternative org structure to reduce total headcount. It would require several positions to take on substantially more work (for example having the Focus Area lead provide ongoing Customer Success/Account Management). But it reduces the total number of hires needed.

