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Product and Project Management in Clarity

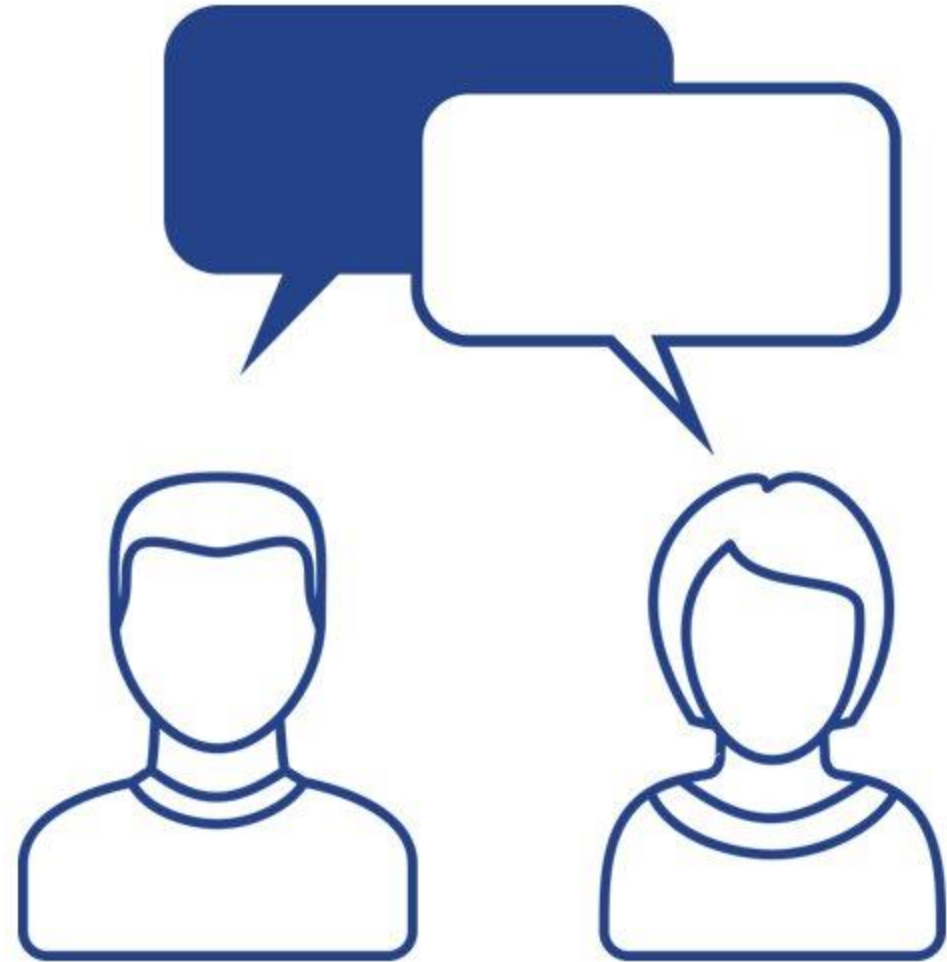
Your Guides:
Eric Myers and Jacob Cancelliere



Part I: Introduction

Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



Your Journey?

- ? How many of you are All Waterfall, All Agile, or a Mix?
- ? Are you considering a Product Model over the Projects?



Rethinking How We Define, Fund, and Deliver Work

In recent years, technology organizations have increasingly shifted from managing work through projects to **delivering value through products**. This evolution offers significant advantages — but only if we fundamentally change how we define, fund, and execute development.



First, we must move from prescribing specific solutions to **articulating the outcomes** we seek to achieve. This shift empowers teams to solve for impact, not just output.



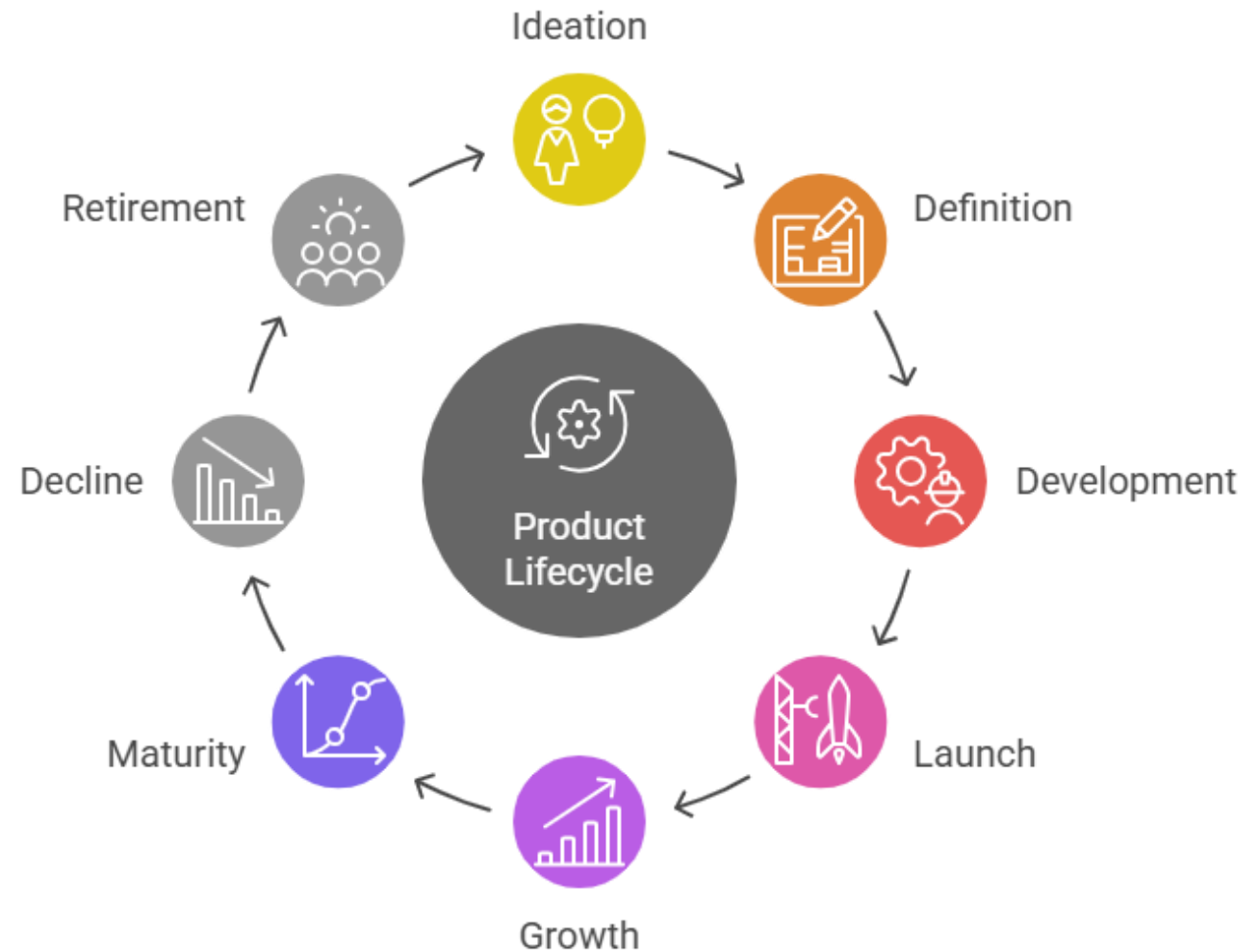
Second, we must rethink funding. Rather than allocating budgets to a fixed scope of work, we should **invest in the ongoing capacity to evolve and improve products over time**.

This session will explore how these changes can be embedded within Clarity to align strategy, funding, and delivery — enabling your organization to unlock the full potential of a product-led approach.

What is a Product

Product Defined and Product Lifecycle

- What is a **Product**?
A **product** is anything that delivers value to a defined customer segment and can be offered to a market to satisfy a need or want.
- What is a **Product-Led Organization**?
A **product-led organization** places the product experience at the center of its growth, customer acquisition, and retention strategy.



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PRODUCT MANAGER FOCUSES ON:

Evolving customer needs
Investment delivers benefits/KPIs

Adaptive planning (iterative)

Long-lived Feature Team

Permanent (until decommissioned) Continual Improvements

Product-level P&L

Focus on outcomes

Key Advantages of Product-led Organizations

Customer-Centric

Increased Agility

Cross-Functional
Collaboration

Faster Time-to-
Market

Sustainable
Growth

Data-Driven
Decision Making

Total Cost of
Ownership



The shift to a product-driven culture is a strategic decision that involves changes in processes, mindset, and sometimes organizational structure.

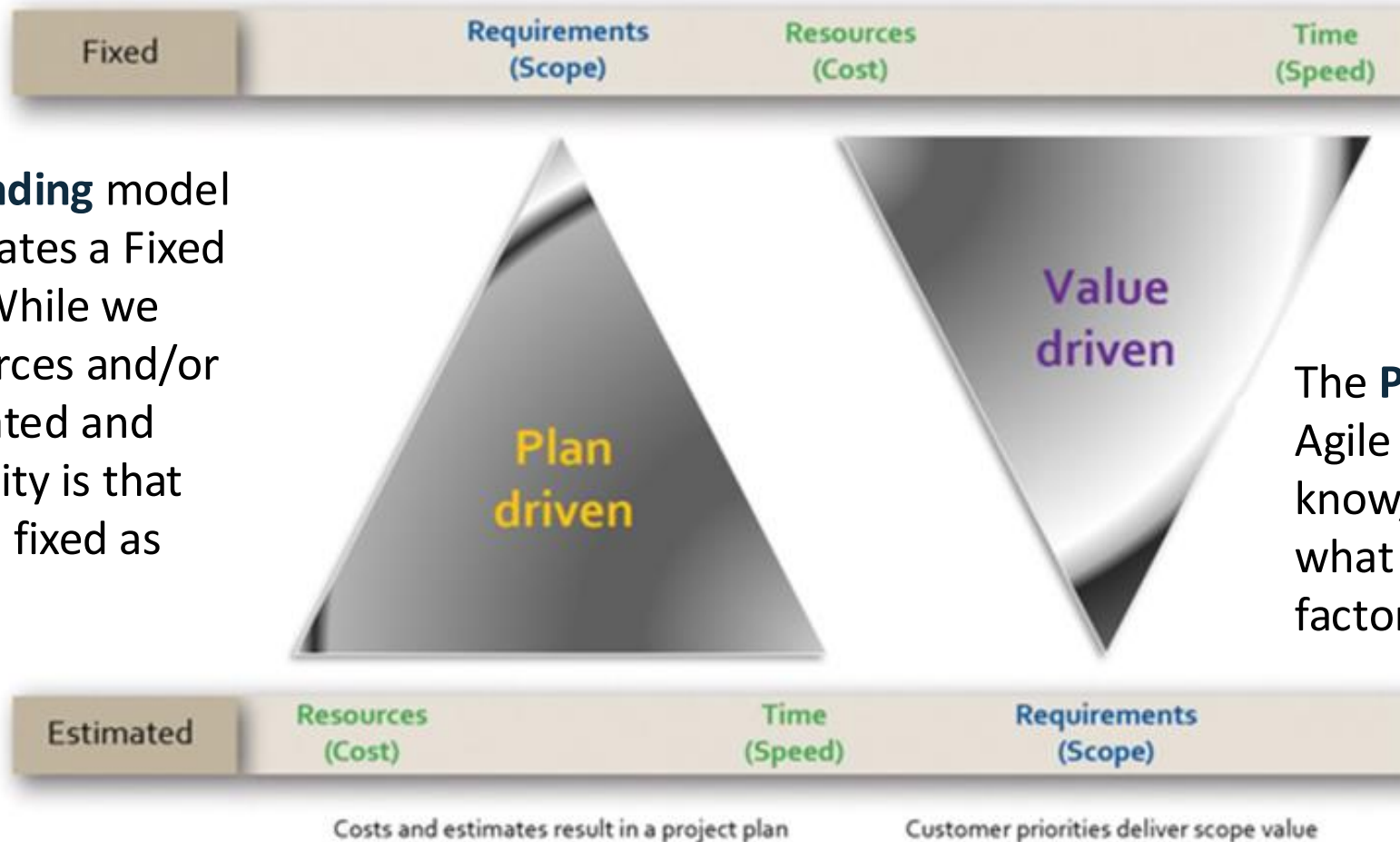
It's not just about developing products but about **building a culture that values customer satisfaction, collaboration, and continuous learning.**

Product Funding

Why shift from Project to Product?

Paradigm Shift

The **Project Funding** model in Waterfall creates a Fixed Requirement. While we think the resources and/or time are estimated and flexible the reality is that one or both are fixed as well.



The **Product Funding** Model in Agile fixes what we reasonably know, and then we estimate what we can fit into those two factors.

Project Funding vs Product Funding

Project Funding Model

- Projects are time-boxed. There is an assumed start and stop date. This results in creating many Projects in many different processes and tools.
- Teams and resources are staffed on Projects, often resulting in resources being “peanut-buttered” across multiple Projects at the same time.
- Annual planning activities take months and force teams to estimate time-to-market and costs based only on very high-level requirements.
- Principles align to typical Waterfall processes.

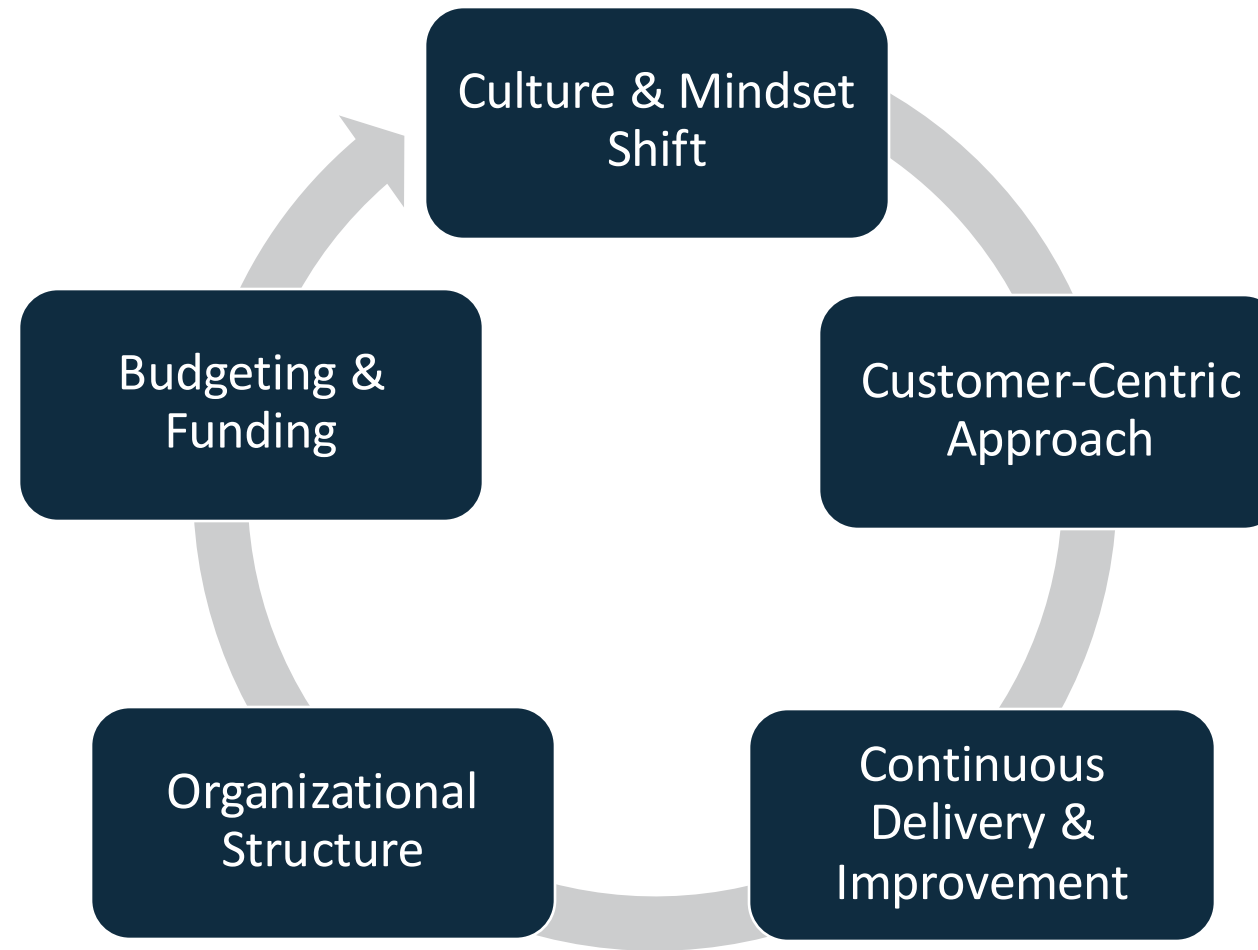
Product Funding Model

- Products are NOT timeboxed. Products exist if they are profitable and provide customer value.
- A physical, software, or service Product can only exist if it meets customer needs and provides value.
- Teams and resources are static and support a single Product or Product Group. Work is brought to these static teams, simplifying budgeting and planning.
- Annual planning is reduced to weeks, since static teams establish budgets and costs.
- Product backlogs are prioritized and ranked.
- Teams move to high-margin Products.
- Principles align to typical Agile methodologies and frameworks.

How To Build Product-Led Organizations

Moving from Project to Product - A Mindset Shift

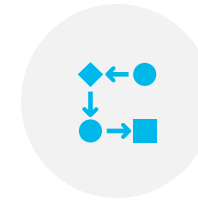
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Are We Ready to Be a Product Organization?



Strategic



Process



Cultural



Financial



Technical /
Tooling



Governance



Training and
Skills



Stakeholders

Strategy Over a Plan



Strategic—Do our Products align with our overall business objectives, vision, and strategy?

**Treating a
plan as a
strategy is an
anti-pattern**

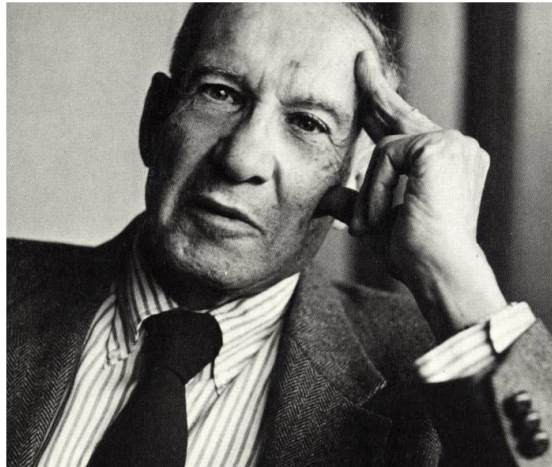
**Mistaking
strategy for a
plan is a
common
mistake**

**Strategies are
meant to
drive
outcomes**

This is How We Have Always Done It!



Cultural—Does our culture prioritize long-term customer value and continuous improvement?



**“Culture eats Strategy
for Breakfast”**
– Drucker



**Culture change
comes last**
– Kotter

➤ Instill, cultivate, and nurture **continuous improvement**


Are you listening to your Heartbeat?



Process—Does our Product development process accommodate continuous feedback loops, iterative development, and cross-functional team collaboration?

✗ “Our tools are our process”

✓ Utilize Personas and Customer Journey Maps early to surface existing and future process needs and challenges



CUSTOMER JOURNEY MAP

Example of an online grocery store

www.columbiaroad.com

STAGE	AWARENESS	CONSIDERATION	DECISION	DELIVERY & USE	LOYALTY & ADVOCACY				
CUSTOMER ACTIVITIES	Hear from friends, see offline or online ad, read from newspapers	Compare & evaluate alternatives	Add groceries to shopping cart	Make an order	Receive or pick up on order	Contact customer service	Enjoy groceries	Order again and/or order more	Share experience
CUSTOMER GOALS	No goals at this point	Find the best solution to buy food	Find and select products easily, get inspired	Order effortlessly	Receive or pick up on order effortlessly and when needed	Get help if problems appear, request for refund	Have the right and good quality in products	Repeat good customer experience	Share feelings, give feedback
TOUCHPOINTS	Word of mouth, traditional media, social media	Word of mouth, website, brick & mortar store, social media	Website, app, order confirmation email	Delivery service, packing, messages (email, SMS, phone call)	Phone, email, chat	Food products, packages, other materials	Word of mouth, social media		
EXPERIENCE	Interested, curious	Requires effort but needed	Excited	"Agent's profile"	Requires effort, happy when received	Frustrated	Satisfied	"This is easy"	"I have to share this!"
BUSINESS GOAL	Increase awareness and interest	Increase number of website visitors	Increase shopping cart value & conversion rate	Increase online sales and conversion rate	Deliver on time and minimise the delivery window	Increase customer service satisfaction, minimise waiting time	Make products to match expectations	Increase retention rate and order value-and/or frequency	Turn customers into advocates, turn negative experiences into positive
KPIs	Number of people reached	New website visitors	Shopping cart value, conversion rate	Online sales, conversion rate	On time delivery rate, average delivery window	Customer service success rate, waiting time	Product reviews	Retention rate, order value and frequency	Customer satisfaction
ORGANISATIONAL ACTIVITIES	Create marketing campaigns and content both offline and online, PR	Create marketing campaigns and content both offline and online	Optimise grocery shopping experience	Optimise online purchase funnel, order handling	Picking & delivery	Customer service	Develop products & product range	Target marketing, make re-ordering easy (upselling and/or cross-selling)	Manage feedback and social media, develop sharing / inviting possibilities
RESPONSIBLE	Marketing & Communications	Marketing & Communications	Online development, Customer service	Online development, warehouse, logistics	Warehouse, logistics	Customer service	Product development, purchasing	Marketing, online development	Customer service, online development
TECHNOLOGY SYSTEMS	CRM, analytics, programmatic buying platforms, social media	CRM, analytics, CMS, marketing automation	CRM, analytics, CMS, e-commerce platform, PIM	CRM, analytics, CMS, e-commerce platform, PIM, inventory system, marketing automation	CRM, analytics, order & delivery system, marketing automation	CRM, analytics, help desk, ticketing system, chat	CRM, analytics, vendor management system, PIM	CRM, analytics, marketing automation, e-commerce platform	CRM, analytics, marketing automation, e-commerce platform, social media analytics

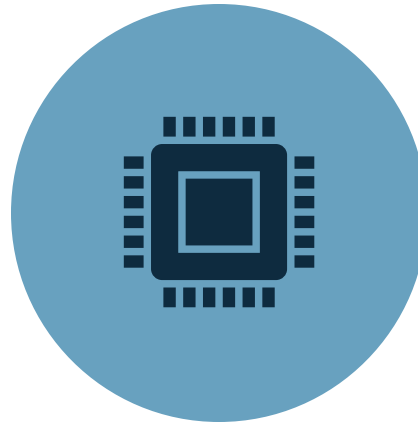
Fit-for-Purpose supporting Toolset



Technical/Tooling—Does our technical infrastructure and tooling support Product, DevOps, continuous integration / continuous deployment, and both Waterfall and Agile project management?



Tool changes should support the process, not dictate the process



Adopting DevOps and/or DevSecOps is a deliberate choice in supporting product-led organization



Tackling debt should have an allocation every iteration

Governance adds value



Governance—Are our governance structures setup to support rapid decision-making, reduced administration, and increased autonomy at the team level?

01

Governance provides a clear direction and alignment across the organization.

02

Governance structures facilitate effective decision-making.

03

Governance helps in managing risks associated with the product.

04

Governance ensures that resources are used efficiently and effectively.

05

Governance promotes accountability and transparency.

In a product-led organization, governance is not about bureaucracy or slowing things down, but rather about providing a framework that enables **speed, innovation, and customer value**.

Fund the products and value streams



Financial—Does our financial planning and budgeting processes accommodate the dynamic nature of product delivery?

Who determines where the budgets are allocated?

What will it take to move to continuous planning around funding allocations?

Is the organization open to bringing work to the teams, and not teams to the work?

Funding based on finish date creates anti-patterns.

Funding scope impacts teams' ability to deliver complex products.

Collaboration is Essential



Stakeholders—Are we engaging all relevant stakeholders in our development lifecycle, including our customers?



Diverse Perspectives Lead to Better Ideas:

Collaboration brings together individuals with different backgrounds and skill sets, leading to unique insights and breakthroughs.



Improved Problem-Solving:

A collective of individuals can combine their resources and knowledge to discover solutions to complex challenges, enhancing efficiency in problem-solving.



Faster Product Development:

Collaboration allows for work division and simultaneous tackling of different aspects of a project, resulting in a shorter overall development time.



Increased Innovation:

Collaboration fosters an environment where individuals can build on each other's ideas and think outside of the box, leading to more innovative solutions.

Continuous Learning



Training and Skills—Do we have the right skills to support customer-centric design thinking, data analytics, and agile methods necessary for product development and management?



Do your teams have the right roles and skill sets?



Does your organization embrace psychological safety and promote failing fast and learning faster?



Are your teams ready to practice and implement what they are trained in?



Challenges

Shifting to Product-Led is not always straight forward

Anti-Patterns of Product Implementations

Due to **misconceptions** about Product-Focused Development, organizations often treat Products and Projects interchangeably and **undermine** their efforts to realize the value of Product-Focused Funding and Development.

Common anti-patterns of Product



Rename the “Projects”
to “Products”



Internal components
are Products



Capabilities labeled
as Products



Services that are
provided within the
business

What is a Product? Examples



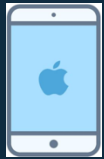
Insurance
Underwriting

No, this is a component
of selling insurance



Etsy

Yes



iPhone

Yes, Hardware, Software,
App Store



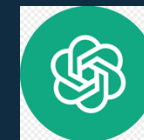
Large Language
Model

Could be
either



Point of Sale
Software

Could be either



ChatGPT

Yes

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Essential Traits of Successful Products

Product Traits:

- Should have the potential to be revenue-generating
- It must be a service, functionality, or capability that the customers can identify
- It should follow a defined product lifecycle
- Products can be tangible goods, intangible offerings, or combinations

Tangible	Intangible	Combination
Physical items like devices, clothing, consumer goods, or machinery	Services, digital experiences, or intellectual property	Integrated solutions blending software, hardware, and service

Characteristics of Products



Relevant



Unique



Problem-Solver



User-Friendly



High-Quality
Design



Comprehensive
Documentation



Cost Effective



Scalable



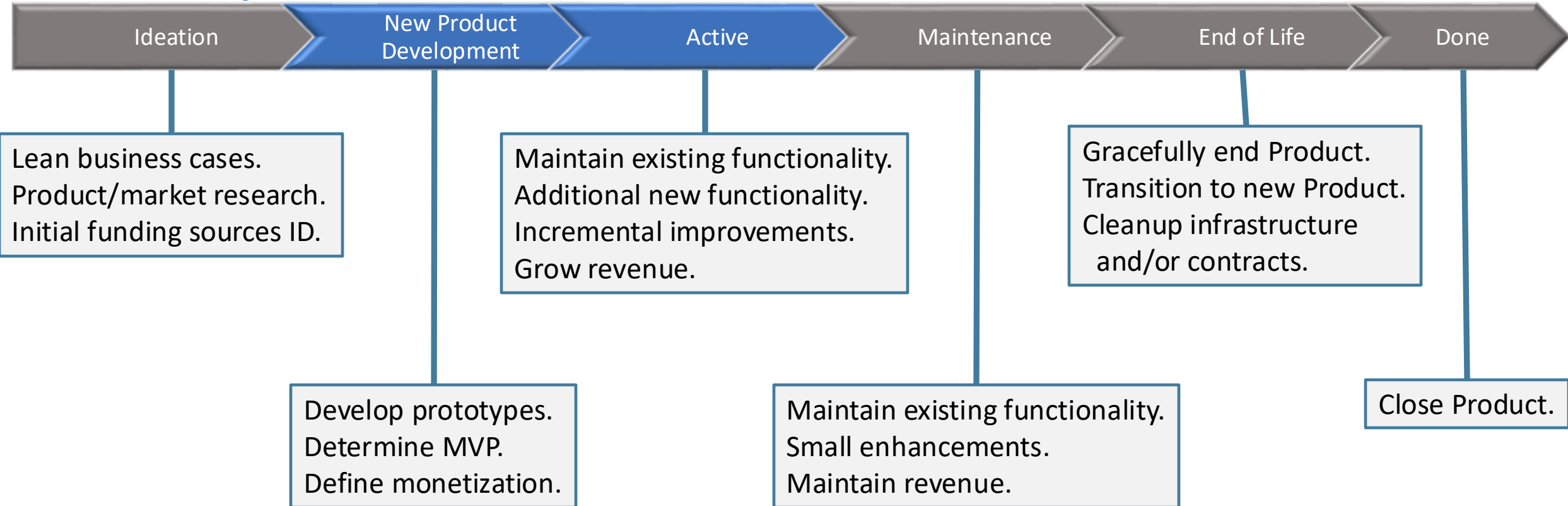
Brand
Awareness



Adaptable

Product Lifecycle Examples

Product Lifecycle



Understanding Your Products Means Understanding Personas

Using Personas in Product Development

- Design user experiences that meet specific user needs.
- Create more targeted and effective marketing campaigns.
- Tailor product features to specific user groups.
- Prioritize product development based on user needs.
- Base user persona on actual data.



The Art of Discovery: The Benefit of Creating Personas

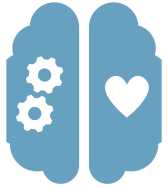
- Personas provide often missed context for Product Development.
- They help teams better understand user needs and behaviors through data.
- They force teams to think deeply about the "pains" and "gains" to be addressed by the Product.
- They lead to more effective Product design and development.
- They result in happier customers.



Future of Product: AI



AI can be enabler of Product Growth



Deep Customer Understanding

- Behavioral analytics at scale
- Predictive Insights



Smarter Product Development

- Rapid prototyping and design assistance
- Automated testing and quality assurance



Hyper-Personalized Experiences

- Dynamic onboarding
- Adaptive in product guidance



Integrated Customer Engagement

- Conversational support
- Proactive outreach



Strategic Decision Support

- Portfolio Prioritization
- Market sensing

An AI Tale



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Conclusion

Final Thoughts on Product-Led Success

Avoid the
Agile Veneer







“We’ve always
done it this way...”

Doing the same thing, but
expecting different results

“Our tools define
the process...”

- A shift in terminology does not change the way we work.
- We must change how we define work, along with the process that manages the work.
- Promote continuous exploration and learning.
- Avoid sunken costs, be open to “pivots.”
- Fund capacity to support Product strategy, Operations, and Maintenance.

Key Takeaways

-  **From Projects → Products:** Align work around enduring value streams, not temporary initiatives.
-  **Benefits at Scale:** Improved customer retention, market penetration, and brand loyalty.
-  **Cultural and Process Shift:** Evolve mindsets, workflows, and tooling to support a product-led approach.
-  **Outcome-Driven:** Define the “why” and “what impact,” not just the “how” or “what feature.”
-  **Funding for Capacity:** Invest in sustained product teams, not fixed scopes.
-  **Full Potential:** A well-executed shift increases agility, efficiency, and customer impact.

Conclusion

The shift from managing through projects to leading with products has accelerated in recent years, delivering tangible benefits such as stronger customer loyalty, deeper market reach, and higher satisfaction. Yet these gains only materialize when organizations evolve their culture, processes, and tools to match.

This means redefining success in terms of:

- The outcomes we aim to achieve — not the solutions we prescribe
- Reimagining funding models to invest in the capacity to develop and improve products continuously

When executed well, this transformation becomes a catalyst for **unlocking organizational potential, driving greater agility, and enabling more effective, impactful product development.**

Questions?





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